



# Projects Website

## User Guide for Project Managers

### **Chapter One - Basic Information**

December 2017

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# 1 Document Management

## 1.1 Contributors

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## 1.2 Version Control

Date	Version	Author	Section	Amendment
18/08/2016	0.1	B Saul	All	First draft
26/08/2016	0.2	S Ruthven	All	Various updates
17/10/2016	0.3	S Ruthven	All	Various updates
07/11/2016	0.4	S Ruthven	9 & 10	Removing group membership and system fixes updated
14/11/2016	0.5	S Ruthven	8.8	New section: deleting documents
29/11/2016	0.6	S Ruthven	8.9	New section: cloning pages
07/02/2017	0.7	S Ruthven	5.1.1	Updated list for management visibility
28/03/2017	0.8	G Growdon	11	Links to further guidance notes added as appendix
19/05/2017	0.9	J Nicoll	All	Section number corrections and re-formatting
26/07/2017	1.0	G Growdon	All	Updated sections after PWS upgrade done by Developer
11/08/2017	1.1	G Growdon	All	Split document into sub chapters
06/12/2017	1.2	S Ruthven	All	General update

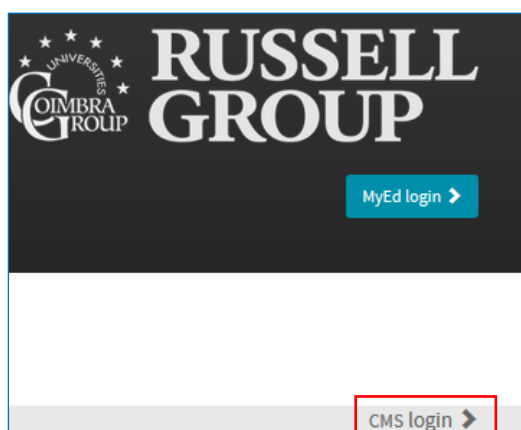
## 2 Logging into the Projects Website

The Projects Website is a public facing site, with secure sections available for users with University accounts.

For University staff, students and registered visitors the site is self-registering. However before you log in for the first time, please check that you have your email address added to the staff directory.

You can request this by emailing [maildir@ed.ac.uk](mailto:maildir@ed.ac.uk). For further details please see the University website instruction [here](#).

In order to access all of the available features you will need to log in via the 'cms login' link at the very bottom-right hand corner. This will automatically register you on the system.



If you do not wish to register on the system, or are outside of the University, then you are still welcome to browse the site, but will be unable to request projects of your own or to access project, programme or portfolio logs.

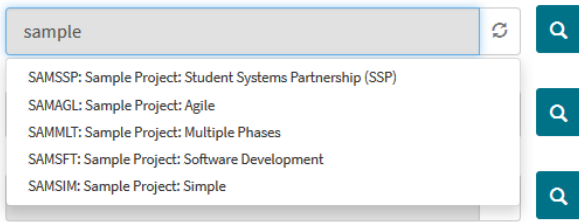
## 3 Viewing Information

From the home page you can view various projects, programmes or portfolios that are published.

### 3.1 Searching the site

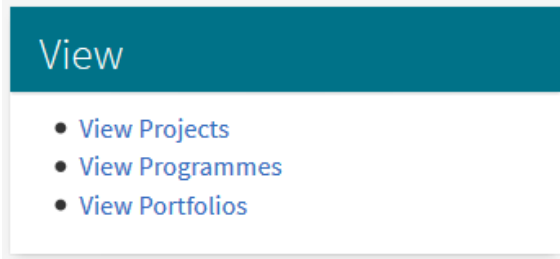
Three search boxes are stacked vertically. Each box has a light grey background and a white border. The first box contains the text 'Find Project...' followed by a small circular refresh icon and a magnifying glass icon. The second box contains the text 'Find Programme...' followed by a small circular refresh icon and a magnifying glass icon. The third box contains the text 'Find Portfolio...' followed by a small circular refresh icon and a magnifying glass icon.

Using the search boxes on the home page, you can search for specific projects, programmes or portfolios that are published within the site. Start typing any part of the name or code, if known, and the site will return a list of possible entries. Click on the one you want to view and then click on the magnifying glass icon to the right.



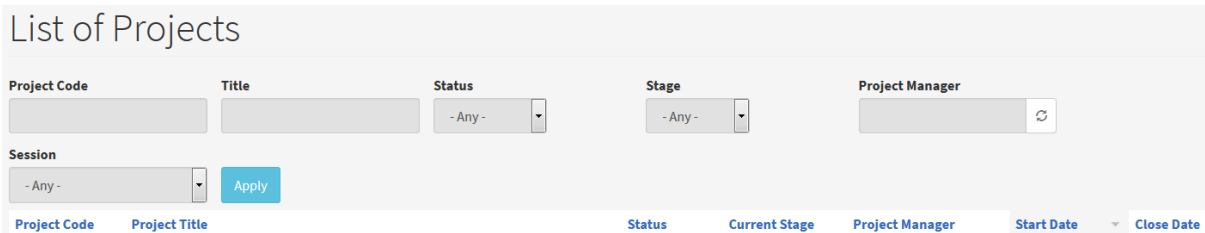
This will take you direct to the home page of the project, programme or portfolio you have chosen.

## 3.2 Viewing Projects, Programme or Portfolios by lists



### 3.2.1 View Projects

This view lists all projects. Note that not all projects may be visible depending on their status. Please see section 5 on permissions for more information.



Projects are displayed initially in start date order. The list can be re-sorted by clicking any of the column headings.

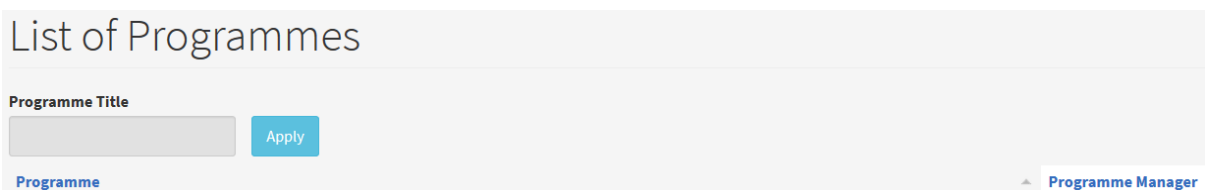
The list can also be narrowed using the various filters available. Make the necessary selection and click on 'Apply'.

To remove a search filter clear the content in the necessary field and click on 'Apply' again.

Clicking on any of the search results will take you to the project home page.

### 3.2.2 View Programmes

This view lists all programmes. Note that not all programmes may be visible depending on their status. Please see section 5 on permissions for more information.

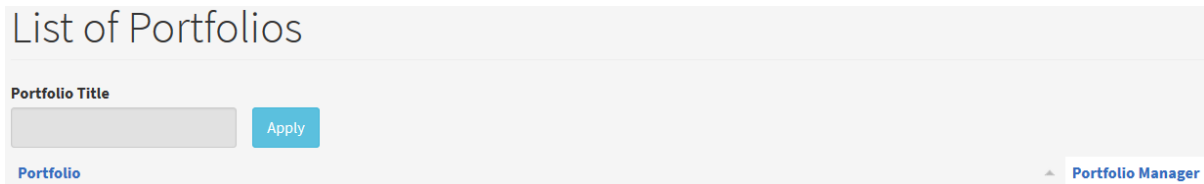


The list can be searched using full or partial titles. Enter your search text and click on 'Apply'.

Clicking on any of the search results will take you to the programme home page.

### 3.2.3 View Portfolios

This view lists all portfolios. Note that not all portfolios may be visible depending on their status. Please see section 5 on permissions for more information.



The list can be searched using full or partial titles. Enter your search text and click on 'Apply'.

Clicking on any of the search results will take you to the portfolio home page.

## 4 User Roles

Registered users can have different roles within the site. These roles are granted by the site Administrators (the Information Services Group Project Management Office).

Current roles in use are as follows:

Role	Description
<b>Anonymous user</b>	This user is not logged in or does not have a Projects Website user account. This user can see most site content but cannot see any private content or request any new items.
<b>Authenticated user</b>	This applies to the majority of users. This user is logged in to the site and has a user account. This user can see most site content and can also carry out various actions, such as requesting a new project.
<b>Programme Manager</b>	This user can create new projects with specific project codes that form part of their programmes.
<b>CMS Operative</b>	This is the site Administrator role.

## 5 Permissions

In the Projects Website, there are two main factors for determining the access to pages:

- a) If the page is published or un-published (i.e. public or private)
- b) The members of the project, programme or portfolio group where that page belongs

### 5.1 Published vs Un-published

Any page that is published is visible to all users, meaning it is publicly available and visible to all anonymous visitors to the site.

Any page that is un-published is only visible to a restricted set of authenticated users that form part of the project, programme or portfolio group (see below).

Pages can be published or un-published at any time depending on the sensitivity of the content.

Any page can be un-published – either whole projects, programmes, portfolios or individual pages contained within, as required.

Note that project, programmes and portfolio logs are always un-published. There is no option to publish these pages meaning these sections are always 'private'.

## 5.2 Group Memberships

Every project, programme and portfolio has its own individual group.

Being a member of a group means that you can see un-published (private) pages within the project, programme or portfolio.

The group members can have different roles depending on how much interaction they need to have with that item. The permissions within the group would be controlled by the Group Manager.

The roles within a group are as follows:

Group Role	Description
<b>View Only (no role selected)</b>	This offers view only access to <b>all</b> pages within the project, programme or portfolio.
<b>Editor</b>	This offers access to edit <b>all</b> pages within the project, programme or portfolio. This user cannot delete any pages.
<b>Publisher</b>	This offers access to edit and publish <b>all</b> publishable pages within the project, programme or portfolio. This user cannot delete any pages.
<b>Group Administrator</b>	This offers full access to the project, programme or portfolio. This user can: <ul style="list-style-type: none"><li>• Edit all pages</li><li>• Publish all publishable pages</li><li>• Add, update and remove group members</li></ul>

Example Project home page, showing what is visible and what is not (by default):

**PMO TEST PROJECT**

Home > Projects > PMO Test Project

**Project Info**

- Project**  
PMO Test Project
- Code**  
P0307
- Programme**  
Sample Programme - for demonstration purposes only (SAMPLE)
- Project Manager**  
Steph Ruthven
- Project Sponsor**  
Steph Ruthven
- Current Stage**  
Execute
- Status**  
In Progress
- Start Date**  
01-Nov-2017
- Close Date**  
n/a
- Overall Priority**  
Normal

**Documentation**

- Initiate
- Plan
- Execute
- Deliver
- Close
- Other
- Add content
- Export section as PDF

**Project Logs**

- Issue/Change Log
- Milestones
- Plan Log
- Risk Log
- Estimation Log
- Actions Log
- Stakeholder List
- Meetings
- Lessons Learned

This is a project used for Projects Website development testing purposes.  
Not an actual project.

This article was published on Dec 5, 2017

Blank page | Outline

**Project journal**

No entries found.  
[more news](#)

**Reporting**

Nothing to report.  
[review all](#)

**Change dashboard**

November 2017  
October 2017  
[review all](#)

**PUBLISHED CONTENT**  
(Can be un-published if required)  
Visible to ALL

**UN-PUBLISHED CONTENT**  
(No option to publish)  
Visible to Group Members only



## 6 Adding new Projects, Programmes and Portfolios

### Requests

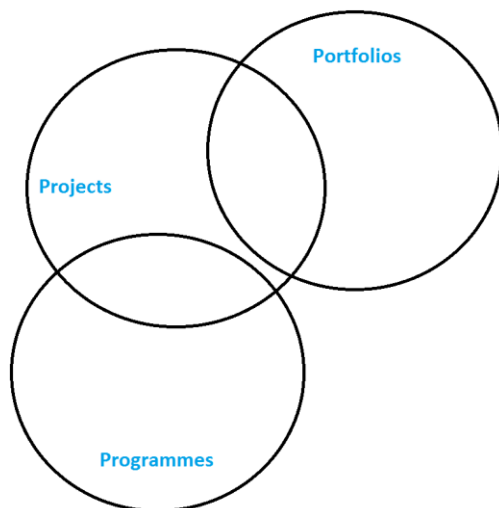
- Request a new project
- Request a new programme
- Request a new portfolio

The structure within the Projects Website is as follows:

Projects can be stand-alone items or part of a programme that will oversee delivery of a group of related projects.

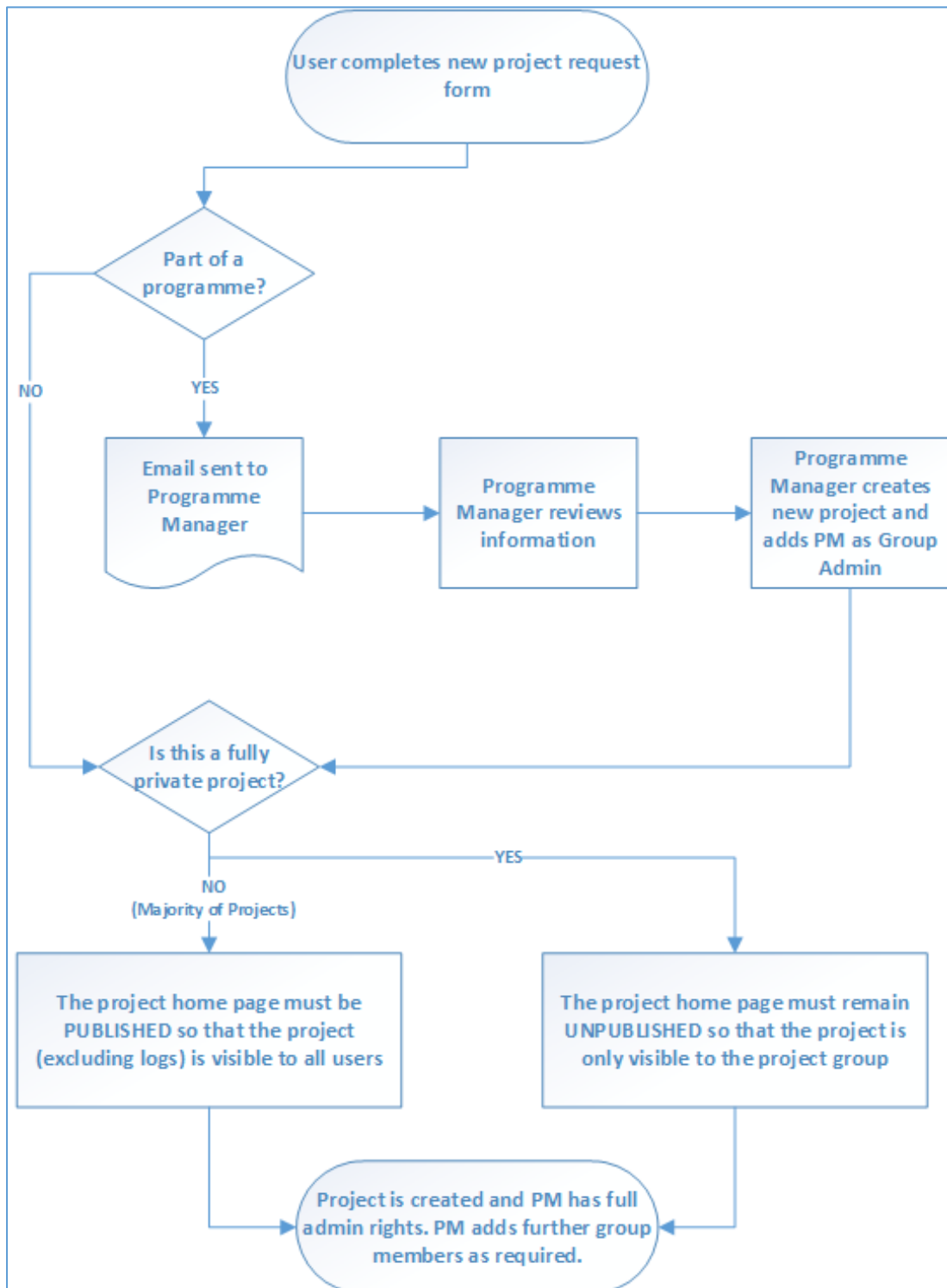
Portfolios will track a list of projects that relate to the portfolio or are of interest to the portfolio.

There is no direct link between programmes and portfolios within the site.



## 6.1 New Projects

New projects can be created via two routes, depending on whether the project is part of a programme or not:



The 'Request a new project' form can be completed as follows:

Field (* = mandatory field)	Guidance
<b>Section 1</b>	
<b>Organisational Unit*</b>	Select the organisational unit from the drop down menu that the new project relates to. This information is used for reporting.
<b>Programme</b>	<p>If your project is a stand-alone piece of work then leave 'No Value' within this field. Your project will be created immediately with a unique reference number (e.g. P0002).</p> <p>If not, select the relevant programme from the offered list and your request will then be automatically emailed to the Programme Manager. The Programme Manager will approve your request and create the project for you.</p>
<b>Project Sponsor*</b>	<p>Start typing the name and a list of registered users will appear to select from. If the person you're looking for is not on the user list you have 2 options: -</p> <ol style="list-style-type: none"> <li>1. Ask that the person logs in to the Projects Website using the 'CMS Login'. This will automatically add them to the user list.</li> <li>2. Temporarily enter your own name whilst you wait for the person to self-register, you can then amend this field at a later date.</li> </ol>
<b>Project Manager*</b>	Your name will automatically populate this field. If you're not going to be the project manager please amend this field to the correct name.
<b>Telephone*</b>	Please enter your preferred contact telephone number in case a site administrator needs to contact you regarding the creation of your new project.
<b>e-mail*</b>	Your email will automatically populate this field. If you're not going to be the project manager please amend this field to the correct email address.
<b>Select 'Next': Section 2 – Project Details</b>	
<b>Project Name*</b>	Enter the title of your project.
<b>Project Overview*</b>	Enter a brief overview of the purpose of the project. This will appear on your project homepage. It is mandatory to enter something here, but it can be edited later.
<b>Project Start*</b>	Select the start date of your project, this may be in the past or in the future.
<b>Template</b>	<p>This is a guide for documents that you may want to use in your project. The options are:</p> <ul style="list-style-type: none"> <li>• Simple Set (suitable for most general-type projects)</li> <li>• Software Set (suitable for software development)</li> </ul>

	<ul style="list-style-type: none"> <li>Agile Set (suitable for Agile projects)</li> </ul>
<b>Project Visibility*</b>	<p>Choose from:</p> <p>Public (default) - project will be visible on project lists to public and EASE users (note project content can still be protected)</p> <p>Private - project will only be visible to the project owner and users that the project manager allows access too, not visible on any public reports/lists (<b>the project home page must remain unpublished</b>)</p>
<b>Project Management Office</b>	<p>Choose from drop down menu:</p> <ul style="list-style-type: none"> <li>CSG Project Office</li> <li>ISG PMO</li> <li>Service Excellence PMO</li> </ul>
<p><i>Once you have completed these fields select 'Submit'. The flow chart above shows whether your project will be created immediately or will go through a Programme Manager approval. Note the different between a public and a private (published/un-published) project.</i></p>	

## 6.2 New Programmes

The 'Request a new programme' form can be completed as follows:

Field (* = mandatory field)	Guidance
<b>Programme Name*</b>	Enter the title of your programme.
<b>Programme Code*</b>	Enter the unique code that the programme will use. This is normally three letters. This will be used to generate the URL.
<b>Responsible Group*</b>	Select the most appropriate group from the drop down list.
<b>Business Owner*</b>	Type in the name of the person who will be responsible for the programme in the Business.
<b>Business Owner's email address*</b>	Type in the email address of the Business Owner.
<b>Programme Manager*</b>	Type in the name of the person who will be managing the programme.
<b>Programme Manager's email address*</b>	Type in the email address of the Programme Manager.
<b>Apps Division</b>	Yes / No

On selecting submit, this form will be emailed to the ISG PMO who will create the programme and email the programme manager with further information.

## 6.3 New Portfolios

The 'Request a new portfolio' form can be completed as follows:

Field (* = mandatory field)	Guidance
<b>Portfolio Title*</b>	Enter the title of your portfolio.
<b>Organisational Unit</b>	Select the organisational unit from the drop down menu that the new portfolio relates to.
<b>Brief Mission Statement*</b>	Enter a brief overview of the purpose of the project. This will appear on your portfolio homepage. It is mandatory to enter something here, but it can be edited later.
<b>Portfolio Manager*</b>	Type in the name of the person who will be managing the portfolio.
<b>Business Contact*</b>	Type in the name of the person who will be responsible for the portfolio in the Business.
<b>Portfolio Code*</b>	Enter the unique code that the portfolio will use. This is normally three letters. This will be used to generate the URL.
<b>Contact email*</b>	Type in the email address of the Portfolio Manager.

On selecting submit, this form will be emailed to the ISG PMO who will create the portfolio and email the portfolio manager with further information.

## 7 Further Information

Further information on Project Basics can be found on these sample projects:-

- SAMSIM: Sample Project, Simple
- SAMSFT: Sample Project, Software Development
- SAMAGL: Sample Project, Agile
- SAMMLT: Sample Project, Multiple Phase

See also:

Chapter 2: Managing my Project for more guidance.

Chapter 3: Best Practice, FAQ's

Managing my Programme

Managing my Portfolio

Glossary