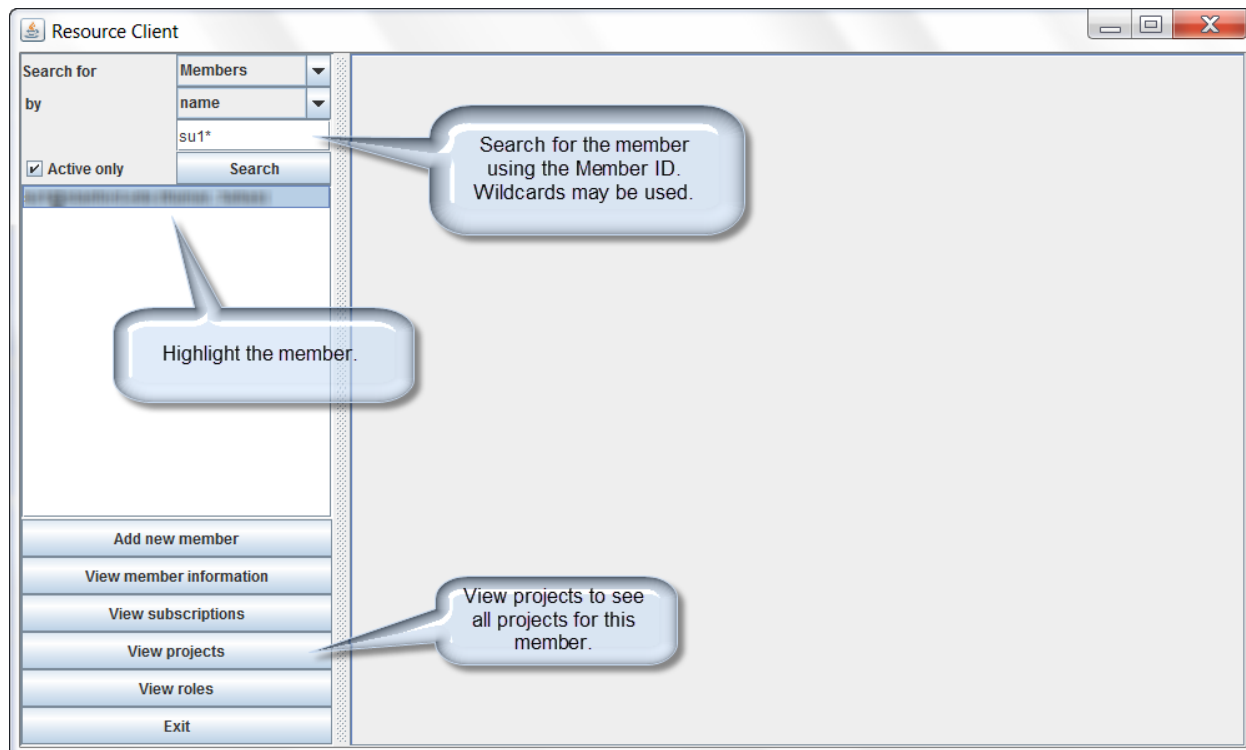


Badger Docs – Project Add/Replacement

You can replace a project for a member at any date in the past. Typically projects change as of the start of the month. Select Members from the pull-down and enter the ID (and optionally a wildcard) to search for the member.



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Members may have one or more projects, but they must have at least one valid project.

The screenshot shows the 'Resource Client' window. On the left, there is a search panel with a 'Members' dropdown menu set to 'name' and a search box containing 'su1*'. Below the search box is a 'Search' button and a checked 'Active only' checkbox. A callout bubble points to the search box with the text: 'Search for the member ID of the person whose project you want to replace. Use the asterisk as a wildcard.' Below the search panel is a list of menu items: 'Add new member', 'View member information', 'View subscriptions', 'View projects', 'View roles', and 'Exit'. A callout bubble points to the 'View projects' menu item with the text: 'View existing projects which display at the top.' The main area of the window displays a table titled 'Projects for member su1@stanford.edu'. The table has columns for 'Project', 'Active', 'Approver', 'Begin date', 'Revoker', and 'End date'. A single row is visible with the following data: 'Project', 'true', 's', '2012-3-19 15:7:23', and empty cells for 'Revoker' and 'End date'. A callout bubble points to the table with the text: 'Highlight the member.' At the bottom of the window, there are four buttons: 'Add project', 'Remove project', 'Replace project', and 'Close'. A callout bubble points to the 'Add project' button with the text: 'Adding a project is simple. Just select Add Project.'

Project	Active	Approver	Begin date	Revoker	End date
	true	s	2012-3-19 15:7:23		

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The screenshot shows the 'Resource Client' application window. On the left, there is a search panel with a dropdown menu set to 'Members' and a search box containing 'su1*'. Below the search panel are buttons for 'Add new member', 'View member information', 'View subscriptions', 'View projects', 'View roles', and 'Exit'. The main area displays a table titled 'Projects for member su1@stanford.edu' with the following data:

Project	Active	Approver	Begin date	Revoker	End date
1125047-100-047	true	su1@stanford.edu	2012-3-19 15:7:23		

A 'Prompt' dialog box is open in the center, asking for a 'new project name' with an input field and 'OK' and 'Cancel' buttons. A speech bubble points to the first row of the table with the text: 'Highlight the project you want to replace.' Another speech bubble points to the 'Replace project' button at the bottom with the text: 'After selecting Replace Project enter the new project name. The project must already exist before you can add it to a member.'

At the bottom of the main window, there are four buttons: 'Add project', 'Remove project', 'Replace project', and 'Close'.

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The screenshot shows the 'Resource Client' application window. The main area displays a table of projects for member 'su1@stanford.edu'. A 'Prompt' dialog box is open, asking for an effective date for project replacement. A speech bubble provides instructions: 'Now enter the effective date. It should be a date in the past, but usually not prior to the last monthly billing.' The dialog box contains a text input field with '04/01/12' and 'OK' and 'Cancel' buttons.

Project	Active	Approver	Begin date	Revoker	End date
1	true		2012-3-19 15:7:23		

Prompt

Enter effective date for project replacement (mm/dd/yy):

04/01/12

OK Cancel

Buttons at the bottom of the window: Add project, Remove project, Replace project, Close

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The screenshot shows the 'Resource Client' application window. The main area displays a table of projects for member 'su1@stanford.edu'. A confirmation dialog box is overlaid on the table, asking 'Are you sure you want to replace [project name] for member su1@stanford.edu?'. A speech bubble points to the dialog with the text 'Verify the information.'.

Projects for member su1@stanford.edu

Project	Active	Approver	Begin date	Revoker	End date
XXXXXXXXXXXXXXXXXXXX	true	XXXXXXXXXXXXXXXXXXXX	2012-3-19 15:7:23		

Confirm

Are you sure you want to replace XXXXXXXXXXXXXXXXXXXX for member su1@stanford.edu?

Badger Docs – Project Add/Replacement

Resource Client

Search for Members

by name

su1*

Active only

Search

Projects for member su1@stanford.edu

Project	Active	Approver	Begin date	Revoker	End date
	false		2012-3-19 15:7:23		2012-4-1 0:0:0
	true		2012-4-1 0:0:0		

The new project is effective as of the date specified while the old project is terminated on the same day.

Success

Changes were successful.

OK

Add project Remove project Replace project Close

Add new member

View member information

View subscriptions

View projects

View roles

Exit