



Creating a Confidential Project

Quick Reference Guide

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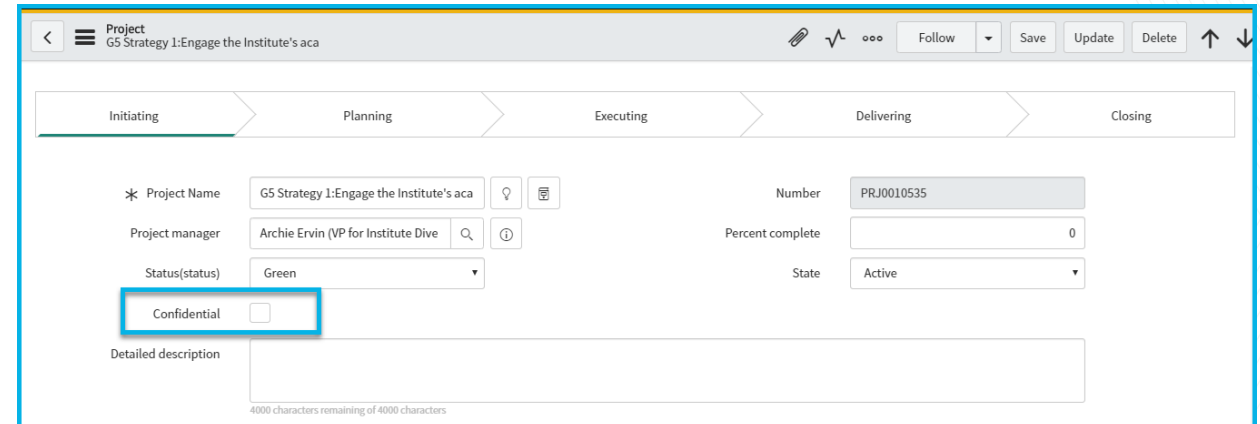
A Project can be identified as Confidential. Information related to that Project will only be available to the following users:

- Project Manager on the project
- All users identified in the Project Team field (found on Details tab)
- All users in any user field of a related list on the parent project including Project Tasks, Stakeholders, Stories, Requirements, Resource Plans and Actions.

It is important to note that reporting and dashboard results may differ between users depending on the access of these Projects.

To identify a Project as confidential:

1. Check the **Confidential** field in the Project Header.



The screenshot shows the 'Project Details' form for 'G5 Strategy 1: Engage the Institute's aca'. The form is divided into two main sections: 'Project Header' and 'Project Details'. The 'Project Header' section includes fields for 'Project Name', 'Project manager', 'Status(status)', 'Number', 'Percent complete', and 'State'. The 'Project Details' section includes a 'Detailed description' field. The 'Confidential' checkbox is highlighted with a red box. The 'Project Name' field contains the text 'G5 Strategy 1: Engage the Institute's aca'. The 'Project manager' field contains the text 'Archie Ervin (VP for Institute Dive)'. The 'Status(status)' dropdown is set to 'Green'. The 'Number' field contains the text 'PRJ0010535'. The 'Percent complete' field contains the text '0'. The 'State' dropdown is set to 'Active'. The 'Detailed description' field is empty and has a character count of '4000 characters remaining of 4000 characters'.

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2. Add Team Members to the **Project Team** field in the Details tab.

The screenshot displays the 'Details' tab of a project management interface. The 'Project Team' field is highlighted with a red rectangular box. This field contains a lock icon and a plus icon, indicating it is a restricted field where new team members can be added. Other visible fields include Portfolio, Program, Execution type (set to Waterfall), Priority (Select one), Phase (Initiating), Business Unit (Office of Institute Diversity, Equit), Department (Office of Institute Diversity, Equit), Impacted Business Units, Business Applications, and Primary Service (Select one).