

# edison365

## edison365 – Projects Module Admin Guide

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Presented to: edison365 Projects Module Administrators

## edison365 – Projects Module Admin Guide

## Version History

Version	Date	Author	Comments
0.1	18 Jun 2020	Jake Favell	Document created – Initial Draft
1.0	29 Sep 2020	Paul Mather	Updates and Released
1.1	12 Feb 2021	Jake Favell	February Updates including: Project Stages, Dynamic Buttons, New Reporting Experience at Global and Type Level, and Customer Info. Updated Role Profiles to accommodate Project Reviewers, Updated Installation to accommodate the Customer Info, Updated Fields to accommodate Calculated Field Types

## Contents

1	Introduction .....	4
2	Installation .....	5
3	Administrator's Console.....	6
4	Database Configuration.....	7
5	Global Users.....	8
5.1	USER PROFILES .....	9
6	Fields .....	10
7	Tables .....	12
8	Project Buttons .....	16
9	Forms.....	18
10	Types .....	28
11	News .....	30
12	Theme .....	30
13	Notifications .....	32
14	Projects.....	33
15	Product Links - Business Case Integration.....	34
16	Teams .....	36
17	Yammer.....	37
18	Reports .....	37
19	Customer Info.....	37

## 1 Introduction

This document provides instructions for managing the edison365 application projects module and covers administrative tasks related to application configuration for administrators.

The audience for this document is the edison365 Application: Projects Module Administrators.

## 2 Installation

edison365 projects module requires two prerequisites as detailed in the product description document:

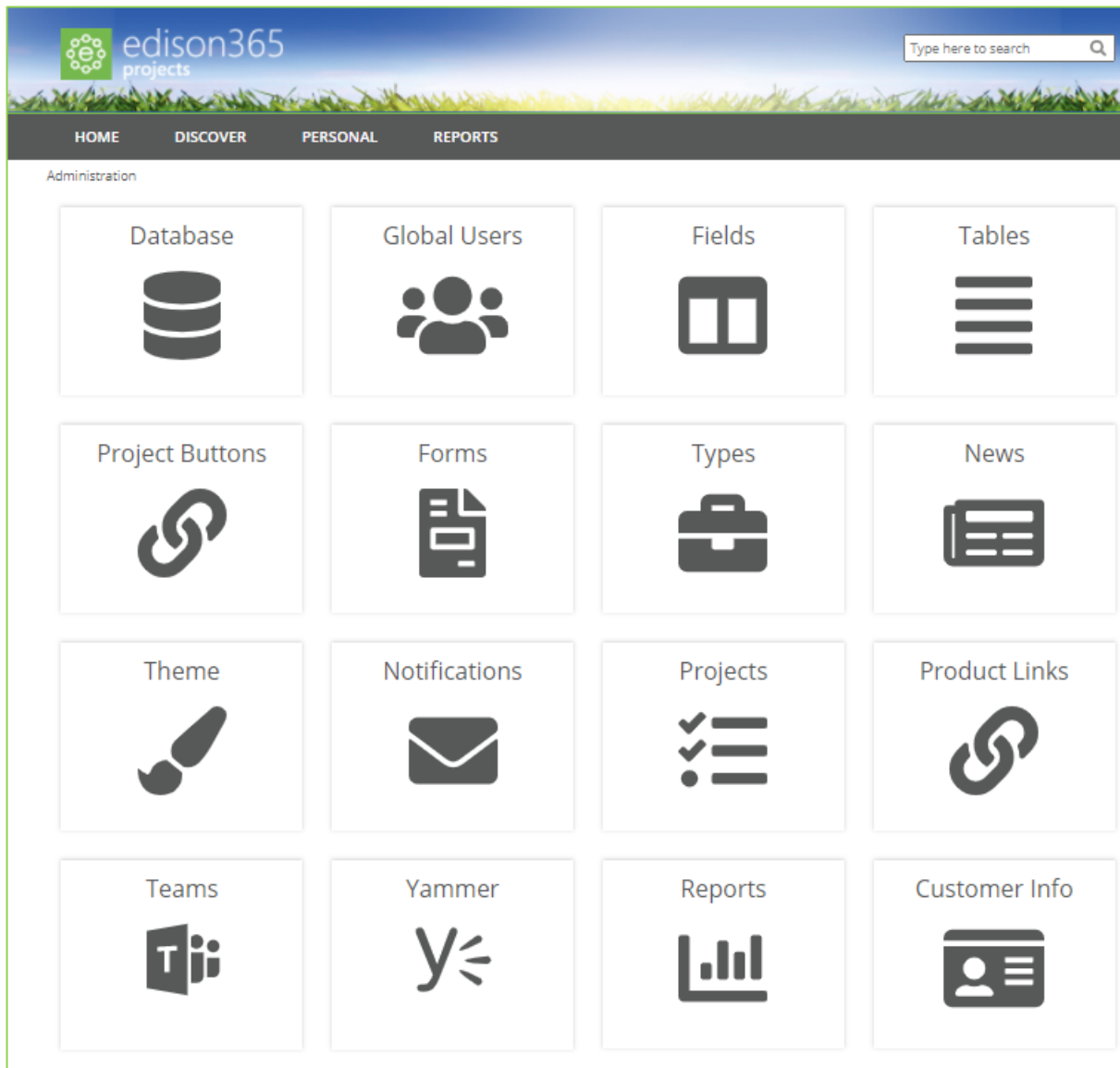
- Azure SQL Database
  - At least S1 tier but the database usage should be monitored and scaled as required
- A SharePoint Online Modern Team Site Collection to deploy the application to

The user installing the application on the new site collection will require Site Collection Administrator privileges as they will be the only users who have access to the edison365 projects module initially. This user accessing the application for the first time will be advised about SharePoint artefacts that will be deployed to the underlying SharePoint Online site collection to support edison365 projects module.

Once the Application is installed and the Admin Console is displayed the edison365 Support Team will walk you through the Customer Info screen. This will help capture information on your business and to capture information from edison365 to provide contact information for Support and Technical help from edison365.

## 3 Administrator's Console

The Administrator's Console is accessed via the cog icon in the top right corner next to the user profile. The Admin cog navigates to the admin home page. Below is a screenshot of the edison365 projects module admin homepage.



## 4 Database Configuration

Before the Projects application can be used an empty Azure SQL database must be assigned. To do this ensure a valid Server Address, Port, Database Name, Database Account, and Password is entered. Should any of the database configuration be invalid the database updates will not save or updated.

The screenshot shows the 'Administration > Database' page in the edison365 projects application. At the top, there is a search bar and navigation tabs for HOME, DISCOVER, PERSONAL, and REPORTS. The main content area is titled 'edison365projects Database Status' and contains a message: 'There are database updates available for your database to enable new features in edison365projects as outlined in the release notes. Before upgrading the database, please arrange an outage for the application so that your SQL Admins can take a full database backup before proceeding. Once the users are not using the application and you confirmed that you have a full SQL database backup, click Upgrade to apply the database schema updates. To help you plan the outage window, the upgrade of the database should take no longer than 30 minutes to complete.' Below this message is a blue 'Upgrade' button. The second section is 'edison365projects Database Connection Settings', which includes input fields for Server Address, Server Port, Database Name, Database Account, and Password. There is also a checkbox for 'Active Directory' and a sub-option 'Use Active Directory Password Authentication'. A blue 'Save' button is located at the bottom of this section.

Database schemas can occasionally be updated should a new schema be available. To update them click on the Upgrade button but ensure the actions outlined on the database status page are performed first. Once clicked a background job will take place on your database to update the schema to add any additional SQL objects such as new tables or columns in existing tables. This can take some time so it will be best to carry this out during a time that will not impact users as per the summary text on the database status page.

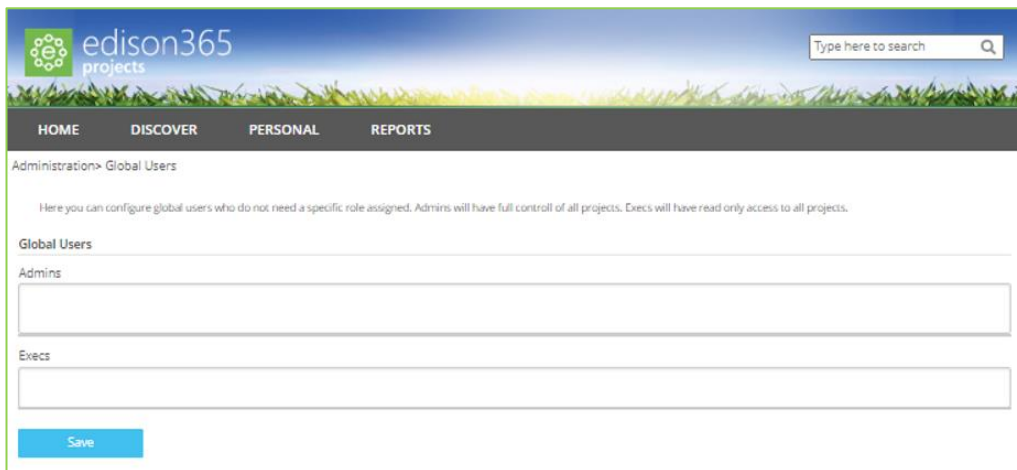
As always with any database updates it is essential to ensure a backup of the database is available before the database is updated.

This screenshot shows the same 'Administration > Database' page, but the 'edison365projects Database Status' section now displays the message: 'Your database schema is up to date.' The 'edison365projects Database Connection Settings' section remains the same, with all input fields and the 'Save' button visible. The navigation tabs now include HOME, DISCOVER, PERSONAL, and REPORTS.

Once the schema is updated the Database Status section will update to show the schema is up to date.

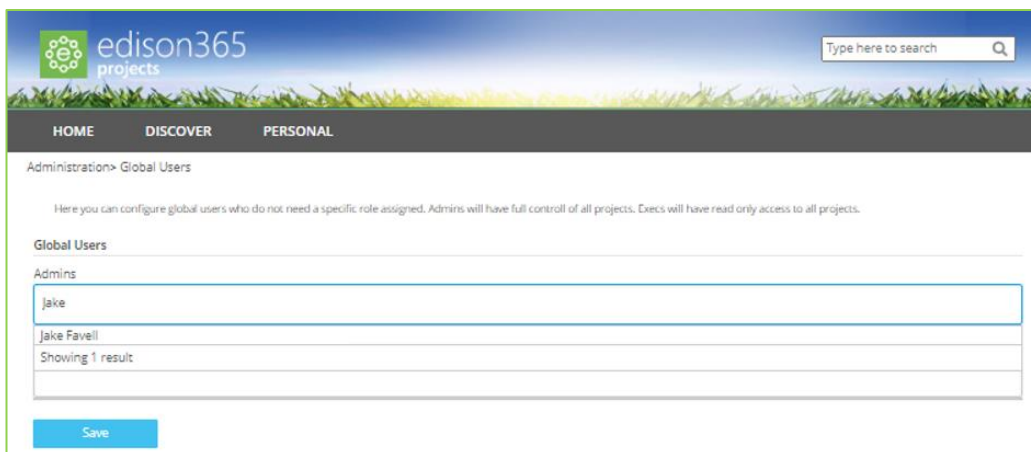
## 5 Global Users

This area is used to assign Admin and Exec roles to users for the Projects application.



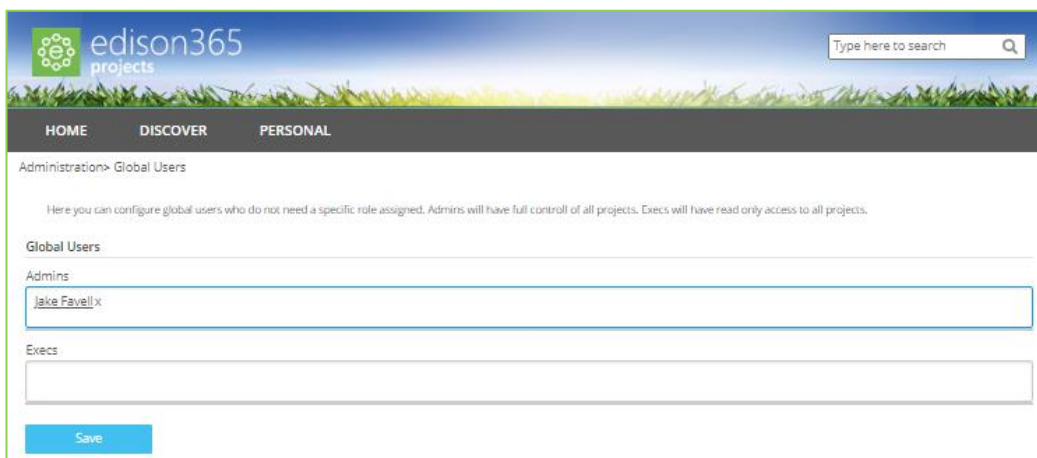
The screenshot shows the Edison365 Projects administration interface. At the top, there is a search bar with the text "Type here to search" and a magnifying glass icon. Below the search bar is a navigation menu with "HOME", "DISCOVER", "PERSONAL", and "REPORTS". The main content area is titled "Administration > Global Users" and contains a descriptive paragraph: "Here you can configure global users who do not need a specific role assigned. Admins will have full control of all projects. Execs will have read only access to all projects." Below this, there are two input fields labeled "Admins" and "Execs", both of which are currently empty. A blue "Save" button is located at the bottom left of the form area.

To add a user, enter a name and a search will be carried out using the name entered and all possible matches will be displayed.



This screenshot shows the same configuration page as the previous one, but with the "Admins" input field containing the text "jake". Below the input field, a search results list is displayed, showing "Jake Favell" as the only match. Below the list, it says "Showing 1 result". The "Execs" input field remains empty. The "Save" button is still visible at the bottom left.

When the name from the search results is selected the full name will be added to the Admin/Execs boxes. When the user is added to the box click on the Save button and the user will be added to the role.



This screenshot shows the configuration page with "jake Favell" entered in the "Admins" input field. The search results list is no longer visible. The "Execs" input field is still empty. The "Save" button is at the bottom left.

Admins have full access to edison365 projects module for configuration and data, Execs have read only access to all projects and no access to the configuration.



## 5.1 USER PROFILES

When assigned to a Project role that user will be granted Read permissions on the SharePoint site collection and the role(s) given when setting up each type will be used when viewing the application.

### edison365 Projects Administrators (Admin Global User)

Members of this group can access the edison365 Projects administrator settings. These users have full control across all functionalities.

### edison365 Project Owners

Members of this group can create Projects for Project types they are set as a possible Owner. The assigned project owners can also edit the project where that user is the assigned project owner.

### edison365 Process Managers

Members of this group can fully edit any project for the Project Types they are assigned to. They can edit a project, create versions, and assign readers.

### edison365 Project Readers

Members of this group can view a Project in full for the Project Types they are assigned to as a reader.

### edison365 Project Viewers (Exec Global User)

Members of this group can view all Projects in a read only format for all Project Types.

### Edison365 Project Reviewers

Members of this group can review a project if it is currently in a Review stage. They can View and Review a Project. They can also Edit a Project but only when configured on a Stage at Type Level.

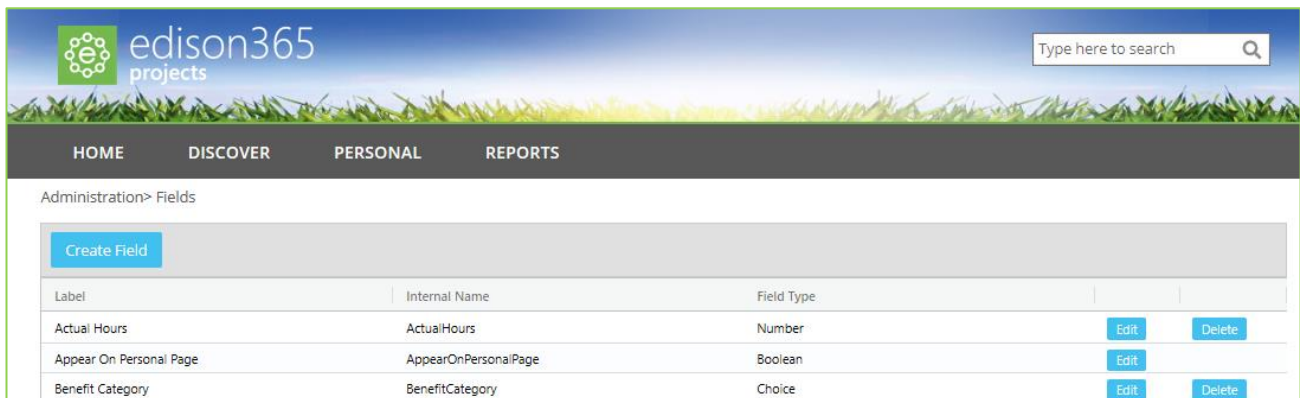
Below is a visual guide to show each role and the functionalities that role can carry out.

Role	Functionalities																		
	Create Project	Edit Project	View Project	Delete Project	Assign Owners	Delete Owners	Assign Managers	Delete Managers	Change Stage	Review Projects	Create Version	Attach Documents	View Documents	Delete Documents	View History	View Comments	Link to a Team	Apply Readers	Admin Console
Global Admin	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Project Type Manager		X	X		X	X	X	X			X	X	X	X	X	X	X	X	
Project Type Owners	X		X	X	X	X					X	X	X	X	X	X	X	X	
Project Type Readers			X										X		X	X			
Project Owners	X	X	X	X	X	X					X		X		X	X		X	
Project Manager		X	X		X	X	X	X	X		X	X	X	X	X	X	X	X	
Project Reviewers		X	X							X									
Project Readers			X										X		X	X			

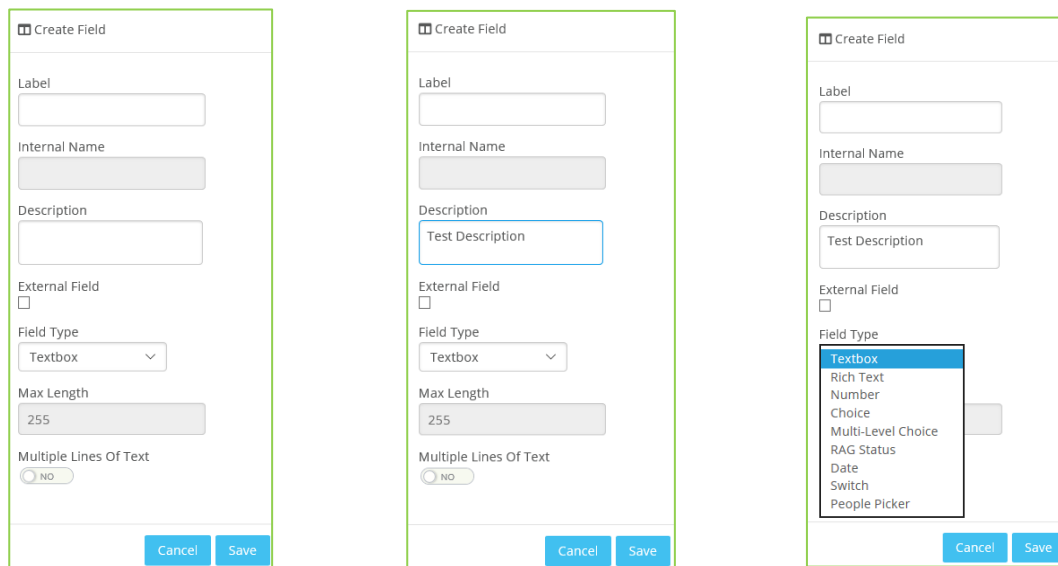
This permission matrix can be used to determine the roles required.

## 6 Fields

This area is where all custom fields can be added and managed.



To create a new field, click on the Create Field button and the following window will be opened.



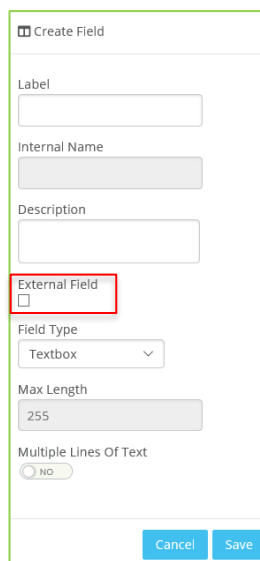
Once the window is opened simply enter the name for the field in the Label field which will automatically assign the Internal Name field which cannot be changed. The Field Type can also be changed. See image 3 for the different field types. Depending on the field type selected additional settings may be added or removed. Below is a summary of the fields and field settings:

- Textbox – Max Length (numeric), and Multiple Lines of Text (Yes/No switch).
- Rich Text – None.
- Number – Format (Number, Percentage, or Currency), Decimal Places (Drop down values 0 – 5), Min Value (numeric text box), Max Value (numeric text box).
- Choice – Text box to enter choices for the field.
- Multi-Level Choice: Choice field with multiple layers. Can be set as single or multi select.
- RAG Status: Fully customisable visual indication of progress.
- Date – None.
- Switch – On Label (text box), Off Label (text box), Default Value (on/off switch).
- People Picker – Multi Select (Yes/No switch).
- URL – None.
- Calculated – Any Text and Number fields can be added and when values are added to the fields used the calculation will take place. If a value is not set for all fields the field will display 'error'

To Edit a field simply click on the Edit button next to the relevant field which will open a window like when a field is created. However, the only difference is all the data that was set when the field was created is displayed. Clicking the Delete button will display a confirmation message and clicking Yes will delete the field.

Some fields are automatically generated in edison365 Projects to support a Project when created. These are known as System Fields. System Fields can be edited to support full customisation so you can configure them based on your needs. The properties can also be changed for certain fields. However, there are occasions the properties cannot be changed. If so, these config values will be greyed out. System fields cannot be deleted so the Delete button is removed from these fields.

Projects from Project Online can also be surfaced in edison365 Projects if configured using edison365 DataStore. Part of the support for this is to allow a field to be set as an External Field. This can be configured when creating the field by setting the checkbox to the 'External Field button.



The image shows a 'Create Field' dialog box with the following fields and options:

- Label:
- Internal Name:
- Description:
- External Field:  (highlighted with a red box)
- Field Type:
- Max Length:
- Multiple Lines Of Text:

Buttons: Cancel, Save

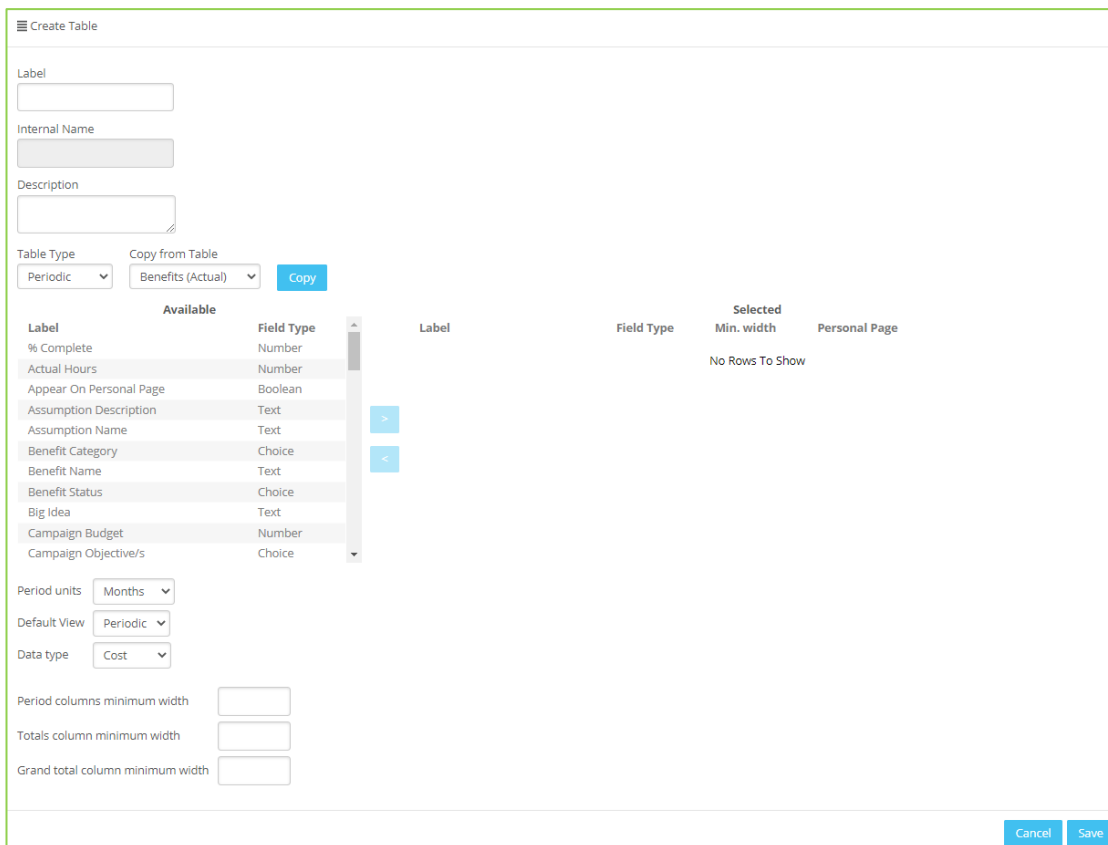
Once a field has been created the External Field setting cannot be changed. When a field is set as an External Field this will enable the data for the field from Project Online to be surfaced in edison365 Projects as read-only.

## 7 Tables

This area is where all Tables are created. The tables created will be available to be used when creating a form. Below are example tables created.



To create a table, click on the Create Table button and the following window will be displayed.

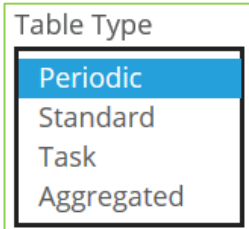


Click on the Label field and enter a name for the table. Like the Fields section the Internal Name will be set as the name entered minus any spaces automatically.

Existing tables can be copied so the configuration set can be used for other tables. To do this set the name for the new table and click on the Copy from Table dropdown and select a table then click the copy button. The tables displayed in the dropdown will be dependent on the Table Type used. If a Periodic type is selected only Periodic tables will be displayed in the Copy from Table dropdown. Once

the copy button is clicked all the rows and configuration such as row widths from the original table will be added to the new table.

If you add text in the Description field, it will be add a new icon to the right of the table and when clicked the text entered will be displayed. This can be used to support why the table is used and what data is required



Clicking on the Table Type drop down will display a list of available table types. Each table type will display the same fields except Aggregated Totals which will display all Periodic tables. Below is a list of additional fields for each Table Type

- Periodic – None
  - This type of table is used when time phased data is required with the table items
- Standard – None
  - This type of table is used when a list type table is required
- Task – This table will include the default system fields required on the Task table
  - This type of table is used to capture tasks, this includes a timeline view with a Gantt
- Aggregated Totals – Calculated Rows
  - This type of table enables data from periodic tables to be calculated

Once the Name and Table Type has been set the next option to set is assign the fields for the table. If you click on a field in the Available pane a button with an arrow pointing right is displayed. Click on this button and the field selected will be moved to the Selected pane.

For periodic tables you can include more specific configuration:

- Period Units – The time phasing the table will gather data on. This can be Monthly, Quarterly and Yearly.
- Default View – When first loaded the table will be displayed in the Periodic or Details based on what is selected.
- Data Type – This is to specify the type of data the table is used for. You can select Cost, Effort, or Materials. Selecting effort will allow additional configuration for Hours, Days, or FTE's.

Available		Selected			
Field Name	Field Type	Label	Field Type	Min. width	Personal Page
Benefit Category	Choice	Unique ID	Number		Read Only
Benefit Name	Text	Assumption Name	Text		Read Only
Benefit Status	Choice	Assumption Description	Text		Read Only
Big Idea	Text				
Campaign Budget	Number				
Campaign Objective/s	Choice				
Campaign Performance	Choice				
Challenge	Rich Text				
Channel Action Type	Boolean				
Channels	Choice				
Client Name	Text				
Content Description	Text				

To remove a field, click on the field to remove on the Selected pane which will highlight the button with the left arrow. Click on the button and the field will be moved back to the available pane.

The selected fields order can be updated by using the square drag handle to the left of the field name, use this to drag the field up or down as required.

Each column added to a table can have a specific width set. To do this enter a value (in pixels) in the Min. width field for each column. Once a minimum width is set for a column, ensure to click off of the current row onto another row to commit the change. For Periodic and Aggregated tables, the totals columns can also have a minimum width set. When selected the following fields are displayed.

Period columns minimum width	<input type="text"/>
Totals column minimum width	<input type="text"/>
Grand total column minimum width	<input type="text"/>

Standard tables can also have a board view defined, the table will need to have 3 columns / fields added:

- A choice field
- The default "Owner" field
- The "Appear on Person Page" field

Table Type: Standard | Copy from Table: Assumptions | Copy

Available	Field Type	Label	Field Type	Selected Min. width	Personal Page
Solution	Text	Name	Text		Read Only
Stakeholders	People Picker	Success Type	Choice		Read Only
Start Date	Date	Owner	People Picker		Read Only
Strategic Alignment	Choice	Appear On Personal Page	Boolean		Read Only
Success - Lower Boundary	Number				
Success - Stretch	Number				
Success - Target	Number				
Success Description	Text				
Success Metric	Choice				
Unique ID	Number				
Unit Benefit Value	Number				
Unit Problem Value	Number				

Enable Board View:   
 Board column field: None Selected  
 Column Order:   
 Work Item title field: None Selected  
 Optional display field 1: None Selected  
 Optional display field 2: None Selected

The Board view can then be enabled once the choice field has been set in the “Board column field” option and the “Work Item title field” has been set:

Available	Field Type	Label	Field Type	Selected Min. width	Personal Page
Solution	Text	Name	Text		Read Only
Stakeholders	People Picker	Success Type	Choice		Read Only
Start Date	Date	Owner	People Picker		Read Only
Strategic Alignment	Choice	Appear On Personal Page	Boolean		Read Only
Success - Lower Boundary	Number				
Success - Stretch	Number				
Success - Target	Number				
Success Description	Text				
Success Metric	Choice				
Unique ID	Number				
Unit Benefit Value	Number				
Unit Problem Value	Number				

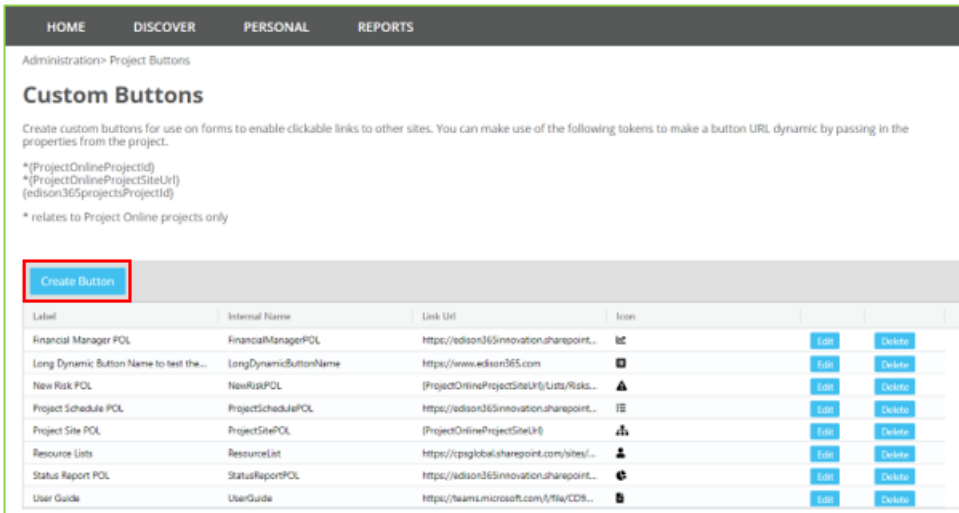
Enable Board View:   
 Board column field: Success Type  
 Column Order:   
 Work Item title field: Name  
 Optional display field 1: None Selected  
 Optional display field 2: None Selected

The table will then have a Board view option on the project. Table items can also be pushed to the table row Owners personal page using by setting the “Appear on personal page” to Yes for that table row item. The column setting “Personal Page” can be used to control what fields the table row owner can view or edit:

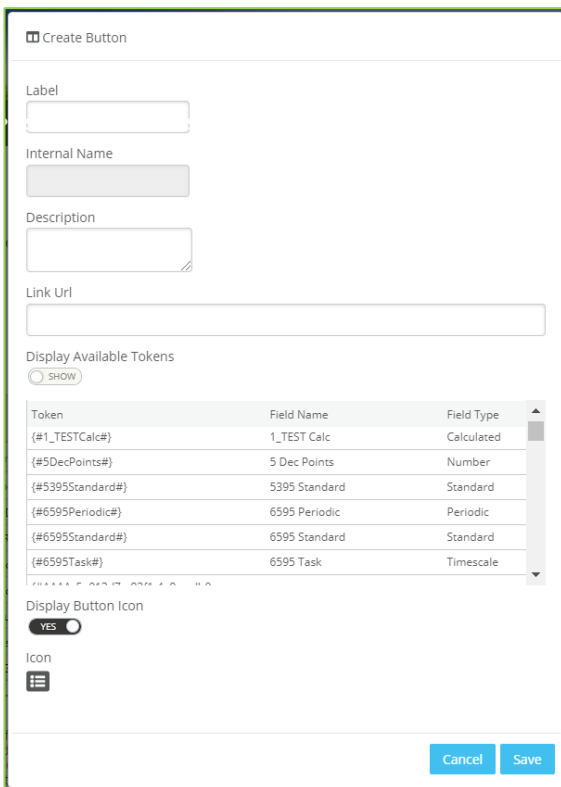
Label	Field Type	Selected Min. width	Personal Page
Name	Text		Read Only
Success Type	Choice		Read Only
Owner	People Picker		Editable
Appear On Personal Page	Boolean		Hidden

## 8 Project Buttons

The Project Buttons is where you can create buttons that can be added to a Form which when clicked by a user will open a URL in a new tab. These can be used to allow an external page to be accessed directly from the Project. The buttons will require a name, URL, and an optional icon.



To Create a button, click on the 'Create Button' button which will open the following window.



The details entered in the Label field will be displayed as the Button Name which will also automatically set the Internal Name in the same way when a field or table is created. If you include a Description this will be included as a tooltip when the button is added to a form. The final thing to configure the button is to include the URL for the button to use.



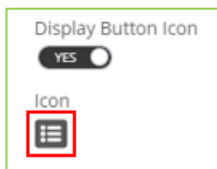
If your edison365 Projects instance is linked to an instance of edison365 Project Online DataStore and PWA is configured a set of tokens will be included to use which will allow you to automatically include the links from PWA. If an external project is created and a button uses the tokens when clicked the external project will be opened.

These will be available at the top of the list of Tokens. To view the tokens ensure the switch for 'Display Available Tokens' is set to Show.

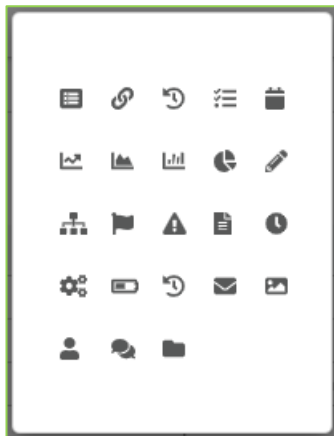
Token	Field Name	Field Type
{edison365projectsProjectId}		Internal Token
{ProjectOnlineProjectId}		Internal Token
{ProjectOnlineProjectSiteUrl}		Internal Token
{#TaskPercentageComplete#}	% Complete	Number

The remaining tokens are the current field set configured in your edison365 Projects instance.

The final optional configuration is the Icon to display on a button. Before an Icon can be selected ensure the Display Button Icon switch is set to Yes which will display an icon. To change the icon click on the icon displayed



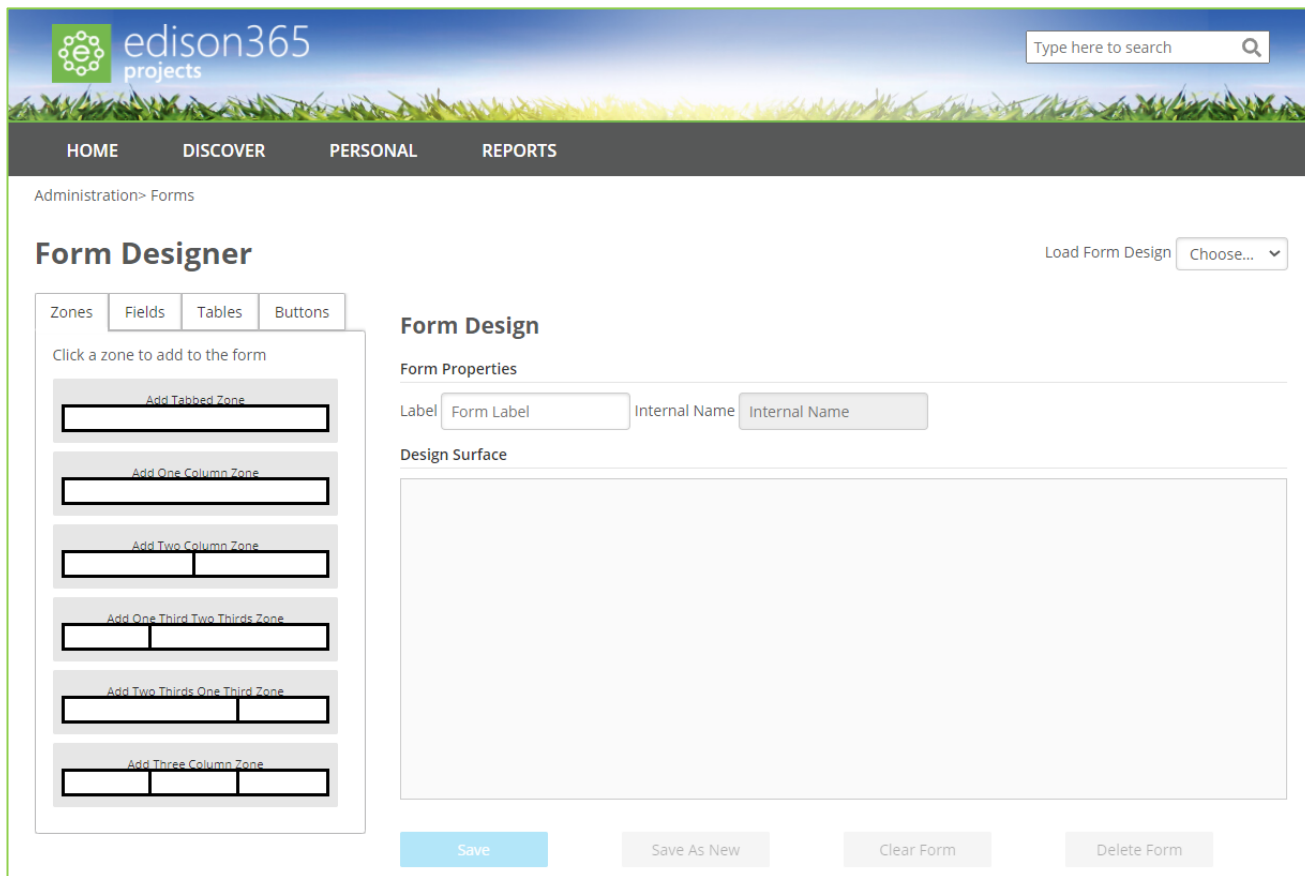
Once clicked the following modal will be displayed where you can select a new icon.



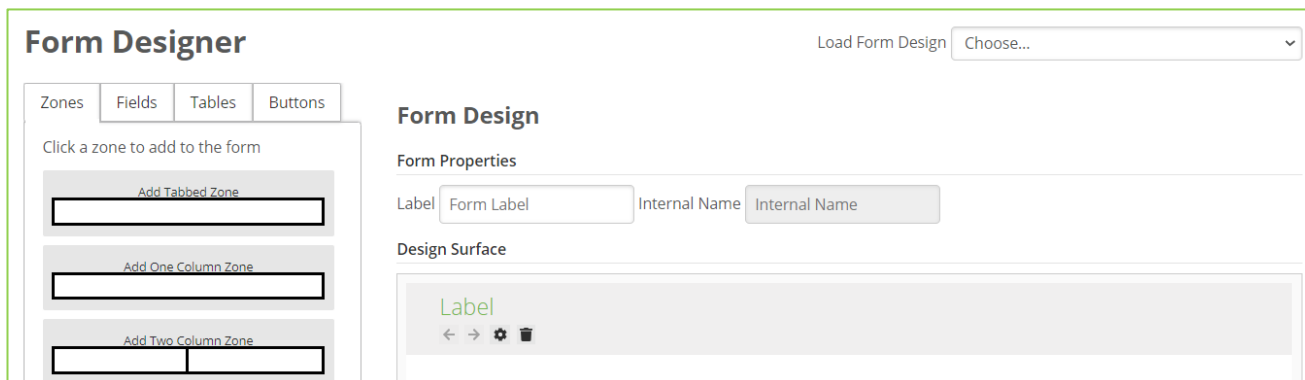
Click on the Icon to use which will close the modal and the new icon will be displayed. Once the configuration is completed click the Save button which will add the new button to the Grid and is now available to be added to a Form. Please note a button cannot be added to a Table.

## 9 Forms

edison365 Projects allows a form template to be created which can be used across all Project types. The form designer used to create a form is broken down in 4 sections: Zones, Fields, Tables, and Buttons.



You can include tabs to a Form to allow the Project to be broken down in sections. You do not have to add any tabs to create a form, but it is down to your business requirements. If you click on the Add Tabbed Zone option in the Zones section, the following is displayed. A maximum of 8 tabs can be included. If a tab is added it will be displayed as follows:



To change the name of a tab click on the cog icon under 'label' which will open the Tab Settings and enter the desired name for the tab.

If a tab is no longer needed simply click on the bin icon. Any fields added will also be removed from the form.

If multiple tabs have been added to a Form, they can be rearranged by clicking the right and left arrows.

Before any fields and tables can be added at least 1 zone has to be added to the Form Designer. All zones must have at least 1 field / table added, empty zones are not supported.

The zones are broken down in 5 different formats:

- One Column Zone
- Two Column Zone
- One Third Two Thirds Zone
- Two Thirds One Third Zone
- Three Column Zone

When a zone is selected it will be displayed in the Design Surface in a blank format.

### Form Design

**Form Properties**

Label  Internal Name

**Design Surface**

↑ ↓ 🗑️

The zone order can be changed using the up / down arrows in the zone heading. Once all the Zones required have been added the next thing to do is to add any fields and/or tables to the zones added. Click on the Fields tab on the Form Designer to display all the fields created in the Fields section. These are broken down by the field type (Boolean, Choice, Date, Multi-Level Choice, Number, People Picker, Project Online (if configured) Rich Text, System, Text, or URL).

### Form Designer

Zones

Fields

Tables

Buttons

Drag fields onto a zone

**Boolean**

**Calculated**

**Choice**

Approval - Product Approved to sell and supply  
Benefit Category  
Benefit Status  
Change Status

### Form Designer

Zones

Fields

Tables

Buttons

Drag tables onto a zone

**Aggregated**

Aggregated Benefits  
Investment Appraisal

**Periodic**

Benefits (Actual)  
Benefits (Planned)  
Costs  
Costs Monthly  
Costs Quarterly  
Costs Yearly  
Financial Benefits  
Financial Disbenefits

### Form Designer

Zones

Fields

Tables

Buttons

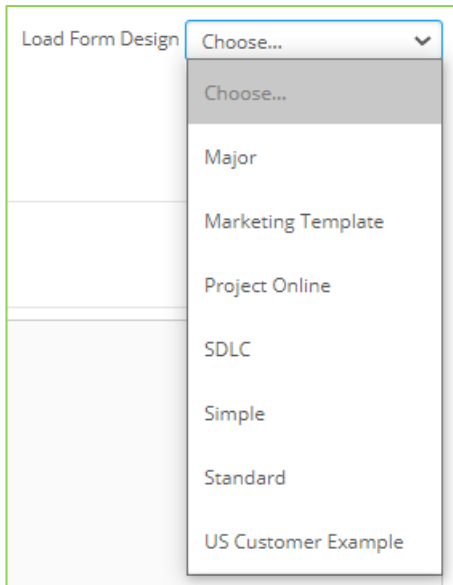
Drag buttons onto a zone

Financial Manager POL  
Long Dynamic Button Name to test the UI display  
New Risk POL  
Project Schedule POL  
Project Site POL  
Resource Lists  
Status Report POL  
User Guide

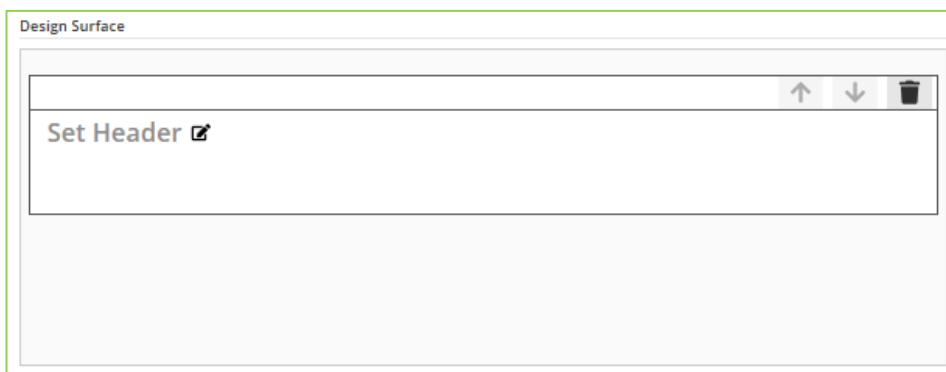
To add a field or a table to a zone drag and drop the field or table to a zone. Once a field or table is added it cannot be added to another zone on the same form.

Once the zones, fields, and tables have been added to the Design Surface a name will be needed for the form. To add a name, click on the Label field above the Design Surface area and enter a name. Once added the Internal Name field will be automatically populated with the name entered minus any spaces.

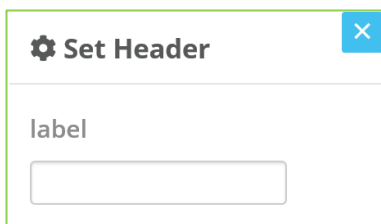
Once saved a form can be accessed in the form designer and managed to keep it up to date should any changes be needed. Click on the Load Form Design and all forms created will be displayed.



Single Column Zones can have a header included in them to help grouping of fields. When a single column zone is added to the Form Designer text labelled 'Set Header' will be added along with an edit icon.

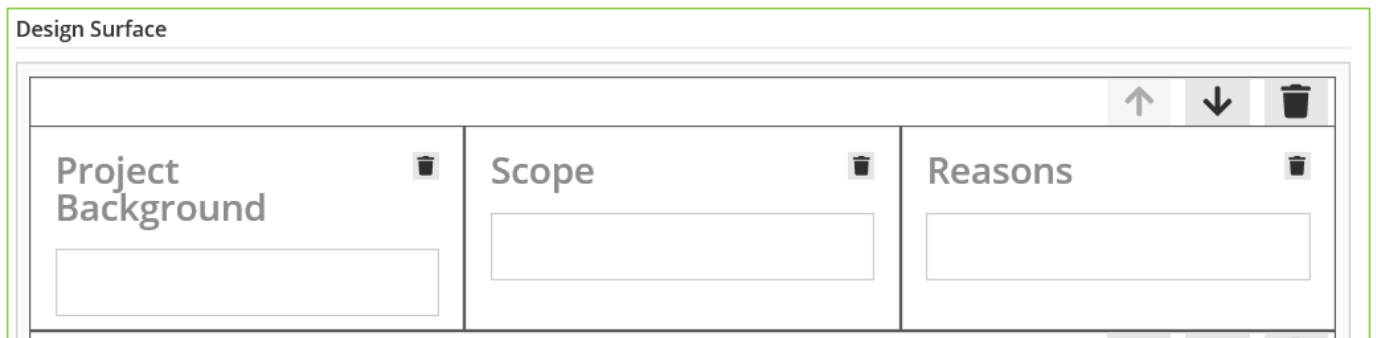


If you click on the edit icon next to the 'Set Header' text a window will open where the header can be set.



When a header has been added close the window and the text entered will replace the 'Set Header' text and will be used throughout the form. If the 'Set Header' text is not set a header will not be used on the zone.

When a form is selected all the Zones, Fields, and Tables will be loaded in the Design Surface. From the Design Surface all zones and the contents can be deleted, moved up or down in order.



Once a form is completed the following actions can be carried out to manage the form:

- Save – When a change is made to a Form this will overwrite any previous versions.
- Save as New – When a change is made to a form and the Label is also changed this will save the Form and keep the previous version.
- Clear Form – This will remove all Zones, Fields, and Tables from the form.
- Delete Form – The form will be removed from the available forms.

If a field or table configuration has been updated and that field is used on the form, if those changes are required on the form, access that form and click yes when prompted to include the field changes to the form then Save the form. If the change is then required in the project type, the project type will need to be edited – see the project type section for details.

## 10 Types

edison365 Projects allows multiple types of projects to support a project for different project requirements. The roles set in each type will also control the permissions to the application for the Admins, Owners, and Readers.

The screenshot shows the 'Administration > Types' page in the edison365 Projects application. At the top, there is a search bar with the text 'Type here to search'. Below the search bar is a navigation menu with 'HOME', 'DISCOVER', 'PERSONAL', and 'REPORTS'. The main content area features a 'Create Project Type' button and a table listing existing project types. Each row in the table includes a 'Name', 'Description', 'Is Config Complete' status, and 'Edit' and 'Delete' buttons.

Name	Description	Is Config Complete		
Customer Example	Work in progress example and test	true	<a href="#">Edit</a>	<a href="#">Delete</a>
Major Project	Use this type for complex projects	true	<a href="#">Edit</a>	<a href="#">Delete</a>
Marketing Template	Simple Format for new marketing projects	true	<a href="#">Edit</a>	<a href="#">Delete</a>
Project Online	Template combining POL and edison365projects data	true	<a href="#">Edit</a>	<a href="#">Delete</a>
Simple Project	Use this type for simple project	true	<a href="#">Edit</a>	<a href="#">Delete</a>
Software Development Template	Standard SDLC template	true	<a href="#">Edit</a>	<a href="#">Delete</a>
Standard Project	Use this project type for standard projects	true	<a href="#">Edit</a>	<a href="#">Delete</a>

To create a Project type, click on the Create Project Type button which will open the following page (page not displayed in full in screen shot).

The screenshot shows the 'Administration > Types > Edit Project Type' page. At the top, there is a search bar with the text 'Type here to search'. Below the search bar is a navigation menu with 'HOME', 'DISCOVER', 'PERSONAL', and 'REPORTS'. The main content area features a 'Details' button and a 'Form' button. Below these buttons is a 'Project Details' section with several form fields: 'Name \*', 'Internal Name \*', 'Description \*', and 'Default Image \*'. The 'Default Image \*' field has a dashed box placeholder with the text 'Choose an image or drag one here.'. Below the form fields is a 'Default Documents' section with an 'Upload File' field and 'Browse' and 'Upload' buttons.

To complete the form to create a Project type ensure all mandatory fields are completed. All mandatory fields are marked with a red asterisk. If the form is saved and a mandatory field has no data in it an error will be displayed on the field when saved.

Name \*

Internal Name \*

Name \*


Name is required.

Internal Name \*

Documents can be included as a default attachment for a project type when a new project is created for the type. This is achieved by using the document explorer which opens the file explorer. To delete any attached documents, click the Delete button next to the correct attachment

Default Documents

Upload File

 Test Attachment Word.docx

When all the core details have been added the users can be assigned to specific roles for the Project type (Process Managers, Owners, and Readers).

Process Managers \*

Add the users who can edit all projects of this type. From this list of users, one or more users would then pick up and manage the project.

Owners \*

Add the users who can create and own projects using the project type.

Readers

Add the users who can read all projects of this type.

To add a user, enter the name required and once three characters have been entered a search will take place and any matches based on the criteria entered.

Process Managers \*

Jake Favell (jake.favell@edison365.com)

Showing 1 result

Owners

Add the users who can create and own projects using the project type.

Readers

Add the users who can read all projects of this type.

Once the username has been found, select the correct match then click the name to add the user to the role.

**Process Managers \***

Add the users who can edit all projects of this type. From this list of users, one or more users would then pick up and manage the project.

**Owners \***

Add the users who can create and own projects using the project type.

**Readers**

Add the users who can read all projects of this type.

The next config options are to support Version creation on a Stage Change (Project Status). If enabled when the Project Status is changed a new version of the project will be created automatically.

**Create project version on Project Status change?**

OFF

If you have edison365 Project Online configured and a DataStore Database has been configured, you can create a Project in edison365 Projects using the data from Project Online. To configure this, ensure a tick is placed in the External Project box which will then generate a drop down to select you external Projects provider.

**External Project**

**External Data Source**

Project Online ▾

The Project Type can also have the Year Start set so each Project has the correct start month label on Monthly period tables.

**Year Start**

Jan ▾

Specify which month to use as the starting period for a monthly periodic table. Please note, when changing this value the data will not move. If Jan was the starting month and Jan had 150 entered in an example business case. Updating the starting month to Sep, for that business case the 150 will now appear in Sep.

**Quarters format \***

Q%q %yy

Specify the format to be used for any quarters periods in periodic tables. %q will be replaced by the quarter number (1,2,3 or 4), %yy will be replaced by the short year (i.e. 19) and %yyyy will be replaced by the full year (i.e. 2019)

The format of the Quarters can be set as Q%q %yy which will display as Q1 20 or Q%q %yyyy as Q1 2020. If you enter anything other than this the value will not be allowed and an error will occur. This controls the Quarters label on Quarterly period tables.

Projects can also have stages configured to allow various members of the project team to review the various stages and approve or reject the stage of the project. By default this will be disabled on the Azure Cosmos DB so ensure it is enabled here before progressing.

Once the Stages functionality has been enabled on the Azure Cosmos DB a new switch will appear on the Types Details page. To enable at the type level ensure the below switch is set to On

**Enable Stages**

OFF



Once enabled a new section will be added where you can enter the details for your stages with one default stage added.

Enable Stages  
 ON


**Process**

---

**Step 1**

Name  Description

Status  
 Open  
 Under Review

Colour  

To add a new stage, you will need to click on the Add Stage button which will add a blank stage below the previous stage. Each stage needs the following info to be fully configured:

- Name: Stage Name displayed in the progress bar.
- Description: A brief description of any additional information for the stage.
- Status: If set to Open the project will need actioning by the Process Manager. If set to Under Review a new set of fields will be generated to set the Reviewers and Tasks to be completed for the stage.
- Colour: The background colour of the Stage displayed on the Project card.

Enable Stages  
 ON


**Process**

---

**Step 1**

Name  Description

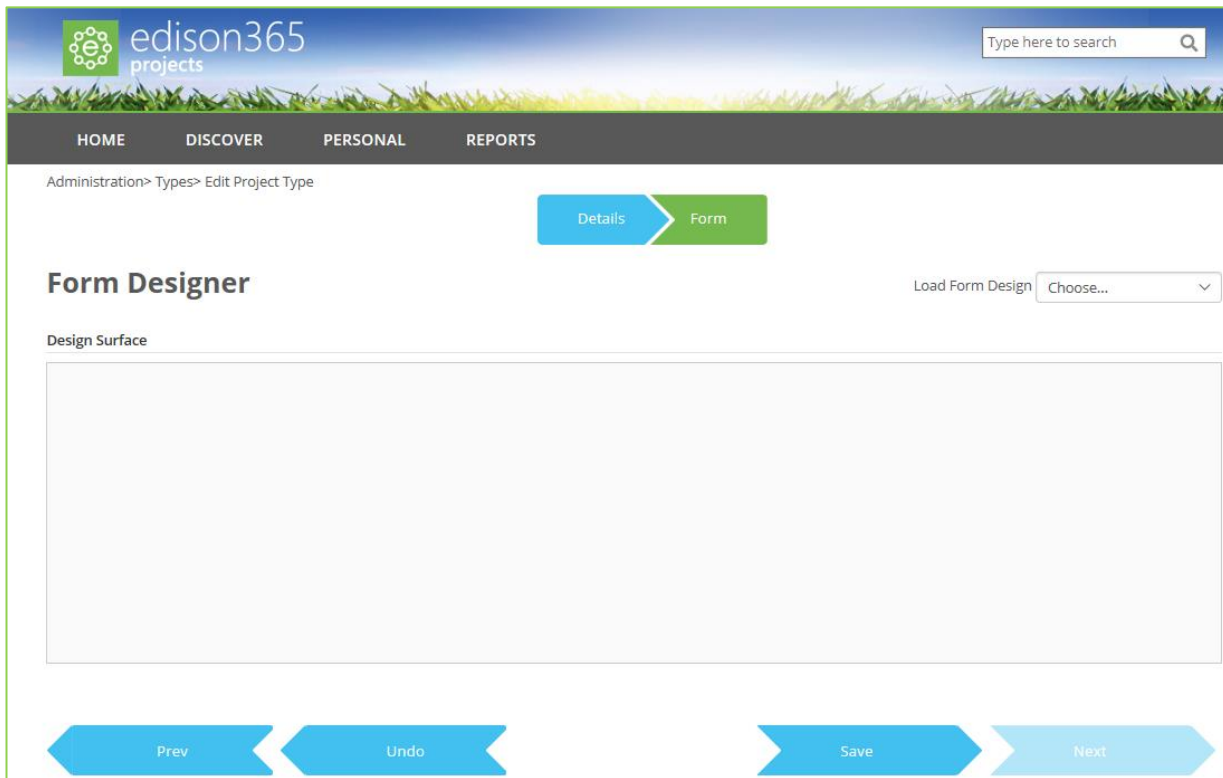
Status  
 Open  
 Under Review  
 Editable To Reviewers

Colour  

Reviewers  Reviewer Tasks

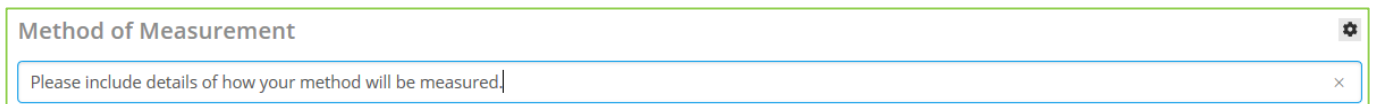
To add a reviewer, click on the Reviewers box and enter the individual names of the required reviewers and a people picker will display the matching names to select. Once the reviewers are added the Tasks for each reviewer will need to be added. To add a task, click on the Reviewer Tasks text box and enter the name of a task and click the Add Task button which will add the task to a list of tasks.

When the Next button is clicked after the Details are completed a blank form is displayed in the same way as the Forms section (section 7) minus the Zones, Fields, and Tables selectors.



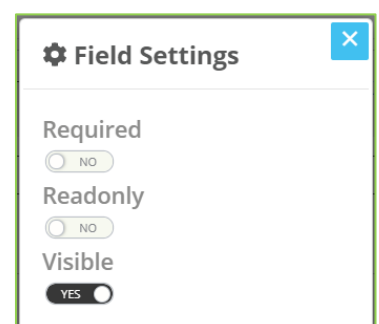
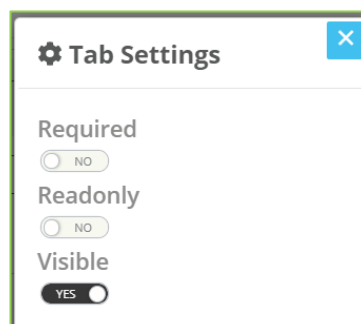
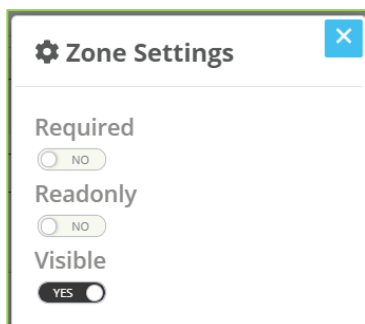
To select the form to use click on the Load Form Design drop down to display a list of all the current form designs. When selected the form template will be displayed.

In the same way a document can be attached as default to any new projects for the project type, the form can also have default data included. If you add data to any field or table on the form when creating or editing a project type the data will be included on all new projects created from that type.



If data is added as default data to a form the configuration settings for the field will still be applied so it can still be set required if needed.

From here you can select whether you tailor the form by selecting whether a Zone or Field (or a tab if added) is set as required. To do this click on the cog icon for the area you wish to apply the settings to. When the cog icon is clicked the windows will look as follows:



There is a switch with a Yes/No option for Required, Read Only, and Visible and depending on the selection will affect the behaviour of the zone, tab or field.

Please note, should a change be made to a Form (new or updated field / table) the changes will need to be accepted on the Project Type before they can be used by users. When a change is made to a Form, access the type and the following message will be displayed:

**⚠ Global Form Template Changed**

The global form template has been changed. Do you want to update this Business Case Type?

Clicking 'Yes' will accept the changes for the type and the form will be updated with the updated version of the Field, Table, or Form.

## 11 News

edison365 Projects allows News items to be created and displayed on the Home page of the Projects Module.


Administration > News

edison365projects News

Show edison365 News  
The edison365 news is displayed by default if there aren't any news items.

News Carousel Items

Create News Item

Heading	Description	Image	Image Alt Text	Read More Text	Read More Link	Display Order	Edit	Delete
edison365projects launched Jan 1st	Add your projects now to take advantage of our enterprise PPM toolset - edison365projects		Launch	See more here	<a href="https://www.google.c">https://www.google.c</a>	1	Edit	Delete

To create a news item, click on the Create News Item button which will open the following window

Add News Item

Heading \*

Image \*

Choose an image or drag one here.

Image Alt Text

Summary Text

Read More URL

Read More Text

Display Order \*

Cancel Save & Close

To complete the creation of the news item all mandatory fields (marked with a red asterisk) must be completed. The fields in the form are as follows:

- **Heading\*** - The name for the news item to be displayed on the Home page.
- **Image\*** - The Image used when viewing the news item on the Home page.
- **Image Alt Text** – The text used to summarise the image used.
- **Summary Text** – The main details of the news item.
- **Read More URL** – If more information is available and accessible via a URL, the URL can be added here.
- **Read More text** – This is the text that will be used on the Read More button of a News item.
- **Display Order\*** – This is the order the news item will be placed on the news carousel of the Home page.

If no News Items are created the default edison365 news will be displayed on the News carousel of the Home page. If at least one news item has been created the default edison365 news can be toggled on and off to be displayed. This can be achieved by adding (to enable) or removing (to disable) the edison365 news.

Administration> News  
**edison365projects News**

---

Show edison365 News  
The edison365 news is displayed by default if there aren't any news items.

Administration> News  
**edison365projects News**

---

Show edison365 News  
The edison365 news is displayed by default if there aren't any news items.

To edit a news item, click on the Edit button which will display the news item in the Edit News Item window with the data set when creating the News item pre-populated.

To delete the news item, click on the Delete button and confirm the deletion and the news item will be removed from the list and the carousel of the Home page.

## 12 Themes

edison365 Projects allows the customisation of the application. Allowing the colour scheme, logos, and footer text used to suit the business requirements.

The screenshot displays the 'Administration > Theme' configuration interface. At the top, there is a search bar and navigation tabs for 'HOME', 'DISCOVER', and 'PERSONAL'. The main content area is organized into sections:

- Header:** Contains 'Logo Image URL' with a preview of the logo and a text input field containing '/dist/assets/images/projects-logo.png'. It also includes 'Banner Image URL' with a preview of the banner and a text input field containing '/dist/assets/images/banner-background.jpg'.
- Suite Bar:** Features 'Suite Bar Background' with a color picker showing '#253f7a' and 'Suite Bar Colour' with a color picker showing '#fff'.
- Nav Bar:** Features 'Nav Bar Background' with a color picker showing '#575858' and 'Nav Bar Colour' with a color picker showing '#fff'.
- Colour Palette:** Includes 'Primary' with a color picker showing '#75b84e', 'Accent' with a color picker showing '#41c0f0', 'Primary Foreground' with a color picker showing '#fff', and 'Accent Foreground' with a color picker showing '#fff'.
- Footer:** Contains a 'Footer Text' area with a text box containing the text: 'The modular idea generation and portfolio management suite built on Office 365, edison365 creates the freedom to crowdsource ideas, and the platform to implement them. By leveraging Microsoft Office 365 and harnessing your employees' insight, edison365 turns your good ideas into great business solutions and services.' Below this are 'Save' and 'Reset Settings' buttons.

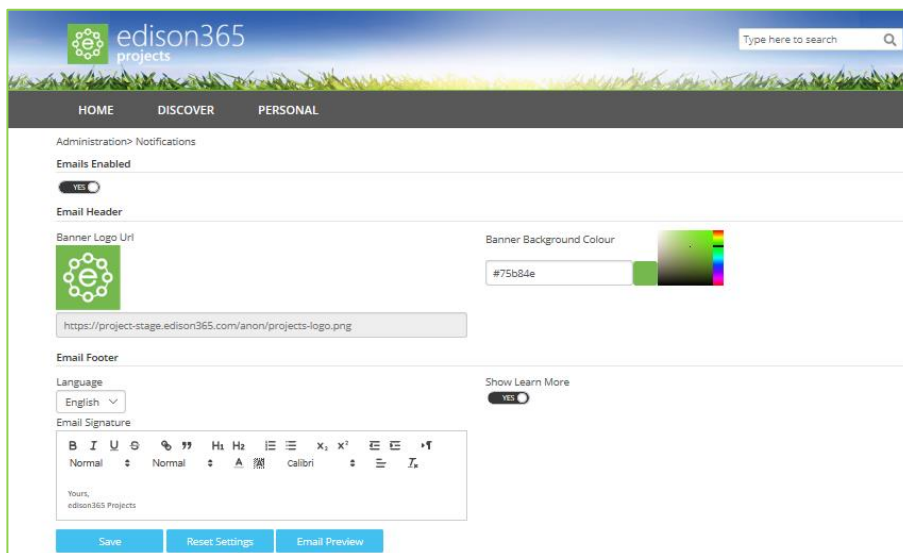
The Header and Banner images can be uploaded using the image uploader and cropping tool. Once uploaded and saved the images used will be saved to the site collection under the paths set below the images.

The colour palette options will change the colour of each area listed in the colour picker to ensure the colours used matches any branding.

The text used in the footer area is what will be displayed at the bottom of each page in the Projects application.

## 13 Notifications

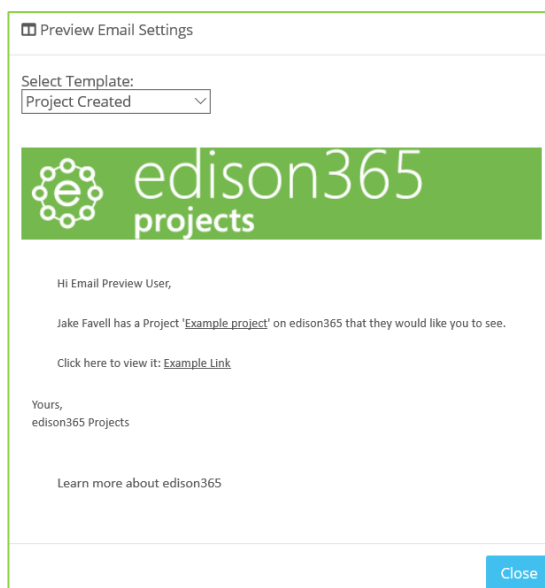
edison365 Projects allows notifications to be sent to users once a specific action has taken place. To access the Notifications configuration screen, click on the Notifications tile from the Admin Console. Once accessed the default enabled option will be 'No' and the configuration fields will be hidden. When enabled the following will be displayed:



From here you can set the URL for the banner image used in the emails, the banner colour, the language used via a dropdown – this is not saved but is used for preview as emails will be sent based on the language the user sets in the application, and the email signature as well as a Show Learn More switch which if enabled will take users to the edison365 website.

The email signature field is a rich text field which includes text formatting options to add full customisation to the signature.

Once happy with the configuration click the Save button and this configuration will be used on all email notifications. If you have made changes and no longer wish to use them click the Reset Settings button to revert to the default settings. To ensure you are happy with the configuration set you can view how the emails will be displayed by clicking on the Email Preview button. From here you can use the dropdown to view how each template will look.



## 14 Projects

Projects from Project Online can be surfaced into edison365 Projects via edison365 DataStore. Configuring the Project Online Connection settings allows this. If a Project Type is configured to be an External Project Type, it will allow a user to select a Project Online Project to be surfaced in edison365 Projects. Once accessed the following is displayed:

The screenshot shows the 'edison365 projects' administration interface. At the top, there is a navigation bar with 'HOME', 'DISCOVER', 'PERSONAL', and 'REPORTS'. Below this, the breadcrumb path is 'Administration > Projects'. The main section is titled 'edison365projects Project Online Connection Settings'. It includes a checkbox for 'Enable PWA Configuration' which is checked. Below this is a text input field for 'Project Online Url'. The next section is 'edison365projects Project Online DataStore connection details', which contains several input fields: 'Server Address', 'Server Port', 'Database Name', 'Database Account', and 'Password'. There is also a checkbox for 'Active Directory' and a sub-option 'Use Active Directory Password Authentication'. The final section is 'edison365projects Project Online Background Data refresh', which has a checked 'Enable background data refresh' checkbox, two dropdown menus for 'Hours' (set to 6) and 'Minutes' (set to 00), and a note: 'Note: These are UTC hours and minutes'. A blue 'Save' button is located at the bottom of the form.

The Project Online URL will need to be the URL to access your instance of Project Online.

The following will need to match the same as set in edison365 DataStore:

- Server Address
- Server Port
- Database Name
- Database Account
- Password

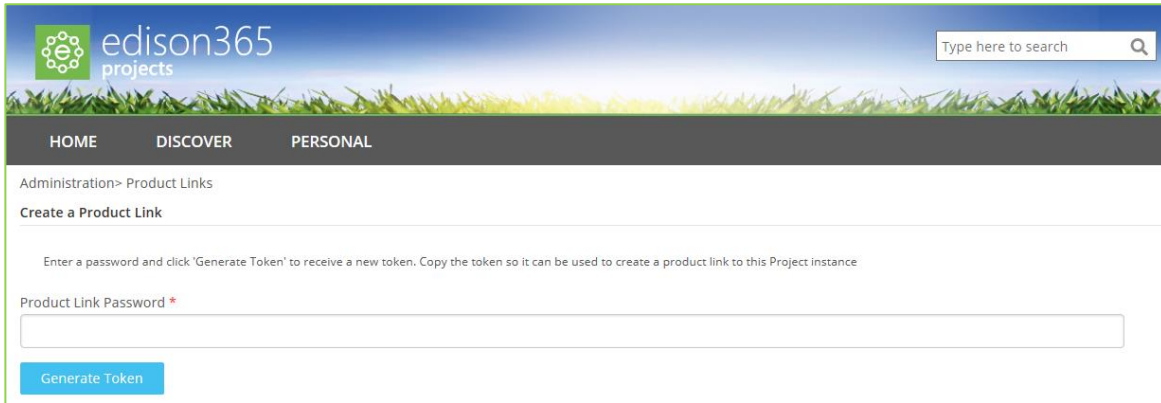
Should any of these not match what is used in edison365 DataStore the link cannot be fully established and updates between Project Online and edison365 Projects will not take place.

A configuration option to enable automatic background refreshes can also be used. Simply tick the Enable background data refresh button and use the Hours and Minute dropdowns to select when the refresh takes place. The minutes are in 15 minute intervals. Please note the time set is set as UTC.



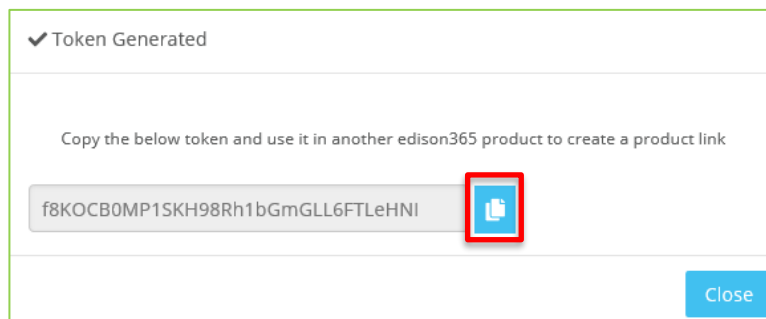
## 15 Product Links – Business Case Integration

edison365 products can be linked together. edison365ideas can be linked to edison365businesscase and or edison365 Projects, and edison365businesscase can be linked to edison365 Projects. This allows an idea from a user to become a business case or project, and a business case a project. This makes the process from idea to project streamlined when you have a licence for all 3 modules.



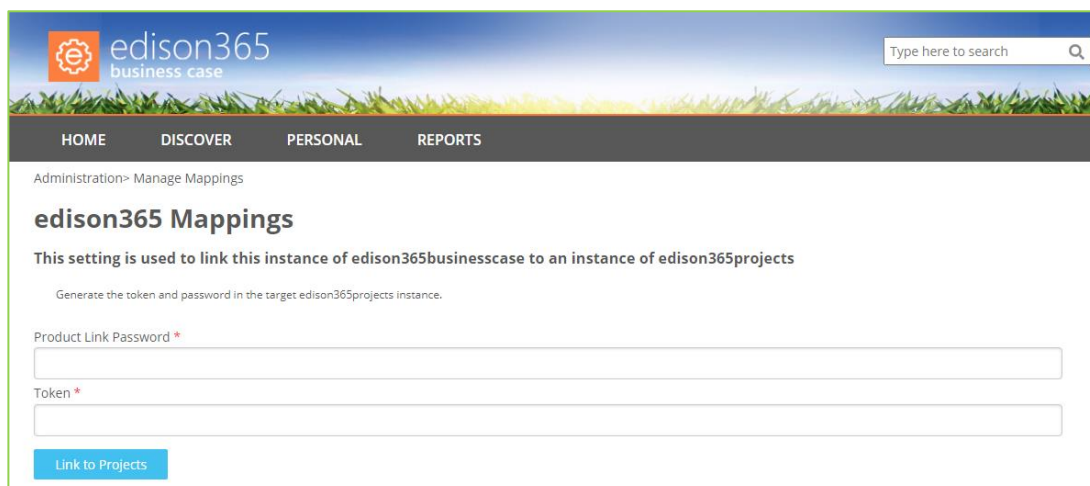
The screenshot shows the 'edison365 projects' interface. At the top, there is a search bar with the text 'Type here to search'. Below the search bar is a navigation menu with 'HOME', 'DISCOVER', and 'PERSONAL'. The main content area is titled 'Administration > Product Links' and 'Create a Product Link'. It contains a text box for 'Product Link Password \*' and a blue button labeled 'Generate Token'. A small instruction text above the password field reads: 'Enter a password and click 'Generate Token' to receive a new token. Copy the token so it can be used to create a product link to this Project instance.'

To configure a link from Business Case to Projects you will need to enter a password in the Product Link Password field in edison365 Projects in the screen as above. Once the password has been entered click on the Generate Token button. Once that is clicked a window will open with a token value:



The screenshot shows a dialog box titled 'Token Generated'. It contains the text: 'Copy the below token and use it in another edison365 product to create a product link'. Below this text is a grey box containing the token value 'f8KOCB0MP1SKH98Rh1bGmGLL6FTLeHNI'. To the right of the token box is a blue copy icon button, which is highlighted with a red square. At the bottom right of the dialog box is a blue button labeled 'Close'.

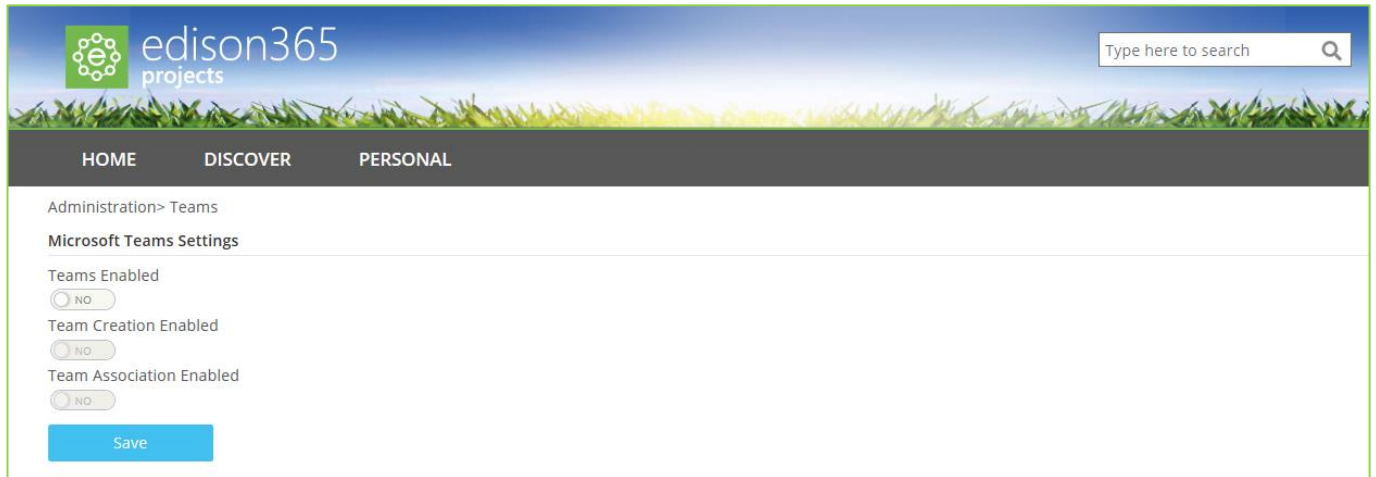
Once the token has been generated you will have to copy the token by clicking the button to the right of the token (highlighted in image above). Now it is copied you can access edison365businesscase and use that token and password to link the products together by pasting the token in the Token field and the same password used to generate the token in the Product Link Password. Once both details have been added click the Link to Products button which will then link the two products.



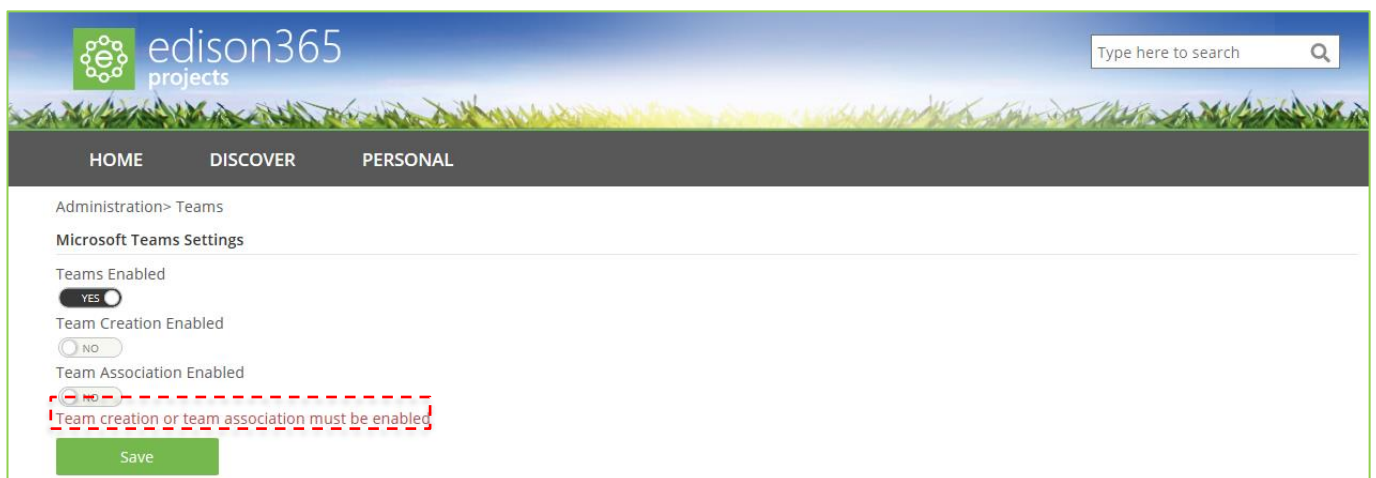
The screenshot shows the 'edison365 business case' interface. At the top, there is a search bar with the text 'Type here to search'. Below the search bar is a navigation menu with 'HOME', 'DISCOVER', 'PERSONAL', and 'REPORTS'. The main content area is titled 'Administration > Manage Mappings' and 'edison365 Mappings'. It contains a text box for 'Product Link Password \*' and a text box for 'Token \*'. Below these fields is a blue button labeled 'Link to Projects'. A small instruction text above the password field reads: 'This setting is used to link this instance of edison365businesscase to an instance of edison365projects'. Below the password field, it says: 'Generate the token and password in the target edison365projects instance.'

## 16 Teams

Projects can be linked to a Team in Microsoft Teams. Once linked the Projects can be viewed and managed in Teams. To enable this feature click on the Teams tile on the Admin Console which will display the following screen:



By default, the feature will be disabled and will look like the above screenshot. To enable the feature click on the 'Teams Enabled' switch and ensure one of the 'Team Creation Enabled' or 'Team Association Enabled' Boolean fields also must be enabled. If one of these are not enabled an error will be displayed.



A quick summary of each field is as follows:

- Teams Enabled – This is the master switch to enable the whole feature. Until this is enabled the other 2 features cannot change.
- Team Creation Enabled – Once enabled users will be able to create new Teams for Microsoft Teams to link their project with.
- Teams Association Enabled – Once enabled users will be able to link their project to any Team, they are a member of in Microsoft Teams.

Once the required configuration has been set click on the Save button and depending on the configuration options enabled the users will be able to link a project to a Team.

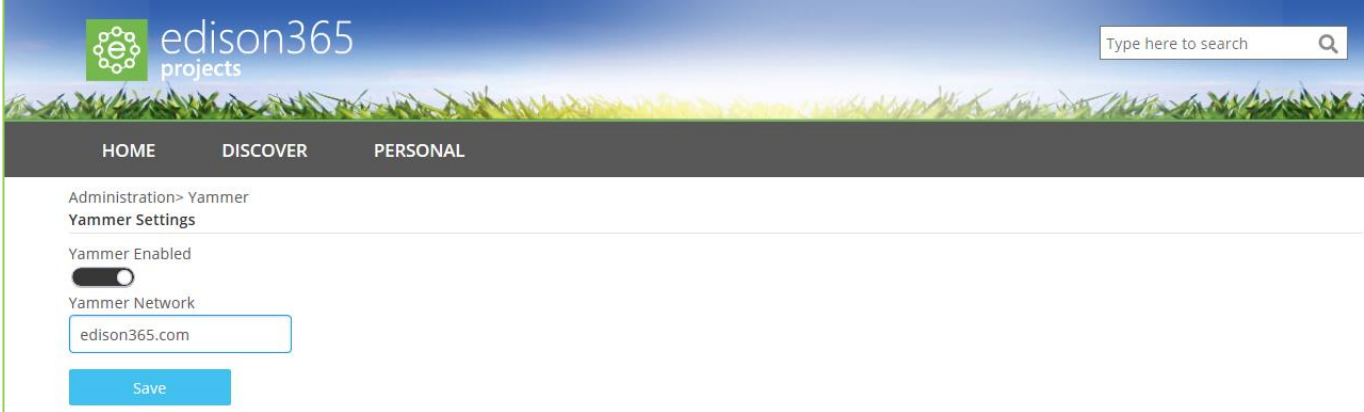
To make use of this feature one of the Office 365 tenant administrators will have to first access the following link to authorize the edison365 application in Azure AD if they haven't done so already for another edison365 product:

[https://login.microsoftonline.com/common/adminconsent?client\\_id=1268dd20-fb8a-47b5-b781-736bde942005&redirect\\_uri=https://www.edison365.com/appregsuccess](https://login.microsoftonline.com/common/adminconsent?client_id=1268dd20-fb8a-47b5-b781-736bde942005&redirect_uri=https://www.edison365.com/appregsuccess)

Once this link is clicked and access is granted to the edison365 Azure AD Application, this will allow edison365 Projects and Microsoft Teams to work together to on your tenant

## 17 Yammer

Projects can be linked to a Yammer channel on your network to allow users to discuss the Project. This must be enabled at a global level before this can be enabled on a Project Type and Project level. To do this click on the Yammer tile on the Admin Console. Once accessed the following page will be displayed:

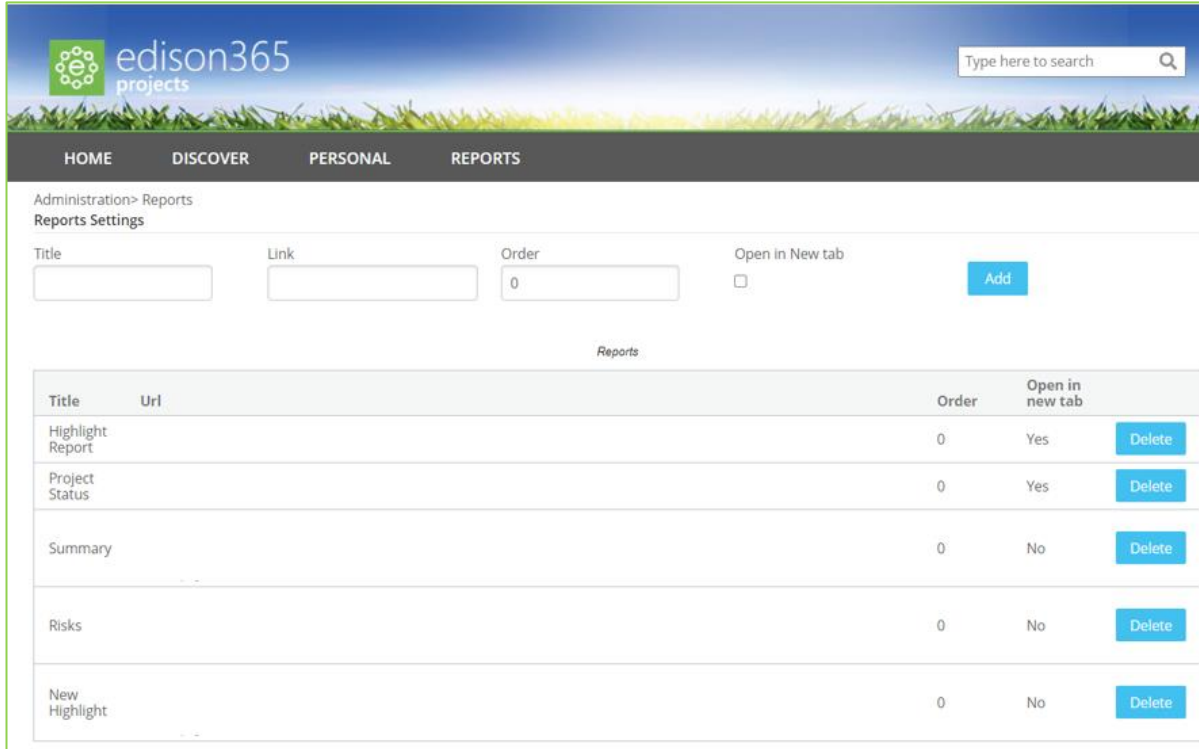


The screenshot shows the Admin Console interface for edison365 projects. At the top left is the edison365 projects logo. To the right is a search bar with the placeholder text "Type here to search" and a magnifying glass icon. Below the header is a navigation bar with three tabs: HOME, DISCOVER, and PERSONAL. The main content area shows the breadcrumb "Administration > Yammer" and the title "Yammer Settings". There are three settings: "Yammer Enabled" with a toggle switch that is currently turned off; "Yammer Network" with a text input field containing "edison365.com"; and a blue "Save" button at the bottom.

Once the settings have been Enabled as above you need to add your network name that you login to Yammer with in the Yammer Network field. Once saved a Type can now have a Yammer channel assigned to it to start discussions.

## 18 Reports

Reports can be accessed directly through the edison365 Projects UI. Multiple reports can be configured to allow ease of access to your reports to support your project needs. To access the configuration, click on the Reports tile on the Admin Console which will take you to the below grid.

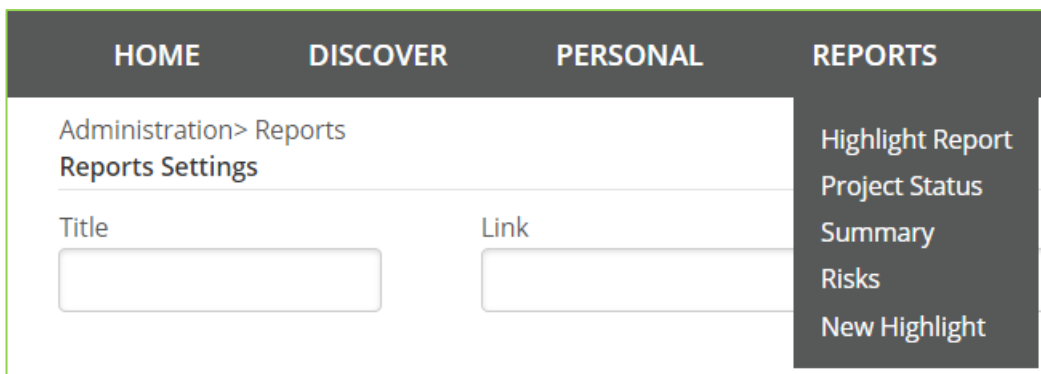


The grid will show all the reports configured including a name, Url (hidden in the above example), the order, and whether accessing the report will be in a new tab.

To configure a new report enter a name in the Title field, the URL of the report in the Link field, if you require the report to be placed in a specific place set the Order (All reports will be set at 0 and placed in order of creation unless stated), the final option is to set whether the report will open in a new tab or not by adding a tick in the Open in New Tab field to open the report in a new tab.

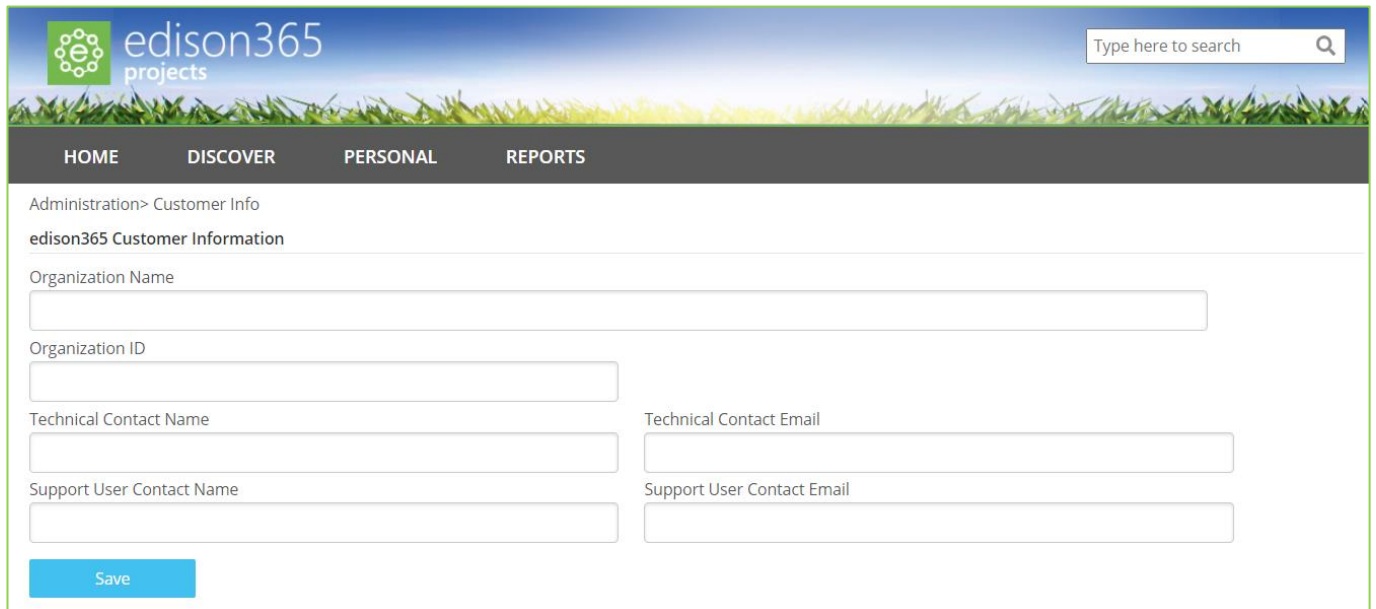
Once the Report information is configured click the Add button which will add the Report to the Reports grid.

To view a report, hover the cursor over the Reports option on the navigation bar which will display the list of reports. Then click on the Report listed to view it in full.



## 19 Customer Info

The Customer Info page will be used after the edison365 Projects instance is first deployed and installed by edison365. This is where you can capture and store information such as your company information, and information from edison365 such as contact details. This will be provided by edison365 when first deployed.



The screenshot shows the 'edison365 projects' interface. At the top left is the logo, and at the top right is a search bar with the placeholder text 'Type here to search'. Below the logo is a navigation menu with the items 'HOME', 'DISCOVER', 'PERSONAL', and 'REPORTS'. The main content area is titled 'Administration > Customer Info' and 'edison365 Customer Information'. It contains a form with the following fields: 'Organization Name' (a single wide input), 'Organization ID' (a single wide input), 'Technical Contact Name' (a single wide input), 'Technical Contact Email' (a single wide input), 'Support User Contact Name' (a single wide input), and 'Support User Contact Email' (a single wide input). A blue 'Save' button is located at the bottom left of the form area.