User Basics

User Guide

Planview ChangePoint 2022

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1. ChangePoint Basics

The ChangePoint solution

The ChangePoint solution consists of three main areas of functionality:

- ChangePoint – the application through which end users access the ChangePoint functionality to do their day-to-day work.
- ChangePoint Administration – the features of ChangePoint that system administrators use for setting up and maintaining ChangePoint.
- ChangePoint Analytics – the report application for creating custom reports using ChangePoint data.

  Note: In the ChangePoint user interfaces and product documentation, end users are referred to as *resources*.

In addition, the Client Portal application provides your organization's customers with access to areas in ChangePoint such as team folders, invoice review, projects, and to log support and request SLA items.

About ChangePoint entities

The data records in ChangePoint are called *entities*. The main entities include: customers, contracts, opportunities, contacts, projects, tasks, knowledge items, and requests.

All entities have a read-only view called a profile, and an editable dialog box or inline view. The entity profiles share many common characteristics. For example, you can perform the following actions from all entity profiles:

- create other entities that are related to the current entity
- create a knowledge item, or request for the entity
- associate a team folder to the entity
- view history of the entity
- view surveys related to the entity

When you create an entity from the current entity, the two entities are automatically associated (linked). For example, when you create a contract from a customer, the two entities share some common information and are linked in ChangePoint.

In the entity profile, there are sections that display the entities that are associated to the current entity. For example, if there are requests for the entity, the **Related request** section displays the requests.

About signing in to ChangePoint

Depending on your ChangePoint installation, you may or may not require a user ID and password. You can only have one active ChangePoint session at a time. If you are already signed in to ChangePoint and you try to sign in to a new session, you must cancel either the new session or the previous session.

If you exceed the specified number of sign-in attempts set up by your organization, you will be locked out of ChangePoint. If you are locked out, or your password expires, you must contact your system administrator to have your password reset.

Signing in to ChangePoint

1. Start your web browser application.
2. In the address bar, enter the ChangePoint URL.
3. If the ChangePoint sign-in page appears:
   a. Enter your user ID and password.
   b. Click **Sign in**.
   c. To avoid having to enter your user ID every time, select the **Remember me** check box.

   Note: Not all browsers support the **Remember me** option.

   ChangePoint opens in your web browser.

Signing out of ChangePoint

In order to end your ChangePoint session properly, you must use this procedure to sign out.

1. Click user menu > **Sign out**.
2. Click **OK** to confirm.

Changing your password

1. In the navigation bar, click the user menu > **My settings**.

The **My settings** view appears.

2. Click the **Change password** link.

   The **Change Password** dialog box appears.

3. In the **Current password** field, enter your current password.
4. In the **New password** field, enter your new password.
5. In the **Re-enter new password** field, enter your new password again.
6. Click **Save**.

About the ChangePoint user interface

The ChangePoint product documentation and online help uses the default ChangePoint terminology and describes a standard default ChangePoint installation.

However, your ChangePoint installation and user interface may appear differently for one or more of the following reasons:

- the appearance of the user interface can be different, depending on the operating system, display settings, and browser that you use
- only the applications, features, fields, and data that you have access to are displayed
- user interface labels and application terminology can be customized
- standard fields can be hidden or made mandatory
- standard sections can be hidden
- additional *configurable fields* can be added to existing sections, or grouped in custom configurable field sections.
- only the fields that have a value are displayed in entity profiles, and field sections display only when at least one of the fields in the section has a value
- the procedures describe the tabbed dialog box version of create and edit functionality
- planning units can be days or FTEs instead of hours

Navigating the user interface

Navigation bar

The navigation bar includes the home icon, apps menu icon, main entity options, search icon, notifications icon and user menu icon.

Menu item	Description
	Home page. The initial view when you first launch ChangePoint displays your default dashboard. You can view the default dashboard anytime by clicking the home icon or **> Dashboards**.
	Apps menu. Includes all of the components and entities other than the main entities such as: **Recents**, **Dashboards**, **Time Sheet**, **Calendar** and **Expenses**, etc.
	Custom menu. Includes custom menu items and standard and custom Intelligent Forms.
Entity options	Options to access list views for the following entities: • Customers • Opportunities • Projects • Contracts • Invoices • Requests
	Search. The global search, knowledge search, and support search are all available from one location by clicking the search icon on the main navigation menu.
	Notifications. Alerts for notifications appear here.
	User menu. The user-specific components such as **My settings**, **Help**, **Customer Success Center**, **Sign out**, and **Administrator view**.

Recently viewed sections in tree views

There is a **Recently viewed** section in the tree views for some entities, such as projects, resources, and requests. This section includes up to the last five entity records that were

accessed.

Option lists

The **New**, **Recents**, **Worksheet**, and **Dashboards** lists are displayed in the left pane when selected from the apps menu . Option lists are also included in Service Scheduler and Workforce Planning.

About language settings

The ChangePoint user interface is available in the following languages:

- English
- Brazilian Portuguese
- Dutch
- French
- German
- Italian
- Spanish

To display the user interface in one of the available languages, you must change the language setting in your browser. For more information, see the online help for your browser. If you set your browser to a language that is not supported by ChangePoint, the user interface is displayed in English by default.

> **Note:** If your organization enforces the display of the user interface in a specific language, then the user interface is always displayed in that language regardless of the language that you select in your browser language settings.

Accessing online help

The following types of online help are available from the user menu :

- online help – context-sensitive online help.
- Customer Success Center – website that includes release notes, product guides, and knowledge base.

Help icons also appear on the interface where online help is available:

- If the online help is available for the top level of an entity profile or dialog box, the corresponding help icons appear at the top right of the entity profile or dialog box.
- If online help is available for a dialog box tab or inline section, then an ellipsis (…) appears on the tab or section. Point to the ellipsis to display the help icons, and then click the appropriate icon to open the help.

Help icon	Description
	Opens the ChangePoint online help.
	Opens the custom help, which is online help or documents that are created and installed by your organization
…	Displays the help icons that are available for the current tab or section.

About the list of recent items

Entity records that you have recently accessed are added to the **Recents** list (> **Applications** > **Recents**). You can directly access either the entity profile or the edit dialog box of the items in the list. For projects, you also have the option of directly accessing the project in Project Worksheet.

A maximum of 36 items per entity is kept in the list. When the number is exceeded for an entity, the oldest entity item in the list is dropped when a new entity item is accessed.

You can add an item to the favorites view that is available in entity list views. When you add an item to favorites, it is also pinned at the top of this **Recents** list, and remains there until you remove it from favorites. The **Recents** list can contain a maximum of 24 pinned items.

The following entity items are added to the **Recents** list when you access them. Some entities display a list of recently accessed entities of the same type above the tree view.

- campaigns
- customers
- competitors
- contacts

- contracts
- funding sources
- knowledge items
- opportunities
- portfolio
- products
- projects
- requests
- resources
- team folders

Accessing an item from the Recents list

1. Click > **Applications** > **Recents**. The list of recent items appears.
2. Do one of the following:
   - To access the entity profile for the item, click the item name.
   - To edit the item, click to the right of the item.
   - To access a project in Project Worksheet, click .
3. To add the item to the favorites list in the entity list view, click to the left of the item.

   The item is added to favorites and placed at the top of the list.
4. To remove the item from the top of the list and the favorites list, click to the left of the item. The item is moved to the unpinned list and removed from favorites.

About jump lists in Internet Explorer

The following ChangePoint quick links are available in the jump list in Internet Explorer:

- Time Sheet
- Approve Time – Time Approval view
- Approve Expense – Expense Report Approval view

- Request Workflow – view for processing workflow steps for requests
- Resource Request Workflow – view for processing workflow steps for resource requests
- Project Workflow – view for processing workflow steps for projects
- Opportunity Workflow – view for processing workflow steps for opportunities.

The time sheet and time and expense approval quick links are available in the jump list only if you have access to the associated views. The workflow quick links are always available, but if there are no workflow steps for you to process, the default dashboard is displayed instead of the workflow view when you click the quick link.

For more information about using jump lists, see the Microsoft Internet Explorer help.

About entity list views

List views display the entity items in rows with a limited number of columns of entity data.

You have the following options for displaying the contents of the list:

- All [entity name] – all entity items
- Favorites – entity items that you selected to be added to it, either from the entity profile or from the main **Recents** list (> **Recents**).
- Recents – the entity items that you viewed recently

To view a legend of the entity item colors

The entity items are color-coded based on certain field values.

To view a legend of the colors and values, click .

To filter the entity items based on data values in the key columns.

You can filter entity items based on the values in the columns that have a filter icon in the column header. The filters that you set for each view (**All [entities]**, **Favorites**, **Recents**, and so on) are saved separately.

1. Click a column header that includes a filter icon.
2. Select the values for the entity items that you want to include and clear the check boxes for the entity item values that you want to exclude.
3. Click **Apply**.

To access an entity profile

Click the entity row. The entity profile appears.

To edit an entity profile

In the item row, click ⋮ > **Edit**. The **Edit [entity]** dialog box appears.

To create a new entity item

Click . The **Create [entity]** dialog box appears.

To access the online help

Click ⋮ > **Help**.

To add an item to favorites from an entity list

In the item row, click ⋮ > **Add to favorites**.

To remove an item from favorites from an entity list

1. Do one of the following:
   - Switch to the **Favorites** view and in the entity row, click ⋮ > **Remove from favorites**.
   - Access the entity profile and then click the remove from favorites icon .

Searching in entity list views

In the entity list views, you can search for entity profiles in the main entity column and certain other entity columns.

> **Note:** The search results are saved in the selected list view for the browser session until you either change or clear the search criteria. Each view (**All [entities]**, **Favorites**, **Recents**, and so on) can have different search criteria.

To search for entity profiles in a list view

1. Access the entity list view.
2. To search all entity items, select the **All [entities]** view.
3. Select the column that you want to search in.

4. To search for entity profiles that start with the same character, type the first one or two characters (maximum) into the search field, and then press **Enter**.

   The search results include the entity profiles that start with the characters.

5. To search for entity profiles that contain the same characters, type three or more characters, and then press **Enter**.

   The search results include the entity profiles that contain the characters anywhere.

About entity profiles

If you have upgraded from ChangePoint 2020 or earlier, this topic explains the differences in the new entity profile design:

- **Summary** section at the top of the entity profile displays pertinent overview information, which can be viewed by all resources, regardless of their access rights
  - Depending on configuration settings, monetary amounts are converted to either the entity currency or the default currency, and are based on exchange rates for the item date or the current date as applicable.
- You can add the entity item to (remove the item from) favorites by clicking ( )
- Profile information that was in tabs and sections is in *cards* with similar or related information:
  - where applicable, information has been moved to cards with related information; for example, some fields in **General** sections and all fields in **Details** sections were moved to cards that contain related information
  - many entity fields that previously were displayed only in the edit dialogs are now displayed (exceptions include access fields for some entities)
  - only fields that have values are displayed, which includes check boxes that have been selected (enabled)
  - cards that contain information in fields display a limited number of fields but you can click the down arrow to display all fields
  - cards that contain lists of items display a maximum of three items but you can click to view all items

  - cards that contain information in tables display up to six rows and a limited number of columns but you can click to display all rows and columns
  - cards with numerous items or rows include options to filter the items that are displayed
  - cards that contain tables have retained most right-click options. The **Export to Excel** option has been removed
- **Actions** menu options have been reorganized into the create menu and more menu

  , added to new menus, or have been converted to cards

Refreshing an entity profile

Warning: Do not use the refresh action in the browser to refresh pages in ChangePoint.

1. Click the entity list view option in the main menu.
2. Reselect the entity in the list.

About the Folders view

The folders view is the left pane that appears when you access certain applications. When you first sign in to ChangePoint, the Folders view is collapsed. When you select an application that includes a Folders view, the name of the Folders view changes to the application name, and either a tree view of folders, or a search panel appears. A few applications, such as the calendar, time sheet and entity list views, do not have a tree view or search panel and therefore the Folders view is collapsed when you select these applications.

To locate a specific record, you must either expand the folders and subfolders in the tree view and then click a record to display it in the Details view.

From the tree view, you can access records as follows:

- To display the record profile in the Details view, click the record
- To edit the record, double-click the record
- To access a menu of actions, right-click the record

About the Options menu in tree views

Some tree views include an **Options** menu with commands that allow you to control the items that are displayed in the tree view. Examples of the options include:

- Display only certain records. For example, in the **Projects** tree view, there is an option to exclude the projects that are completed.
- Search for a specific record. For more information, see "Searching for records in tree views" on page 22.
- Filter the records in the tree view. For more information, see "Filtering records in tree views" on page 22.
- Sort the records. For example, in the time sheet tree view, there are options to sort by alphabetical or WBS (work breakdown structure) order.
- Toggle between the search panel and the tree view.

About searching for records in tree views

You can search for specific records or sets of records using the **Search** command in the **Options** menu. Depending on the tree view, the search is based on one of the following methods:

- Contains search – searches for all records that contain the search text anywhere in the record name (beginning, middle, or end).
- Starts with search – searches for all records that start with the search text. You can still do a “contains” search by using the percent sign (%) as a wildcard character. For example, to search for a record name that contains “abc”, you would enter “%abc”.

Searching for records in tree views

1. Access the tree view that contains the record you want to search for.
2. Click **Options** > **View** > **Search**.

   A search field and a **Search** button appear in the tree view.
3. Enter the search text.
4. Click **Search**.

   All records that match the search text are displayed in the tree view.

Filtering records in tree views

Rather than display a list of records that match the search text, a filter displays only the folders that contain the records that match the text that you enter in the text field.

Some tree views have additional filter options in the **Options** menu.

1. Open the tree view that contains the filter field.
2. In the field, enter the filter text.
3. Click **Filter**.

   The tree view displays only the folders that contain matching records.
4. Expand the folders to locate the records.

About right-click menus in tree views

In the tree views, you can right-click a record to display a menu that contains actions that can be performed on the selected record. The actions vary depending on the selected record, but options to do the following are typically available:

- edit the record
- create entities that are related to the record
- view a history of the record

Resizing the areas of the user interface

To increase the available screen space and view more data, you can:

- resize the **Folders** view or the Details view
- minimize the **Folders** view

Resizing areas

To change the width of the Folders view or the Details view, point to the border between the views until the cursor changes to a double-headed arrow, and then drag the border to the new size. The new widths are saved automatically.

Minimizing the Folders view

To minimize the Folders view, point to the darker part of the border between the Folders view and the Details view. When the cursor changes to a hand, click the highlighted section of the border. To maximize the Folders view, click the highlighted section of the border.

About entering data into ChangePoint fields

Most of the fields in ChangePoint work the same way as the fields in other similar types of applications. However, some field types are exclusive to ChangePoint or work slightly

differently in ChangePoint, and therefore require some additional explanation about how to use them.

Invalid characters

The pipe character (|) and nonprinting characters cannot be entered into any field in ChangePoint, either by using the keyboard or by copy-paste.

Invalid character combinations

The following character combinations cannot be entered in any field:

- &#
- Less than character (<) followed immediately by:
  - English lowercase letters a-z
  - English uppercase letters A-Z
  - !
  - /
  - ?

If you enter these character combinations in a field that does not support it, a space is automatically inserted after the ampersand (&) or less than character.

> **Note:** You can use the less than character in large text fields, but only to enter the supported HTML tags for formatting the text. For more information, see "About formatting text in large text fields" on page 24.

About formatting text in large text fields

In large text fields in ChangePoint, you can format text by using the following HTML tags:

- For bold text:
  - ,
  - ,
- For italic text: ,
- For line breaks: <br>, </br>

Note: Only these HTML tags are supported. You are prevented from entering any other HMTL tags due to restrictions on character combinations. For more information, see "About entering data into ChangePoint fields" on page 23.

Large text fields are the fields that accept more than one line of text; for example, Comments fields.

The formatted text is visible only in the entity profile (read-only mode), and only if the HTML tags are used correctly.

Large text fields in scenario comparisons worksheets

The formatting of text works slightly differently. In the worksheet cells, the HTML tags are visible. However, when you point to a cell, the tool tip displays the text with the formatting applied.

In the **Edit Multiple Lines** dialog box, the text is displayed with the formatting applied until you access the fields to edit them.

Selecting multiple values in a list

This procedure describes how to select multiple values in a list, such as the product team list.

1. To select a range of consecutive values:
   a. Click the starting value for the range.
   b. While pressing the **Shift** key, click the value for the end of the range.

      The two list items and all list items in between them are selected.
2. To select multiple, nonconsecutive values:
   a. Click the first value that you want to select.
   b. While pressing the **Ctrl** key, click the additional values that you want to select.

      Each value that you click is selected.

   Tip: To deselect a value, click it again while continuing to press the **Ctrl** key.

Selecting resources

This procedure describes how to select additional resources in the **Select Resources** dialog box and optionally add them to your preferred resources.

1. Click **Manage Resources**.

   The **Select Resources** dialog box appears.

2. To search for a resource:

   a. Clear the **Show selected items only** check box.

   b. Enter the search text, and then click **Search**.

3. To display the tree view:

   a. Clear the **Show selected items only** check box.

   b. Clear the **Show as a list** check box.

   c. Ensure that the search field is empty, and then click **Search**.

4. To display the resources in a list instead of in the tree view, select the **Show as a list** check box.

5. Select the check boxes for one or more resources.

6. To display the selected resources only:

   a. Select the **Show selected items only** check box.

   b. Ensure that the search field is empty, and then click **Search**.

7. To add the selected resources to your preferred resources, select the **Update preferred resources** check box.

8. Click **O**K.

About type-ahead fields

Type-ahead fields resemble regular drop-down lists, but you can enter text in the fields to filter the list of values that is displayed. You can also press **Enter** or click the drop-down arrow to view the entire list of values. However, type-ahead fields are typically available where there are a large number of values to select from. Therefore it is recommended that you enter filter text to reduce the list of values, whenever possible.

There is a maximum number of values that can be displayed in the list at once. If the value that you want to use is not displayed in the list, then you must enter or refine the filter text to further filter the results.

The following table shows how the different type-ahead fields appear after text has been entered in them. For more information about using the type-ahead fields, see the following sections:

- "Using a standard type-ahead field" on page 29
- "Using a tree view type-ahead field" on page 29
- "Using a multiselect type-ahead field" on page 29
- "Using a multiselect with edit icon type-ahead field" on page 30
- "Using a standard with clear field icon type-ahead field" on page 31

Standard type-ahead field

Initial appearance:

Changes to:

Tree view type-ahead field

Initial appearance:

Changes to:

Multiselect type-ahead field

Initial appearance:

Changes to:

Multiselect with edit icon type-ahead field

Initial appearance:

Changes to:

Standard with clear field icon type-ahead field

Initial appearance:

Changes to:

Using a standard type-ahead field

1. Enter the first few characters of the item name, and then press **Enter** or click the drop-down arrow.
2. Select the item.
3. To clear the field, do one of the following:
   - Select the value in the field, and then press the **Delete** key
   - Select the blank value at the top of the list

Using a tree view type-ahead field

1. Enter the first few characters of the item name, and then press **Enter** or click the drop-down arrow.
2. Expand the tree view, and then select the item.
3. To clear the field, select the value and then press the **Delete** key.

Using a multiselect type-ahead field

Note: For all of the following procedures, you can either press **Enter** or click .

1. Enter the first few characters of the item name, and then press **Enter**.
2. Select the value.
3. Press **Enter**.

To select a range of consecutive values using the mouse

1. Select the first value in the range.
2. While pressing the **Shift** key, select the last value in the range.
3. Press **Enter**.

To select a range of consecutive values using the keyboard

1. Select the first value in the range by pressing the spacebar.
2. Use the up arrow or down arrow keys to move up or down the list.
3. While pressing the **Shift** key, select the last value in the range by pressing the spacebar.
4. Press **Enter**.

To select multiple nonconsecutive values using the mouse

1. Select the first value.
2. While pressing the **Ctrl** key, select the additional values by clicking them.
3. Press **Enter**.

To select multiple nonconsecutive values using the keyboard

1. Select the first value by pressing the spacebar.
2. Use the up arrow or down arrow keys to move up or down the list.
3. While pressing the **Ctrl** key, select the additional values by pressing the spacebar.
4. Press **Enter**.

To clear the value from the field

Do one of the following:

- Select the value, and then press the **Delete** key
- Select the blank value at the top of the list, and then press **Enter**

To clear some, but not all, of the values from the field

1. Press **Enter** in the field.
2. While pressing the **Ctrl** key, clear one or more values from the list by either clicking them with the mouse, or pressing the spacebar.

Using a multiselect with edit icon type-ahead field

1. Click .

   A list box displays under the field.
2. Enter the first few characters of the item name, and then press **Enter** or click .
3. Select one or more items.

   Tip: To cancel, click .
4. Click .

The items are added to the field.

5. To remove items from the field, select the items, and then click .

Using a standard with clear field icon type-ahead field

1. Enter the first few characters of the item name, and then press **Enter**.

   The field changes to a drop-down list.

2. Click the drop-down arrow.

3. Select the item.

4. To clear the field, click .

Entering a date by typing in a date field

You must type dates according to the format that is determined by your browser language settings. For example, if your browser language is set to English (US), the date format is `mm/dd/yyyy`. If your browser language is set to German, the date format is `dd.mm.yyyy`.

For all date formats, the date separators (slashes, dots, and so on) and the first two digits for the year are optional. For example, if the date format is `mm/dd/yyyy`, then to enter the date of July 24, 2014, you can type `072414`. When you type only the last two digits for the year, the digits “00” to “49” are interpreted as 2000 to 2049, and “50” to “99” are interpreted as 1950 to 1999.

1. Double-click in the date field.

2. Enter the date using the displayed format.

3. Press the **Tab** key.

Entering a date by using the calendar icon

1. Click .

   The calendar appears.

2. To select the current date, click .

3. To select a date in the current month, click the date.

4. To change the month and/or year, do one or more of the following:

- Select the month and/or year from the drop-down lists.
- To move to a month in the past, click the left arrow beside the month name.
- To move to a month in the future, click the right arrow beside the year.

Tip: To clear the date field, double-click in it, or place your cursor in the field and press the **Escape** key.

About configurable fields

Your ChangePoint installation might include *configurable fields*, which are custom fields that have been added by your organization, and therefore are not described in the standard ChangePoint product documentation.

- The icon next to a configurable field indicates that additional information is available. To show the additional information, click . To hide the information, click the icon again.
- If configurable fields have been grouped, click + to expand the group. Click – to collapse it.
- If you enter a URL in a configurable text field, the typed text becomes a hyperlink in the profile page.

  Note: The configurable field text displays as a hyperlink only when only the URL is entered in the field, for example, “http://www.changepoint.com.” If you enter additional text, for example, “Visit our website http://www.changepoint.com”, the URL displays as text.

Viewing the history of an entity

You can view the history of actions that were performed on an entity. The information that is tracked includes the date the entity was created, the resource who created the entity, the date that changes are made to the entity, the resource who made the changes, and comments added to the entity.

1. Access the entity profile.
2. Do one of the following:
   - Expand the **Record history** card and then click **View history**.
   - Click **Actions** > **View** > **History**.

The history view appears.

3. To filter the records in the history view:

   a. Click **Actions** > **Filter history**. The **Filter Criteria** dialog box appears.

   b. In the **Scope** field, select the records whose data you want to display in the history view.

   c. In the **Period start** and **Period end** fields, define the date range of the data to be displayed.

   d. Select a sort option (based on the record date):

      - To display the oldest records at the top of the history view, select **Ascending**.
      - To display the newest records at the top of the history view, select **Descending**.

   e. Click **Go**.

   The records that match the filter criteria are displayed.

About searches

The search icon in the navigation menu provides access to three types of searches:

- Global search – for entity records. For more information, see "About global searches" on page 33.
- Knowledge search – for knowledge items. Fore more information, see "Searching for knowledge items or team items" on page 95.
- Support search – for support items. For more information, see "Searching for a support item" on page 1.

About global searches

Use the **Global Search** to search for entity records. The search results include the following information:

- The matching records are sorted according to relevance. The records at the top of the list are more recent and have more matches within them.
- Links to the matching records.
- Additional links to related records, if the related records option was selected for the search.

The search results return only the records that you have access to.

By default, the search is based on records that start with the text that you enter in the search field. However, you can use the percent sign (%) as a wildcard to search for records that contain the search text. For example:

- To search for a record that starts with “abc”, enter “abc”
- To search for a record that contains “abc”, enter “%abc”

For performance reasons, the search returns a maximum of 250 results.

Global Search fields

The **Global Search** looks for matches in the following fields:

- **Name** or **Number** field, whichever is the main identifier field for the entity
- **Alternate name** field
- **Description** field

You have the option to include additional fields as described in the following table.

ChangePoint Entity	The following fields are searched
Campaigns	• Campaign category • Campaign category description
Customers	• Customer ID • Alternate customer name • Web page address • Additional address fields (city, state, country)
Competitors	• Competitor category • Competitor category description
Contacts	• Web page address • Additional address fields (city, state, country) • Email address • Title
Contracts	• Contract ID (user defined) • Alternate name

ChangePoint Entity	The following fields are searched
Invoices	• Invoice number • Customer name • Alternate customer name
Leads	• Web page address • Additional address fields (city, state, country)
Opportunities	• Alternate name
Products	• Product category name • Product category description
Prospects	• Web page address • Additional address fields (city, state, country)
Projects and tasks	• Project ID (user defined) • Alternate name
Resources	• Email address • Location • Additional address fields (city, state, country)
Requests	• Short description field • Resource name (assigned to the request) • Resource alternate name (assigned to the request)

ChangePoint Entity	The following fields are searched
Surveys	• Name • Description • Company Name • Contact Name • Contact Email • Resource Name • Resource Email
Team folders	• Team folder name • Attachment: Title, File Name, Description • Bulletin: Title, Subject, Description • Discussion: Subject, Description • Event: Event title, Description • Link: Link name, URL, Description • Poll: Poll title, Question

Using the global search

1. Click the search icon, and then select **Global Search**.
2. In the search field, enter the search text. To do a "contains" search, add a percent symbol (%) at the beginning of the search text.
3. In the entity list, select the entity type.
4. In the **Only records modified within** list, do one of the following:
   - To search for records based on the last time they were updated, select a time period.
   - To search all records, select **All**.
5. To include additional fields in the search, and display records that are related to the matching records in the search results, select the **Include related records** check box.
6. Click **Search**.

   The **Search Results** view displays the matching records.
7. To redefine the search criteria, click the search icon.
8. To view the record details, click the record name.

About notifications

Notifications appear in the notifications list that you access by clicking the bell icon in the main menu bar.

The color of the bell icon indicates whether you have notifications:

- gray icon – no notifications
- blue icon – reminders and information-only notifications
- blue icon with orange dot – time-critical notifications that require action

For reminder and information-only notifications, the entity icon in the notification is blue. For example:

For time-critical notifications, the entity icon is orange. For example:

To view the details for a notification

1. Click the notification.
2. In the view that appears, you can view the details of and process the related items. The notification is cleared from the list when you have processed all related items.

About using Intelligent Forms

Intelligent Forms guide you through the steps of creating ChangePoint entities, such as projects and requests, or generating documents related to an entity such as statements of work and project status reports. Intelligent Forms are available from the **Actions** menu of the entity on which the form is based.

> **Note:** Intelligent Forms are available only if your organization has configured them for use. Intelligent Forms are available only with PSA terminology, but the terminology in the forms can be changed as required.

The following table lists the standard ChangePoint forms. Your organization may have created additional custom forms.

Form Purpose	How to access the form
Create Contract Create a customer and contacts, contract, project, tasks, and knowledge management items.	> Create Contract
Create Opportunity Create an opportunity from a customer profile.	Customer profile > Actions menu > View > Intelligent Forms > Create Opportunity
Create Project Create a project from a contract profile.	Contract profile > Actions menu > View > Intelligent Forms > Create Project
Create Project Request Create a request from a project profile.	Project profile > Actions menu > View > Intelligent Forms > Create Project Request
Project Status Report Create a status report from a project profile.	Project profile >Actions menu > Project Status Report
Statement of Work (SOW) Create a statement of work from a contract profile.	Contract profile > Actions menu > View > Intelligent Forms > Statement of Work (SOW)
Generate Invoice Document Generate an invoice document in PDF format.	Invoice profile > Actions menu > View > Intelligent Forms > Invoice Document

Using ChangePoint worksheets: Best practices

The following information is a list of best practices and recommendations for using Project Worksheet, Resource Planner, and the scenario comparison worksheet.

Use custom worksheet views

Create custom worksheet views to display only the data that is relevant to you in the worksheet.

Improve the task data entry performance by using a view that contains only the fields that you require for data entry. If read-only fields are not necessary for data entry or editing, remove them from the view.

Filter data as much as possible

Create and apply filters so that only the items that you require are displayed in the worksheet. The less data that has to be processed and rendered, the better the response time of the worksheet.

Create expressions with the logical operators (AND and OR) and parentheses to create more complex filter criteria.

Expanding and collapsing entity rows in worksheets

When working with worksheets that contain large amounts of data, avoid expanding all of the items on the worksheet.

When working with large projects, expand only the row you want to view or edit, and collapse all other rows.

Before closing the worksheet, collapse all rows to reduce the loading time the next time that you access the worksheet.

Enter data by rows

Enter all of the data in a row before moving to another row. Avoid going back and forth between rows. Each time you edit a cell and move to a different row creates a separate action, which increases processing time.

Processing a workflow step

If you are assigned a step in a project, resource request, request or opportunity workflow, a reminder displays in the **My Reminders** portlet.

1. Access your **My Reminders** portlet from a dashboard that includes it.
2. Click the link of the workflow step.

   The **Workflow** view displays the entity in the workflow, the name of the workflow step and the assignment.
3. Click the step name.

   The step dialog box appears. The **Instructions** section displays instructions about the action you are required to take. Documents or links attached to the step or entity are listed in the **Guidance** or **Entity attachment** section.

Performing an Action step

At this stage in the workflow, you must perform a task and provide an approval. For example, review a document and approve or reject it.

1. Access the step dialog box. For more information, see "Processing a workflow step" on page 39.
2. Follow the instructions in the **Instructions** section.
3. Select a new status.
   - If you select **Approved** or **Rejected**, the project moves on to the next step in the workflow.
   - If you select **In Progress**, **On Hold** or **Reassigned**, the project remains in the current stage of the workflow until the status is changed to **Approved** or **Rejected**.
4. Click **Save**.

Performing a Status step

At this stage in the workflow, you must perform a task and mark the task as completed. For example, arrange a team meeting and then mark it as completed after the meeting.

1. Access the step dialog box. For more information, see "Processing a workflow step" on page 39.
2. Follow the instructions in the **Instructions** section.
3. Select a new status.
   - If you select **Completed**, the project moves on to the next step in the workflow.
   - If you select **In Progress**, **On Hold** or **Reassigned**, the project remains in the current stage of the workflow until the status is changed to **Completed**.
4. Click **Save**.

Performing a Survey step

At this stage in the workflow, you must choose the recipients of a survey and send out the survey.

Note: If the survey is set to expire within the next 14 days, you are prompted to modify the expiry date.

1. Access the step dialog box. For more information, see "Processing a workflow step" on page 39.
2. Follow the instructions in the **Instructions** section.
3. In the **Recipients** list, select the recipients for the survey.
4. Click **Send**.
5. Complete the required prompt tag and email information. For more information, see "About prompt tags" on page 1.
6. In the **Status** field of the dialog box, select a new status.
   - If you select **Sent**, the project moves on to the next step in the workflow. (You can only select the status **Sent** after you have sent out the survey.)
   - If you select **On Hold** or **Reassigned**, the entity remains in the current stage of the workflow until the status is changed to **Done**.
7. Click **Save**.

Performing an Upload step

At this stage in the workflow, you must upload a document.

1. Access the step dialog box. For more information, see "Processing a workflow step" on page 39.
2. Follow the instructions in the **Instructions** section.
3. Click **Upload**.

   The **Create Knowledge Item** dialog box appears.
4. Complete all required fields. For more information, see "Creating a knowledge item" on page 86.
5. If required, attach a file to the knowledge item.
6. Click **Save**.
7. In the **Status** field of the dialog box, select a new status for the entity.
   - If you select **Done**, the entity moves on to the next step in the workflow. You can only select **Done** after you have attached the file.

- If you select **On Hold** or **Reassigned**, the entity remains in the current stage of the workflow until the status is changed to **Done**.

8. Click **Save**.

Performing a Copy Project step

At this stage in the project or opportunity workflow, you must create a new project based on an existing project or opportunity.

1. Access the step dialog box. For more information, see "Processing a workflow step" on page 39.
2. Follow the instructions in the **Instructions** section.
3. Click **Create**.

   The **Copy Project** dialog box appears.
4. Complete the required fields. For more information, see "Viewing the Task Status Compliance report" in the *Project Management User Guide*.
5. In the **Status** field on the **Action** dialog box, select a status for the project.
   - If you select **Done**, the project moves on to the next step in the workflow. You can only select the status **Done** after you saved the new project or updated an existing project updated.
   - If you select **In Progress**, **On Hold** or **Reassigned**, the project remains in the current stage of the workflow until the status is changed to **Done**.
6. Click **Save**.

Performing a Tri-State Approval step

For this step, you must perform a task, but the workflow process can branch out to several steps depending on your action and the status you assign to the step.

1. Access the step dialog box. For more information, see "Processing a workflow step" on page 39.
2. Follow the instructions in the **Instructions** section.
3. Select a new status:

- If you select **Approved**, **Canceled** or **Routed to**, the entity moves on to another step in the workflow.
- If you select **In Progress**, **On Hold** or **Reassigned**, the entity remains in the current stage of the workflow until the status is changed to **Approved**, **Canceled** or **Routed to**.

About using tables in ChangePoint

Throughout the various views and dialog boxes in ChangePoint, information is often displayed in a table format.

These tables have common features that you can use to control how the information is organized and displayed. For more information, see the following topics:

- "Selecting and deselecting rows in a ChangePoint table" on page 43
- "Displaying rows with column totals in a ChangePoint table" on page 44
- "Sorting data in a ChangePoint table" on page 44
- "Hiding repeating values in a ChangePoint table" on page 45
- "Moving columns in a ChangePoint table" on page 45
- "Resizing columns in a ChangePoint table" on page 45
- "Filtering data in a ChangePoint table" on page 46
- "Hiding and showing columns in a ChangePoint table" on page 46
- "Selecting and clearing all check boxes in a ChangePoint table" on page 46
- "Exporting data in a ChangePoint table to Microsoft Excel" on page 46

Note: ChangePoint tables are different from the *worksheets* such as Project Worksheet and Resource Planner, which are spreadsheet-like applications that are displayed in a separate browser window.

To navigate right and left from cell to cell within a table, you use **Tab** and **Shift + Tab**.

Selecting and deselecting rows in a ChangePoint table

You can select multiple rows in a table, and then perform actions on all of the selected rows at once.

Note: The deletion of multiple rows is not supported in all tables.

To select or deselect a row

- To select a row, click the row. When a row is selected, it is highlighted.
- To deselect a row, click it again.

To select a range of rows

- Click the first row in the range.
- Press **Shift** and then click the last row in the range.

To select multiple non-consecutive rows

- Click the first row.
- Press and hold **Ctrl** while clicking additional rows.

Displaying rows with column totals in a ChangePoint table

When you first access a table, the totals row displays the sum of all of the rows in the table.

If you select a single row, the totals row displays the sum of all of the rows.

If you select two or more rows, the totals row displays the sum of the *selected rows only*.

Sorting data in a ChangePoint table

You can sort the data in a ChangePoint table in ascending or descending order according to the values in one or more columns. For example, you can sort the data in a table according to dates by clicking the date column header. You can sort by more than one column. For example, you could sort requests by priority, by category, and then by creation date.

Note: You cannot sort grouped headings in a table.

1. Access the table.
2. To sort the rows in ascending order according to the values in the column, click the column header.

   The data is sorted in ascending order, and an “up” arrow appears next to the column header.
3. To sort the rows in descending order, click the same column header again.

   The data is sorted in descending order, and an “down” arrow appears next to the column header.

4. To sort the by multiple columns:
   a. Press and hold the **Ctrl** key.
   b. Click the column headers in the order of the sorting preference.

Hiding repeating values in a ChangePoint table

You can hide data that is repeated in a column or the entire table.

- To hide repeated data records in the table, right-click anywhere in the table and select **Repeating values** > **Suppress for all columns**. Only the first record of repeated data is displayed.
- To hide repeated data in a column, right-click anywhere in the column and select **Repeating values** > **Suppress for this column**.
- To show hidden data, select **Repeating values** > **Show for this column** or **Repeating values** > **Show for all columns**.

Moving columns in a ChangePoint table

It is possible to move columns in most ChangePoint tables. However, some columns are in a fixed position and cannot be moved.

1. Access the table.
2. Drag the column header to the target column header, which is highlighted, and then do one of the following:
   - To insert the column to the left of the target column, drag the column header until the left border of the highlighted column is highlighted.
   - To insert the column to the right of the target column, drag the column header until the right border of the highlighted column is highlighted.

Resizing columns in a ChangePoint table

1. Access the table.
2. Point to the line between the column headers until the pointer changes to a two-way arrow.
3. Click and drag the line to the right or left to resize the column.

Filtering data in a ChangePoint table

You can filter the data in the table to display only the rows that include data that matches the condition that you specify based on a value in a column. For example, if the column includes a value of 100, you could filter the data to include only the rows that have a value of 100 in that column.

1. Access the table.
2. Right-click the value that you want to base the filter on.
3. Select a filter option.

   The table displays only the rows that include values that match the filter option.

Clearing a filter from a ChangePoint table

To clear a filter that was applied to a table and display all of the rows, right-click anywhere in the table, and then select **Disable filter**.

Selecting and clearing all check boxes in a ChangePoint table

If a table contains rows that include check boxes that can be selected or cleared, right-click on the column containing the check boxes and select either **Filter > Select all** or **Filter > Clear all**.

Hiding and showing columns in a ChangePoint table

1. Access the table.
2. Do one of the following:
   - To hide a column, right-click the column heading, and then select **Hide column**.
   - To show hidden columns, right-click any column heading, and then select **Show all columns**.

Exporting data in a ChangePoint table to Microsoft Excel

You can export the table data to Microsoft Excel.

1. Access the table.
2. Right-click in the table and select **Export to Excel**.

   The **File Download** dialog box appears.

3. Click **Save** to save the data to a Microsoft Excel file.

2. Dashboards and Portlets

About dashboards

Dashboards contain one or more *portlets*, which are components that display ChangePoint data in various formats. The dashboard that is designated as your default is effectively a home page and is displayed when you do any of the following:

- first sign into ChangePoint
- click the ChangePoint logo
- click > **Analytics** > **Dashboards**

There are two types of dashboards:

- *System-defined dashboards* – provided by your organization. You cannot modify these dashboards, but you can use them as a starting point to create a personal dashboard.
- *Personal dashboards* – created by resources for their own use. You can create a completely new personal dashboard or use an existing dashboard as a starting point. For more information, see "Creating a personal dashboard" on page 50.

  Note: Your organization can restrict the ability for you to create personal dashboards and/or change your default dashboard.

Accessing a dashboard

If more than one dashboard is available, you can display a different dashboard. The current dashboard is displayed until you access a different entity or component or sign out from ChangePoint.

Do one of the following:

- To access your default dashboard, click .
- To access a dashboard other than your default, click > **Analytics** > **Dashboards**.

  and then select the dashboard from the list.

Specifying a dashboard as your default dashboard

1. Click > **Analytics** > **Dashboards**. The beside a dashboard indicates the default dashboard.
2. Click beside the dashboard that you want as your default, and then click the dashboard.

   The dashboard is set as your default dashboard and is displayed when you first sign into ChangePoint and when you click > **Analytics** > **Dashboards**.

Creating a personal dashboard

When you create a personal dashboard, you can specify the portlets that you want to include, as well as whether the portlets are expanded by default when you access the portlet. However, you cannot change the settings for portlets that have been configured as mandatory.

1. Click the user menu > **My settings**.

   The **My settings** view appears.
2. Expand the **Dashboards** section.
3. In the **Edit or copy from dashboard** list, select **Blank**.

   The list of portlets that you have access to is displayed.
4. In the **Name of new dashboard** field, enter the name of the dashboard.
5. To add a portlet:
   a. Select the check box to the left of the portlet.
   b. To display the portlet open by default, clear the **Closed by default** check box.
6. Click **Actions** > **Save personal dashboard**.

Creating a personal dashboard by copying an existing dashboard

You can create a dashboard by copying an existing dashboard and then changing the settings as required.

1. Click user menu > **My settings**.

The **My settings** view appears.

2. Expand the **Dashboards** section.
3. From the **Edit or copy from dashboard** list, select the dashboard that you want to copy.

   The list of portlets that you have access to is displayed with the default settings for portlets as specified in the selected dashboard.

4. In the **Name of new dashboard** field, enter the name of the dashboard.
5. To add a portlet:
   a. Select the check box to the left of the portlet.
   b. To display the portlet open by default, clear the **Closed by default** check box.
6. To remove a portlet, clear the check box to the left of the portlet.
7. Click **Actions > Save personal dashboard**.

Editing a personal dashboard

1. Click the user menu > **My settings**.

   The **My settings** view appears.

2. Expand the **Dashboards** section.
3. In the **Edit or copy from dashboard** list, select the dashboard.
4. Make the necessary changes.
5. Click **Actions > Save personal dashboard**.

Deleting a personal dashboard

If you delete your default dashboard, the system default dashboard is used instead.

1. Click the user menu > **My settings**.

   The **My settings** view appears.

2. Expand the **Dashboards** section.
3. In the **Edit or copy from dashboard** list, select the dashboard.
4. Click **Actions > Delete personal dashboard**.

5. Click **OK** to confirm.

Removing a portlet from the current dashboard

When a dashboard is displayed, you can remove a standard portlet from it without having the edit the dashboard. However to add a portlet, you must edit the dashboard.

1. Access the dashboard.
2. Point to the portlet heading, click , and then select **Remove**.

   The portlet is removed from the dashboard.

About portlets

Portlets included in a dashboard can contain data, charts, reports, and links to entities or websites. There are two types of portlets:

- **Standard portlets** – Portlets installed with ChangePoint. To display a standard portlet on a dashboard, you must add the portlet to the dashboard. For more information, see "About standard portlets" on page 53.
- **Custom portlets** – Portlets that you created. You can add a custom portlet directly on the dashboard tab. For more information, see "Creating a custom portlet" on page 62.

Maximizing a portlet

You can maximize the size of a portlet so that only the portlet appears in the Details view.

1. Access the dashboard.
2. Point to the portlet heading, and then click .

   The portlet appears in the Details view.

   Note: To restore the portlet back to its regular size, click .

Refreshing a portlet

You can refresh the contents of a portlet to display the most up-to-date information.

1. Access the dashboard.
2. Point to the portlet heading, click and then select **Refresh**.

Filtering the data in a portlet

Some portlets have a filter that you can use to display only the data that matches the filter criteria. The filter criteria varies depending on the portlet.

1. Access the dashboard.
2. Point to the portlet heading and then click .

   The filter appears.
3. Specify the filter criteria.
4. To include all workgroups below a selected workgroup in the filter criteria, select the **Include children** check box.
5. Click **Go**.

   Only the data that matches the filter criteria is displayed in the portlet.

Changing the height of a portlet

1. Access the dashboard.
2. Expand the portlet.
3. Point to the bottom edge of the portlet until the pointer changes to a double-ended arrow.
4. Drag the edge up or down to the desired height.

Hiding a portlet in a dashboard

You can hide portlets on a dashboard. The portlets remain hidden until you refresh the dashboard.

1. Access the dashboard.
2. Point to the portlet heading, click and then select **Hide**.

   The portlet is hidden.
3. To show the portlet, refresh the dashboard by accessing the dashboard again.

About standard portlets

Standard portlets are installed with ChangePoint. Some portlets provide the following:

- Filtering – If a filter icon displays in the portlet heading, you can filter the data that you want to display. For more information, see "Filtering the data in a portlet" on page 53.
- Links – If links display in a portlet, you can click them to display more detailed information or access another related view in ChangePoint.
- Sorting options – Click a heading in a portlet to sort the records by that heading in ascending or descending order.
- Data in chart format – Some portlets are also available in chart format.

The portlets are grouped in categories, based on the resources who most frequently use these portlets. For more information, see the following topics:

- "General portlets" on page 54
- "Sales and marketing portlets" on page 56
- "Client services portlets" on page 57
- "Request management portlets" on page 59
- "Financial management portlets" on page 59
- "Performance management portlets" on page 60

General portlets

General portlets are available to all resources.

My Reminders

This portlet displays notifications from all areas of ChangePoint. Some examples of notifications are:

- time or expense approvals
- checked out knowledge items
- automated surveys
- tasks that require status updates
- workflow steps
- new knowledge items or team items

My Favorite Reports

You can create a list of the reports that you use most often. For more information, see "Managing reports in the My Favorite Reports portlet" on page 61.

Find Person

You can search for a resource or contact, or view a list of resources who are in the office (according to the option that they select on this portlet or their resource profile), or signed in to ChangePoint. You can also indicate whether you are in or out of the office. For more information, see "Using the Find Person portlet" on page 60.

Knowledge Management

Displays knowledge items to which you have a subscription. Knowledge items are displayed in the portlet until the date specified by the resource who created the knowledge item.

My Utilization

Use this portlet to track how you used your time in the current or previous calendar month.

Utilized hours	All utilized hours (billable and nonbillable)
Billable utilized hours	All utilized billable hours
Billable hours	All billable hours (utilized and non-utilized)
Nonbillable hours	All nonbillable hours (utilized and non-utilized)
Total hours	Sum of all billable and nonbillable hours
Target hours	Annual target hours specified in user setup for the resource, divided by 12.

My Links

You can create a list of the Web links that you access most often. For more information, see "Managing links in the My Links portlet" on page 61.

Sales and marketing portlets

Competitive Outcomes

Displays wins and losses over a specified period of time. The information is based on the outcome date of opportunities. Includes the number of competitors that were added to ChangePoint during the selected time period.

Opportunity Outcome Summary

Displays a summary of the outcomes for your assigned opportunities, or all opportunities in the current month.

Active Opportunities

Displays the quantity of active opportunities that started within the current or previous month, listed by status. Includes the following information:

- the probability that the opportunity will be won
- the weighted amount of the opportunity (revenue forecast amount of the opportunity * probability that the opportunity will be won)
- the total monetary value of the opportunity

Opportunity Rollups

Includes the following reports:

- **All active opportunities** – displays a consolidated view of all active opportunities. The rollup report displays the revenue forecast for each opportunity and a total forecast for all opportunities.
- **Forecast rollup** – displays a consolidated view of current and past opportunities. You can do the following:
  - view information by sales representative, by month or by probability.
  - view forecast details for fixed fees, products, services and expenses.
  - view the amounts in another currency.

Opportunities Won

Includes the following reports:

- **Opportunity Outcome: Won** – displays all the opportunities that have been won and closed within a specified time period.
- **Closed last 30 days** – displays all the opportunities that were won and closed in the last 30 days.
- **Closed last 90 days** – displays all the opportunities that were won and closed in the last 90 days.

Opportunities Lost

Displays the following reports:

- **Opportunity Outcome: Lost** – displays all the opportunities that have been lost within a specified period of time.
- **Opportunity Outcome: No Outcome** – displays all the opportunities that do not have an outcome.
- **Opportunity Outcome: Other** – displays all the opportunities that had other reasons as the outcome.

Campaign Results

Displays all new opportunities, leads, or prospects that have been created in ChangePoint in the previous 10 days, and have been associated with a campaign.

Upcoming Campaigns

Displays all campaigns that start within the next calendar month.

Client services portlets

Workgroup Utilization

Use this portlet to view the utilization of workgroups or all workgroups in the current or previous month. A workgroup is included only if the workgroup:

- has been configured to be included in service-related portlets
- includes a resource that has time approved during the month
- is the workgroup of a contract manager and includes a committed invoice

Heading	Description
Workgroup	Name of the workgroup
Billable time (%)	Billable hours (regular hours + overtime hours) for the month / Target hours (total annual target hours of all workgroup resources divided by 12) * 100
Billable engagement %	Total hours (regular hours + overtime hours entered for a billable contract, regardless of being billable or not) / Target hours (annual target hours of all workgroup resources / 12) * 100
Billable ratio	Billable hours / hours entered for a billable contract, regardless of whether the hours are billable or not. The hours values are the same values used for the respective percentage calculations.
Revenue	Amount of committed invoices (including taxes), where the workgroup of the contract manager is the selected workgroup and the date is within the selected month.

Underutilized Resources

Use this portlet to view all the resources that will be available in the next 30 days, and are under 50 % utilized. This list is based on resources with the **Planned resource** feature.

The utilized percentage is calculated as follows:

Forecast remaining hours / Target hours * 100

where

- Forecast remaining hours = task hours forecast in the next 30 days on active projects + calendar entries
- Target hours = daily capacity of the resource * number of working days

Note: This portlet uses data from task status updates and therefore is only accurate if resources update the status of their tasks regularly.

Contract Warnings

Use this portlet to view contracts for which the invoiced amounts exceed 80% of the contract amount. The contract amount includes amounts of invoices with the following statuses: **Committed**, **Sent**, **Partially paid**, **Paid**, or **Archived**.

You can filter the data to view the results for a specific workgroup. Contracts where the contract manager belongs to the selected workgroup will be included in the results.

Request management portlets

Request Summary

Displays all of the request types and the number of requests that were created, closed, opened, and suspended within a specific period.

Requests Assigned to Me

Displays all the open requests that are assigned to you.

Requests Initiated by Me

Displays all the open requests that were initiated by you.

Financial management portlets

Draft Invoices

Displays all of the draft invoices and credit notes. Credit notes display in red.

Invoices Pending Approval

Displays all invoices and credit notes that are pending approval. Credit notes display in red.

Rejected Invoices

Displays all invoices and credit notes that have been rejected by the invoice approver. Credit notes display in red.

Approved Invoices

Displays all invoices and credit notes that have been approved by the invoice approver. Credit notes display in red.

Financial Reminders

Displays the items that have not yet been billed to a customer. Also includes a reminder of the number of days remaining until the month.

Performance management portlets

Portfolio Performance Management

Displays the performance status of project portfolios.

My Performance

Displays the results of metrics that are assigned to you directly, or to a team that you belong to.

People Performance Management

Displays the results of metrics of resources in your workgroup and in workgroups to which you have access.

Survey Management

Displays all of the surveys that you have selected to display in the portlet. If you are a survey administrator, all pending automated and expiring surveys automatically display in your portlet.

Using the Find Person portlet

1. Access the dashboard that includes the **Find Person** portlet.
2. Expand the **Find Person** portlet.
3. To search for a resource or contact, enter the name and click **Go**.
4. To view a list of resources who are in the office, click **Who's in the office**.
5. To view a list of resources who are signed into ChangePoint, click **Who's online**.
6. To indicate whether you are in or out of the office:
   a. Select the appropriate option.
   b. If you select **Out of the office**, you can enter details in the text field, such as temporary contact information or the date that you expect to return.
   c. Click **Update**.

The out of the office notification displays on your resource profile.

Managing reports in the My Favorite Reports portlet

Use this portlet to view a list of the reports that you use most often.

1. Access the dashboard that includes the **My Favorite Reports** portlet.
2. Expand the **My Favorite Reports** portlet.
3. Click **Manage reports**.

   The **My Reports** dialog box appears.
4. Expand the tree view and do the following:
   - To add a report, select the check box beside it.
   - To remove a report, clear the check box beside it.
5. Click **OK**.
6. To refresh the portlet, click and then select **Refresh**.

Managing links in the My Links portlet

Use the **My Links** portlet to add links to websites that you access frequently.

1. Access the dashboard that includes the **My Links** portlet.
2. Expand the **My Links** portlet.
3. To add a link:
   a. Click **Manage Links**. The **My Links** dialog box appears.
   b. In the **Name** field, enter a name for the link.
   c. In the **URL** field, enter the website address after the **http://** prompt.
   d. Click **Save**. The link displays in the list on the left side of the dialog box.
   e. Click **Close**.
4. To remove a link
   a. Click **Manage Links**. The **My Links** dialog box appears.
   b. Select the link to delete.

c. Click **Delete**.

d. Click **Close**.

5. To refresh the portlet, click and then select **Refresh**.

Printing a standard portlet

The following procedure describes how to print standard portlets.

1. Access the dashboard.
2. Expand the portlet.
3. Point to the portlet header, click and then select **Print**.

   The Windows **Print** dialog box appears.

4. Select the print settings.
5. Click **Print**.

Creating a custom portlet

You can create custom portlets that contain an intranet site or external website.

Warning: Verify that the website source code does not contain a *target="top"* property. This property opens the website in the top-most window and forces ChangePoint to sign out. If you cannot verify the source code, then be sure to test the portlet for this behavior.

1. Access the dashboard.
2. Click **Actions** > **Create** > **Portlet**.

   The **Properties** dialog box appears.

3. In the **Name** field, enter the name of the portlet.
4. In the **URL** field, enter the address for the website or intranet site.
5. Click **OK**.

   The portlet displays on the dashboard.

Editing a custom portlet

After creating a custom portlet, you can edit the name and URL of the portlet.

1. Access the dashboard that includes the custom portlet.
2. Point to the portlet heading, click and then select **Properties**.

   The **Properties** dialog box appears.
3. Make the necessary changes.
4. Click **OK**.

Deleting a custom portlet

You can delete only the portlets that you created.

1. Access the dashboard that includes the custom portlet to delete.
2. Point to the portlet heading, click and then select **Properties**.

   The **Properties** dialog box appears.
3. Click **Delete**.
4. Click **OK** to confirm.

About changing the layout of dashboards

You can make the following layout changes to personal dashboards:

- "Changing the layout of a dashboard" on page 63
- "Rearranging portlets in a dashboard" on page 64
- "Sorting portlets into alphabetical order" on page 64
- "Resizing the panes in a dashboard" on page 64
- "Printing a standard portlet" on page 62

Layout changes are saved immediately. You do not have to apply or save them.

Changing the layout of a dashboard

By default, the portlets are displayed in a single pane layout, but you can chose another layout from a list of custom layouts that include two to four panes. After you select a new layout, you can move the portlets to the various panes.

1. Access the dashboard.

2. Click **Actions** > **Arrange** > **Custom layout**.

   The **Custom Layout** dialog box appears.

3. Select a layout and then click **OK**.

4. Rearrange the portlets.

   Your changes are automatically saved.

Reverting a dashboard to the default layout

If you selected a custom layout for a dashboard, you can revert back to the default single pane layout.

1. Access the dashboard.

2. Click **Actions** > **Arrange** > **Default layout**.

   The default layout is applied to the dashboard.

Rearranging portlets in a dashboard

You can move a portlet within a dashboard to another position within a pane, or to another pane.

1. Access the dashboard.

2. Drag the portlet towards the new position until a blue line appears.

Sorting portlets into alphabetical order

You can sort the portlets into alphabetical order. If the dashboard includes multiple panes, the portlets are sorted in each of the panes.

1. Access the dashboard.

2. Click **Actions** > **Arrange** > **Alphabetical**.

Resizing the panes in a dashboard

If the dashboard includes multiple panes, you can resize the width and height of the various panes.

1. Access the dashboard.

2. Point to the space between the panes until the cursor changes to a double-ended arrow.

3. Drag the arrow to the desired position.

Troubleshooting dashboards and portlets

This topic provides troubleshooting information for portlets and dashboards.

A portlet is not available in a dashboard

If a portlet is not available in your dashboard, you must add the portlet to a dashboard and then view the dashboard. For more information, see "Creating a personal dashboard" on page 50 and "Accessing a dashboard" on page 49.

A new dashboard is not created when you copy a dashboard

When creating a new dashboard by copying an existing dashboard, make sure that you enter a name for the new dashboard. Otherwise, you end up editing the existing dashboard instead of creating a new one.

The dashboard takes a long time to display

Limit the number of open portlets in a dashboard because open portlets increase the time the dashboard take to display.

3. Setting Personal Preferences

Updating your personal contact information

The **My contact info** section contains information that is displayed on your resource profile that can be viewed by other ChangePoint resources and Client Portal users. You can add an out-of-office message and a picture to your resource profile.

1. Click the user menu > **My settings**.
2. Expand the **My contact info** section.
3. To display a message on your profile:
   a. Select the **Out of office** check box.
   b. In the **Out-of-Office Message** field, enter the message text.
4. In the **Contact Numbers** section:
   a. Enter your contact numbers.
   b. To hide a contact number from Client Portal users, select the corresponding **Hide from Client Portal users** check box.
5. In the **Personal Picture** section:
   a. Click **Attach Picture**.

      The **Attach Picture** dialog box appears.
   b. Click **Browse**, choose a GIF or JPG file, then click **Open**.
   c. Click **Upload** and then **OK**.
   d. Select the **Show picture** check box.
6. In the **Business Address** area, enter your location, business email address, and business address.
7. In the **Additional information** field, enter information that you want to display on your resource profile.
8. Click **Save**.

Setting workforce planning preferences

You can configure the settings for notifications to be sent to you when a workforce planning issue requires your attention. These settings include the following:

- types of demand to be considered
- threshold percentage of resource capacity

1. Click the user menu > **My settings**.
2. Expand the **Workforce planning options** section.
3. To enable monitoring, click the **Activate workforce planning** check box.
4. In the **Monitoring period** field, enter the number of days (30, 60, 90) from today to be monitored.
5. In the **Include effort from** option, select the demand items to be included.
6. In the **Resources to be monitored** option, select resources:
   a. To search for an item, enter the search text and then click **Search**.
   b. To display the tree view, clear the **Show selected items only** check box, ensure that the search field is empty, and then click **Search**.
   c. Select one or more items.
   d. To display the selected items only, select the **Show selected items only** check box, ensure that the search field is empty, and then click **Search**.
7. In the **Notification thresholds** section, enter the value for **Resource capacity threshold**. When this capacity percentage is met or exceeded, a notification is sent.

About delegating your approval rights

The **Approvals** section displays the names of your current time approvers, expense approvers, and invoice approvers.

For information about delegating your approval rights, see the following:

- "Delegating your time approval rights" on page 69
- "Delegating your expense approval rights" on page 69
- "Delegating your invoice approval rights" on page 70

- "Delegating your workflow approval rights" on page 70

Viewing your time and expense approvers

1. Click the user menu > **My settings**.
2. Expand the **Approval** section.

   The **Who is my...?** section displays the names of your time approver, your expense approver, and, if applicable, your invoice approver.

Delegating your time approval rights

When you delegate your time approval rights, you must select a resource as the primary approver, and another resource as the secondary approver in case the primary approver is not available.

1. Click the user menu > **My settings**.
2. Expand the **Approvals** section.
3. Select the **Delegate my time approval rights** check box.
4. In the **Primary approver** type-ahead field, enter the name of the resource to whom you delegate your time approval rights.
5. In the **Secondary approver** type-ahead field, enter the name of a different resource, in case the primary approver is not available.
6. To take back your time approval rights, clear the **Delegate my time approval rights** check box.
7. Click **Save**.

Delegating your expense approval rights

When you delegate your expense approval rights, you must select a resource as the primary approver, and another resource as the secondary approver in case the primary approver is not available.

1. Click **My settings**.
2. Expand the **Approvals** section.
3. Select the **Delegate my expense approval rights** check box.

4. In the **Primary approver** type-ahead field, enter the resource to whom you delegate your expense approval rights.
5. In the **Secondary approver** type-ahead field, enter the name of a different resource, in case the primary approver is not available.
6. To take back your expense approval rights, clear the **Delegate my expense approval rights** check box.
7. Click **Save**.

Delegating your invoice approval rights

1. Click the user menu > **My settings**.
2. Expand the **Approvals** section.
3. Select the **Delegate my invoice approval rights** check box.
4. In the **At contract-level** type-ahead field, enter the name of the resource to which you delegate contract-level invoice approval rights.
5. In the **Second-level approval** type-ahead field, enter the name of the resource who will approve invoices at a level above the contract.
6. To take back your invoice approval rights, clear the **Delegate my invoice approval rights** check box.
7. Click **Save**.

Delegating your workflow approval rights

You can delegate your workflow approval rights to another resource, role, or configurable field participant. When you delegate your workflow approval rights, workflow notifications are sent to both your and your delegate's **My Reminders** portlet.

1. Click the user menu > **My settings**.
2. Expand the **Approvals** section.
3. In the **Delegate my workflow rights** section, click the row of the entity for which you want to delegate your workflow rights.
4. Select the **Active** check box.

5. In the **Participant** type-ahead field, enter the resource, role, or configurable field participant.
6. In the **Approvals** section, click **Save**.

About preferred resources

You can add resources to your list of preferred resources, which is available in most areas in ChangePoint where you have to select resources. For example, your preferred resources list is available for assigning a resource to a task assignment.

You can also create personal groups of resources that you can use to select all members of the group at the same time.

Adding a resource to your preferred resources

1. Click the user menu > **My settings**.
2. Expand the **Preferred resources** section.
3. Click **Manage preferred resources**.

   The **Manage Resources** dialog box appears.

To search for a resource

1. Enter the search text.
2. To search through all resources, select the **Show all items** option.
3. To search through selected resources only, select the **Show selected items only** option.
4. Click .

To switch between the tree view and list view of resources

Select or clear the **Show resources in a list** check box. The view switches from the list of resources to the tree view and vice versa.

To add (or remove) workgroups or individual resources

1. Select (or clear) the check boxes for the workgroups or individual resources.
2. Click **Save**.

Creating a personal group in your preferred resources list

You can create personal groups of resources that are in your preferred resources list. You use personal groups to assign a group of resources to a task instead of having to select one resource at a time.

1. Click the user menu > **My settings**.
2. Expand the **Preferred resources** section.
3. Click **Manage preferred resources**.

   The **Manage resources** dialog box appears.
4. Click the **Personal groups** tab.
5. In the **Name** field, enter a name for the group.
6. In the **Description** field, enter information about the group.
7. In the **Available resources** list, select the resources that you want to add to the group.
8. Click the right arrow, or drag the resources to the **Group members** list.

   The resources are moved to the **Group members** list.
9. Click **Save**.

Editing a personal group in your preferred resources list

You can add or remove resources from your personal groups, and delete a personal group.

1. Click user menu > **My settings**.
2. Expand the **Preferred resources** section.
3. Click **Manage preferred resources**.

   The **Manage Resources** dialog box appears.
4. Click the **Personal groups** tab.
5. In the **Group** list, select the group.
6. To add resources to the group, select the resources in the **Available resources** list, and then click the right arrow or drag the resources to the **Group members** list.

7. To remove resources from the group, select the resources in the **Group members** list, and then click the left arrow or drag the resources to the **Available resources** list.
8. To delete the group:
   a. Click (beside the **Name** field).
   b. Click **OK** to confirm.
9. Click **Save**.

Viewing the security features assigned to you

You can view the security features that have been assigned to you. These security features control your access rights to ChangePoint functionality.

1. Click the user menu > **My settings**.
2. Expand the **Security features** section.

   The categories of security features appear.
3. Expand the security categories to view the features assigned to you.

About qualifications

You can update your qualifications and competencies in your resource profile. Other resources, such as a project managers, search for resources that are best suited to specific tasks and projects based on this information.

If you update your qualifications, an email notification is sent to your manager and workgroup resource manager.

Updating your list of qualifications

1. Click the user menu > **My settings**.
2. Expand the **Qualifications** section.

   The list of qualifications categories that are assigned to you appears.
3. Click **Manage qualifications**.

   The **Manage Qualifications** dialog box appears.
4. Expand the qualification categories to locate the competency.

5. Select the check box for a competency.
6. In the **Years of experience** field, enter the number of years qualified.
7. In the **Last used** field, enter the date the qualification was last used.
8. Click **Update Qualifications**.
9. To view the updated qualifications in the **Qualifications** section, click **Refresh list**.

Enabling or disabling notifications

There are two kinds of notifications:

- application notifications – appear in the notifications list that you access by clicking the bell icon in the main menu bar
- email notifications are sent to you automatically by email when certain events occur in ChangePoint. For example, when you are assigned to a new task in ChangePoint, the **New task** notification is sent to you.

To enable/disable application notifications

1. Click the user menu > **My settings**.
2. Expand the **Notifications** section.
3. To enable/disable application notifications, select/clear the **Enable application notifications** check box.

To enable/disable email notifications

You can disable all email notifications, or select and clear individual email notifications.

1. Click the user menu > **My settings**.
2. Expand the **Notifications** section.

   A list of all system email notifications appears.
3. To disable all email notifications, select the **Disable all email notifications** check box.
4. To disable or enable email notifications individually:
   a. If the **Disable all email notifications** check box is selected, clear it.
   b. To disable an email notification, select the corresponding check box.

c. To enable an email notification, clear the corresponding check box.

5. Click **Save**.

Setting the calendar time format

You can set the time format that displays in your calendar to display in either 12-hour (for example, 1:30 pm) or 24-hour (for example, 13:30) format. The time format applies to all of the items; that is, you cannot set different time formats for items.

1. Click the user menu > **My settings**.
2. Expand the **Calendar time format** section.
3. Select the **12-hour clock** option or the **24-hour clock** option.
4. Enter your daily start time.
5. Click **Save**.

Setting your display preferences

Depending on how ChangePoint has been configured, the create and edit functionality for entities is displayed by default either as dialog boxes with tabs, or inline in the Details view with expandable and collapsible sections. You can choose your preferred display option for each entity.

1. Click the user menu > **My settings**
2. Expand the **Display options** section.
3. To set your preferred display option for creating and editing each entity:
   - To display the create and edit functionality in dialog boxes, select **Tabbed**.
   - To display the create and edit functionality inline in the Details view, select **Inline**.
4. Click **Save**.

Deleting server cookies

You can delete server cookies when certain user-specific settings are not being saved in ChangePoint. For example, if you access an entity dialog box and the last tab that you accessed is not open, or search criteria that you entered in entity profiles and tree views is not saved.

1. Click the user menu > **My settings**.

The **My settings** view appears.

2. Click **Delete server cookies**.

   A message appears when the server cookies are deleted.

About installing add-ins

The **Add-in Installations** section is where you can obtain the installers for the add-ins that are required by ChangePoint to interact with third-party software.

The following add-ins are available:

- ChangePoint MSP COM Add-in
- ChangePoint Outlook tools

Installing or upgrading an add-in

You upgrade add-ins by re-installing them.

1. Click the user menu > **My settings**.
2. Expand the **Add-in installations** section.
3. Click the appropriate link.
4. Run the installation and follow the prompts.
5. If you are prompted for a URL, copy and paste the information from the **Add-in installations** section.

Uninstalling add-ins

You uninstall add-ins using **Add or Remove Programs** in Windows Control Panel.

About setting planning and time sheet units

You can select the units (hours, days, or FTEs) that you prefer to use for entering time in the time sheet and for planning purposes in the following entities:

- Budget – services
- Opportunity – services
- Project – tasks, task assignments, projects, project team, and Project Worksheet
- Projected resources – projected resources on contracts

- Request demand – request demand on requests
- Resource Planner
- Time – time sheet (hours or days only)

Setting planning and time sheet units

1. Click the user menu > **My settings**.
2. Expand the **Planning and time sheet units** section.
3. For each of the entities, select **Hours**, **Days**, or **FTEs**.
4. Click **Save**.

Automatically displaying active tasks in the time sheet

There is an option in **My settings** that you can select to automatically display the tasks in the time sheet for which one or more days in the selected week is within the planned start and finish dates for the task. If forecast start and/or finish dates are available, they are used instead.

To display active tasks in the time sheet

1. Click the user menu > **My settings**.
2. Expand the **Planning and time sheet units** section.
3. In the **Automatically display tasks on time sheet** section, select the **Automatically display tasks for which the selected week is within the start and finish dates for the task** check box.
4. Click **Save**.

4. Using the Calendar

About using the calendar

You can enter and manage your own appointments in the calendar. The calendar also displays calendar entries for demand items (task assignments, project team, and request demands) and appointments that have been entered by resource managers, contract managers, or project managers.

Calendar entries for demand items display the item name and planned hours per day. Appointments display the time range and description if the appointment is a partial day, and only the description if the appointment is a full day. All calendar entries reduce your availability.

The colors in the calendar have the following meanings:

- blue calendar entry – time is committed and cannot be changed
- green calendar entry – time is tentative and can be changed
- dates in red font – time in the calendar entries exceeds your standard hours per day
- gray background – nonworking day
- yellow background – current day

Accessing the calendar

When you access the calendar for the first time, the current date is displayed in the month view. However, you can change the view to a weekly or day view.

1. Click > **Calendar**. The calendar appears.
2. To change the view, at the top right of the calendar, click **Month**, **Week**, or **Day**.
3. To view the next or previous time period, at the top left of the calendar, click the right or left arrows.
4. To return to the current date view, click **Today**.

Viewing calendar entry details

You can view the details for calendar entries for demand items, and appointments.

1. Access the calendar.

2. Display the view that contains the calendar entry or appointment.
3. Click the calendar entry or appointment.

   One of the following occurs:

   - If you clicked a calendar entry, the **Day View** dialog box appears.
   - If you clicked an appointment, the **Edit Appointment** dialog box appears.

About creating calendar appointments

You can create appointments in your calendar. You can associate appointments with contracts, projects, or opportunities.

Marking a day as nonworking in the calendar

To ensure that no work is planned for you on a given day (for example, a vacation day), you can mark a day as nonworking. To mark a day in your calendar as nonworking, you create a full day appointment and then select the nonworking day option.

Creating a calendar appointment

1. Access the calendar.
2. Double-click the date where you want to create an appointment.

   The **Create Appointment** dialog box appears.
3. Complete the fields as required. For more information, see "Create/Edit Appointment dialog, Appointment details tab options" on page 80.
4. Click **Save**.

Create/Edit Appointment dialog, Appointment details tab options

Field	Description
Resource field	Creator of the appointment.
Start date field	Start date for the appointment.
Daily start time field	Start time for the appointment.

Field	Description
End date field	End date for the appointment.
Daily end time field	End time for the appointment.
Description field	Brief description of the appointment.
Flexible (allow override) check box	When selected, the appointment time can be used for other work if necessary.
Full day check box	When selected, the appointment is for the entire day.
Nonworking day check box.	When selected, the day is a nonworking day. Available only when the **Full day** check box is selected.
Include weekends/nonworking days check box	When selected, the appointment includes weekends and other nonworking days.

Create/Edit Appointment dialog, Reference tab options

Field	Description
Reference list	Type of entity (contract, project, or opportunity) that the appointment is associated with.
Contract, **Project**, or **Opportunity** type-ahead field	Appears after you select an option in the **Reference** list. The specific contract, project, or opportunity that the appointment is associated with.
Notes field	Additional information.

Editing a calendar appointment

You can edit your calendar appointments, but you cannot edit the calendar entries for demand items that were added by other resources.

1. Access the calendar.
2. Click the appointment that you want to edit.

   The **Edit Appointment** dialog box appears.

3. Make the necessary changes. For more information, see "Create/Edit Appointment dialog, Appointment details tab options" on page 80.
4. Click **Save**.

Editing a multiple day appointment

You can edit your calendar appointments, but you cannot edit the calendar entries for demand items that were added by other resources.

You can edit either a specific date in a multiple day appointment, or you can edit the overall appointment.

1. Access the calendar.
2. To edit a specific date:
   a. Click the appointment on the specific date. The **Multiple Day Entry** dialog box appears.
   b. Select **Edit this date only** and then click **OK**. The **Edit Appointment** dialog box appears.
   c. Make the necessary changes.
   d. Click **Save**.
3. To edit the overall appointment:
   a. Click the appointment. The **Multiple Day Entry** dialog box appears.
   b. Select **Edit the series** and then click **OK**. The **Edit Appointment** dialog box appears.
   c. Make the necessary changes.
   d. Click **Save**.

Deleting a calendar appointment

Because calendar appointments affect your availability, it is good practice to delete them if they are no longer required. You cannot delete the calendar entries that were added by other resources. Tasks are automatically removed from your calendar when you mark them as completed.

1. Access the calendar.
2. Click the appointment.

The **Edit appointment** dialog box appears.

3. Click **Delete**.
4. Click **OK** to confirm.

Deleting all of the calendar appointments within a date range

You can delete the calendar appointments within a date range. You can delete all of the appointments within the date range, only the full day appointments, or only the partial day appointments.

1. Access the calendar.
2. Click **Actions** > **Delete**.

   The **Delete Appointment** dialog box appears.
3. Complete the fields as required. For more information, see "Delete Appointment dialog box options" on page 83.
4. Click **Delete**.
5. Click **OK** to confirm.

Delete Appointment dialog box options

Field	Description
Resource field	Name of the person to which the appointment applies.
Period start field	Start date of the date range.
Period end field	End date of the date range.
Entries list	Appointments to be deleted. Options include: • **All** – all of the appointments • **Full day only** – only the full day appointments • **Partial day only** – only the partial day appointments
Include weekends/nonworking days check box	When selected, includes weekends and nonworking days in the date range.

5. Knowledge Management

About knowledge items

You can share information through the use of knowledge items. You create knowledge items by attaching document files or links (to websites or shared repositories) to entities such as customers, opportunities and contracts and so on. Other resources can then access these knowledge items from the entity profile or through searches. You can also create knowledge items separately from entities.

About subscriptions

Access to knowledge items is based on subscriptions, which are groups of knowledge categories and subcategories, and roles. Resources who have the roles in a subscription automatically have access to, and can create, knowledge items in the knowledge categories and subcategories that are in the same subscription.

Subscriptions also send notifications to the **Knowledge Management** portlet when a new knowledge item is created. Resources can stop and start the notifications.

If subscriptions are not configured on your ChangePoint installation, all resources can create knowledge items and can access knowledge items in all knowledge categories and subcategories. Notifications are not sent to the **Knowledge Management** portlet.

About accessing knowledge items

You can access a knowledge item in the following ways:

- from the **Knowledge Management** portlet in a dashboard – notifications for new knowledge items are displayed in the **Knowledge Management** portlet for the length of time that is specified when they are created (default is two weeks).
- from entity profiles – knowledge items that are linked to an entity are available from the **Related knowledge** section of the entity profile
- from the **Knowledge Search** panel – for more information, see "Searching for knowledge items or team items" on page 95.
- by using the **Global search** – for more information, see "Using the global search" on page 36.

Stopping and starting notifications for knowledge items

You can stop the notifications that are sent to the **Knowledge Management** portlet for one or more subscriptions. While the notifications are stopped, you can still access and create knowledge items for the subscriptions. You can restart the notifications at any time.

1. Click the user menu > **My settings**.

   The **My settings** view appears.

2. Expand the **Knowledge subscriptions** section.

3. To stop the notifications for all subscriptions, select the **Disable all subscriptions** check box.

4. To stop the notifications for specific subscriptions:

   a. Clear the **Disable all subscriptions** check box.

   a. Select the check boxes for the subscriptions in the **Disable only the following subscriptions** section.

5. To restart the notifications for specific subscriptions:

   a. Clear the **Disable all subscriptions** check box.

   a. Clear the check boxes for the subscriptions in the **Disable only the following subscriptions** section.

6. Click **Save**.

Creating a knowledge item

You can create a knowledge item from entity profiles or from the **New** menu. When you create a knowledge item from an entity profile, the knowledge item is automatically linked to the entity, and is available from the **Related knowledge** section of the entity profile.

You can also create a knowledge item from a custom report. For more information, see "Creating a knowledge item based on a custom report" on page 87.

1. Click > **Applications** > **New**.

2. Click **Knowledge item**.

   The **Create Knowledge Item** dialog box appears.

3. Complete the fields as required. For more information, see "Create/Edit Knowledge Item dialog, General tab options" on page 88.
4. To link the knowledge item to an entity:
   a. In the **ChangePoint link** field, click . The **ChangePoint Link** dialog box appears.
   b. In the **Type** list, select the entity type.
   c. In the **Subtype** list, select the entity.
   d. Click **OK**.
5. To remove the link to an entity, click .
6. To restrict access to the knowledge item, click the **Access** tab. For more information, see "Restricting access to a knowledge item" on page 89.
7. Click **Save**.

Creating a knowledge item based on a custom report

When you create a knowledge item based on a custom report, the report is saved as a .zip file attachment that includes a read-only view of the report in HTML format and the following files when applicable:

- report chart files in .png format
- conditional formatting image files
- image object files

Warning: The data in custom reports that are saved as knowledge items can be viewed by all resources who have access to the knowledge item, regardless of whether the resource would normally have access to the data in the custom report.

1. Run the custom report.
2. Click **Actions** > **Create** > **Knowledge item**.

   The **Create Knowledge Item** dialog box displays with the name of the report in the **Document title** field.
3. Complete the fields as required. For more information, see "Create/Edit Knowledge Item dialog, General tab options" on page 88.

4. Click **Save**.

Create/Edit Knowledge Item dialog, General tab options

Field	Description
Author field	Resource who created the knowledge item.
Private button	When selected, only the resource who created the knowledge item can view it.
Public button	When selected, all resources who subscribe to the related subscription can view the knowledge item.
Display on Knowledge Management portlet until field	Date after which the item is removed from the **Knowledge Management** portlet. Default is two weeks from the current date. Only the creator of the knowledge item can change the date.
Document title field	Title of the knowledge item.
Description field	Brief description of the knowledge item.
Keywords field	Words that can be used as search criteria. Keywords must be separated with a semicolon(;).
Category list	Category for the knowledge item.
Subcategory list	Subcategory for the knowledge item.
Web link field	URL including the protocol (for example, http:// or FTP) to a web link, or network path to a document stored on the network.
ChangePoint link field	Entity that the knowledge item is associated with.
Attachment field	Network path to the file attachment.
Browse button	Opens the **Choose file to Upload** dialog box.

Field	Description
View link	Opens the **File download** dialog box (**Edit Knowledge Item** dialog box only.)
Replace attachment check box	When selected, the **Browse** button appears for you to select the replacement file (**Edit Knowledge Item** dialog box only.)
Delete attachment check box	When selected, the attachment is deleted when the knowledge item is saved (**Edit Knowledge Item** dialog box only.)
File description field	Description of the file.
Keep the knowledge item checked out check box	When selected, the knowledge item is not checked in when the knowledge item is saved; that is, when you click **Check in** (**Edit Knowledge Item** dialog box only.)

Restricting access to a knowledge item

By default, all resources with the subscription can view all knowledge items that are included in the subscription. However, you can restrict view and edit access to individual resources or to the resources in specific workgroups.

1. Access the knowledge item.
2. Click **Actions** > **Edit**.

   The **Edit Knowledge Item** dialog box appears.
3. Click the **Access** tab.
4. To restrict view access, select the **Restrict view access to the following resources** check box.
5. To restrict edit access, select the **Restrict edit access to the following resources** check box.
6. To select individual resources:
   a. To select other resources and optionally add them to your preferred resources list, click **Manage Resources**.
   b. In the **Preferred resources** list, select the resources that you want to restrict access to.

c. Move the resources to the appropriate view access list (or edit access list) by clicking the up arrow above (or the down arrow below) the **Preferred Resources** list.

7. To restrict access by all of the resources in one or more workgroups:

   a. Click **Workgroups**.

   b. In the **Workgroups** list, select the workgroups whose members you want to restrict access to.

   c. Move the workgroups to the appropriate view access list (or edit access list) by clicking the up arrow above (or the down arrow below) the **Workgroups** list.

   d. To add other workgroups to the list, click **Manage Workgroups**.

   Note: The **Manage Workgroups** dialog box does not indicate the workgroups that have previously been selected.

8. Click **Save**.

Accessing a knowledge item attachment

1. Access the knowledge item.
2. If the knowledge item attachment has a lock icon beside it, you must request access to the attachment. For more information, see "Requesting access to a knowledge item attachment" on page 91.
3. In the **Attachment information** section, click the link in the **Attachment** field.

   The **File Download** dialog box appears.
4. If a disclaimer message appears, read the disclaimer and click **OK**.
5. Open or save the attachment.

Viewing a knowledge item attachment that includes images

Use the following procedure to view a report attachment with images. A report attachment is in a .zip file that contains the report in HTML format and images in .bmp, .gif, .jpg or .png format.

1. Extract the files from the attachment .zip file into a directory folder.
2. Open the HTML file using a browser application.

Requesting access to a knowledge item attachment

If a knowledge item attachment has a lock icon beside it, you must request access to the attachment, which must be approved before you can access the attachment.

1. Access the knowledge item.
2. Click **Actions** > **Attachment access request**.

   The **Attachment Access Request** dialog box appears.
3. In the **Reason** field, enter the reason why you want to access the attachment.
4. Click **OK**.

   The access request is sent. When the access request is approved (or rejected), a notification appears in your **My Reminders** portlet.
5. In your **My Reminders** portlet, click the notification for access request.

   The **Approved (Rejected) Attachment Access Requests** view appears.
6. Select the check box beside the knowledge item, and then click **Acknowledge**.

   If the access request was approved, you can now access the knowledge item and its attachment.

Restricting access to knowledge item attachments

You can restrict access to the attachments in a knowledge item as follows:

- restrict access to the attachment – resources must obtain approval before accessing the attachment
- set up a legal disclaimer – resources must read and accept the legal disclaimer before accessing the attachment

1. Access the knowledge item.
2. Click **Actions** > **Edit**.

   The **Edit Knowledge Item** dialog box appears.
3. Click the **Access** tab.
4. To restrict access to attachments, select the **Restrict access to attachments** check box.

5. To enforce a legal disclaimer for the attachment, select the **Enable legal disclaimer** check box.
6. Click **Save**.

About restricting access to knowledge item attachments

If configured on your ChangePoint installation, an option is available for you to restrict access to a knowledge item attachment. When you restrict access to a knowledge item attachment, resources can view the knowledge item, but must request access and receive approval before they can access the attachment. A lock icon next to the attachment indicates that the attachment is restricted.

If the access is approved, a notification appears in the resource's **My Reminders** portlet. The resource must acknowledge receipt of the notification first, and then can access the knowledge item and its attachment. If the access is rejected, the resource must similarly acknowledge receipt of the notification.

About legal disclaimers for knowledge items

If configured on your ChangePoint installation, an option is available for you to add a legal disclaimer to knowledge items.

When you select the legal disclaimer option, an icon appears beside the attachment and resources must acknowledge a legal disclaimer before they can view the attachment.

About editing knowledge items

You can edit knowledge items, including replacing or deleting the attachment.

About editing knowledge items under version control

If version control has been enabled for a knowledge category, then version control applies to all knowledge items that are created in the category. When a knowledge item is first created, "Version 1" is displayed next to the name of the knowledge item. Each time the knowledge item is edited, the version number is incremented.

About editing version items with check-in and checkout support enabled

If check-in and checkout support has been enabled for a knowledge category, then all knowledge items in the category must be checked out before they can be edited.

The knowledge item can only be edited by the resource who checked it out. No other resources can edit the knowledge item until it is checked back in. However, while a knowledge item is checked out, resources can still view the knowledge item and download its attachment.

Editing a knowledge item

1. Access the knowledge item.
2. If the knowledge item is under version control, click **Actions** > **Version control** > **Check out**.

   The **(Checked-out)** flag appears in the page title.
3. Click **Actions** > **Edit**.

   The **Knowledge Item** dialog box appears.
4. Make the necessary changes. For more information, see "Create/Edit Knowledge Item dialog, General tab options" on page 88.
5. To open or download the attachment, click **View**.
6. To replace the attachment:
   a. Select the **Replace attachment** check box. The **Browse** button appears.
   b. Click **Browse** and then select the file.
7. Click **Save** or **Check in**.

Checking out or checking in a knowledge item

When you check out a knowledge item, the **(Checked out)** flag appears in the page title and a reminder displays in your **My Reminders** portlet.

1. Access the knowledge item.
2. To check out the knowledge item, click **Actions** > **Version control** > **Check out**.
3. To check in the knowledge item, click **Actions** > **Version control** > **Check in**.

Viewing the version history of a knowledge item

If version control has been enabled for the knowledge category, then you can view the version history of the knowledge items in the knowledge category. The version history lists the

versions of the knowledge item, the modification dates, the resource who modified the version, and the comments.

1. Access the knowledge item.
2. Click **Actions** > **View** > **Version history**.

   The **Version history** view appears.
3. To view or edit a version, select the version number.

   The **Edit Knowledge Item** dialog box appears.

Deleting a knowledge item

1. Access the knowledge item.
2. Click **Actions** > **Edit**.

   The **Knowledge Item** dialog box appears.
3. Click **Delete**.
4. Click **OK** to confirm.

About searching for knowledge items and team items

Searches for knowledge items include most knowledge item fields: **Category**, **Subcategory**, **Document title**, **Description**, **Keywords**, **File description**, and any configurable fields. The name and description of all attachments are searched, as well as the content of attachments of the file types .doc, .xls, .txt, .htm, and .ppt. The content of other file types (for example, .docx, .xlsx, .pptx, .zip, and .pdf) will be searched if your ChangePoint installation has been configured to support them.

You can include team items in a knowledge search.

> **Note:** You might not be able to locate a newly-created knowledge item using a keyword search. Keywords are available only after certain system updates are run. These system updates are typically run at least daily. If necessary, try searching on the knowledge category or subcategory instead.

Knowledge search guidelines

Searches are not case sensitive. Searches ignore the words “a,” “and,” “is,” and “the”.

Search objective	Example Search Text
To search for a single word (SQL)	sql
To search for an exact multiple word phrase (SQL Server)	“SQL server”
To search for a partial word (all words that begin with “Change”)	“Change*”
To search for two words (cookies, browser) that are in the same sentence, but not necessarily next to each other	cookies near browser
To search for results that include two words (ChangePoint, Microsoft)	ChangePoint and Microsoft
To search for a word, but exclude the results that include another word	server and not sql
To search for one word or another	asp or portal

Searching for knowledge items or team items

1. Click the search icon , and then select the **Knowledge Search** tab.
2. In the search field, enter the text that you want to search for. For more information, see "Knowledge search guidelines" on page 94.
3. To limit the search to a category and subcategory:
   a. In the list beside the search field, select the category
   b. In the **Subcategory**, select the subcategory.

   Note: Specifying a category or subcategory does not affect team item searches.
4. To display all versions of the matching knowledge items, enable the **Include all versions** option. Otherwise, only the latest version of the knowledge item is included in the knowledge search.

   Note: This field is available only if knowledge management version history has been enabled.
5. To include team items in the search, enable the **Include team folders** option.

6. Click **Search**.

   The **Knowledge Base Search Results** view displays with the search results.

Approving access to a restricted knowledge attachment

If you are the approver for a knowledge item that has an attachment with restricted access, then when a resource requests access to the attachment, a notification is sent to your **My Reminders** portlet.

1. Access your **My Reminders** portlet.
2. Click the **You have knowledge item access requests to approve** link.

   The **Attachment Access Request Approval** view appears.
3. To approve requests:
   a. In the **Knowledge requests** section, select the check boxes for the requests.
   b. Click **Approve selected**.
4. To reject requests:
   a. In the **Knowledge requests** section, select the check boxes for the requests.
   b. Click **Reject selected**. The **Reject Request** dialog box appears.
   c. Enter the reason for the rejection.
   d. Click **OK**.

   A notification is sent to the **My Reminders** portlet of the resource who requested the access.

6. Using Team Folders

Team folder basics

Team folders are folders in ChangePoint that resources can use to post and share information in various formats. Within a team folder, you can create *team items*, which include: discussions, Internet links, polls, events, bulletins, and attachments.

The resource who creates a team folder is the team leader for the folder by default. The team leader can grant access to the team folder to all ChangePoint users and/or all Client Portal users, or can specify that only team members can access the folder. The team members can be individual internal or external users, workgroups, customers or roles. Team members can view the team items in the team folder and respond to team items by creating a sub-item.

About team folder portals

You can create a team folder that is a portal to a website or a collaborative tool such as a wiki. Team folders display only the item that is specified in the **External URL** field. Also, because team folders have no **Actions** menu, the following behavior differs from regular team folders:

- team items cannot be added to team folders
- associations to entities must be added and removed from the entity profile
- to edit a team folder, you must right-click the team folder in the **Team Folders** tree view and select **Edit**

Accessing a team folder

1. Click > **Applications** > **Team folders**

   The **Team Folders** tree view appears.

2. Click the team folder that you want to view.

   The team folder and its team items appear in the Details view.

Sorting team items in a team folder

By default, the team items on the team folder profile are listed in the order that they were created, with the newest team item at the top. You can change the sort order for the team

items.

1. Access the team folder.
2. Do one of the following:
   - To sort the team items in descending order by the date they were created, click **Actions** > **View** > **By date**.
   - To sort the team items in alphabetical order by the name of the resource or contact who created them, click **Actions** > **View** > **By author**.
   - To sort the team items in alphabetical order by title, click **Actions** > **View** > **By title**.

Accessing a team item

1. Access the team folder.
2. To display the details of a team item, click the team item bar.
3. To collapse the team item, click the team item bar again.

Accessing a team sub-item

When a team item has sub-items, the number of sub-items appears in the team item bar.

1. Access the team item.
2. Click .

   The sub-items are displayed.
3. To hide the sub-items, click again.

Searching for a team item in a team folder

You can search for a team item from the team folder profile. The search results include the team items that match the search criteria in any of the team item fields.

1. Access the team folder.
2. In the search field, enter the search text.
3. Click .

   The team items that match the search criteria are displayed.

Accessing a link team item

1. Access the team folder.
2. To display the description of the link item, click the team item bar.
3. Click the link in the team item bar, or the filename link in the expanded team item.

About responding to discussion, bulletin and event team items

You respond or add to discussion, bulletin, and event team items by creating sub-items. For example, to contribute to a discussion, you access the discussion team item, and add a discussion sub-item to it. For more information, see "Creating a team sub-item" on page 111.

Downloading an attachment team item

1. Access the team folder.
2. To display the description of the attachment, click the team item bar.
3. To download the attachment, click the link in the team item bar or the filename link in the expanded team item.

   The **File Download** dialog box appears.
4. Do one of the following:
   - To open the file, click **Open**. The file is opened.
   - To save the file, click **Save** and then specify where you want to save the file.

Voting on a poll team item

1. Access the team folder.
2. In the Details view, click the poll item.
3. Click the **Click here to vote** link.

   The **Vote** dialog box appears.
4. Select the option that you want to vote for and then click **Save**.
5. To view your vote included in the participation percentage and vote breakdown:
   a. Refresh the Details view by clicking the team folder in the tree view. The participation percentage is updated.

b. Click the **Vote breakdown** link. The vote breakdown includes your vote.

Accessing an entity profile from a team folder

If a team folder has been associated with an entity profile, you can access the entity profile from the team folder by clicking the entity name link that is below the team folder name.

Creating a team folder

1. Do one of the following:
   - Click the **New** toolbar icon and then select **Team Folder**.
   - From an existing team folder, click **Actions** > **Create** > **Team folder**.

   The **Create Team Folder** dialog box appears.
2. Complete the fields as required. For more information, see "Create/Edit Team Folder dialog box options" on page 100
3. To add team members, click **Add** (beside the **Members** field). For more information, see "Adding a team member to a team folder" on page 101.
4. To make the team folder a dashboard, in the **External URL** field, enter the URL to the website or application.
5. Click **Save**.

Create/Edit Team Folder dialog box options

Option	Description
Team field	Name of the team folder.
Description field	Description of the team folder.
Available to all ChangePoint users check box	When selected, all ChangePoint resources can access the team folder.
Available to all Client Portal users check box	When selected, all Client Portal users can access the team folder.
Members list	Team members

Option	Description
Add button	Displays the **Select Team Members** dialog box.
Remove button	Displays the **Remove Team Members** dialog box.
External URL field	URL to an external website. When there is a URL in this field, the team folder becomes a dashboard and displays only the website.

About controlling access to team folders

Unless access to the team folder has been granted to all ChangePoint users, only the resources who are specified as team members can access the team folder. Similarly, unless access has been granted to all Client Portal users, only the contacts who are specified as team members can access the team folder.

The team leader can select from the following options when specifying team members:

- individual resources
- individual contacts
- workgroups – includes all resources in the selected workgroup
- customers – includes all contacts for the selected customer
- roles – includes all resources with the selected role

The team leader can specify a combination of resources and contacts as follows:

- all ChangePoint resources, and specific customers and/or contacts as team members
- all Client Portal users, and specific workgroups, roles and/or resources as team members

Adding a team member to a team folder

Only the team leader of the team folder can add team members.

1. Access the team folder.
2. Click **Actions** > **Edit**.

   The **Edit Team Folder** dialog box appears.
3. Click **Add**.

The **Select Team Members** dialog box appears.

4. To locate resources manually in the tree view, expand the tree view and then select the resources, workgroups, customers, contacts and roles that you want to add as team members.
5. To filter out resources in the tree view:
   a. Enter the name or partial name of the resource in the filter field and then click **Filter**. The tree view displays only the folders whose names match the filter criteria or that include items that match the filter criteria.
   b. Expand the folders to locate the items that match the filter criteria.
   c. Select the folders and items that you want to add as team members.
6. To search for team members and display the results in a list:
   a. Enter the name or partial name of the team member in the search field.
   b. Select the **Display filter results in a list** check box.
   c. Click **Filter**. The items that match the filter criteria are displayed in a list.
   d. Select the items that you want to add as team members.
7. Click **OK**.
8. Click **Save**.

About editing team folders

You must be the team leader to edit the team folder, which includes the following actions:

- adding and removing team members
- deleting the team folder
- making another team member the team leader

Editing a team folder

1. Access the team folder.
2. Do one of the following:
   - In the team folder profile, click **Actions** > **Edit**.

- In the **Team Folders** tree view, right-click the team folder and select **Edit**.

The **Edit Team Folder** dialog box appears.

3. Make the necessary changes.
4. Click **Save**.

Deleting a team folder

You can delete a team folder if you are the team leader, or if you have the access rights to delete team folders that were created by other resources.

1. Access the team folder.
2. Click **Actions** > **Edit**.

   The **Edit Team Folder** dialog box appears.
3. Click **Delete**.
4. Click **OK** to confirm.

Removing team members

Only the team leader of the team folder can remove team members.

1. Access the team folder.
2. Click **Actions** > **Edit**.

   The **Edit Team Folder** dialog box appears.
3. Click **Remove**.

   The **Remove Team Members** dialog box displays a list of the team members.
4. Select the team members that you want to remove.
5. Click **Remove**.
6. Click **Save**.

Changing the team leader of a team folder

The team leader can assign another team member as the team leader. The team member must be specified as a team member individually and not through a workgroup or role.

1. Access the team folder.
2. Click **Actions** > **Edit**.

   The **Edit Team Folder** dialog box appears.
3. Click **Reassign**.

   The **Reassign Team Leader** dialog box appears.
4. In the **New leader** list, select the team member.
5. Click **OK**.
6. Click **Save**.

About associating team folders to entities

Team leaders can associate their team folders to entities (contracts, customers, projects, resources, and so on) that they have view or edit access to.

A team folder can be associated with only one entity. If the team folder is a portal to a website, then you can only associate the team folder from the entity profile.

When a team folder is associated with an entity, a **Related team folders** section is created on the entity profile. However, the section is not available in Client Portal.

Associating a team folder to an entity

1. Access the team folder.
2. Click **Actions** > **Associate Entity**.

   The **Associate Team Folder to Entity** dialog box appears.
3. In the **Type** list, select the entity type.

   The **Subtype** field name changes to the entity type.
4. In the <**Entity type**> type-ahead field, select the entity.
5. Click **OK**.

   The team folder is associated to the entity.
6. To view the association, click **Resource** > **Team Folders**.

   A link to the entity appears below the team folder name.

Removing the association to an entity from a team folder

1. Access the team folder.
2. Click **Actions** > **Remove association**.

   The association is removed.
3. To verify that the association has been removed, refresh the Details view by clicking the team folder in the tree view.

Removing the association to a team folder from an entity

1. Access the entity.
2. Expand the **Related team folders** section.
3. In the team folder row, click ✕.

   The association is removed.
4. To confirm that the association has been removed, refresh the Details view by clicking the team folder in the tree view.

About team items

You can create the following types of team items in a team folder:

- Link – for links to a website, application or files that are available through a URL.
- Discussion – for issues to be discussed or debated.
- Bulletin – for posting announcements.
- Attachment – for uploading files for sharing with team members. The size limit of the file is set by your organization.
- Event – for posting information about events.
- Poll – for creating polls that team members can vote on.

  Note: The icons on team items appear only when you point to the team item.

Team sub-items

You can create team sub-items under team items. You can organize team items in the team folder by creating a team item as a category, and then creating sub-items under it. For example,

for a team folder relating to a project, you could create discussion team items called “Design discussions,” “Project documents,” “Estimates” and so on. You can then add the related attachments, links, and discussion threads to these team items as sub-items.

Creating a link team item

1. Access the team folder.
2. Click **Actions** > **Create** > **Team item**.

   The **Create Item** dialog box appears.
3. Select **Link**, and then click **OK**.

   The **Create Link** dialog box appears.
4. Complete the fields as required. For more information, see "Create/Edit Link dialog box options" on page 106.
5. Click **OK**.
6. To view the team item, click the team folder in the tree view.

Create/Edit Link dialog box options

Option	Description
Website or link field	Name of the link.
URL field	Web address or network path. The default protocol is HTTP, but you can enter other protocols such as FTP, or the directory path to documents in a network folder.
Description field	Description of the website or folder.
Can be viewed by all team members check box.	When selected, all team members can view the team item. When cleared, only the creator can view the team item.

Creating a discussion team item

1. Access the team folder.
2. Click **Actions** > **Create** > **Team item**.

The **Create Item** dialog box appears.

3. Select **Discussion**, and then click **OK**.

   The **Create Discussion** dialog box appears.

4. Complete the fields as required. For more information, see "Create/Edit Discussion dialog box options" on page 107.

5. Click **OK**.

6. To view the team item, click the team folder in the tree view.

Create/Edit Discussion dialog box options

Option	Description
Subject field	Subject for discussion.
Category list	Discussion category.
Description field	Text for discussion.
Can be viewed by all team members check box.	When selected, all team members can view the team item. When cleared, only the creator can view the team item.

Creating a bulletin team item

1. Access the team folder.

2. Click **Actions** > **Create** > **Team item**.

   The **Create Item** dialog box appears.

3. Select **Bulletin**, and then click **OK**.

   The **Create Bulletin** dialog box appears.

4. Complete the fields as required. For more information, see "Create/Edit Bulletin dialog box options" on page 108.

5. Click **OK**.

6. To view the team item, click the team folder in the tree view.

Create/Edit Bulletin dialog box options

Option	Description
Title field	Title of the bulletin.
Subject field	Subject of the bulletin.
Description field	Content for the bulletin.
Can be viewed by all team members check box.	When selected, all team members can view the team item. When cleared, only the creator can view the team item.

Creating an attachment team item

1. Access the team folder
2. Click **Actions** > **Create** > **Team item**.

   The **Create Item** dialog box appears.
3. Select **Attachment**, and then click **OK**.

   The **Create Attachment** dialog box appears.
4. In the **Attachment** field, click **Browse** to locate and select the file.
5. Complete the fields as required. For more information, see "Create/Edit Attachment dialog box options" on page 109.
6. Click **OK**.
7. To view the team item, click the team folder in the tree view.

Create/Edit Attachment dialog box options

Option	Description
Attachment field	File to be attached to the team item.
Browse button	Displays the **Choose file to upload** dialog box. Available on the create dialog box only.
Download button	Displays the dialog box for downloading the file. Available on the edit dialog box only.
Document title field	Name of the file.
Category list	Category for the attachment.
Description field	Description of the attachment.
Can be viewed by all team members check box.	When selected, all team members can view the team item. When cleared, only the creator can view the team item.

Creating an event team item

1. Access the team folder.
2. Click **Actions** > **Create** > **Team item**.

   The **Create Item** dialog box appears.
3. Select **Event**, and then click **OK**.

   The **Create Event** dialog box appears.
4. Complete the fields as required. For more information, see "Create/Edit Event dialog box options" on page 110.
5. Click **OK**.
6. To view the team item, click the team folder in the tree view.

Create/Edit Event dialog box options

Option	Description
Event title field	Name of the event.
Event type list	Type of event (public or private). **Note:** The event type is for information only and does not control whether the event can be viewed by others.
Date field	Date of the event.
Start time field **End time** field	Start and end times of the event.
Description field	Description of the event.
Can be viewed by all team members check box.	When selected, all team members can view the team item. When cleared, only the creator can view the team item.

About poll team items

The poll team item displays a question for users to vote on. The results that are displayed in the poll team item include:

- a list of the team members who have voted
- the percentage of team members who have voted for each option in the poll
- the total percentage and number of team members who have voted

  Note: If the team leader has granted access to the team folder to all ChangePoint users or all Client Portal users, then the participation percentage is not displayed on the poll.

Creating a poll team item

1. Access the team folder.
2. Click **Actions** > **Create** > **Team item**.

   The **Create Item** dialog box appears.
3. Select **Poll**, and then click **OK**.

The **Create Poll** dialog box appears.

4. Complete the fields as required. For more information, see "Create/Edit Poll dialog box options" on page 111.
5. Click **OK**.
6. To view the team item, click the team folder in the tree view.

Create/Edit Poll dialog box options

Option	Description
Poll title field	Name of the poll.
Question field	Question to be asked.
Vote button	Displays the poll so that you can vote. Available only on the edit dialog, and only if you have not voted.
Answers fields, **1** to **6**	Responses to the poll that team members can select from.
Make voting anonymous check box	When selected, team members cannot view the responses of others. Not available on the edit dialog.
Can be viewed by all team members check box.	When selected, all team members can view the team item. When cleared, only the creator can view the team item.

Creating a team sub-item

Except for the starting point, the procedure for creating sub-items is the same as for creating team items.

1. Access the team folder.
2. On the parent team item, click .

   The **Create Item** dialog box appears.

3. Select the type of team item that you want to create, and then click **OK**.

   The **Create <item type>** dialog box appears.

4. Complete the fields as required. For more information, see the appropriate topic, below:
   - "Create/Edit Link dialog box options" on page 106
   - "Create/Edit Discussion dialog box options" on page 107
   - "Create/Edit Bulletin dialog box options" on page 108
   - "Create/Edit Attachment dialog box options" on page 109
   - "Create/Edit Event dialog box options" on page 110
   - "Create/Edit Poll dialog box options" on page 111

Editing a team item

Only the resource or contact who created the team item can edit it.

1. Access the team folder.
2. On the team item, click .

   The edit item dialog box appears.
3. Make the necessary changes.
4. Click **OK**.

About deleting team items

The team leader, and team members who have delete access to team items have the option to delete the team item and all of its sub-items, or just the team item.

Other resources and contacts can delete only one team item at a time. That is, they cannot delete a team item and all of its sub-items at the same time, even if they created all of the items.

Note: When only a parent team item is deleted, all of its sub-items move up a level.

Deleting a team item

1. Access the team folder.
2. On the team item, click .

   The edit item dialog box appears.

3. Click **Delete**.
4. Do one of the following:
   - If a confirmation message appears, click **OK**.
   - If a message appears with options for deleting sub-items, select an option and then click **OK**.

   The team items are deleted.
5. To verify the deletion, refresh the Details view by clicking the team folder in the tree view.

Clearing the new team item notifications

The **My Reminders** portlet displays a notification message when new team items have been added to the team folders that you can access. The new team items are cleared from the notification list when you either access the team folder that they belong to, or clear all of the notifications.

Instead of opening each team folder to remove the new team items from the notification list, you can remove them all at once.

1. Access your **My Reminders** portlet.
2. Click the notification about the new team items that have been created since you last accessed team folders.

   The **New Team Items** view appears.
3. Click the **Clear all reminders** link.

   The reminders are cleared from the list.

7. Planning in Days or FTEs

About planning in days or FTEs

In ChangePoint, you have the option of displaying and entering planning units in hours, days, or FTEs in the following entities:

- Budget – services
- Opportunity – services
- Project – tasks, task assignments, projects, project team, Project Worksheet
- Projected resources – projected resources on contracts
- Request demand – request demand on requests
- Resource management – Resource Planner

You also have the option of displaying and entering time in the time sheet in either hours or days.

You set these options in **My settings**. The default setting for a new installation of ChangePoint is hours. The default setting for an upgrade from a previous version of ChangePoint that was configured for planning in days, is days.

If you change the setting to days or FTEs, all of the field labels and system messages for the affected areas are changed to display days or FTEs, and all field values are converted to days or FTEs.

> **Note:** Depending on how ChangePoint has been configured by your organization, all of the planning units might not be available for your use.

About the daily conversion factor

All calculations for planning units are based on hours. Days and FTEs are converted to hours as follows:

- Days are converted to hours based on the formula:

  number of days * daily conversion factor

- FTEs are converted to hours based on the formula:

  FTEs * daily conversion factor * number of working days

The daily conversion factor can be set at the resource, workgroup, and system level. The daily conversion factor set at the resource level takes priority over the factor set at the workgroup, which takes priority over the factor set at the system level.

Values for planned effort are displayed to three decimal places by default. Your organization can change the number of decimal places to be displayed from three to two, one, or zero decimal places. You can edit the values to the same number of decimal places as is displayed. In all cases, when planned effort is calculated, the values are calculated and stored to five decimal places.

Note: Configurable fields display a maximum of four decimal places.

About editing the daily conversion factor

Because the daily conversion factor is a fundamental value for planning and effort calculations, it is not intended that the value be edited. If you must edit the value, note that existing demand items that use the original value will not be recalculated to use the new value. The restriction applies when the value is changed for a resource or workgroup, and also when the value is changed by changing the workgroup for a resource or when the staffing workgroup is changed for a contract or opportunity.

When a demand item is edited anywhere except in Project Worksheet or Resource Planner, the days and FTEs for amounts in all periods (including past periods) are recalculated using the new daily conversion factor, which is stored on the demand item.

When days or FTEs are used in Project Worksheet or Resource Planner and a task assignment is edited, then the values for days and FTEs are not recalculated, and the values for hours are recalculated for all periods, including past periods.

The only exception to the previous paragraph is if the loading method for the task assignment is one that replaces past planned effort with actual data, then for the past periods, the values for days and FTEs are recalculated, but the values for hours are not recalculated.

Project rollup uses the daily conversion factor that is stored on the demand item, including when replacing past planned effort with actual data in fiscal periods, and when converting fiscal period data.

For budgets, when replacing past planning data with actual data, the amounts in all fiscal periods will be converted using the original daily conversion factor from the budget item.

About daily capacity

The daily capacity is the number of hours in a working day, which is used for demand and capacity calculations.

The daily capacity value can be set at the resource, workgroup, and system level. The value set at the resource level takes priority over the value set at the workgroup, which takes priority over the value set at the system level. If no value is set at any of the levels, then a default of 8 hours is used.

Daily capacity values between 0 and 24 are used to calculate capacity for the resource. At the resource level, there is also the option to leave the field blank, in which case the workgroup setting is used.

About allocating planned effort to fiscal periods

If you enter hours or days in fiscal periods, the planned hours or planned days are calculated by adding the values in each fiscal period.

If you enter FTEs in fiscal periods, the planned FTEs are calculated as follows:

1. The values in each fiscal period are converted to hours based on the planned start and finish dates of the *demand item*.
2. The values of each fiscal period are added together.
3. The total value is then converted back to FTEs based on the planned start and finish dates of the *demand item*.

For example, you allocate FTEs for a task to fiscal periods as shown in the following table.

- Planned start: October 15
- Planned finish: December 15
- Daily conversion factor: 8

Fiscal period	Number of working days	Planned FTEs
Fiscal period 1 October 1 to 31	10 (October 15 to 31)	1.00
Fiscal period 2 November 1 to 30	20	0.00
Fiscal period 3 December 1 to 31	10 (December 1 to 15)	1.75

1. Values in hours for each fiscal period:
   - Fiscal period 1 hours = 10 * 1.00 * 8 = 80
   - Fiscal period 2 hours = 20 * 0.00 * 8 = 0
   - Fiscal period 3 hours = 10 * 1.75 * 8 = 140
2. Total hours for all fiscal periods:

   80 + 0 + 140 = 220
3. Values converted to FTEs:

   220 / (40 * 8) = 6.875

   Note: FTEs are recalculated only when the assigned resource, start date, finish date, or duration of a demand item is changed.

About allocating planned effort to daily periods

If you allocate planning units to daily periods, the hours, days, or FTEs are displayed on each working day. If the daily conversion factor is 8, then 8 hours on a working day is equal to 1 day or 1 FTE of effort.

About demand items without assigned resources

When a demand item has not been assigned to a specific resource, the nonworking days and daily conversion factor from the staffing workgroup associated with the demand item is used in effort calculations. Note that if the staffing workgroup is changed on a contract or opportunity, demand items are not recalculated.

About actual effort in FTEs in fiscal periods

Actual effort in FTEs in fiscal periods is calculated using the working days in the between the planned start and planned finish dates of the demand item, even if the actual effort is entered for dates outside of the planned dates. For example, you have a task assignment with the following data:

- Planned start: January 1
- Planned finish: January 31
- Daily conversion factor: 8 hours
- Number of working days from January 1 to January 31: 22
- Planned effort: 1 FTE
- Actual hours: 8 hours on December 12, 4 hours on December 14

Actual FTEs: 12 hours / 22 days / 8 hours daily conversion factor = .068

About using FTEs for projects

The **Fiscal year breakdown** section in project profiles includes only the planned effort from task assignments, and does not include planned effort from tasks that have not been assigned.

All planned effort, including planned effort from tasks without assignments is included in the **Status information** section.

FTEs and actual hours

Actual hours are converted to FTEs based on the number of working days between the planned start date and planned finish date.

For example, a task is created with the following data:

- Planned start – January 1
- Planned finish – January 31
- Planned FTEs – 1
- Number of working days – 22

The planned hours for the task is calculated as follows:

```
1 * 22 * 8 = 176
```

(FTEs * number of working days * daily conversion factor)

A resource entered the following time for the task in the time sheet:

- December 12 – 8 hours
- December 14 – 4 hours

The actual FTEs for the task are calculated as follows:

```
12 / 22 / 8 = 0.068
```

(Hours / number of working days / daily conversion factor)

FTEs and remaining hours

In calculations of forecast remaining FTEs for projects and tasks, the remaining number of working days is based on the number of working days between the forecast start date and the finish date. If the start date is in the past, then the number of working days between the current date and the finish date are used. If both dates are in the past, then the number of working days is 1.

About using days or FTEs for opportunities

When you use days or FTEs for opportunities, and the billing type is hourly, the equivalent hours for services are displayed in a tool tip so that you can see how the extended billing and cost amounts are calculated (effort in hours * hourly rate).

Similarly, if the billing type is daily, the extended billing amount is the daily effort * daily rate. If hours or FTEs are being used, the daily effort amount in hours or days is displayed in a tool tip.

However, the rates are displayed as daily or hourly rates, according to the billing type of the opportunity, regardless of the option that you set in **My settings**. The planning units that are displayed in the tool tip matches the billing type.

About using days or FTEs for budgets

Billing rates in budgets are always hourly. If the contract uses daily rates, the daily rates are converted to hourly rates using the resource’s daily conversion factor, and the hourly effort is displayed in a tool tip. If no resource is selected for a service item, then the daily conversion factor from the staffing workgroup of the contract is used.

About using days for invoices

When a daily billing type is selected on the contract, an option appears that allows to select whether the hours to be invoiced are converted to days based on the daily conversion rates from the billing office, or the daily conversion factor of the resource.

> **Note:** When the option to use the daily conversion rates from the is billing office is enabled, the time fields in the invoice dialogs display hours as the planning unit, even when the billing type is daily. However, the hours are converted to days when the invoice is saved.

Examples of conversions for daily billing types

Daily conversion rates from the billing office are:

- 0 to 2 hours = 0.25 days
- 2 to 4 hours = 0.50 days
- 4 to 24 hours = 1.00 days

The resource's daily conversion factor is 8.

The resource has entered hours for tasks from the same project on the same day. The following table shows the billing amounts for each method.

Task (from the same project)	Hours entered by resource	Days, based on daily conversion rates from billing office	Days, based on resource's daily conversion factor
Task 1	1	0.25	0.13 (1 / 8 = 0.125)
Task 2	1	0.25	0.13
Task 3	3	0.50	0.38 (3 / 8 = 0.375)
Task 4	1	0.25	0.13
Total billing amount		1.25	0.77

About using days or FTEs in resource requests

You can use hours, days or FTEs in the areas where resource requests are created (projected resources, project team, and task assignments). However, resource requests display effort in hours only. The hourly amount is calculated on the originating demand item and then transferred to the resource request.

You can select a requested resource when creating a project team entry or projected resource. The daily conversion factor and nonworking days for the requested resource are used to convert planning units for the demand item, even if you select a different resource when you submit the resource request. However, when a resource is assigned to the demand item, the conversions are based on the daily conversion factor and nonworking days of the assigned resource.

If there is neither a requested resource or assigned resource, then the daily conversion factor and nonworking days from the staffing workgroup of the contract are used.

About time entry units

You have the option of displaying and entering time in the time sheet in either hours or days. Depending on how ChangePoint has been configured, time values can be entered and are displayed in the time sheet to zero, two, or three decimal places.

About central time entry

When you use the central time functionality, the time entry units are determined based on the preferences of the resource whose time is being updated.

About time entry when using mobile access

You can set up time entry in days for mobile access. For more information, see the "Setting up time entry in days for mobile access" in the *Mobile Quick Reference Guide*.

8. Running Reports

About running reports

You access reports in the **Reports** tree view. Depending on how a report is set up, it will either be generated immediately, or you may have to complete some filter criteria before you can run the report.

Reports that open in the ChangePoint Analytics Viewer provide additional options, for example to run the report in a different format, such as .pdf, .xml, .csv, or Microsoft Excel. Reports that you run in Excel or .csv format open in an Excel spreadsheet.

The actions that you can perform on the report and its content depend on the access and permissions specified by the report owner. The data that you can view in a report depends on your access to data in ChangePoint.

> **Tip:** You can set up reports that you use frequently in the **My Favorite Reports** portlet, which you can then add to a dashboard. For more information, see "Managing reports in the My Favorite Reports portlet" on page 61.

About scheduling reports

You must use Analytics Portal to schedule reports. For more information, see the IBM Cognos Analytics online help.

Running a report

1. Click > **Analytics** > **Reports**. The **Reports** tree view appears.
2. Expand the tree view and select the report.
3. If a filter criteria window appears, enter the criteria and then click **Go**.

   The report is generated.

About ChangePoint Analytics

ChangePoint is integrated with IBM Cognos Analytics software, which you can use to create, manage, and schedule reports and create Analytics dashboards. You can access Analytics Portal from the apps menu in ChangePoint.

For more information about using the Analytics Portal, see the IBM Cognos Analytics online help, which is available from each of the views.

For information that is specific about creating reports in ChangePoint, see the *Analytics Reports Reference Guide*.

Printing standard reports that open in a new window

This procedure covers all standard reports that are supplied by default with ChangePoint, including revenue recognition reports.

1. Run the standard report.
2. Press **Ctrl+P**.

   The Windows **Print** dialog box appears.
3. Select the print settings.
4. Click **Print**.

9. Using the ChangePoint Outlook Tools

About ChangePoint Outlook tools

The ChangePoint Outlook tools allow you to share data between Microsoft Outlook and ChangePoint. This integration add-in installs the following functionality:

- **Calendar synchronization** – Synchronizing your ChangePoint calendar entries (appointments and tasks) with your Microsoft Outlook desktop calendar or Microsoft Exchange calendar ensures that the calendars in both applications display the same and most recent entries. For more information, see "About calendar synchronization" on page 125.
- **Creation of ChangePoint entities from Outlook** – A ChangePoint menu added in Outlook allows you to create knowledge items, requests, or request attachment from an email in Outlook and save them to the ChangePoint application. For more information, see "About creating ChangePoint entities from Outlook" on page 132.

Installing the ChangePoint Outlook tools

1. In ChangePoint, click the user menu > **My settings**.

   The **My settings** view appears.

2. Expand the **Add-in installations** section.
3. In the **Outlook** subsection, click the **Install ChangePoint Outlook tools** link.

   A file dialog box for the **ChangePoint Outlook Tools** installer appears.

4. When prompted for the ChangePoint URL, copy and paste the URL from the **Outlook** subsection.
5. Click **Finish**.

   A **ChangePoint** menu displays in the menu bar of the main Outlook window.

About calendar synchronization

ChangePoint uses server-side synchronization and client-side synchronization to share and update your calendar entries between ChangePoint and Outlook.

Server-side synchronization (Exchange)

Server-side synchronization occurs between the ChangePoint SQL server database and the Microsoft Exchange server. Server-side synchronization runs on an automated schedule to synchronize your calendar without interrupting your work. Your system administrator determines the following:

- Time interval between synchronizations (typically every 15 minutes).
- Synchronization direction, which can be one of the following:
  - one way from ChangePoint to Exchange
  - one way from Exchange to ChangePoint
  - two way between ChangePoint and Exchange

Client-side synchronization (Outlook)

Client-side synchronization occurs between the ChangePoint SQL server database and the Outlook client installed on your desktop. Client-side synchronization gives you greater control over the calendar entries that are synchronized between Outlook and ChangePoint and the timing of these transfers.

There are two methods of client-side synchronization for calendars:

- **Real-time calendar synchronization** – Outlook calendar entries are automatically synchronized with ChangePoint whenever a calendar entry is added or edited in Outlook. The data transfer is unidirectional from Outlook to ChangePoint and is automatic.
- **Batch calendar synchronization** – Outlook and ChangePoint calendar entries are synchronized for a specified date range. The data transfer is bidirectional between Outlook and ChangePoint, but it is not automatic. You must initiate the process manually.

Calendar synchronization rules and constraints

- By default, only Outlook calendar entries that start or end within your standard working day period are synchronized to ChangePoint. You can change your synchronization settings to include calendar entries that are outside of your standard working hours specified in the **Calendar synchronization** section of the **My settings** view.
- Calendar entries on nonworking days are always synchronized.

- Exchange synchronization does not show the effort distribution of ChangePoint tasks. Tasks appear in Outlook as full day appointments between the start and finish dates. The task information appears in the appointment subject.
- In ChangePoint, you cannot create calendar entries that are marked as **Private**. When Outlook calendar entries that are marked as **Private** are synchronized to ChangePoint, the description of the entry is changed to **Busy** in ChangePoint. You cannot update private entries in ChangePoint.
- Calendar entries created from ChangePoint tasks can only be edited in ChangePoint by the project manager.
- You cannot create recurring nonconsecutive entries (for example, every Monday for the next ten weeks) in ChangePoint. However, recurring nonconsecutive entries created in Outlook are synchronized to ChangePoint, but they cannot be edited in ChangePoint.
- Multiple day entries in ChangePoint become recurring entries in Exchange during synchronization and therefore can only be updated in Exchange.
- Outlook entries with “Working elsewhere” status are synced to ChangePoint.

Enabling server-side calendar synchronization (Exchange)

1. In ChangePoint, click the user menu > **My settings**.

   The **My settings** view appears.
2. Expand the **Calendar synchronization** section.
3. Select **Enable Exchange calendar synchronization**.
4. Complete the fields as required. For more information, see "My settings view, Calendar synchronization section" on page 128.
5. Click **Save**.

My settings view, Calendar synchronization section

Field	Description
Daily Time Settings section	
Daily start time fields	Start time of your standard working day.
Daily end time fields	End time of your standard working day.
Time zone list	Your time zone.
Calendar Synchronization Options section	
Enable Exchange calendar synchronization option	When selected, server-side calendar synchronization is enabled.
Enable Outlook calendar synchronization option	When selected, client-side calendar synchronization is enabled. All other fields in the section are disabled. For more information, see "Enabling client-side calendar synchronization (Outlook)" on page 129.
Synchronize calendar entries created from tasks check box	When selected, ChangePoint calendar entries that have been created from tasks are synchronized to Exchange. This setting is the default for all your calendar entries that have been created from tasks. If you have access rights, you can override this default for individual tasks.
Show time as list	Status of the time entry in Exchange: • Busy • Tentative • Out of office • Free
Synchronize calendar entries outside of working hours check box	When selected, includes the calendar entries that are outside of the start and end time of your standard working day.

Enabling client-side calendar synchronization (Outlook)

If you select the Outlook calendar synchronization option in ChangePoint, you must configure the synchronization settings in Outlook.

1. In ChangePoint, click the user menu > **My settings**.

   The **My settings** view appears.

2. Expand the **Calendar synchronization** section.
3. Select **Enable Outlook calendar synchronization**.
4. Click **Save**.
5. In Outlook, click the **ChangePoint** tab.
6. Click **ChangePoint settings** > **Settings**.

   The **ChangePoint Settings** dialog box appears.

7. In the **Calendar Default Settings** section, do the following:
   - To set up real-time calendar synchronization, select **Real-time synchronization**.
   - To set up batch calendar synchronization, select **Batch synchronization**.
8. Complete the fields or select the options as required. For more information, see "Outlook application, ChangePoint settings dialog options" on page 129.
9. Click **OK**.

Outlook application, ChangePoint settings dialog options

Field	Description
ChangePoint ChangePoint URL field	URL of your ChangePoint ChangePoint server, as specified for **Outlook** in the **add-in installations** section of the **My settings** view in ChangePoint.
Real-time synchronization option	When selected, synchronizes new or edited Outlook calendar entries immediately and automatically to ChangePoint.

Field	Description
Batch synchronization option	When selected, synchronizes Outlook and ChangePoint calendar entries that are in a specified date range.
Synchronize calendar entries outside of working hours check box	When selected, synchronizes calendar entries that are outside your standard working hours.
Synchronize calendar entries created from tasks check box	When selected, synchronizes calendar entries that have been created from ChangePoint tasks to Outlook. This setting is the default for all the calendar entries created from tasks. Resources with the appropriate access rights can override this default for individual tasks.
Daily start time field	Start time of your standard working day.
Daily end time field	End time of your standard working day.
New knowledge items are by default public check box	When selected, knowledge items created from an Outlook email are by default public and can be viewed by all ChangePoint resources who have the relevant knowledge subscription.
Save email message with selected attachments check box	When selected, includes the email as an attachment (.msg file) to the knowledge item.

Running batch calendar synchronization

1. In Outlook, click the **ChangePoint** tab.
2. Click **ChangePoint Actions menu** > **Batch Calendar Synchronization**.

   The **Batch Calendar Synchronization** dialog box appears.
3. In the **From date** field, select a start date for the date range over which you want to synchronize your calendar entries.
4. In the **To date** field, select an end date for the date range.

5. Click **OK**.

   A ChangePoint synchronization box appears while the calendars are being synchronized.

About changing calendar synchronization options

If you change your calendar synchronization from Outlook to Exchange, the next synchronization occurs automatically as scheduled, usually within 15 minutes, and your calendar entries are updated. You can use Outlook to add or edit calendar entries until the synchronization is complete.

If you change your calendar synchronization from Exchange to Outlook, you must run the batch synchronization to update your calendar entries. Calendar entries that are outside of the time interval specified for the batch synchronization are excluded. After your entries, have been synchronized, you can continue to use the batch synchronization or you can switch to real-time calendar synchronization. For more information, see:

- "About calendar synchronization" on page 125
- "Running batch calendar synchronization" on page 130

Changing your calendar synchronization from Exchange to Outlook or from Outlook to Exchange may cause issues in your ChangePoint calendar. For more information, see "Errors caused by changing calendar synchronization options" on page 131.

Errors caused by changing calendar synchronization options

Warning: Although it is possible to change your calendar synchronization from Exchange to Outlook, and from Outlook to Exchange, it is recommended that you do not change this setting.

Entries are duplicated in the calendars

Changing the Exchange or Outlook option can result in duplicate calendar entries.

To correct the calendar, you must delete every duplicate manually.

Entries disappear from the calendars

Changing from Outlook to Exchange calendar synchronization can result in lost calendar entries if the Exchange synchronization is not configured for two-way synchronization. Contact your system administrator to confirm that the Exchange synchronization is configured for two-way synchronization before changing from Outlook to Exchange calendar synchronization.

To correct the calendar, you must recreate the lost entries manually.

Previously synchronized entries are removed from the ChangePoint calendar

Changing Exchange or Outlook synchronization can cause previously synchronized entries to disappear from your ChangePoint calendar.

If you change the calendar synchronization settings from Outlook to Exchange, wait for the next scheduled synchronization to update the entries in your ChangePoint calendar using the Exchange data. You can use Outlook to add or edit calendar entries until the synchronization is complete.

If you change the calendar synchronization settings from Exchange to Outlook, run a batch synchronization to update the entries in your ChangePoint calendar using the Outlook data. Calendar entries that are outside of the time interval specified for the batch synchronization are excluded.

ChangePoint menu options displays in Outlook but is unusable

If you change from Outlook to Exchange synchronization, the ChangePoint menu options remain in your Outlook toolbar, but you can no longer use them.

About creating ChangePoint entities from Outlook

You can create the following ChangePoint entities from an Outlook email:

- "Creating a knowledge item from an Outlook email" on page 133
- "Creating a request from an Outlook email" on page 134
- "Creating a request attachment from an Outlook email" on page 134

About creating knowledge items from Outlook

A knowledge item created in Outlook does not have all the attributes of a knowledge item created in ChangePoint. The following actions can only be done after the knowledge item has been transferred to ChangePoint:

- Enforcing a legal disclaimer or restricting access to a knowledge item attachment.
- Configurable fields cannot be updated in Outlook. You can complete mandatory configurable fields when the new entry is edited in ChangePoint.

After the knowledge item has been transferred to ChangePoint, you can complete the fields that were not available in Outlook.

Creating a knowledge item from an Outlook email

1. In Outlook, access the email message from which you want to create a knowledge item.
2. Click the **ChangePoint** tab.
3. Click **ChangePoint Actions menu** > **Create knowledge item**.

   The **ChangePoint Knowledge Item** dialog box appears.
4. Complete the fields as required. For more information, see "Outlook application, ChangePoint knowledge item dialog options" on page 133.
5. Click **OK**.

Outlook application, ChangePoint knowledge item dialog options

Field	Description
Document title field	Title of the knowledge item.
Description field	Displays by default the header lines and body text of the source email.
Keywords field	Words that can be used as search criteria for the knowledge item. Keywords must be separated with a semicolon(;).
Category list	Category for the knowledge item.
Subcategory list	Subcategory for the knowledge item.
ChangePoint link list	Entity that the knowledge item is associated with.
Save email message with selected attachments check box	When selected, includes the email as an attachment to the knowledge item.
File name field	Name of the file that contains the email and the email attachments. The default name is *Email.msg*.
Attachments box, **Include** column	When selected, includes the email attachment in a file with the name specified in the **File name** field.
Attachments box, **Name** column	Name of the email attachment.

Creating a request from an Outlook email

Requests created from Outlook are routed through the ChangePoint approval process.

1. In Outlook, access the email message from which you want to create a request.
2. Click the **ChangePoint** tab.
3. Click **ChangePoint Actions menu** > **Create request**.

   The **ChangePoint Create Request** dialog box appears.
4. Complete the fields as required. For more information, see "Creating a request" in the *Request Management User Guide*.
5. Click **Save**.

Creating a request attachment from an Outlook email

1. In Outlook, access the email message from which you want to create a request attachment.
2. Click the **ChangePoint** tab.
3. Click **ChangePoint Actions menu** > **Create request attachment**.

   The **Request Attachment** dialog box appears.
4. To search for the request, do the following:

   a. In the **Search request** field, enter the information that you want to search for.

   b. Click .
5. In the **Available requests** list, select the request to which you want to attach the current email and the email attachments.
6. Complete the remaining fields as required. For more information, see the "Outlook application, ChangePoint request attachment dialog options" section on page 135.
7. Click **OK**.

Outlook application, ChangePoint request attachment dialog options

Field	Description
Private option	When selected, creates an attachment that only you can view. The default setting is defined in your Outlook ChangePoint settings.
Public option	When selected, creates an attachment that can be viewed in ChangePoint by all resources with the relevant access rights. The default setting is defined in your Outlook ChangePoint settings.
Search request field	Search criteria for requests in ChangePoint.
Available requests box	Displays the requests that meet the request search criteria.
Description field	Displays by default the header lines and body text of the source email.
File name field	Name of the file that contains the email and the email attachments. The default name is *Email.msg*.
Attachments box, **Include** column	When selected, includes the email attachment in a file with the name specified in the **File name** field.
Attachments box, **Name** column	Name of the email attachment.

10. Archiving Data

Archiving overview

When you archive a contract or a project, all the data associated with the contract or project is archived with it. For example, if you archive a project, the project tasks, requests and knowledge items associated with the project, time and expenses entered for the project, project budget, and so on, are also archived.

When an entity is archived, it is physically deleted from the production database and is no longer available from ChangePoint tree views, search results, or reports. If the system administrator has configured access to the archive database, users can access the archived data through custom ChangePoint Analytics data sources.

Terminology

For the purposes of the archiving functionality, the following terms apply:

- archive administrator – resource responsible for archiving and who can access ChangePoint Administration
- entity manager – generic term that refers to the resource who is the contract manager or project manager for the given entity

Archiving process

1. Before data can be archived, the database administrator must set up an archive database and configure access to the archived data. For more information, see the *ChangePoint Installation Guide*.
2. Entity managers use the archive options in ChangePoint to flag project or contract entities for archiving.
3. The entity archiving request appears in the **Archive Approval** view in ChangePoint Administration.
4. The archive administrator reviews the entity archiving requests, and either approves or rejects the entity for archiving. If a child entity is rejected by the archive administrator, then the parent entity is automatically rejected as well.
5. The archive administrator runs the `Archive Validation` scheduled job that checks whether the approved entities can be safely archived. If a child entity fails the archiving validation, then the parent entity automatically fails as well.

6. The archive administrator or the entity manager clears the failed and rejected entities from the Archiving Validation Log report.
7. The archive administrator runs the `Archive Aged Entities` scheduled job to archive the entities.

Before flagging an entity for archiving

Before flagging an entity for archiving, you must review the following validation lists for issues that can cause an entity to fail validation, and correct any potential issues.

Project validation list

For a project to pass validation, all of the following conditions must be met:

- The project is in **Completed** state, but not locked.
- If the project has subprojects, all subprojects must be able to pass validation.
- The project is not associated to a expense report that is also used by other projects that are not being archived.
- The project is not used as a template in a workflow step.
- The project is not associated with:
  - unapproved expenses
  - billable expenses that have not been invoiced
  - non-committed invoices
  - non-committed credit notes
  - an invoice that:
    - is associated with a product
    - includes fixed fee records
    - includes request time records
    - is used by other projects that are not being archived
  - a credit note that:
    - is associated with a product
    - includes fixed fee records
    - includes request time records
    - is used by other projects that are not being archived

- billable time that has not been invoiced
- unapproved time
- a workflow that has not yet been completed
- time and expense records that have been recognized
- a portfolio

Contract validation list

For a contract to pass validation, all of the following statements must be true:

- The contract must be closed, but not locked.
- All projects under this contract must pass validation.
- The contract is not associated with a non-committed invoice or credit note.
- Revenue recognition must be disabled for the contract.

Flagging an entity for archiving

Before you flag an entity for archiving, make sure the entity is ready to be archived. For more information, see the "Before flagging an entity for archiving" section on page 138.

1. Display the entity profile.
2. Click **Actions** > **Archive**.
3. Click **OK** to confirm.

   The entity is flagged for archiving and is listed in ChangePoint Administration for approval by the archive administrator.

Canceling archiving for an entity – entity managers

You can cancel archiving for an entity that has a validation status of **Pending** or **Passed** at any time before the archive administrator runs the `Archive Aged Entities` scheduled job.

1. If the entity failed validation, you must first clear it from the **Archiving Validation Log** report. For more information, see "Clearing entities from the Archiving Validation Log report" on page 141.
2. Display the entity profile.

3. Click ⋮ > **Cancel archive**.

About the Archiving Validation Log report

Entities that are rejected by the archive administrator or fail validation are listed in the **Archiving Validation Log** report, which is a standard ChangePoint report. Entity managers can view the results for the entities that they flagged for archiving by accessing the **Archiving Validation Log** report in ChangePoint.

It is good practice for the entity managers or archive administrator to clear all failed and rejected entities from the **Archiving Validation Log** before the `Archive Aged Entities` scheduled job is run. Entities can be cleared either by resolving the problems that caused the failures and rerunning the `Archive Validation` scheduled job, or by deleting the entities from the **Archiving Validation Log**.

> **Note:** Entities that fail validation cannot be flagged for archiving nor can they be canceled by entity managers in the entity profile in ChangePoint.

The **Archiving Validation Log** report displays the following information:

- Entity name – name of the entity
- Clear – check box that, when selected, will clear the entity from the report when the report is saved
- Entity type – ENG (contract) or PRJ (project)
- Rejection reason – the reason that the archive administrator rejected the entity
- Validated on – the date that the validation scheduled job was run
- Flagged for archiving by – the entity manager who initiated the archive process

Accessing the Archiving Validation Log report – entity managers

1. Click ⠿ > **Analytics** > **Reports**.

   The **Reports** tree view appears.

2. Expand the **Data Archive** reports category.
3. Select **Archiving Validation Log**.

   The report opens in a new window.

Clearing entities from the Archiving Validation Log report

Entities that fail validation must be removed from the **Archiving Validation Log** report by the entity manager or archive administrator before archiving for the entity can be canceled. However, entities that were rejected by the archive administrator can be canceled from archiving immediately.

1. Access the **Archiving Validation Log** report.
2. In the **Clear** column, select the check boxes for the entities that you want to clear from the log.
3. Click **Save**.

   The selected entities are cleared from the log.

About the Archiving Log report

The entities that are successfully archived are reported in the **Archiving Log** report. Entity managers can view the results for their own entities only, but archive administrators can view the results for all entities.

The **Archiving Log** report displays the following information:

- Entity name – name of the entity
- Entity type – contract or project depending on the archived entity
- Archiving date – the date that the archiving scheduled job is run

Accessing the Archiving Log report – entity managers

1. Click > **Analytics** > **Reports**.
2. In the Folders view, expand the **Data Archive** reports category.
3. Select **Archiving Log**.

   The report opens in a new window.

Troubleshooting archiving

The Archive option for an entity is not available on the entity profile

For an entity to be eligible for archiving, the following conditions must be met:

- User must be the contract manager of the contract or project manager for the project and have the security access for archiving.
- Projects must have a status of Complete
- Contracts must have a status of Closed
- Only one entity in a hierarchy can be flagged for archiving at a time. When a parent entity is flagged, then its children cannot be flagged. For example, if a contract is flagged, then the projects for the contract cannot be flagged. Similarly, when a child entity is flagged, then its parent entity cannot be flagged. These restrictions apply during the entire archiving process until the flagged entity is either archived or archiving is canceled for the entity.

An entity passed validation for archiving, but failed during archiving

Contract and project entities that pass validation are locked, but can be edited as follows:

- Contract managers and project managers can edit their entities, even after they have been locked.
- data associated to a locked entity can be edited by resources.

Therefore, it is possible for an entity to pass validation during the `Archive Validation` scheduled job, but later fail during the `Archive Aged Entities` scheduled job. For example, if a project entity passed validation, but time and expenses are later entered for the project but are not approved, then the project entity would fail validation during the `Archive Aged Entities` scheduled job.

11. ChangePoint Standard Reports

ChangePoint standard reports

Report Name	Description
01 - Pre-Run	Pre-run report showing items that may require changes
02 - Tentative Process	Tentative revenue recognition calculations
03 - Tentative Report	Results of the tentative revenue recognition calculations (report 02)
04 - Tentative Unrecognized	Revenue that could not be recognized during the tentative revenue recognition calculations (report 02)
05 - Unrecognized Completed	Any excess revenue on completed deliverables
06 - Revenue Transfer	Revenue generated between cost centers
07 - Recognition Details	Details of committed recognized revenue
08 - Recognition Adjustment	Process of revenue adjustments
09 - Recognition Summary	Summary by GL account and cost center to be used as a journal entry
10 - Revenue Reconciliation	Reconciliation of recognized revenue vs. invoiced amounts
11 - Recognition Adjustments Summary	All adjustments made during a given period
All Customers	All customers defined in the system
All Requests by Assignee	All requests grouped by assignee

Report Name	Description
All Requests by Customer	All requests grouped by customer
All Requests by Product	All requests grouped by product
All Requests by Request Type	All requests grouped by request type
All Requests by Status	All requests grouped by status
Archive Log	Archiving Validation Log
Archiving Validation Log	Entities that are selected for archiving but have failed validation or have been rejected
Assigned Features by Resource	Features assigned to a resource
Assignment by Metric	Resources assigned to metrics, grouped by metric
Assignment by Workgroup	Resources assigned to metrics, grouped by workgroup
Associate Invoiced Time with Fixed Fee	View and change the fixed-fee association for invoiced time records
Batch Committed Invoices	Invoices that were committed in a batch process
Batch Invoices Created	Invoices that were created in a batch process
Batch Invoicing Errors	Invoices that could not be created during the batch process
Batch Invoicing Processes	Generate, submit, approve and commit invoices in a batch process
Batch Printing	Selection for batch printing of invoices

Report Name	Description
Batch Time and Expenses Approval	Batch approval for time and expenses
Billable Utilization by Workgroup	All non-project hours, billable project hours and nonbillable project hours within a certain time period, grouped by workgroup
Budget Details	Detailed information to assess the impact of budget revisions
Budget vs. Actual by Month	Comparison between budgeted amounts and actual amounts on a monthly basis
Budget vs. Actual for Selected Fixed Fee	Comparison between budgeted revenue and cost with actual amounts for a selected fixed-fee deliverable
Budget vs. Actual Report by Budget Item	Comparison between budgeted amounts and actual amounts on a per-line basis for services, expenses and products
Bug Reports	Defects matching user-specified criteria
Campaign Profitability	Leads and potential revenue vs. costs for campaigns
Competitors by Frequency	Competitors and the frequency at which they are involved in opportunities
Contractor Invoice Reconciliation	Totals from vendor or contractor invoices compared to time and expense records entered in ChangePoint
Customer Radar	Comparison between customers on a defined set of metrics
Employee Phone List	Phone list of all employees, including contact information
Employee Phone List by Workgroup	Phone list of all employees, grouped by workgroup
Contract Financial Analysis	Financial analysis of contracts, by month
Contracts by Customer	All contracts grouped by customer

Report Name	Description
Contracts by Manager	All contracts grouped by responsible resource, with main information, such as status, dates, amounts, etc.
Exceeded Funding Source Report	Funding sources with an associated demand amount or an actual spent amount that exceeds the funding amount
Expense Reports Approved/Rejected by Me	All expense reports approved by the resource running the report
Expense Reports by Resource	All expense reports grouped by resource
Expense Reports by Status	All expense reports grouped by status
Expense Write-Offs/Ups	Expenses that were written off/up
Funding Source Association Exception Report	ChangePoint entities that are missing a required funding source association
Inactive Requests by Product	Inactive requests grouped by product
Invoice Details with Net Write-Offs	Breakdown by date of time, expenses and net write-offs for an invoice
Invoiced Hours by Resource	Billable and invoiced time, grouped by resource for a specified time period
Invoices by Billing Office	All invoices grouped by billing office
Invoices by Billing Office and Month	All invoices grouped by billing office and month
Invoices by Currency	All invoices grouped by invoice currency

Report Name	Description
Invoices by Customer	All invoices grouped by customer
Invoices by Date	All invoices grouped by date
Invoices by Contract Manager	All invoices grouped by contract manager
Invoices by Invoice Number	All invoices grouped by invoice number
Invoices by Month	All invoices grouped by month
Invoices by Project Manager	All invoices grouped by project manager
Invoices by Status	All invoices grouped by status
Invoices with Details by Customer	All invoices with details, grouped by customer
Metric Assignments	List of metric assignments
My Checked-Out Knowledge Items	All knowledge items currently checked-out by the resource who is running the report
My Contacts	List of the contacts of the resource running the report
My Expense Reports	List of all expense reports of the resource running the report, grouped by status
My Knowledge Items	List of all the knowledge items created by the resource running the report
My Queues	List of all requests contained in queues that can be accessed by the resource running the report
My Request Assignments	List of all requests assigned to the resource running the report

Report Name	Description
My Tasks	List of all tasks that are assigned to the resource running the report
Open Requests by Assignee	Open requests grouped, by assigned resource
Open Requests by Category	List of open requests, grouped by category
Open Requests by Customer	List of open requests grouped by the customer they were logged for
Open Requests by Date	List of open requests, grouped by date
Open Requests by Initiator	List of open requests, grouped by resource or contact who initiated the request
Open Requests by Priority	List of open requests, grouped by priority
Open Requests by Product	List of open requests, grouped by product
Opportunity Outcome: Lost	All opportunities that have been lost, sorted by customer
Opportunity Outcome: Won	All opportunities that have been won, sorted by customer
Pending Resources Changes	Resource changes that are pending
Personal Vacation Time	Annual summary of vacation allocated, taken and remaining
Progress by Project	All tasks of a project, with assigned resources and status
Project Progress All	All tasks of all projects, with assigned resources and status
Project Status by Phase	Summary information of projects, by phase

Report Name	Description
Project Summary by Resource	Summary of assigned resources, by project
Projects by Status and by Customer	All projects grouped by status and customer
Projects by Status and by Project Manager	All projects grouped by project manager
Public Support Items	List of public support items
Recognition Details	Details of committed recognized revenue
Reconciliation Results	Reconciliation of time and expense entries on contractor invoices with time and expense entries in ChangePoint
Request Summary	Summary information for a selected group of requests
Resource Functions	Functions assigned to a resource
Resource History	Work-related effective dates of a selected resource
Resource Requests	List of resource requests
Resources by Approver	All resources grouped by approver
Resources by Assigned Feature	Resources by assigned feature
Resources by Function	Resources grouped by primary function
Resources by Task	Resource assignments for each task, grouped by project
Responsibility by Resource	All contracts, projects, and opportunities managed and grouped by a selected resource
Revenue Recognition Adjustments	All revenue recognition adjustments made during a specific period

Report Name	Description
Revenue Recognition Summary	Summary by GL account and cost center to be used as a journal entry
Revenue Reconciliation	Reconciliation of recognized revenue vs. invoiced amounts
Revenue Transfer	All transfers between cost centers completed during the revenue recognition process
Split Billing Consolidation	Consolidated invoicing information for selected split billing contracts
Support Items by Type	Support items grouped by type
Suspended Requests	Requests that are suspended
System Metadata	All fields and their settings, including whether they are mandatory or not
System Reports with Descriptions	All reports with descriptions
System Reports with URL	All reports with URLs
System Terminology	All customizable terms in the system and their values
Task completion	All tasks with completion status, grouped by project
Task Slippage by Project	All tasks showing slippage in the planned finish date, grouped by project
Task Status Compliance	Status information for assignments on a specified project
Tasks in Progress or Scheduled to Start	Tasks in progress or scheduled to start within two weeks, by project
Tasks Scheduled to Finish in Two Weeks	Tasks scheduled to finish within two weeks, by project

Report Name	Description
Tentative Revenue Recognition	Results of the tentative revenue recognition process
Tentative Unrecognized	Assessment of unrecognized revenue during the tentative revenue recognition process
Time and Expenses by Billing Office	All time and expenses grouped by billing office
Time and Expenses by Customer	All time and expense records, grouped by customer
Time and Expenses by Invoice Number	All time and expenses records, grouped by invoice number
Time and Expenses by Resource	All expense reports grouped by resource
Time Locking by Resource	Interface for locking specific time records
Time Submission Conformance	Summary of resources' weekly time sheets, grouped by workgroup, with emphasis on non-conformance
Time Write-Offs/Ups	Time records that were written off/up
Unapproved Support Items	Support items that are unapproved
Unapproved Time and Expenses	Unapproved time and expenses by approver
Unapproved Time by Approver	All unapproved time, grouped by approver
Unassigned Requests by Open Date	Unassigned requests grouped by open date

Report Name	Description
Unassigned Requests by Priority	Unassigned requests grouped by priority
Unbilled Time and Expenses	All unbilled time and expense records
Unpaid Invoices	All unpaid invoices
Unrecognized Completed	Excess revenue on completed deliverables
Unsubmitted Time	All time entries not yet submitted
Upgrade Log Entries	List of all log entries
Utilization by Workgroup	Utilization rate for a specific workgroup within a specific period
Vacation Tracking	Annual summary of vacation allocated, taken and remaining, by resource or by workgroup
Weekly Time Sheet	Weekly time sheet in a printable format
Work in progress	Evaluation of cost and revenue information for a selected contract
Work Performed and Invoiced	Invoices billed either to a client or to the location the work was performed for the client
Workgroup Record History	Time and expense records by workgroup for a selected resource

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