

## How to Edit Your Project View

DreamTeam users have the ability to dictate which projects are contained in their project view. The project view is a list of projects that is accessible by clicking on the drop down menu located directly under the More Apps menu.

By clicking on the Project drop down menu, the user is presented with three options to choose from when creating their project view. These three options include:

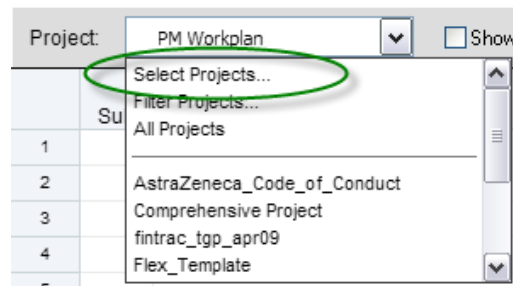
- 1. Select Projects**
- 2. Filter Projects**
- 3. All Projects**

The three sections below describe the three options listed above in detail.

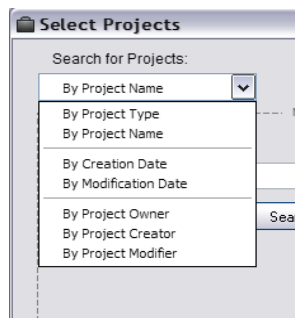
### **1. Select Projects**

The first option is Select Projects. This option enables users to select specific projects and add them to their project view. To use this option simply:

Step 1: Click on the drop down menu and choose the Select Projects command.

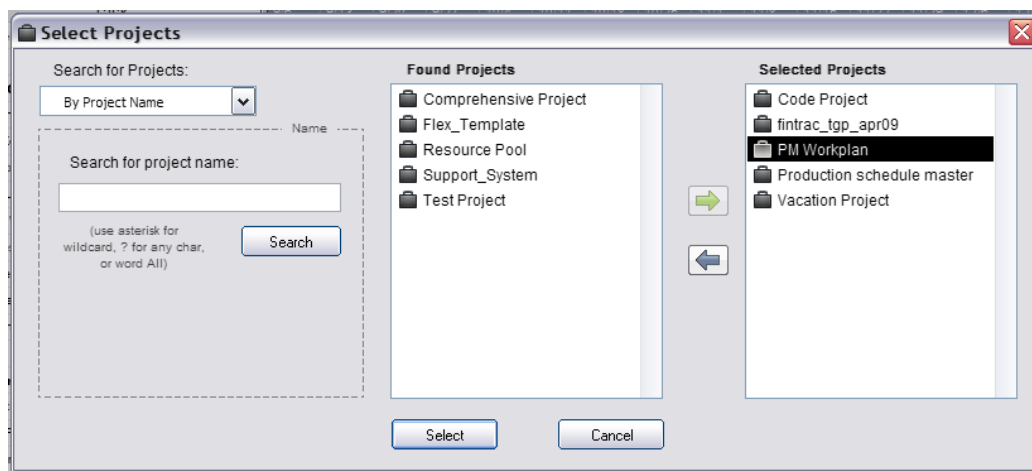


Step 2: Once selected, the Select Projects dialog box will appear. Here the user can search for a specific project using the following search options from the Search for Projects drop down menu.



Once the user has selected the desired search option, then simply type the name of the project in the search box and click the Search button. The results of the search will appear in the Found Projects box.

Step 3: To add a project to your project view, simply select the project from the Found Projects box and then click the green arrow to move it over to the Selected Projects box and click the Select button. The selected project will then appear in the project view drop down menu.

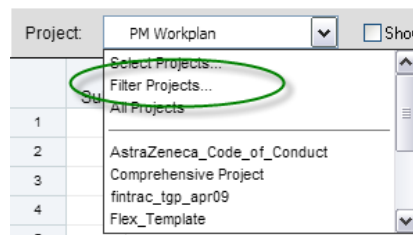


To remove a project from your project view, simply select the project from the Selected Projects box and click the blue arrow to move it over to the Found Projects box and then click the Select button.

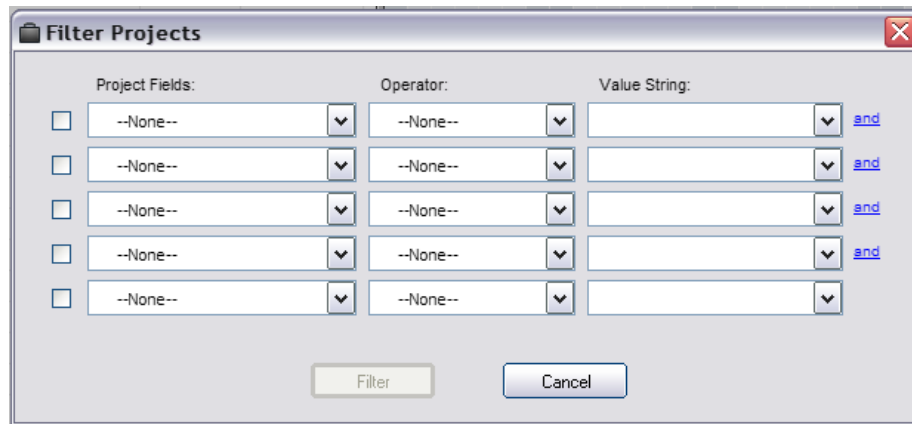
## 2. Filter Projects

The second option is Filter Projects. This option enables users to filter for specific projects or project related information using the Filter Project command. To access this option simply:

Step 1: Select the Filter Projects command from the drop down menu.



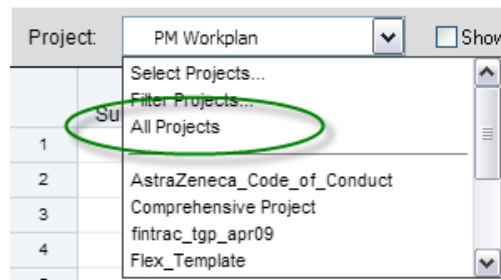
Step 2: Once selected, the Filter Projects screen will appear where users can enter their filter criteria and then click the Filter button.



The 'Filter Projects' dialog box contains three columns: 'Project Fields:', 'Operator:', and 'Value String:'. Each column has five rows, each starting with a checkbox and a dropdown menu currently set to '--None--'. To the right of each 'Value String' dropdown is a blue 'and' link. At the bottom are 'Filter' and 'Cancel' buttons.

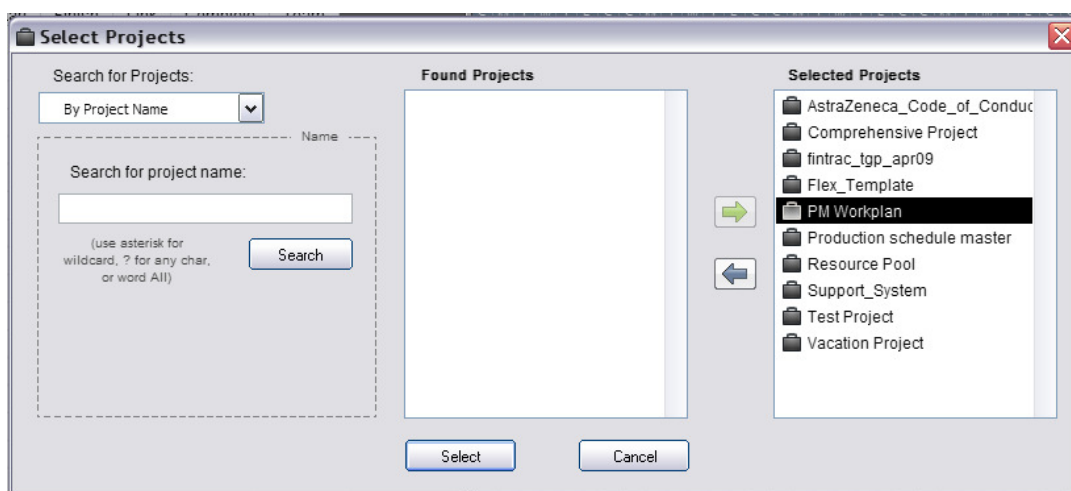
### 3. All Projects

The third and final option is All Projects. This option enables users to add all of their projects to their Project View.



A dropdown menu is shown with 'PM Workplan' selected. The menu options are: 'Select Projects...', 'Filter Projects...', 'All Projects' (circled in green), 'AstraZeneca\_Code\_of\_Conduct', 'Comprehensive Project', 'fintrac\_tgp\_apr09', and 'Flex\_Template'. A 'Show' checkbox is visible to the right of the dropdown.

Once selected, all of the Projects in your Org will be added to the Selected Projects box.



The 'Select Projects' dialog box has three main sections: 'Search for Projects:', 'Found Projects', and 'Selected Projects'. The 'Search for Projects:' section includes a 'By Project Name' dropdown, a search input field, and a 'Search' button. The 'Found Projects' section is currently empty. The 'Selected Projects' section lists several projects, with 'PM Workplan' highlighted. At the bottom are 'Select' and 'Cancel' buttons.