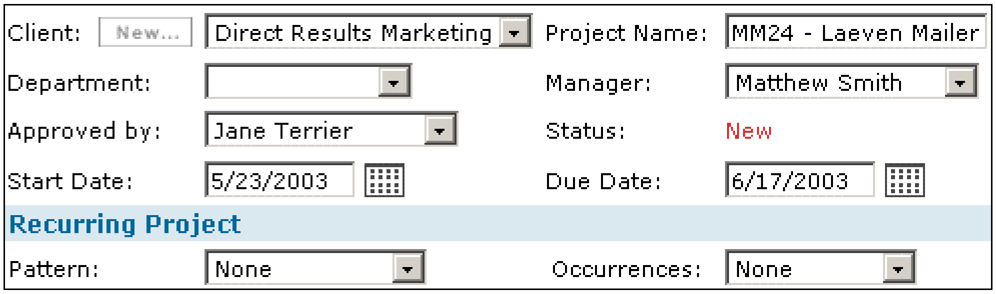
Creating a Project

1) Click on the Projects Icon on the shortcut bar and press New



2) Select an existing client or create a new client

3) Select a project name, Project Manager, and approver

4) You may also specify the optional department, start date, and end date if desired.

5) If the project is a recurring one – you may select the Pattern and Number of Occurrences

6) Press the Save button.

Your project is now saved with a status of NEW!

Adding a budget to your Project

1) Click on the Projects Icon on the shortcut bar.

2) Click on the Project you wish to open.

Client	Project
Direct Results Marketing	Mailer MM9 Old House

3) Select the Budget tab.

4) Press the Edit button.

Employee	Task	Rate	Time	!	Due
Ian Styles	Project Management	$100.00	16		7/2/2003

5) Select an employee from the list at the bottom of the screen.

6) Select a Task to assign the employee. The employees default rate for that task is filled out for you (Default rates are set in each employee’s profile). You may leave the default rate – or override it with a new rate for this project.

7) Enter the amount of time quoted for this employee.

8) Use the checkbox to specify that this task is high priority. The task will then be automatically set to the top of the employees work schedule on their dashboard.

9) Enter a due date (optional). You may enter the date manually by typing into the box, or use the handy calendar feature by clicking on the calendar icon to the right.

10) Enter some notes or a description for the employee.

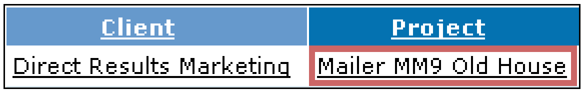
11) Press the Save button.

The task has now been added to the budget!

Adding Hard Costs to your Project

1) Click on the Projects Icon  on the shortcut bar.

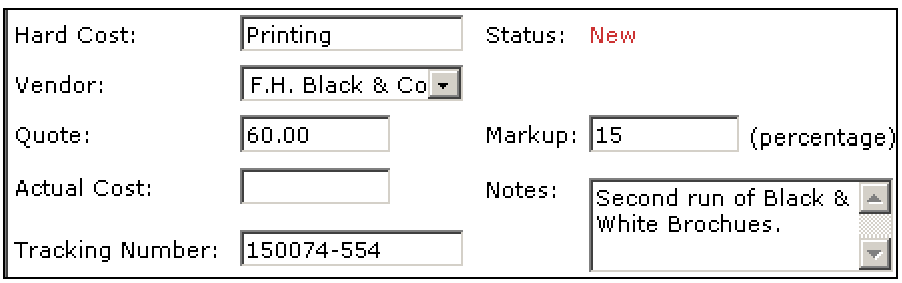
2) Click on the Project you wish to open.



3) Select the Hard Costs tab.

4) Press the Edit button.

5) Click the New button to add a new Hard Cost.



6) Enter the name of the hard cost.

7) Select the appropriate vendor.

8) Enter the quoted amount of the hard cost.

9) Enter you markup costs of the item.

   You may also enter the actual cost (if you already know it), a tracking number, and any other notes that relate to the hard cost.

10) Click the Save button.

Your new Hard Cost has just been added to the Project!

Adding Documents to your Project

1) Click on the Projects Icon  on the shortcut bar.

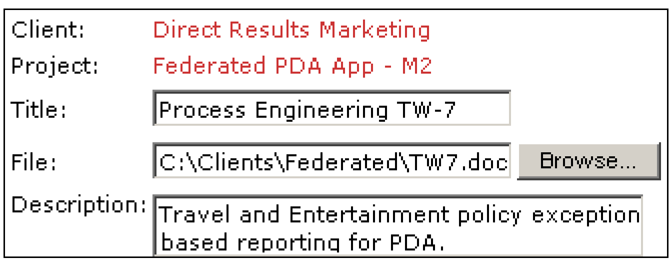
2) Click on the Project you wish to open.

Client	Project
Direct Results Marketing	Mailer MM9 Old House

3) Select the **Documents** tab.

4) Press the Edit button.

5) Click the New button to add a new Document.


Client: Direct Results Marketing
Project: Federated PDA App - M2
Title: Process Engineering TW-7
File: C:\Clients\Federated\TW7.doc Browse...
Description: Travel and Entertainment policy exception based reporting for PDA.

6) Enter the title of the document.

7) Enter a Description of the document (optional).

8) Click the browse button, navigate through your computer file system using the dialog box and select the file you wish and click OPEN.

9) Click the Save button.

Your document has not been uploaded to the Document Store!

Using the Project Journal

1) Click on the Projects Icon  on the shortcut bar.

2) Click on the Project you wish to open.

Client	Project
Direct Results Marketing	Mailer MM9 Old House

3) Select the Journal tab.

Date	User	Comments
05/08/2003	Ian Styles	We discovered that CE2002 and CE2000 ha the application for CE2002 and Palm operat
05/09/2003	Ian Styles	Budget Changed(Ryan Klann --> Research)
05/09/2003	Ian Styles	Budget Changed(Ryan Klann --> Programm
05/10/2003	Ian Styles	Beta 1 sent for review on 3/11
05/10/2003	Ian Styles	DF confirmed that we did NOT have to deve

Project Journal Entry

Type in your comments here

4) Type your comments into the Project Journal Entry area at the bottom of the screen.

5) Press the Save key.

Your Project Journal Entry has been saved!

Submitting your Project/Budget for approval

1) Click on the Projects Icon  on the shortcut bar.

2) Click on the Project you wish to open.

Client	Project
Direct Results Marketing	Mailer MM9 Old House

3) Select the Summary tab.

4) Click the Submit button.

The project is now submitted to the appropriate manager for approval. Employees may not bill against a project until it has been approved (live).

If you selected yourself as the Approving Manager and you have Self Approval rights the project's status will now be live.