



Product	Changepoint 2017 eLearning Program
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Release Description	The Changepoint 2017 eLearning release now adds 4 new sets of lessons including Resource Management, Workflow Management, Using Intelligent Forms and the Project Planning Worksheet phase 2.

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About this release

The Changepoint 2017 eLearning release now adds 4 new sets of lessons including resource management, workflow management, using Intelligent Forms and the Project Planning Worksheet phase 2.

Resource management

Basic definitions

In these lessons, users learn the basic definitions in resource management.

Lessons include:

- What is resource management?
- Critical components of resource management
- Changepoint definitions

Sources of demand

In this lesson Changepoint users learn about the various sources of demand in Changepoint resource management.

Soft bookings

In this lesson Changepoint users learn about soft booking resources.

Best practices

In this lesson users learn about the various best practices for resource management in Changepoint.

Resource management models

In these lessons users learn about the various resource management models in Changepoint.

Lessons include:

- Decentralized
- Resource Managers without resource requests
- Resource Managers with engagement level resource requests
- Resource Managers with project level resource requests
- Resource Managers with task assignment level resource requests

Using resource requests

In these lessons users learn about using resource requests. Lessons include:

- Using resource requests
- Resource request workflows - stored procedures

Sample resource request workflow

In these lessons Changepoint users will examine sample resource request workflows.

Lessons include:

- Details of the workflow
- Project manager needs an extension for this resource
- Project manager needs to release a resource from the project
- The project is reassigned to another project manager

Viewing resource demand and supply information

In these lessons Changepoint users will learn methods for viewing resource demand and supply information. Lessons include:

- Calendars
- Creating an appointment for a resource
- Managing appointments in the personal calendars of resources
- Resource Demand Portlets and Reports
- Resource Demand and Capacity by Week
- Resource Demand and Details by Week
- Additional lessons include Demand and Capacity by Function
- Demand Details by Function report
- Project Assignments Report, Professional Development Planning by Function
- Professional Development Planning by Qualification
- Resource Professional Development Planning
- Professional Development Request and Workflow

Resource search

In this lesson users will learn how to search for resources in Changepoint.

Resource levelling

In this lesson users will learn about resource levelling in Changepoint.

Resource management worksheet

In these lessons Changepoint users will learn about the resource management worksheet.

Lessons include:

- Technical requirements
- Workgroup settings and Workgroup settings – examples
- Links is provided to the Resource management worksheet lessons

Resource management scenarios

In these lessons Changepoint users will learn about Resource management scenarios

Lessons include:

- Resource management scenarios – Introduction
- 7 scenario lessons

Resource management worksheet (RMW) vs. Resource demand analysis (RDA)

In this set of lessons users learn about the resource management worksheet vs. resource demand analysis.

Using the resource scheduling calendar

In this set of lessons users will learn how to use the resource scheduling calendar.

Lessons include:

- Introduction
- Accessing the resource scheduling calendar
- Filtering resources in the resource scheduling calendar
- Creating an appointment for a resource
- Managing appointments in the personal calendars of resources
- Viewing a resource profile from the resource scheduling calendar
- Checking for resource capacity conflicts

Project planning worksheet phase 2

Introduction

This series of lessons introduces users to the Project Planning Worksheet - Phase 2.

Lessons include:

- Introduction to the Project Planning Worksheet
- Best practices
- Accessing the Project Planning Worksheet
- Expanding and collapsing tasks
- Creating a project worksheet view
- Editing a project worksheet view
- Deleting a project worksheet view
- Creating a project worksheet filter
- Editing a project worksheet filter
- Deleting a project worksheet filter

Managing tasks

This series of lessons provides instruction on managing tasks. Lessons include:

- Managing tasks – Introduction
- Moving tasks
- Creating summary tasks and subtasks
- Editing rules for summary task managers

Creating tasks

This series of lessons provides instruction on creating tasks. Lessons include:

- Creating tasks and task dependencies
- About duration
- Activating tasks
- Copying tasks

Editing tasks

This series of lessons provides instruction on editing tasks. Lessons include:

- Editing tasks
- Reordering tasks
- Deleting tasks

Creating task assignments

This series of lessons provides instruction on creating tasks assignments. Lessons include:

- Creating task assignments
- Using the assign resources dialog box
- Editing task assignments
- Editing effort in fiscal periods or daily distributions
- Deleting task assignments
- Adding preferred resources

Using the Gantt chart

This lesson provides instruction on Using the Gantt chart.

Workflow management

Introduction to workflow management

This series of lessons provides an introduction to workflow management in Changepoint. Lessons include:

- Introduction

- Workflow configuration overview
- Enabling and disabling workflow for an entity
- Resetting a workflow process instance and Resetting a workflow state

Workflow state definitions and layout

This series of lessons provides instruction on the Workflow state definitions and layout.

Lessons include:

- Workflow state definitions and filters
- Creating a workflow state definition
- Editing a workflow state definition
- Deleting a workflow state definition
- Activating and validating a workflow state definition
- Copying a workflow state definition
- Importing and exporting workflow state definitions

The state workflow layout

This series of lessons provides instruction on the state Workflow layout. Lessons include:

- Overview of the state workflow layout
- Accessing the state workflow layout window
- Adding a state to the state workflow layout
- Restricting edit access to the entity while in a workflow state
- Adding a state transition to the state workflow layout
- Restricting edit access to the state workflow transition
- Adding and editing a trigger for a workflow state transition
- Modifying a workflow state and Modifying a workflow state transition.

Resource request Workflows

This series of lessons provides instruction on resource request workflows. Lessons include:

- Default state definitions for resource request workflow
- Stored procedures for logic execution steps in resource request workflows

The process workflow layout

This series of lessons provides instruction on the process workflow layout. Lessons include:

- The process workflow layout – Introduction
- Creating a process workflow
- Modifying or deleting a process workflow definition

The process workflow layout window

This series of lessons provides instruction on the process workflow layout window. Lessons include:

- Accessing the process workflow layout window
- Creating a process workflow layout

About process workflow steps

This series of lessons provides instruction on the process workflow layout window. Lessons include:

- Process workflow steps – Introduction
- Deleting a process workflow state

Configuring process workflow steps

This series of lessons provides instruction on Configuring process workflow steps. Lessons include:

- Configuring a process workflow action step
- Configuring a process workflow status step
- Configuring a process workflow decision step
- Configuring a process workflow notification step
- Configuring a process workflow copy project step
- Configuring a process workflow tri-state approval step
- Configuring a process workflow system-driven survey step
- Configuring a user driven survey step
- Configuring a process workflow upload step

Process workflow logic execution steps

This series of lessons provides instruction on Configuring process workflow steps.

Lessons include:

- Process workflow logic execution steps – Introduction
- Configuring a process workflow logic execution step

Assigning workflow steps to participants

This lesson provides instruction on assigning workflow steps to participants.

Adding knowledge items and links to a workflow step

This lesson provides instruction on adding knowledge items and links to a workflow step

About workflow escalation

This lesson provides instruction on configuring a workflow escalation

About workflow decisions

This series of lessons provides instruction on workflow decisions. Lessons include:

- Configuring a workflow join decision
- About workflow split decisions
- Available conditions in the workflow split expression builder
- Sample stored procedure used in a workflow split decision

About editing a workflow process

This lesson provides instruction on editing a workflow process

Intelligent forms

This lesson provides instruction on using standard forms.

System requirements

Over and above the minimum configuration requirements for the Changepoint application, the requirements to run the eLearning lessons are the following:

- For details on browser compatibility for Changepoint eLearning, see the *Changepoint 2017 Product Architecture and Technology Matrix* located in the 2017 Release Notes and Patches team folder in Changepoint through the Client Portal, or through your client manager or project manager.
- A computer with an audio card
- Computer speakers or headphones

Language Availability

The Changepoint eLearning lessons are currently available in English only.

Setup Instructions

1. Copy the setup folder from the eLearning folder on the product media to a location on the web server.
2. Run the \Setup\Setup.exe from the copied location on your web server; specify the correct folder path, database server name and database name; follow the instructions for the remaining screens.
3. Reset IIS
4. Advise users to clear their browser cache before launching Changepoint eLearning.

Multiple website instance installation

The installer can be executed multiple times on multiple instances. The installer defaults to the file path installed for the first instance, therefore the user must modify the file path as required.

Manual Setup Instructions

There are two separate required components to installing eLearning manually: **Website** and **Database**.

To install the website component:

1. Copy the files from Manual Upgrade\Website\Enterprise\eLearning\ITD\E folder of this package to your Changepoint\eLearning\ITD\E folder. Allow any existing files to be overwritten.
2. Copy the files from Manual Upgrade\Website\Enterprise\eLearning\PSO\E folder of this package to your Changepoint\eLearning\PSO\E folder. Allow any existing files to be overwritten.
3. Reset IIS.
4. Repeat the same steps for all Changepoint website instances if more than one Changepoint websites are hosted.
5. Advise users to clear their browser cache before launching Changepoint eLearning.

Accessing the eLearning

The Changepoint eLearning lessons can be accessed from within Changepoint:

- From the **Help** menu in Changepoint. Click **Help** in the top navigation menu and select **Changepoint eLearning**. The Changepoint eLearning page appears providing links to the lessons.
- From the **context-sensitive** links in Changepoint. Lessons relating to specific areas of the application are available from within the Changepoint application. Move your mouse over an area of the application (such as a tab or a section) that is linked to a specific lesson to display an arrow icon within a balloon. Click the icon to launch the lesson.

Customizing the eLearning

Removing Unwanted Lessons from the eLearning

You can remove unwanted lessons from the eLearning launch page by modifying the associated html page (for example Basics_lessons.html or Project_mgmt_lessons.html). Create a backup of the original files before proceeding.

Note: To edit a file, use a basic text editing program such as Notepad, as more robust editors like Microsoft Word™ could potentially insert unwanted text formatting characters that could break the file.

To remove a lesson, locate the block of text that represents the lesson that you want to remove. Delete everything between the `` and `` tags. For example:

```
<li>
Unlocking requests
<span class="Duration">(2 min 10 Sec)</span>
<span class="LaunchElearn"><a href="lessons/M10_L4d/M10_L4d.htm"
target="_blank">LAUNCH</a></span>
</li>
```

To remove a module, delete everything between the `` and `` tags, as well as the header. For example:

```
<h2>Using the Client Portal</h2>
<ul>
<li>
Using the client portal - Introduction
<span class="Duration">(1 min 30 Sec)</span>
<span class="LaunchElearn"><a href="lessons/M7_L1/M7_L1.htm"
target="_blank">LAUNCH</a></span>
</li>
<li>
Enabling client portal access for a contact
<span class="Duration">(3 min 45 Sec)</span>
<span class="LaunchElearn"><a href="lessons/M7_L2/M7_L2.htm"
target="_blank">LAUNCH</a></span>
```

```

</li>
<li>
  Accessing the client portal
  <span class="Duration">(2 min 0 Sec)</span>
  <span class="LaunchElearn"><a href="lessons/M7_L3/M7_L3.htm"
  target="_blank">LAUNCH</a></span>
</li>
<li>
  Navigating the client portal
  <span class="Duration">(5 min 15 Sec)</span>
  <span class="LaunchElearn"><a href="lessons/M7_L4/M7_L4.htm"
  target="_blank">LAUNCH</a></span>
</li>
</ul>

```

Availability of eLearning Source Files for Customers

It is possible to customize the eLearning lessons. However, customers must purchase a copy of the eLearning source code and will require Adobe Captivate for this purpose.

The customization of the eLearning material is not supported within the terms of your Changepoint support agreement. It is expected that an individual knowledgeable in Adobe Captivate, the Changepoint applications and your organization's business practices be responsible for creating and maintaining custom eLearning material. If you require assistance, contact your account manager to arrange for chargeable consulting services. Your Changepoint support analyst will not be able to assist you in this area.

Known Issues

After the update containing the new eLearning lessons has been installed, users will need to clear their browsing data from their web browser before the update will be visible. This procedure is different for each browser.

Google Chrome

1. Press **Ctrl-Shift-Del**
2. In the dialog box, click the **Cached images and files** check box, as well as any other types of data you would like to delete
3. In the pull-down menu at the top, select **The beginning of time**
4. Click the **Clear browsing data** button

Firefox

1. Press **Ctrl-Shift-Del** to open the **Clear Recent History** dialog box
2. Check the box next to **Cache**, choose a time range from the pull-down menu at the top
3. Click **Clear Now**

Internet Explorer

1. Open the **Delete Browsing History** box by clicking **Ctrl-Shift-Del**
2. The **Delete browsing history** dialog box appears
3. Unchecked the **Preserve Favorites website data** check box.
4. Click the **Temporary Internet files and website files** checkbox
5. Click the **Delete** button

Safari

1. In the top right corner of the browser click the gear icon
2. From the menu select **Reset Safari**
3. The items are checked by default. Click the **Reset** button