



building project templates

Reference Guide: Complex Project Components & List Values

Overview

The purpose of this reference guide—Complex Project Components & List Values—is to provide an understanding of key Project components, including Data Types, Project Fields, Events, required Task Items, Review Steps, Time Codes, and Days to Complete.

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Topic 1: Data Types

Data Types are the format of possible responses to Task Item questions. For example, Data Types could be a text field, date, drop-down field, or checkbox. The scope of answers to Task Item questions is nearly unlimited, as PensionPro allows users to create their own dropdown answer options if they do not already exist in the system.

Available Data Types

There are a few available Data Types that have pre-formatted Answer Types. These Template Data Types should not be edited.

Default Data Types include:

- **Checkbox** – Checkbox field for yes/no values
- **Currency** – Number with two decimals in a currency format
- **Date** – Date field in the format MM/DD/YYYY
- **Integer** – Whole number value that does not contain decimals
- **None** – Does not show an answer field; used when the Task Item contains text for informational purposes only
- **Number** – Number value that allows decimal figures
- **Text** – Field for any text characters of unspecified format

Creating Additional Values

Security Rights required: Maintenance

If the desired Data Type is not available on the list, additional Data Types (a form of **List Value**) can be added in PensionPro to create custom dropdown options.

To add a Data Type:

1. From the Navigation Panel, select **Maintenance > List Values**. *The List Values screen displays.*
2. Select the **Template** view.
3. Select the **Add** icon at the upper-right corner of the grid. *The Add Template Data Type window displays.*
4. Enter the desired name in the **Name** field.
5. Ensure the **Active** checkbox is selected.
6. Select **Save & Open**.

Now that the Data Type has been created, the options that will display in the dropdown menu can be added.

To add answer options (**Data Values**) to display in the newly created Data Type dropdown:

1. Select the **Add** icon at the upper-right corner of the grid. *The Add Template Data Value window displays.*
2. Enter the desired dropdown option in the **Display Name** field.
3. Add a **Description**, if desired.
4. Ensure the **Active** checkbox is selected.
Note: If the Active checkbox is not selected, the Data Value will not display in its corresponding Data Type dropdown menu in PensionPro.
5. Select **Save**.

Topic 2: Required Task Items

When building Project Templates, Task Items may be marked as 'required' or 'not required.' If the Task Item is not required, a user may complete the Task without inputting an answer for the Task Item.

Making Task Items Required/Not Required

Task Items can be marked as 'required' or 'not required' in both PensionPro and in an Excel Project Template.

In PensionPro

To change the requirement status of a Task Item in PensionPro:

1. From the Navigation Panel, select **Maintenance > Templates**. *The Project Templates screen displays.*
2. Double-click the desired **Project**. *The Template Summary Details screen displays.*
3. Select the **Workflow** view. *The Project displays the Task Groupings level.*
4. Double-click the **Task Grouping** and then the **Task** to arrive at the Task Item level.
5. Hover over the desired Task Item, then select the **Edit** icon on the right. *The Edit Task Item window displays.*
6. Select or deselect the **Answer Required** checkbox as desired.
7. Select **Save**.

In an Excel Project Template

To change the requirement status of a Task Item in an Excel Project Template, enter in the **Required** column:

- **TRUE** to indicate that the Task Item requires an answer.
- **FALSE** to indicate that the Task Item does not require an answer.

Topic 3: Days to Complete

The **Days to Complete** value in a Project Template represents the number of business days allotted for Task completion by the assigned Employee or Worktray. This should be based on your firm's internal performance standards.

How Days to Complete Works

Once a Project is launched, the Days to Complete value is determined based on its relation to other Tasks:

- In the first Task of a project, Days to Complete begins counting when the Project is started.
- If the Task is not the first in a project, Days to Complete begins counting down as soon as the previous Task is completed.

If the Task is not completed within the number of days specified in Days to Complete, the Task will display as past due on the Dashboard, reflected by its appearance in red. Note that the Days to Complete can only be entered on the Task level and not on the Task Grouping or Task Item levels.

Topic 4: Project Fields

Project Fields are used to "tag" Task Item answers within projects so that the tagged Task Item can be:

- Viewed in queries and reports.
- Filtered upon when mass launching projects.
- Used to target certain Contacts or merged data for Blast Email and Merge Document creation.

Creating Project Fields

To create a Project Field:

1. From the Navigation Panel, select **Maintenance > List Values**. *The List Values screen displays.*
2. Expand the **Core > Project** categories in the Views list on the left.
3. Under the **Project** category on the left, select **Project Field**. *The Project Fields grid displays a list of any existing Project Fields.*
4. Select the **Add** icon at the top-right corner of the grid. *The Add Project Field window displays.*
5. Enter the **Display Name**.
6. Enter a **Description**.
7. Confirm the **Active** checkbox is selected.
Note: If not selected, the Project Field Name will not be an available option when adding Project Fields to a Task Item.
8. Select **Save**.

Using Project Fields

Now that Project Fields have been created, they can be used within Project Templates in both PensionPro and in Excel.

In PensionPro

To add a Project Field to a Template in PensionPro:

1. From the Navigation Panel, select **Maintenance > Templates**. *The Project Templates screen displays.*
2. Double-click the desired **Project Name**. *The Template Summary Details screen displays.*
3. Select the **Workflow** view. *The Project displays the Task Groupings level.*
4. Double-click the **Task Grouping**.
5. Double-click the **Task**. *The list of Task Items displays.*
6. Hover over the desired Task Item, then select the **Edit** icon on the right. *The Edit Task Item pop-up displays.*
7. Select the desired Project Field from the **Project Field** dropdown.
8. If desired, select the **Show on Project Summary** checkbox.
Note: If selected, the answer recorded by the user for this Task Item will be displayed on the **Project Fields** view within a Project.

9. If desired, select the **Show on Plan Summary** checkbox.
Note: If selected, the answer recorded by the user for this Task Item will be displayed on the **Project Fields** view within a Plan.
10. Select **Save**.
Note: If neither checkbox option was selected, the field will still be reportable in PensionPro and available using Fetch.

In an Excel Project Template

To add Project Fields to a Project Template in Excel format for upload into PensionPro, enter:

- The Project Field's Display Name in the **Project Field** column.
- **TRUE** or **FALSE** in the **Show on Project** column of the desired Task Item row.
- **TRUE** or **FALSE** in the **Show on Plan** column of the desired Task Item row.

Once all desired Project Fields have been added, save and close the Template. The Project Template must now be imported. If you have specified a new Project Field in your Template, but have not yet added the Project Field to your List Values, you may choose to create the new Project Fields automatically during the Template import process.

Reporting on/Querying Project Fields

Users can report on Project Field answers by using the *Project Field Values* Report. To access this report, navigate to **Reporting > Projects > Project Field Values**. Users can select the Projects and Project Fields to report on. Project Fields can also be reported on in Fetch, PensionPro's custom querying tool.

Add Project Fields as Merge Fields in Blast Email

Project Fields can also be added as Merge Fields in Blast Email.

To add Project Fields as Merge Fields in Blast Email:

1. From the Navigation Panel, select **Communications > Blast Email**.
2. Double-click the desired Blast Email Template. *The Blast Email Information screen displays.*
3. Select **Next** to reach the **Subject and Body** step.
4. Select the **Edit** icon at the upper-right corner.
5. Click to place the text cursor in the **Subject** or **Message Body** field where the Merge Field should be added.
6. Expand the **Project Fields** selection under the **Merge Fields** list to the right of the window.
7. Double-click the desired Project Field to add it into the Blast Email.
8. Select **Save**.

Topic 5: Time Codes

Using Time Codes helps to categorize time activity with various classifications for reporting and billing purposes. PensionPro's Time Reports and Power Tools provide time data and metrics for all activities, enabling managers to review and analyze time and time management.

Creating Time Codes

Security rights required: Maintenance

Time Codes must first be created before they can be added to a Project Template and tracked in PensionPro.

To add a Time Code:

1. From the Navigation Panel, select **Maintenance > Time Codes**.
2. Select the **Add** icon at the top-right of the grid. *The Add Time Code window displays.*
3. Enter the **Name**.
4. Enter the **Description**.
5. Select the **Billing Code** from the dropdown, if applicable.
6. Select the **Billable** checkbox if the Time Code is billable.
7. Select the **Active** checkbox to make the Time Code active for use.
8. Select **Save**.

Tracking Time Against a Project

Time can also be tracked against Projects in PensionPro. Although not required, doing so wherever possible is recommended. A few reasons why tracking time against Projects can be valuable:

- It offers visibility into workflows and Projects, bringing operational and profitability metrics to the forefront.
- It provides insight into benchmarking, budgeting, and staffing.
- Over time, it provides insight as to how long it truly takes to complete certain Projects.
- It makes it clear where bottlenecks might occur and gives understanding where process order may need to be reevaluated.

Time codes can be added to the Task level of a Project. For additional information on Time Tracking, please refer to the Help Center article *PensionPro 2.0 - Using Time Tracking*.

Topic 6: Events

Events are a part of The PensionPro Event Management tool which helps firms track the key milestones that drive deadlines for Plans. Here you can create, monitor, and control a standard set of Events that are tied to Project Tasks in PensionPro.

When/Why Events Should be Used

Event Management is a powerful tool. Here are just some of the reasons to employ it:

- It provides management a high-level overview of where certain Projects stand at any given point.
- It gives the management team a burndown for easy viewing of total number of Tasks, how many have been completed, and how many remain.

Example: Events are extremely useful when tracking the Year-End Data Collection process. Adding Events to certain Tasks within the Project would provide managers with the ability to track how many Census Requests have been sent, while also tracking both the number of censuses that have been completed and the number that remain.

For additional information on Event Management, please review the *PensionPro 2.0 – Using Event Management* article on the Help Center.