# Archer Project Management

The Archer Project Management app-pack provides a framework for managing multiple large-scale projects simultaneously, evaluating project complexity and priority, and redirecting strategic resources to areas where they are needed most to ensure that projects are delivered on time and within budget. Project team members can link projects to related expenses and resources to determine and access project inter-dependencies. Essential project information can also be attached to the master project record to ensure quick access for future reference. The integrated approach of Archer Project Management allows users to develop and deliver successful projects.

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## Release notes

| Release Version | Published Date | Notes |
| --- | --- | --- |
| Archer 6.2 | July 2017 | Initial Release |
| Archer 6.2 | August 2020 | * Minor fixes in documentation. * Addition of note to fix minor defect in package after package installation. |
| Archer 6.9 | February 2021 | * Excluded core applications Contacts and Appointment from the package. * Require less ODA for implementation. Excluded Document Repository ODA from the package. * Added a new sub-form Project Status Report. * Improved the user experience with updated dashboards. Added new iViews to Project Manager and Staff/Consultant Dashboard * Added a new Dashboard for Program Manager * Added fields to track customer and client information. Added Report Objects in the Project Management app. |

## Overview of Archer Project Management

### Key features and benefits

Archer Project Management provides the structure for organizing and managing projects and resources in a manner that simplifies and enhances the ability to complete a project within the defined scope, time and cost constraints.

Archer Project Management is a core tenet for any medium or large organization that is managing the rollout process for Archer implementations, general IT projects, third party contractor deliverables, or general program management.

With Archer Project Management, you will be able to:

* Compile an overview of the project deliverables, milestones, resources, timelines, budget, and more.
* Easily track all projects managed by one central organizational function (business unit, team, etc.)
* Schedule staff to perform work for a specific project deliverable.
* Track project-related expenses for project reporting.
* Monitor key deadlines and anchor points crucial to a project's success.

Benefits include:

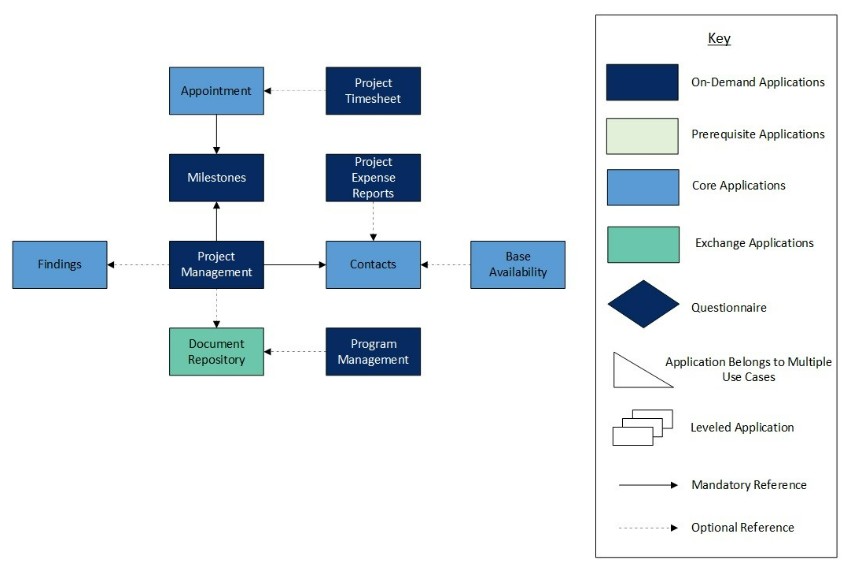
* Gain control and insight into a variety of factors and costs that influence project quality and delivery.
* Access a real-time view of stakeholders and resources, timelines, project activities and artifacts produced as part of project delivery.
* Document project milestones and track their completion.
* Identify and manage issues that may impact project success, and quickly react to changes in project scope or resource availability.
* Real-time reports offer project status to key stakeholders to build confidence that the project will be completed on time, with the agreed upon scope, and within budget.

### Prerequisites (ODA and system requirements)

| Components | Recommended Software |
| --- | --- |
| ODA License | Archer Project Management requires 2-5 ODA licenses. Two (2) ODA are required and three (3) ODA are optional. |
| Archer | Archer 6.9 and later |
| Pre-Requisite Applications | Requirements for installation and operation of Archer Project Management includes the following applications.   * Contacts * Appointment |

## Project Management components

### Architecture diagram



### Swim lane diagram

The Archer Project Management process begins when the project manager creates arecord. Milestones are subsequently populated and linked to projects to illustrate key deadlines and anchor points. Staff members then schedule and create an association between appointments and milestones. Expense reports are generated by staff members and submitted to the Project Manager for review. The Project Manager can approve, cancel, or reject the expense report. In the event of a rejected expense report, a notification is sent to the submitter prompting them to revise and resubmit the report.

The following diagram shows the general workflow of the use case.

### Required applications

| Application | Description |
| --- | --- |
| Project Management | The application synthesizes the company’s comprehensive project management methodology with real-time data to govern the development and delivery of projects that consistently exceed client expectations for value. Using the application, the management team can easily gain control and insight into a wide variety of factors and costs that influence project quality and delivery. |
| Milestones | The Milestones applications enables users to define and monitor key deadlines and anchor points crucial to a project's success. Milestones are comprised of a number of appointments. The project manager can create new appointments or link existing appointments to make up a milestone. Completion of a milestone is dependent upon all of the related appointments being closed. |
| Appointment | The Appointment application enables users to create and edit appointments for resources such as contacts, devices, or facilities. |
| Contacts | The Contacts application serves as a central repository for contact information, is utilized across multiple areas of Archer, and contains information that is often leveraged by other use cases. Updates to a profile record within this application automatically propagate in any records where that contact information is displayed. |

### Optional applications

| Application | Use Case / Solution | Description |
| --- | --- | --- |
| Project Timesheet | Project Planning | The Project Timesheet application stores actual time worked against scheduled appointments in the Schedule application. |
| Project Expense Reports | Project Planning | The Project Expense Reports application is used to document project-related expenses. This documentation allows users to quickly report on expenses for a specific project, resource or week. Users can create and submit expense reports to their approving authority for review. Subsequently, the project manager can approve, cancel, or reject expense reports. Project expense reports is driven by advanced workflow. |
| Program Management | Program Management | The Program Management application tracks the status of programs within the company, allowing the organization to manage multiple projects simultaneously by program owner, business unit, etc. Programs are comprised of one or more tasks that are related to the program. |
| Document Repository | Archer Documentation Request Tracking | The Document Repository application serves as the central storage and retrieval system for the organization's documents, including help and reference materials, marketing collateral, employee forms and handbooks, methodologies and corporate templates. |
| Findings | Issues Management | The Findings application is used to document issues, deficiencies or gaps found through assessments and control testing. Findings are auto-generated from questionnaires and include links back to the questionnaire, target and any applicable control standards and authoritative sources. Findings may be resolved via remediation tasks or exception requests. |
| Base Availability | Audit Planning & Quality | The Base Availability application provides a central repository for employment details over one or many date ranges. The interface collects an employment type, a base number of work hours per week, the base working days, and the start and stop date range for which the other attributes apply. |

### Personas and access roles

The following table describes the functions that make up the application’s organization roles. Depending on the organization of your company, these functions and responsibilities may vary.

| Function | Description |
| --- | --- |
| Consultant | Assists companies in executing strategic business decisions. They typically provide oversight and leadership in executing projects from planning to completion. They are responsible for analyzing data, and identifying trends and inefficiencies to mitigate potential risks. |
| Program Manager | Oversees a collection of related projects in a coordinated manner to obtain benefit and improve organizational performance. They often manage multiple projects, project teams, and project managers. Program managers are responsible for outlining the overall strategy, while project managers often work on day-to-day task management. |
| Project Manager | Responsible for planning, procurement and execution of a project. Project managers are the initial point of contact for any issue or discrepancies arising from the project. Their primary objectives are on-time, in scope and within budget delivery of projects. Tasks include budget creation, team assignments, tracking milestones and reviewing expense reports. |

### Permissions chart

| Applications | Project Manager | Program Manager | Staff | Consultant |
| --- | --- | --- | --- | --- |
| Project Management | CRU\* | CRUD | R\* | R |
| Project Expense Reports | CRU\* | CRUD | CR\* | R |
| Appointment | CRU\* | CRUD | CRU\* | R |
| Contacts | CRU\* | CRUD | CR | R |
| Project Timesheets | CRU\* | CRUD | CR\* | R |
| Program Management | R\* | CRUD\* | R\* | R |
| Milestones | CRU\* | CRUD | R\* | R |
| Document Repository | CRU\* | CRUD | CRU\* | CRU\* |

C = Create, R = Read, U = Update, D = Delete

\*Indicates Record Permissions

## Installing Project Management

### Installation overview

Complete the following tasks to install the application.

#### Task 1: Prepare for the installation

1. Ensure that your Archer system meets the following requirements:
   * Archer Platform version 6.9
2. Download the ODA install package from the Archer Exchange on:<https://community.rsa.com/community/products/archer-grc/exchange>
3. Read and understand the "Packaging Data" section of Archer Help.

#### Task 2: Install the package

Installing a package requires that you import the package file, map the objects in the package to objects in the target instance, and then install the package. See [Installing the Application Package](#InstallAppPackage) for complete information.

#### Task 3: Test the installation

Test the application according to your company standards and procedures, to ensure that the use case works with your existing processes.

### Installing the package

#### Task 1: Back up your database

There is no Undo function for a package installation. Packaging is a powerful feature that can make significant changes to an instance. Archer strongly recommends backing up the instance database before installing a package. This process enables a full restoration if necessary.

An alternate method for undoing a package installation is to create a package of the affected objects in the target instance before installing the new package. This package provides a snapshot of the instance before the new package is installed, which can be used to help undo the changes made by the package installation. New objects created by the package installation must be manually deleted.

#### Task 2: Import the package

1. Go to the Install Packages page.
   1. From the menu bar, click
   * .
   1. Under Application Builder, click Install Packages.
2. In the Available Packages section, click Import.
3. Click Add New, then locate and select the package file that you want to import.
4. Click OK.

The package file is displayed in the Available Packages section and is ready for installation.

#### Task 3: Map objects in the package

1. From the menu bar, click

* > Application Builder > Install Packages.

1. In the Available Packages section, locate the package you want to map.
2. In the Actions column, click

* for that package.
* The analyzer examines the information in the package. The analyzer automatically matches the system IDs of the objects in the package with the objects in the target instance and identifies objects from the package that are successfully mapped to objects in the target instance, objects that are new or exist but are not mapped, and objects that do not exist (the object is in the target but not in the source).
* When the analyzer is complete, the Advanced Package Mapping page lists the objects in the package file and corresponding objects in the target instance.

1. On the Advanced Mapping page, click to open each category and review the icons next to each object to determine which objects you must map manually.

The following table describes the icons.

| Icon | Name | Description |
| --- | --- | --- |
| Awaiting mapping review | Awaiting Mapping Review | Indicates that the system could not automatically match the object or one of its children to a corresponding object in the target instance.  Objects marked with this icon must be mapped manually.  New objects should not be mapped. Select Do Not Map from the drop-down menu to clear this icon for an individual object, or click Do Not Map to clear the icon for all unmapped objects. |
| Mapping completed | Mapping Completed | Indicates that the object and all children are mapped to objects in the target instance, or that they have been marked as Do Not Map. Nothing more needs to be done with these objects in Advanced Package Mapping. |

* **Note:** You can run the mapping process without mapping all objects. The Awaiting mapping review icon is for informational purposes only.

1. For objects awaiting mapping review, do one of the following:
   * To map each object individually, use the drop-down menu in the Target column to select the object in the target instance to which you want to map the source object. To leave an object unmapped, select Do Not Map in the Target column.
   * To automatically map all objects in a category that have different system IDs but the same object name as an object in the target instance, click Auto Map. Select whether to ignore case and spaces when matching object names. Click OK.
   * To mark all unmapped objects as Do Not Map, click Do Not Map.
2. (Optional) Click Filter to enable filter fields that you can use to find specific objects in each mapping category. To undo your mapping selections, click Undo, then select whether to undo all mappings in the category or only the mappings on a single page. If you choose to undo all mappings, you will be returned to the categories list.
3. (Optional) To save your mapping selections and return to the categories list without committing changes to the target instance, click RSA.
4. After you review and map all objects, click Execute.
5. Select I understand the implications of performing this operation. Click OK.

* When the mapping is complete, the Import and Install Packages page displays.
* **Important:** Advanced Package Mapping modifies the system IDs in the target instance. You must update any Data Feeds and Web Service APIs that use these objects with the new system IDs.

#### Task 4: Install the package

All objects from the source instance are installed in the target instance unless the object can not be found or is flagged to not be installed in the target instance. A list of conditions that may cause objects not to be installed is provided in the Log Messages section. A log entry is displayed in the Package Installation Log section.

1. Go to the Install Packages page.
   1. From the menu bar, click Admin menu.
   2. Under Application Builder, click Install Packages.
2. In the Available Packages section, do the following:
   1. Locate the package file you want to install.
   2. In the Actions column, click Ellipsis.
3. In the Selected Components section, select the components of the package that you want to install.
   * To select all components, select the top-level checkbox.
   * To install only specific global reports in an already installed application, select the checkbox associated with each report that you want to install.

**Note:** Items in the package that do not match an existing item in the target instance are selected by default.

1. Click Lookup.
2. For each component section, do the following:

**Note:** To move onto another component section, click Continue or select a component section in the Jump To drop-down menu.

1. In the Install Method drop-down menu, select an install method for each selected component.

* **Note:** If you have any existing components that you do not want to modify, select Create New Only. You may have to modify those components after installing the package to use the changes made by the package.

1. In the Install Option drop-down menu, select an install option for each selected component.

* **Note:** If you have any custom fields or formatting in a component that you do not want to lose, select Do Not Override Layout. You may have to modify the layout after installing the package to use the changes made by the package.

1. Click OK.
2. To deactivate target fields and data-driven events that are not in the package, in the Post-Install Actions section, select the Deactivate target fields and data-driven events that are not in the package check box. To rename the deactivated target fields and data-driven events with a user-defined prefix, select the Apply a prefix to all deactivated objects check box, and enter a prefix. This can help you identify any fields or data-driven events that you may want to review for clean up post-install.
3. Click Install.
4. Click OK.

#### Task 5: Review the package installation log

1. Go to the Package Installation Log tab of the Install Packages page.
   1. From the menu bar, click Admin menu.
   2. Under Application Builder, click Install Packages.
   3. Click the Package Installation Log tab.
2. Click the package that you want to view.
3. In the Package Installation Log page, in the Object Details section, click View All Warnings.

**Note:** Ignore the Warning related to “Advanced Workflow was installed but is inactive. Please review and activate” for Project Management application.

#### Task 6: Activate advanced workflow

1. Go to the Applications page.
   1. From the menu bar, click Admin menu.
   2. Under Application Builder, click Applications.
2. In the Applications section, select the Project Expense Reports Application.
3. On the Advanced Workflow Tab, click ‘Activate’ in the top right corner of the page.
4. Then click ‘Save Workflow’ in the top left corner of the page.

#### Task 7: Adding core apps to Project Management solution

1. Go to the Solutions page.
   1. From the menu bar, click Admin menu.
   2. Under Application Builder, click Solutions.
2. Select Project Management.
3. In the Applications section, click Add New.
4. Select Appointment and Contacts application. Click OK.
5. Save the Solution.

## Configuring the Project Management

### Configure contacts application

#### Task 1: Add fields

**Note:** Configuring the Contacts application is only required if you have installed the ‘Program Management’ ODA. If you do not have the Program Management ODA, skip this Task and proceed to Configure Appointment Application.

1. Navigate to Applications by clicking the Administration dropdown menu and selecting Applications under Application Builder.
2. Select the Contacts application and navigate to the Fields tab.
3. In the Fields tab. Add the following fields:
   1. Default Project Management RP
      1. Type: Record Permissions
      2. Display Options: Dropdown
      3. Permission Model: Automatic
      4. Default Users/Groups: Assign Update and Delete access to the group “Project Management: Program Manager”.
4. Click Apply.
5. Save the Application.

### Configure appointment application

#### Task 1: Add fields to the layout

1. Navigate to Applications by clicking the Administration dropdown menu and selecting Applications under Application Builder.
2. Select the Appointment application and navigate to the Fields tab.
3. In the Fields tab. Add the following fields:
   1. Default Staff (Project Management)
      1. Type: Record Permissions
      2. Display Options: Dropdown
      3. Permission Model: Automatic
      4. Default Users/Groups: Assign only Read access to the group “Project Management: Staff”.
   2. Inherited Project Manager (Project Management)
      1. Type: Record Permissions
      2. Display Options: Dropdown
      3. Permission Model: Inherited. Unrestricted
      4. Field Population: Select “Project Owner” from Project Management application.
   3. Inherited Staff (Project Management)
      1. Type: Record Permissions
      2. Display Options: Dropdown
      3. Permission Model: Inherited. Unrestricted
      4. Field Population: Select “Assigned Staff” from Project Management application.

**Note:** These steps are required only if you have installed ‘Program Management’ ODA. If you do not have Program Management ODA, skip the creation of below field.

d. Program Manager (Project Management)

1. Type: Record Permissions
2. Display Options: Dropdown
3. Permission Model: Automatic
4. Default Users/Groups: Assign Update and Delete access to the group “Project Management: Program Manager”.
5. Click Apply.
6. Edit the field Total Actual Hours.
   1. Modify the formula:
   * IF(ISEMPTY([Timesheet Task]),
   * SUM(REF([Project Timesheets ],[Actual Hours])),
   * SUM(REF([Timesheet Task],[Actual Hours])))
   1. Save the field.
7. Navigate to Layout > Designer tab >Add New Layout Object
8. Add Tab Set named “Solutions”. Add the following tabs under it:
   1. Project Management
9. (Optional) If you have installed Project Time-sheets ODA during package installation, a related records field named “Project Time-sheets” will be in Appointment application.
10. Enter the data on “Project Management” tab.
11. Click Apply.
12. Save the Application.

#### Task 2: Create reports

1. Navigate to Appointment Applications.
2. Add the following reports by clicking on New Report.
3. Report Name: Appointments this Week
   1. Fields to Display: Tracking ID, Contact Full Name, Name, Appointment Start Date, Appointment End Date, Duration (Hours), Total Actual Hours
   2. Filters:

| Field to Evaluate | Operator | Values |
| --- | --- | --- |
| Appointment Start Date | Next | 7 Days |
| Inherited Staff (Project Management) | Contains | Current User |

* 1. Click Search.
  2. Save the report.

1. Report Name: Appointments this Month
   1. Fields to Display: Contact Full Name, Name, Tracking ID, Appointment Start Date, Appointment End Date, Duration (Hours), Total Actual Hours
   2. Filters:

| Field to Evaluate | Operator | Values |
| --- | --- | --- |
| Appointment Start Date | Current | Month |
| Inherited Staff (Project Management) | Contains | Current User |

* 1. Click Search.
  2. Save the Report.

1. Report Name: Appointments this Quarter
   1. Fields to Display: Tracking ID, Contact Full Name, Name, Appointment Start Date, Appointment End Date, Duration (Hours), Total Actual Hours
   2. Filters:

| Field to Evaluate | Operator | Values |
| --- | --- | --- |
| Appointment Start Date | Current | Quarter |
| Inherited Staff (Project Management) | Contains | Current User |

* 1. Click Search.
  2. Save the Report.

1. Report Name: Appointments Starting & Ending this Month (Calendar)
   1. Fields to Display: Name, Appointment Start Date, Appointment End Date, Contact Full Name, Status, Tracking ID
   2. No Filters
   3. Display Options:
      1. Display Format: Calendar
      2. Date Display: Appointment Start Date, Appointment End Date
   4. Click Search
   5. Save the Report.

#### Task 3: Create iView

1. Navigate to iViews page by clicking the Administration dropdown menu and selecting GlobaliViews under Workspaces and Dashboards.
2. iView Name: Staff Appointments
   1. Type: Report
   2. Folder: Project Management
   3. Add the reports created above to the iView:
      1. Appointments this Week
      2. Appointments this Month
      3. Appointments this Quarter
3. Click Save
4. Navigate to Dashboards and the add the iView created above in ‘Staff/Consultant’ Dashboard of Project Management.

### Configure project timesheets application (optional)

#### Task 1: Add fields

1. Navigate to Applications by clicking the Administration dropdown menu and selecting Applications under Application Builder.
2. Select the Project Timesheets application and navigate to the Fields tab.
3. In the Fields tab. Edit the following fields:
   1. Inherited Project Manager
   2. Field Population: Appointments > Project Timesheets > Inherited Project Manager (Project Management)
4. Click Save.
5. Save the Application.

**Note:** This task will mitigate the warning “Inherited Project Manager (Project Management) was not found in the target instance and was removed from field Inherited Project Manager” in Project Timesheets app detected from the package installation.

## Using Project Management

### Task 1: Create a project

Users: Project Manager

1. Go to the Project Management record.
   1. From the menu bar, click Project Management.
   2. Under Solutions, click Project Management.
   3. Under Applications, click Project Management.
   4. In the Project Management record browser, click New Record.
2. Enter all pertinent information related to the project in the General Information section.
3. Enter a Project Name, Type, and Description. These are required fields that must be entered to save a record.
4. Enter a Start Date and Due Date for the project.
5. Select the Type, Stage, Phase, and Delivery Status from the respective dropdown menus.
6. In the Description field, record any additional information about the project that you would like to document.
7. (Optional) In the Success Criteria field, enter information that is crucial to the overall success of the project such as key deliverables, dates, deadlines, etc.
8. Click Save in the Record Toolbar.

### Task 2: Assign team members to a project

Users: Project Manager

1. In the Project Management record browser, click the project where you would like to make a team assignment.
2. Select the Staffing Tab at the bottom of the General Information section.
3. Click the Add New button in the Team Assignments section.
   1. Select the role of the Team Member from the dropdown field.
   2. Click the Ellipsis button in the name field.
      1. Select a team member by clicking the radio button next to their name.
      2. Click the OK button.
   3. (Optional) In the Notes field, record any additional information about the team member that you would like to document.
4. Click Save in the Record Toolbar.

### Task 3: Schedule an appointment

Users: Project Manager, Staff

1. Go to the Appointment record browser.
   1. From the menu bar, click Project Management.
   2. Under Solutions, click Project Management.
   3. Under Applications, click Appointment.
   4. In the Appointment record browser, click New Record.
2. In the Appointment Information section:
   1. Enter the Name, Duration (Hours) scheduled for the appointment, Appointment Start Date, and Appointment End Date.
   2. Select the Type and Status of the appointment from the respective dropdown menus.
3. In the Appointment Detail section:
   1. Click the down arrow in the Parent field and select ‘Project Management: Staff Schedule.’
   2. ClickEllipsisunder the Resource field and select the radio button of the contact you would like to schedule an appointment for.
   3. Click the down arrow in the Resource field and select ‘Contacts.’
   4. Click Ellipsisunder the Resource field and select the radio button of the contact you would like to schedule an appointment for.
4. Click Save in the Record Toolbar.

### Task 4: Create a milestone

Users: Project Manager

1. Go to the Milestones record browser.
   1. From the menu bar, click Project Management.
   2. Under Solutions, click Project Management.
   3. Under Applications, click Milestones.
   4. In the Milestones record browser, click New Record.
2. Enter a brief, descriptive name in the Milestone Name field.
3. To link the Milestone to a Project, do the following:
   1. In the Project field, clickEllipsis.
   2. From the Record Lookup window click the check box of the Project(s) you want to link with the Milestone.
   3. Click OK.
4. Select a Creation Date and Due Date for the Milestone in the respective fields.
5. (Optional) In the Notes field, record any additional information about the Milestone that you would like to document.
6. To link existing Appointments to the Milestone, do the following:
   1. Click the Lookup icon in the Appointments section.
   2. From the Record Lookup window, select the appointment(s) you’d like to include by clicking in their respective check box.
   3. Click OK.
7. The Percent Complete, Tracking ID, # Appointments, # In Progress Appointments, and # Completed appointments fields automatically calculate based on the status of associated appointments.
8. Click Save in the Record Toolbar.

### Task 5: Create a project budget

Users: Project Manager

1. Navigate to the Project Management application.
2. In the Project Management record browser, click the project record you want to access.
3. Select the tab titled Project Financial at the bottom of the General Information section.
4. Click the Edit button at the top left of the window.
5. Enter the Original Budget Expenses in the Project Financial section and any Change Request Expenses that have been approved.
6. Enter the Original Budget Hours in the Schedule Analysis section and any Change Request Hours that have been approved.
7. The remaining fields in Project Financial and Schedule Analysis will automatically update and calculate based on data driven events.
8. Click the Save in the Record Toolbar.

### Task 6: Create a program

Users: Program Manager

1. Go to the Program Management record browser.
   1. From the menu bar, click Project Management.
   2. Under Solutions, click Program Management.
   3. Under Applications, click Program Management.
   4. In the Program Management record browser, click New Record.
2. Enter a brief, descriptive name in the Program Name field.
3. Select a Start Date and End Date for the project in their respective fields.
4. (Optional) In the Description field, record any additional information about the program that you would like to document.
5. Link existing Projects to the Program by clicking the | Lookup |icon in the Projects section.
6. Information in the Program Financial section will be automatically populated with the aggregate financial records from each included project.
7. Attach documents to the program by clicking the | Add New |button in the Project Documentation / Deliverable section.
8. Link existing documents to the program by clicking the | Lookup |button.
9. Click Save in the Record Toolbar.

### Task 7: Create and submit an expense report

Users: Staff

1. Go to the Project Expense Report record browser.
   1. From the menu bar, click Project Management.
   2. Under Solutions, click Project Planning.
   3. Under Applications, click Project Expense Reports.
   4. In the Project Expense Reports record browser, click New Record.
2. To select the project, click Ellipsis in the Project field.
   1. From the Record Lookup window, select the project by clicking the appropriate check box.
   2. Once you have selected the correct project click the OK button.
3. To select the resource who incurred the expense, click Ellipsis in the Resource field.
   1. From the Record Lookup window, select the resource by clicking the appropriate check box.
   2. Once you have selected the correct resource, click OK.
4. Project Owner responsible for reviewing the expense report will be inherited from related Project Management record in the Approving Authority field.
5. To enter expense information, click the Add New button in the Expense Details section.
   1. Select the type of expense by clicking the down arrow in the Expense Type field.
   2. Enter the amount of the expense and date it was incurred in the respective fields.
   3. (Optional) In the Description field, record any additional information about the expense that you would like to document.
   4. (Optional) To add an attachment to the expense report click the Add New button under the attachment section.
      1. From the Upload window click the Select File(s) button and navigate to the file(s) you wish to include.
      2. Once you have selected the document(s) to include click the OK button.
   5. Click the Save button and click Help unavailable  in the top right of the screen to return to the Add New Record screen.
6. Once you are satisfied with the expense report click the Submit Expense Report button in the top left.

### Task 8: Reviewing an expense report

Users: Project Manager

When an expense report is submitted for your review a notification will be sent to your email address

1. Log into Archer. Our task-driven landing screen will display a task widget titled “Expense Report Review.”
2. Click the text titled “An expense report requires your review” to open the expense record.
3. After reviewing the expense details click the Edit button in the top left of the window.
4. Select one of the following options:
   1. Approve Expense. Sends an approval notification to the submitter and the expense will be reflected in the project financials.
   2. Cancel Expense. Sends a cancellation notification to the submitter and closes the record.
   3. Reject Expense. Sends a rejection notification to the submitter prompting them to revise the expense report. Archer recommends that you include the required revisions in the Comments field under the Review Comments section.

### Task 9: Upload a file to document repository

Users: Program Manager, Project Manager, Staff

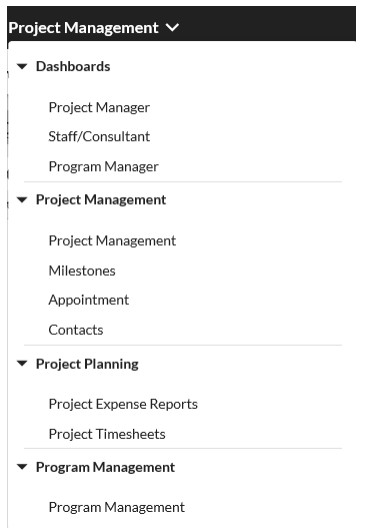
1. In the Document Repository record browser, click New Record.
2. Enter a brief, concise name in the Document Name field.
3. Select a Category and Status by clicking the dropdown arrow in the respective fields.
4. (Optional) In the Description field, record any additional information about the document that you would like to record.
5. To attach a document click the | Add New |button in the Attachment(s) section.
   1. From the Upload window click the Select File(s) button and navigate to the file(s) you wish to include.
   2. Once you have selected the document(s) to include click the OK button.
6. Click SAVE in the Record Toolbar.

## Upgrade best practices for existing implementations

The latest package has five (5) applications as mentioned in before chapters:

* Project Management
* Milestones
* Project Expense Reports
* Project Timesheets
* Program Management

The following changes were made to the existing app-pack:

* Excluded core applications Contacts and Appointment from the package.
* Excluded Document Repository ODA from the package.
* Added a new sub-form Project Status Report.
* Added a new Dashboard for Program Manager
* Added new iViews to Project Management Dashboard
* Added new iViews to Staff/Consultant Dashboard
* Added new fields and Report Objects in the Project Management applications
* Grouped the ODAs in solutions:
* 

Case 1: If users are using the existing Project Management app-pack and wish to utilize the latest package alongside the current Document Repository ODA following changes are recommended during package installation:

* Ensure to select ‘Do not map’ for the Project Document / Deliverables field in Project Management and Program Management during mapping.

Case 2: If users are using the existing Project Management app-pack without Document Repository ODA and wish to utilize the latest package alongside the Document Repository following changes are recommended before package installation:

* Ensure to install Document Repository ODA from Archer Documentation Request Tracking app-pack. For more details, refer the link: <https://community.rsa.com/docs/DOC-86034>

## Certification environment

Date tested: February 2021

| Product Name | Version Information | Operating System |
| --- | --- | --- |
| Archer Suite | 6.9 | Virtual Appliance |