Basic Form Commands

This Quick Reference Guide will explore the basic form commands for navigating ProjectTeam .com including accessing forms, individual panes contained on forms, icons, buttons, dropdown menus, and navigating log views.

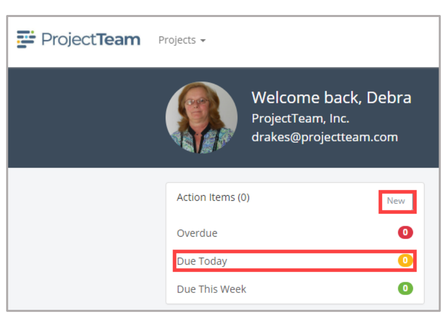
<u>My Page</u>

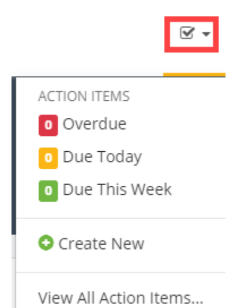
1. On the My Page users can Edit Profile, Change their Password, Update Email Notifications, review Action Items, review Workflow Items and review Recent Activity on their projects.

2. Click **Edit** Profile to change or update information about yourself or add your profile picture.

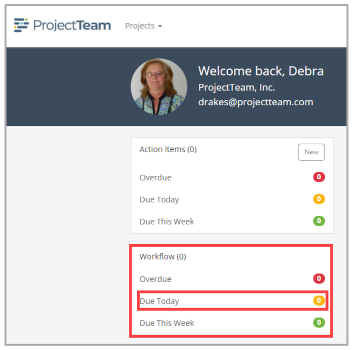
3. Click the **ellipsis button (three dots)** button to Change password and Update email notifications.

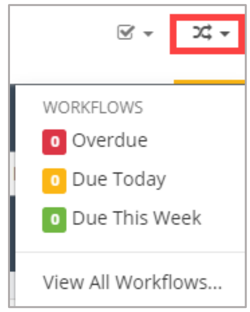
4. Click any row of the Actions Items pane to review **Action Items** Assigned to or By you. The user can also create actions items from this pane. At all locations in Project the User will always have access to **Action Items** using the icon at the top of the page.



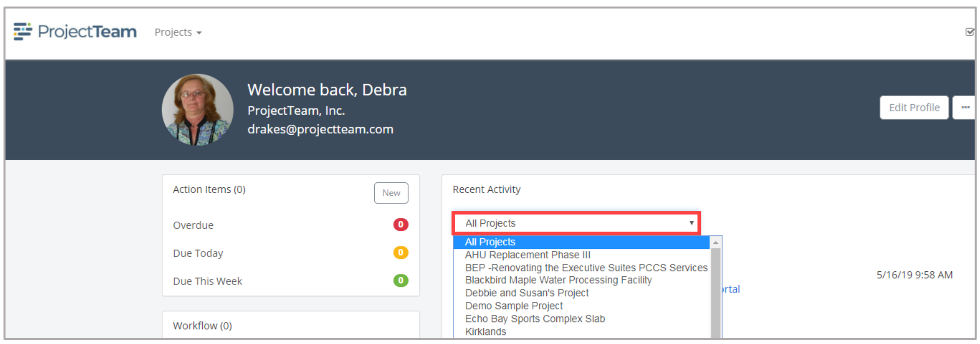


5. Click any row of the Workflow pane to review **Workflow** Assigned to you. At all locations in Projectteam the User will always have access to **Workflow** Items using the icon at the top of the page.



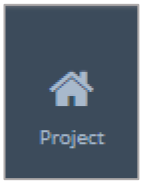


6. Recent Activity can be searched on a Project by Project level using the **All Project Search** box.

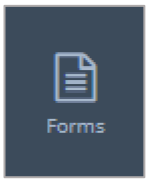


Project Home Page
Navigation Pane

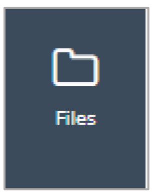
From the navigation pane on the left side of the screen the icons will take the user to the following locations in Projectteam.



Return to Project Home Page

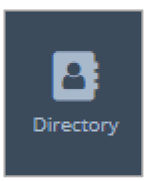


Access Forms

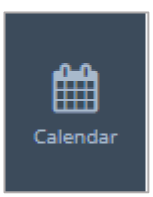


Maintain File Storage Area

Access Project and Published Company Reports



View the Project Directory



View and Maintain the Project Calendar

Window Panes

1. **Favorite Form Types** – Favorite Form Types are a personal perference. Defining your favorite form types help you navigate Projectteam.com quickly.

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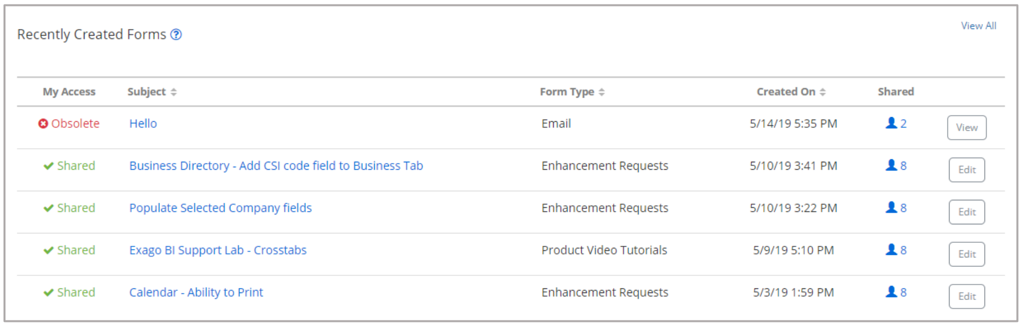
2. **Recently Created Forms** – This list shows up to five of the most recently created forms that you have access to in the project. The Subject is a clickable link for easy access to the documents.

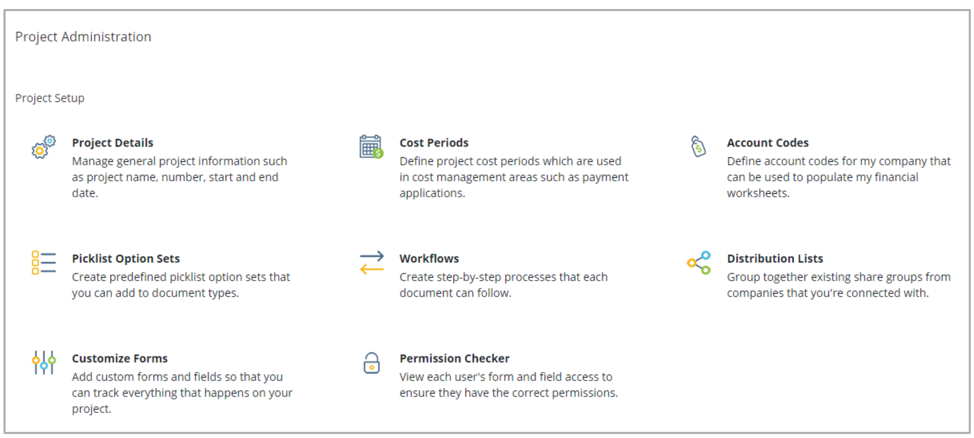


Recently Created Forms

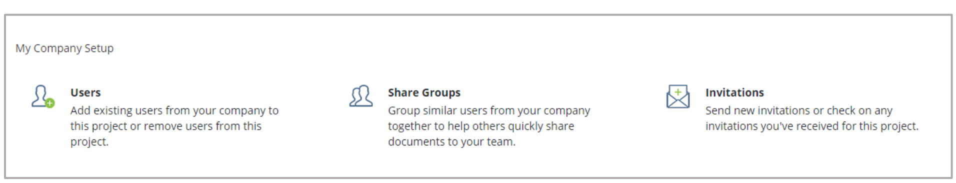
View All

My Access	Subject	Form Type	Created On	Shared	
Obsolete	Hello	Email	5/14/19 5:35 PM	2	View
Shared	Business Directory - Add CSI code field to Business Tab	Enhancement Requests	5/10/19 3:41 PM	8	Edit
Shared	Populate Selected Company fields	Enhancement Requests	5/10/19 3:22 PM	8	Edit
Shared	Exago BI Support Lab - Crosstabs	Product Video Tutorials	5/9/19 5:10 PM	8	Edit
Shared	Calendar - Ability to Print	Enhancement Requests	5/3/19 1:59 PM	8	Edit

3. **Project Administration** – Contains Project Setup functions such as Project Details, Cost Periods, Account Codes, Picklist Options Sets, Workflows, Distribution Lists, Customize Forms, and Permission Checker. These items are typically setup at the beginning of the project but can be accessed throughout the progression of the project for easy access as changes occur.



4. **My Company Setup** – provides easy access to add Users to the project create Share Groups for your company and track Project Invitations.



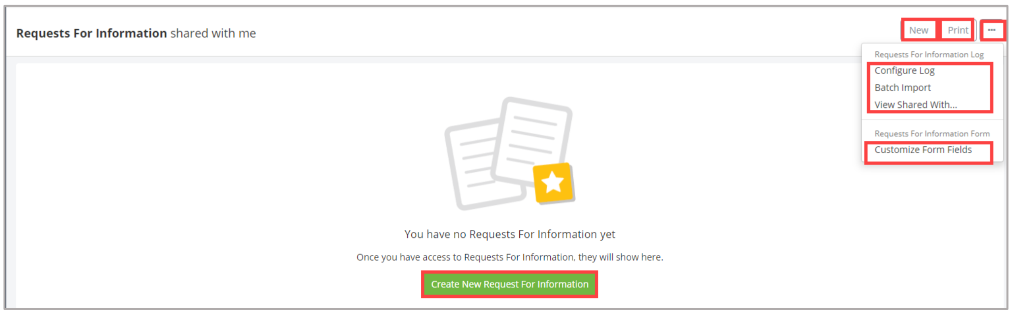
Log Views

1. **New** button – adds a new record

2. **Print** button – allows the user to print a log as displayed on the view including any filters applied or sorts reflected.

3. **Ellipsis (three dots)** button – allows access to Log and Form features.
   Configure Log – allows user to view what fields they wish to see in the log view
   Batch Import – walks user through a 3 step import wizard for the form.
   View Shared With… allows the user to see what records have been shared with a specific user.
   Customize Form Fields – allows user to add or modify custom fields on the form.

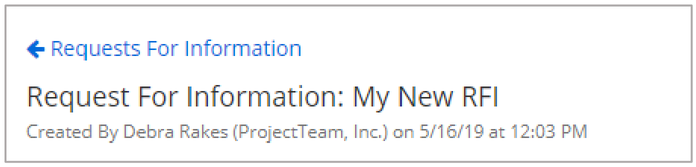
4. **Create New…** - adds a new record.



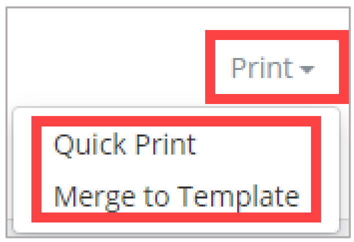
Form View

All forms contain a Document Pane, Share With, Details, Workflows, Attachments, Action Items, Activity and Reference Links Panes. Below is a brief description of standard navigation the user has with each pane.

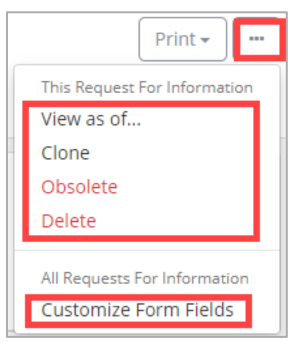
Document Pane – contains the **form name cookie crumb trail** that you are currently viewing along with the **Subject**, **who created** the record with their (**Company Name**) as well as **date/time** created.



1. **Print** button – allows the user the access to **Quick Print** or **Merge to Template.**



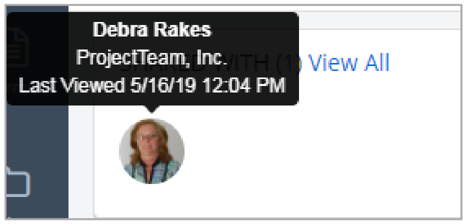
2. **Ellipsis (three dots)** button
   View as of… - allows user to view the form as it was in a previous state.
   Clone –makes a copy of the data creating a new record with the exact data.
   Obsolete – removes the record from the log view therefore obsoleting the record. Use this function if you have already shared a document but you do not want it to show in the log view any longer.
   Delete – removes the record in its entirety. User can only delete records that have not been shared with other users.
   Customize Form Fields - allows user to add or modify custom fields on the form.



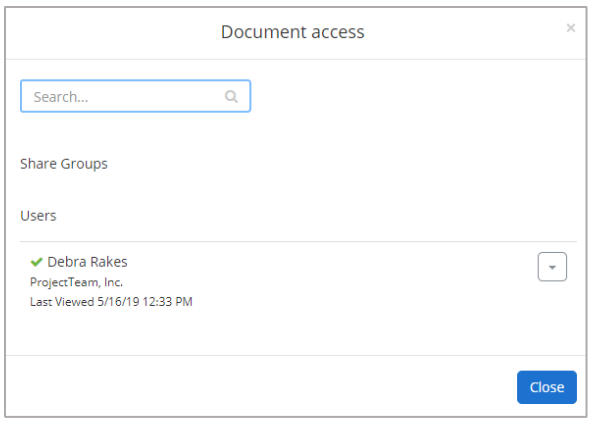
Shared With Pane

Displays all users the document has been shared with.

1. Hover over the profile picture to see when the users last viewed the record.



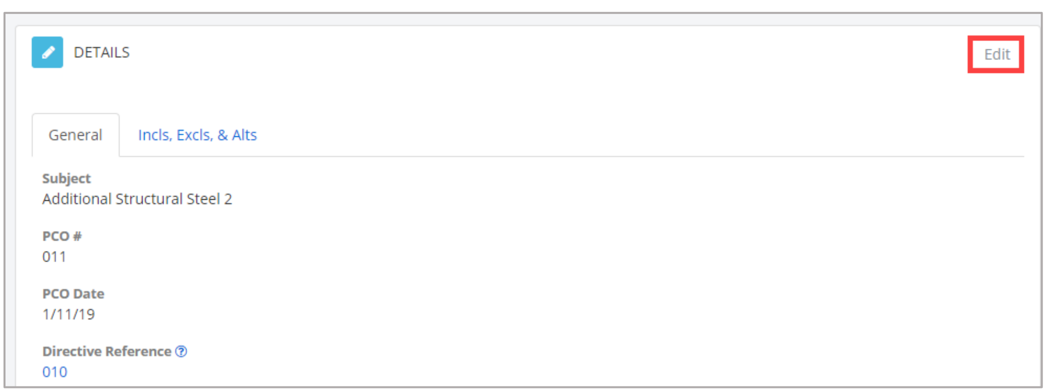
2. **View All** link – opens the Document access modal window so user can see detailed information regarding users that have access to the document.



Details Pane

The Details pane contains the details for that particular form.

1. **Edit** button – takes record from view mode to edit mode so changes can be made to the record.



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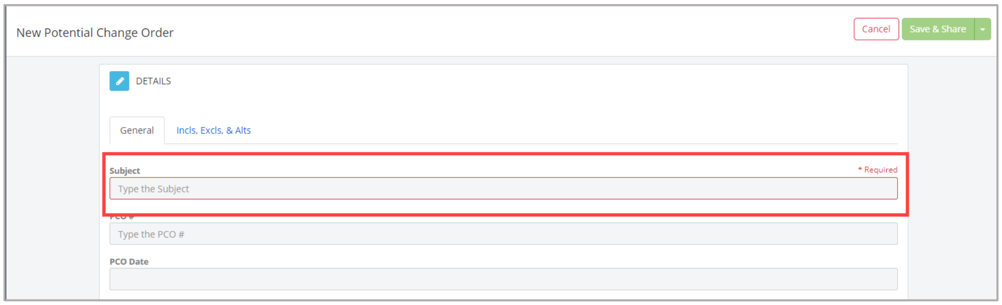
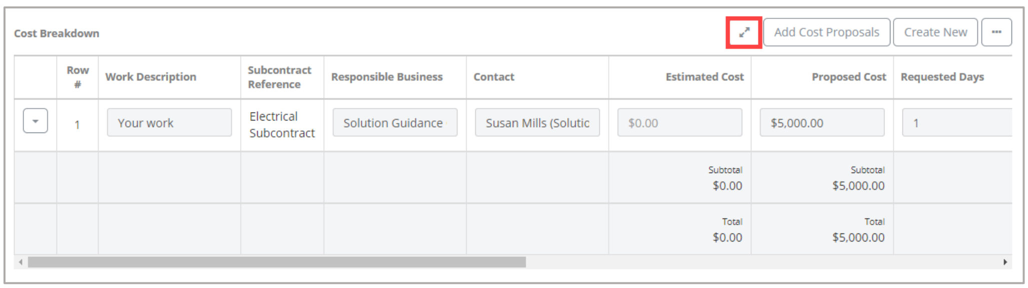
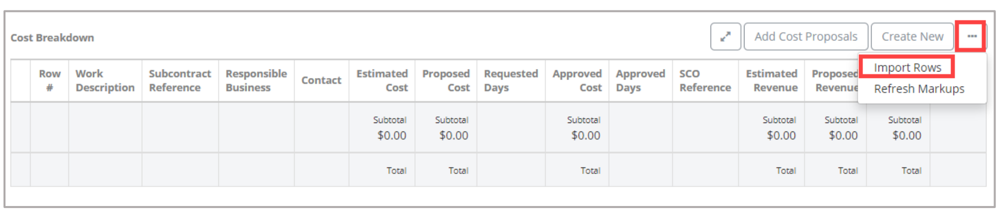
2. All required fields will be have red colored borders around the field and be marked *Required in red.



3. Forms that contain collections will have a **Shannon** button, which allows the user to maximize the collection to full screen and return to original settings.



4. **Ellipsis (three dots)** button on a Collection will allow user to import rows in the collection.

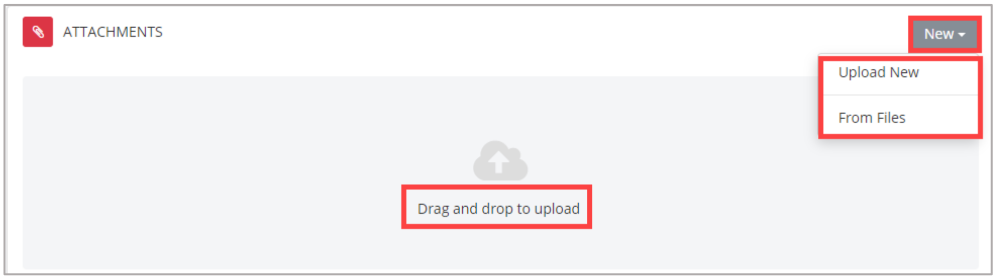


Workflow Pane

All forms contain a Workflow pane allowing users to apply workflow that has been setup for that form to be started and tracked through the document process. Multiple workflows can be applied to any form. Workflow can be configured for use on multiple forms that follow the same document process.

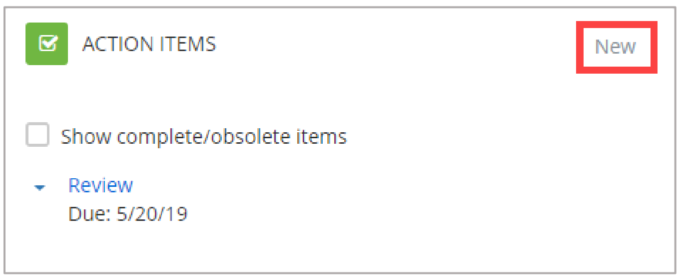
Attachments Pane

Use the attachments pane to drag and drop or upload file attachments to any form type.

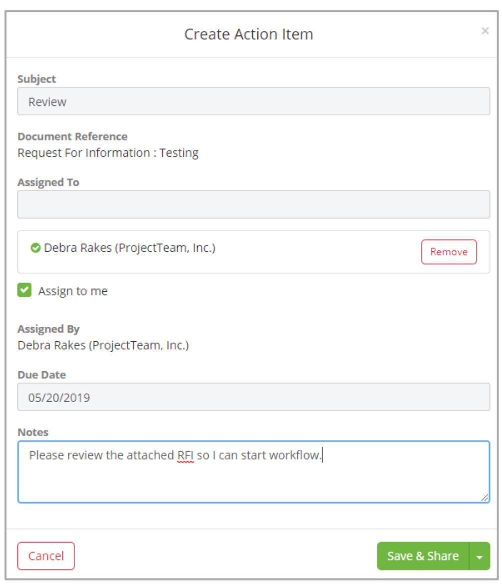


Action Items Pane

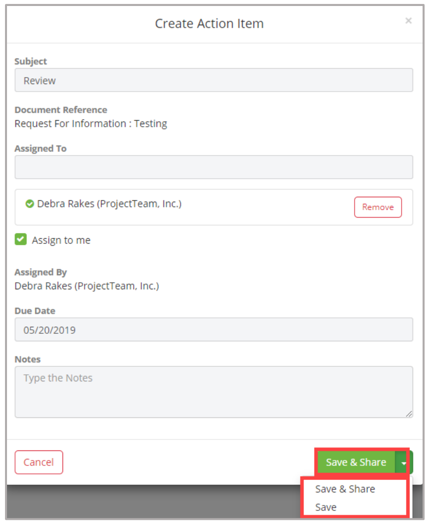
Use the Action Items pane to assign action to any user on the project. Action Items assigned to you will also appear in the Action Items view.



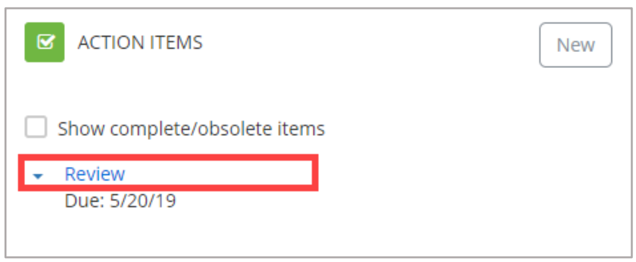
1. Click the **New** button to create an Action Item. The Create Action Item modal window will open. Complete the required **Subject**, **Assigned To**, **Due Date** and any remaining fields necessary for a complete record.



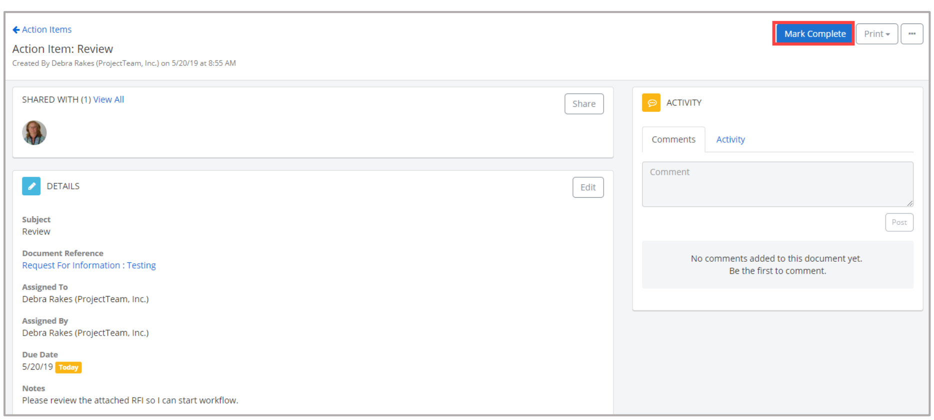
2. Click the **Save & Share** or **Save** to save the record.



3. The Action Item will appear on the Action Items Pane. Click the **Action Item Name link** to take action and mark the item complete.



4. The Action Items record will open. Click the **Mark Complete** button at the top of the window to complete the action item.



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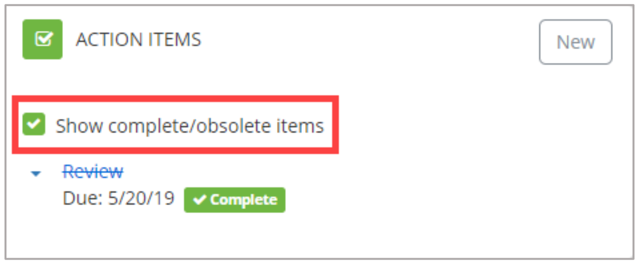
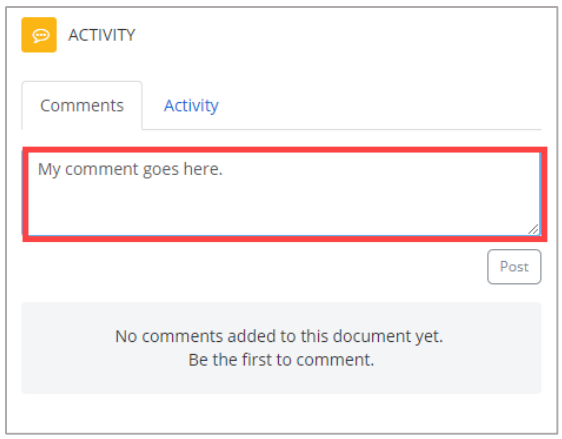
5. Click the **checkbox** to the left of **the Show complete/obsolete items** to view completed or obsoleted action items.



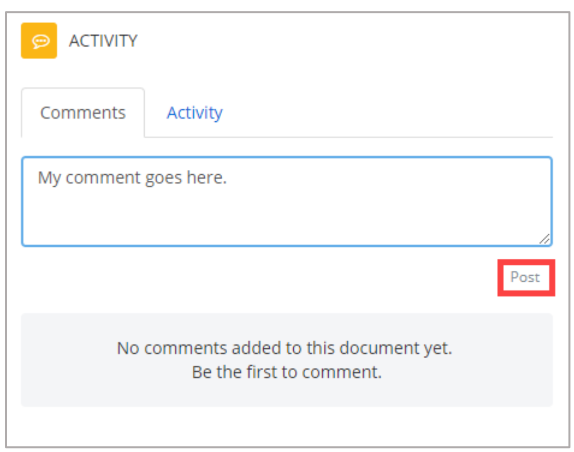
Activity Pane

The Activity Pane tracks all comments made on a form type as well as all Activity performed to that form.

1. To make a comment on a form type, enter the comment in the **Comments** box.



2. Click the **Post** button to post the comment. A notification will be forwarded to users that have enabled the Comments in their project notification configurations.



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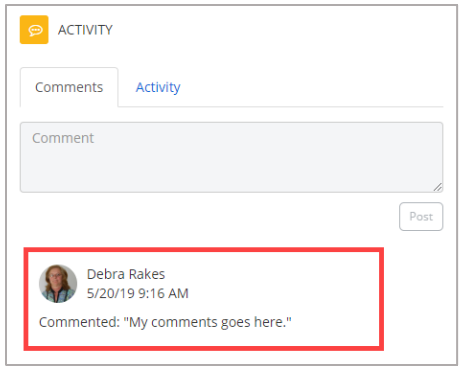
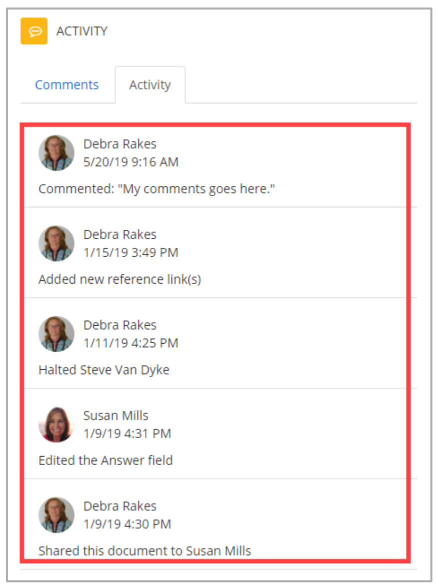
3. Your comments will be posted on the Activity Pane of the document.



4. Click the **Activity** tab. All activity performed on this document will be reported on this tab. The list will include the User's Name, Date Time of the Activity and what action was performed throughout the duration of the form type.



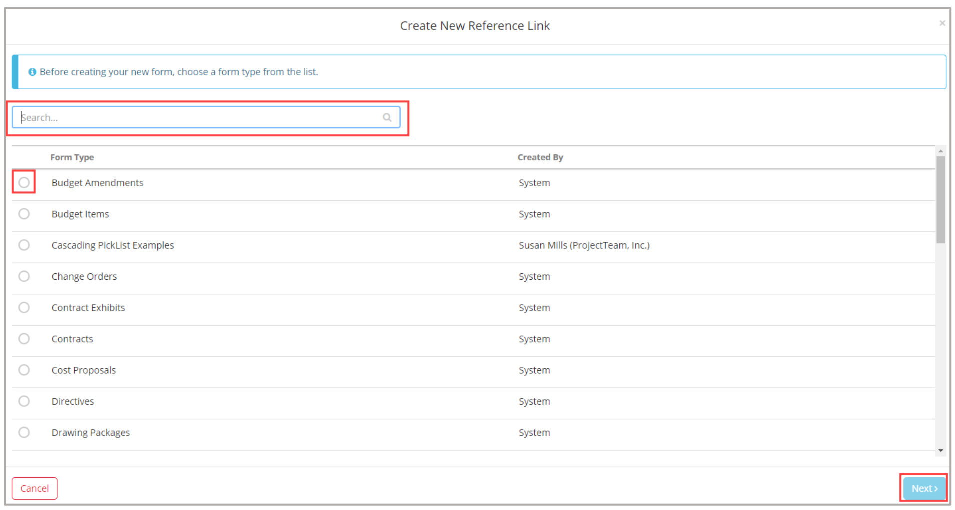
Reference Links Pane

The Reference Links Pane allows users to link multiple related form types together for ease in tracking documents that pertain to each other. Once created the link is a dual link for both form types.

Create A New Reference Link

1. To create a new reference Link, click the **New** button and then click **Create New**.

2. The **Create New Reference Link** modal window opens. Use the **search** box to find a form type and click the **radio button** beside the document name. Once the document form type is selected, click the **Next** button located on the bottom right corner of the screen.



3. The form selected in the previous step will open. Complete all *Required fields and any other fields necessary and click **Save & Share** to share the new document with other users or **Save** to simply save the record and not share with others.

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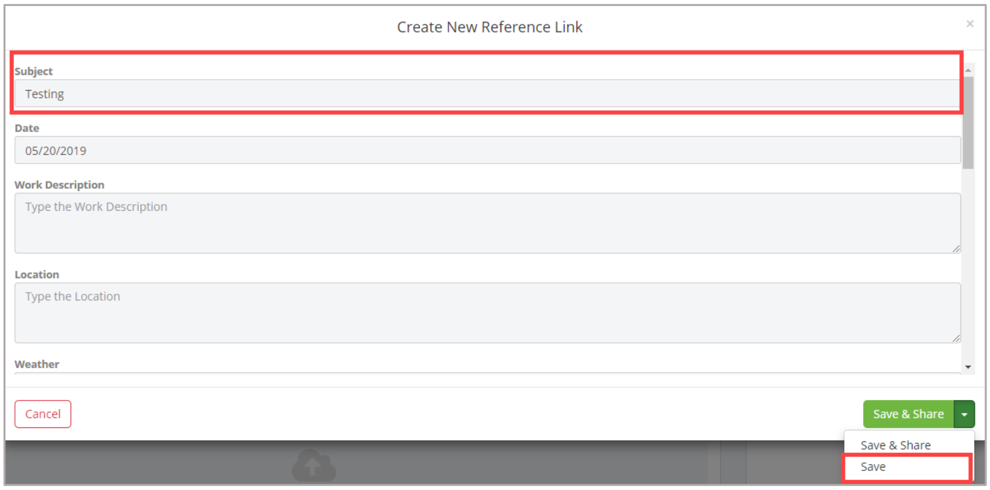
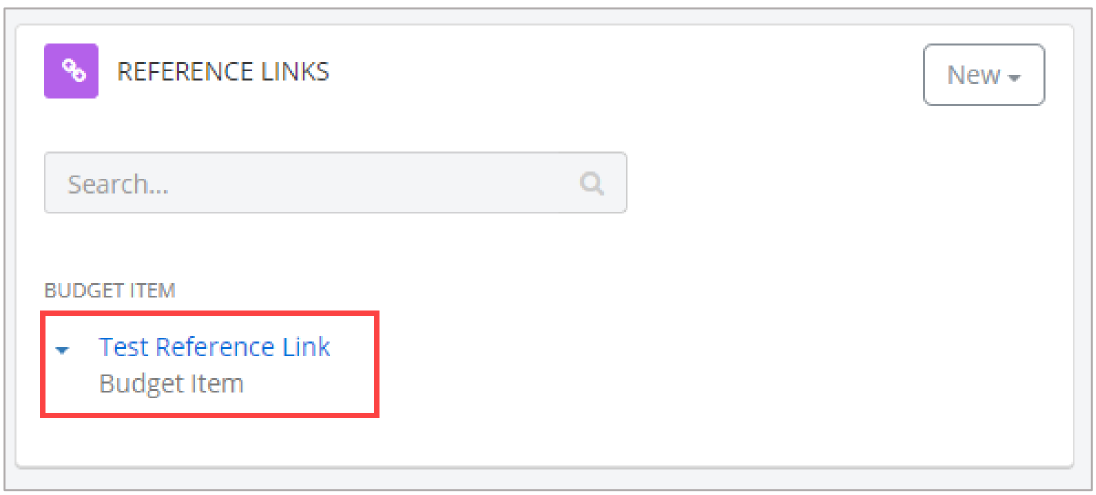
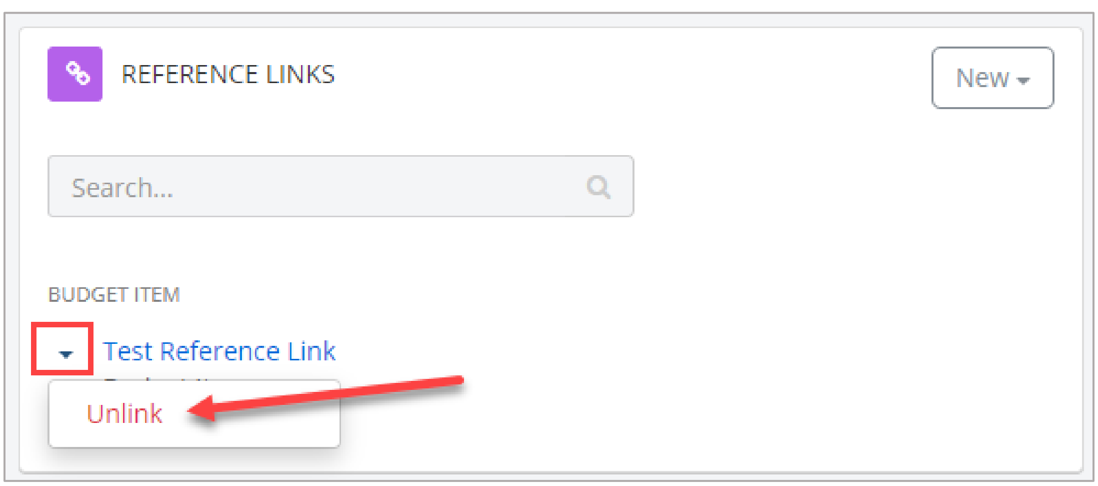


4. The linked record will be displayed as a **clickable link**.



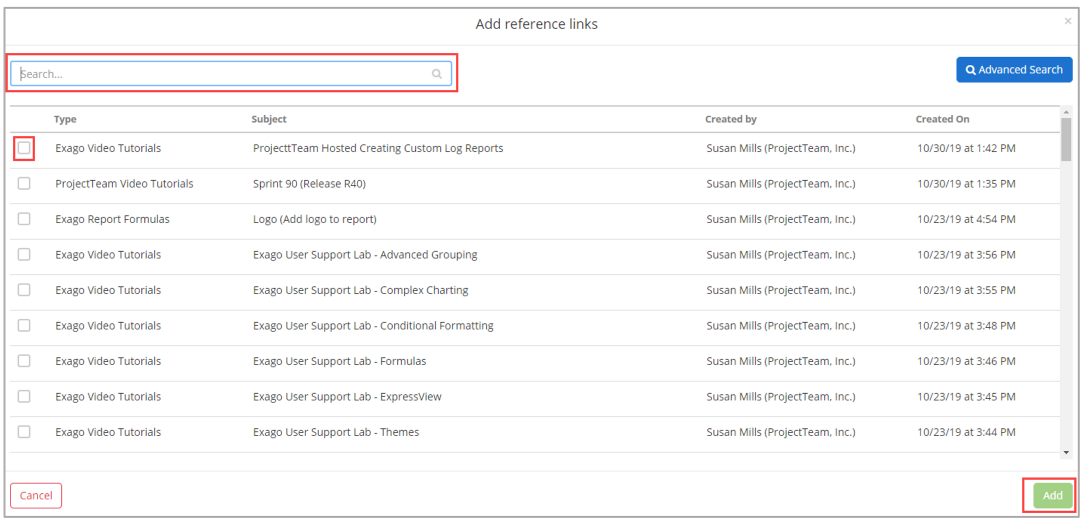
5. To unlink a Reference Link, click the **dropdown arrow** beside the clickable link and click **Unlink**.



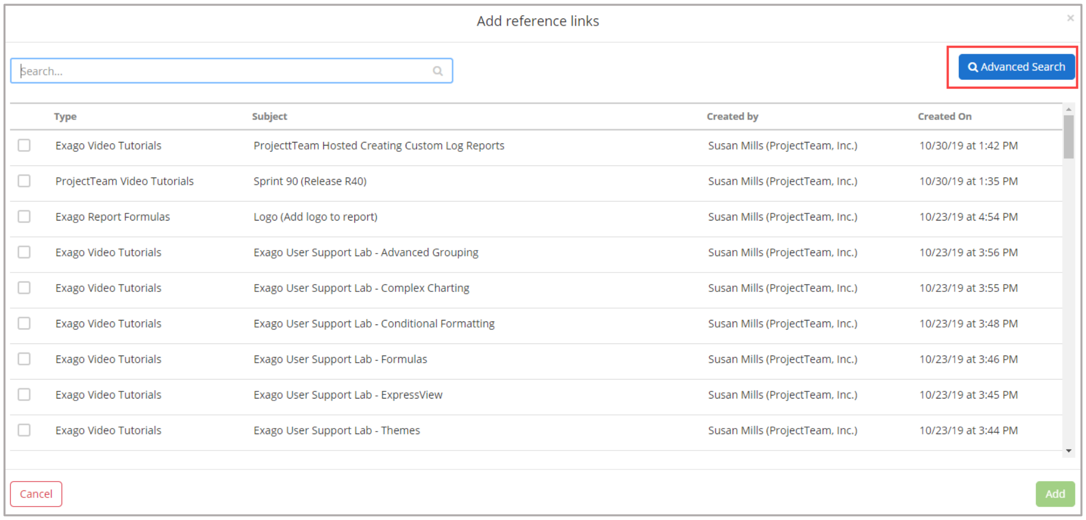
Add an Existing Reference Link

1. To add an existing document as a reference link, click the **New** button and click **Add Existing**.

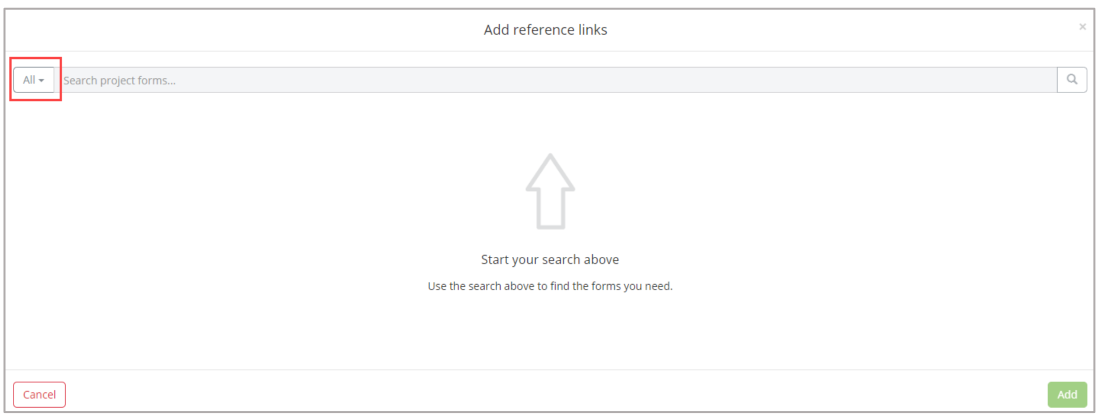
2. The Add Reference Links modal window will open. Use the **Search** feature to quickly locate a form title or use the scroll bar to manually search for a title. Once found, click the **checkbox** beside the form title to select the document and the **Add** button on the bottom of the modal window.



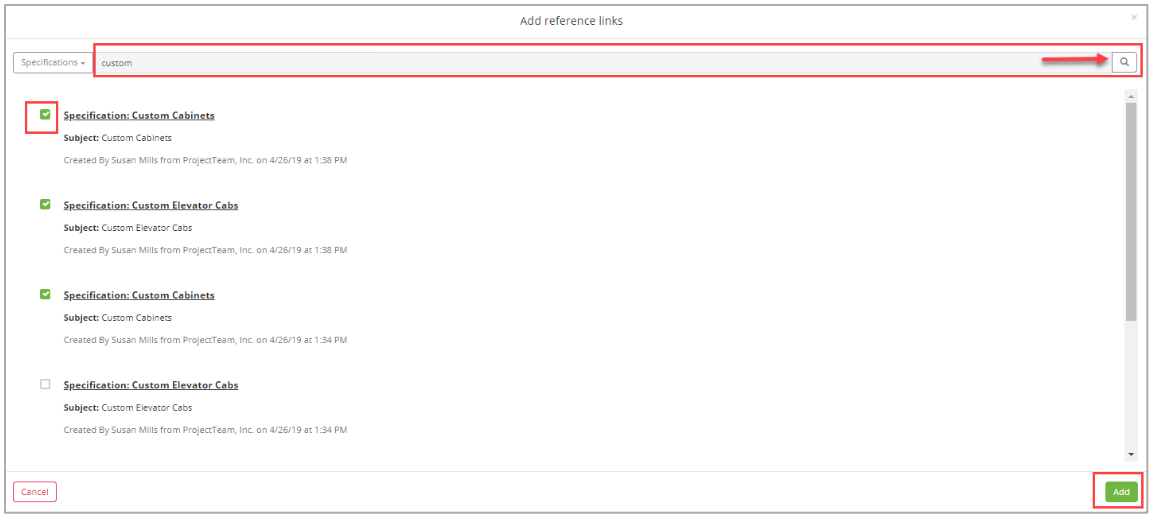
3. To filter the search by a specific form type, click the **Advanced Search** button located on the top right corner of the modal window.



4. The Advanced Search modal window will open. Click the **dropdown** to select a form type.



5. Enter the search criteria in the **search** field and press the **lookup icon** (or press the enter key on the keyboard). Click the **checkbox(es)** to select the document(s) and click the **Add** button located on the bottom of the form.



6. The selected document(s) will be displayed as a **clickable links**. Each referenced document is listed under the form type to make it easy to quickly locate the referenced item.