Este guia tem por finalidade facilitar a operação do Projec Builder pelos usuários cadastrados no sistema com perfil Gerente de Projetos.

Com este guia você vai conseguir:

1 Filtrar Portfólio 2

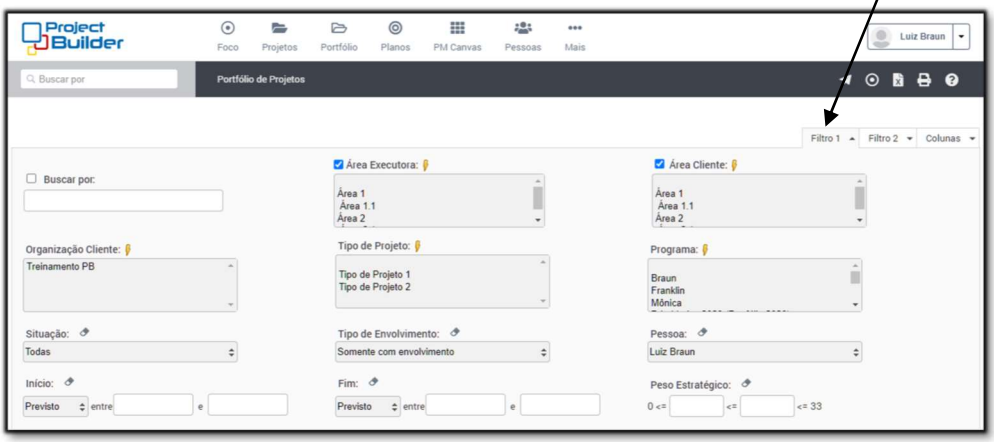
2 Formatar visão 2

3 Favoritar 3

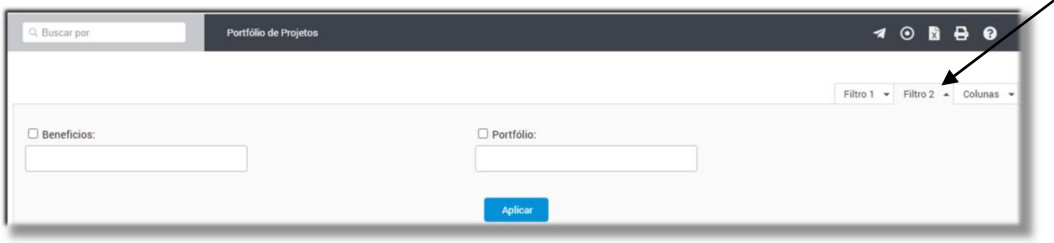
4 Extrair Cronograma 4

1 Filtrar Portfólio

Em Portfólios, se desejar filtrar por campos nativos clique aqui

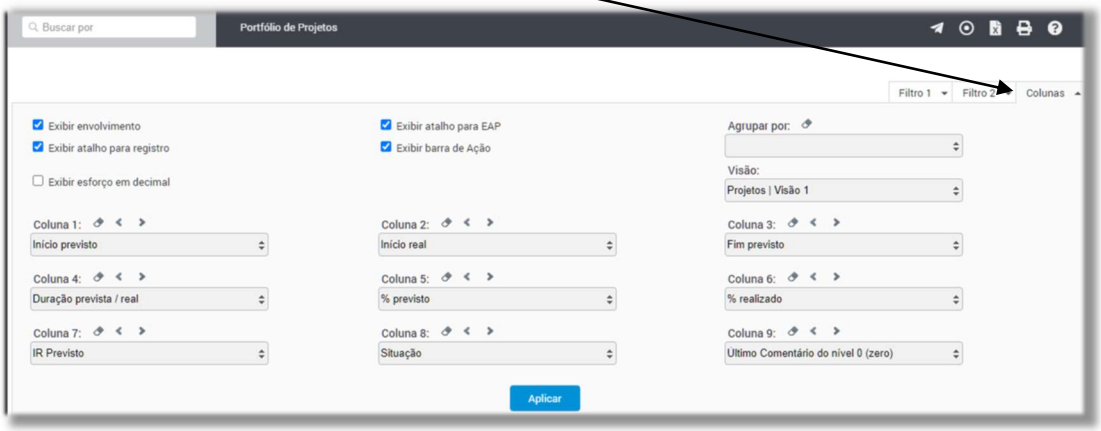


Se desejar filtar por campos customizáveis, por exemplo Portfólio, clique aqui



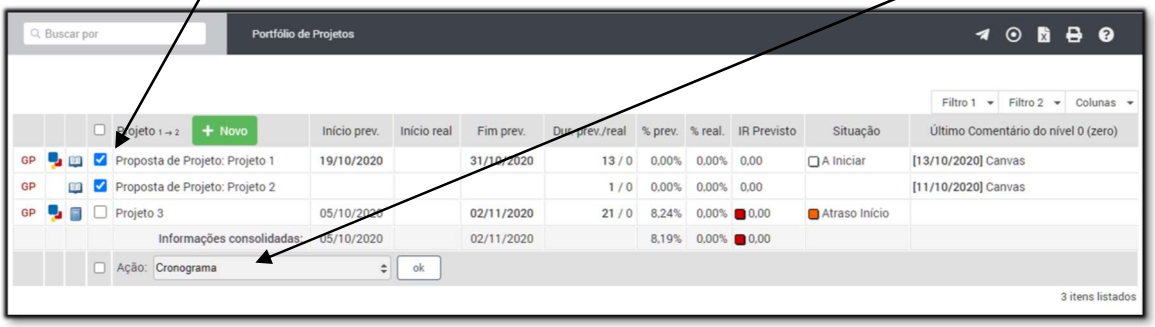
2 Formatar visão

Em Portfólio, clique aqui

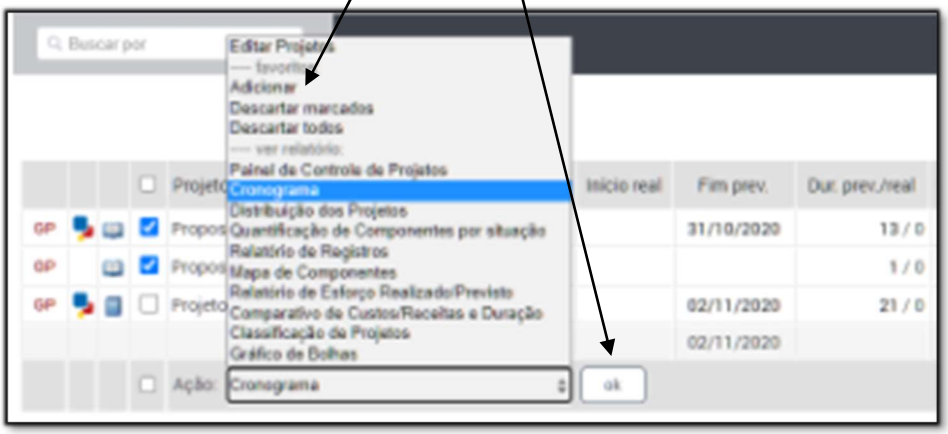


3 Favoritar

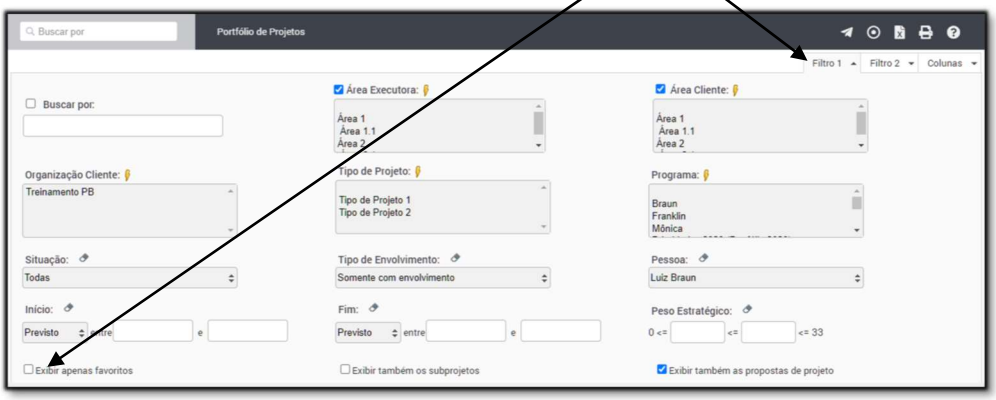
Em Portfólios, marque os Projetos/Propostas desejados e clique aqui



Para Adicionar clique aqui e aqui

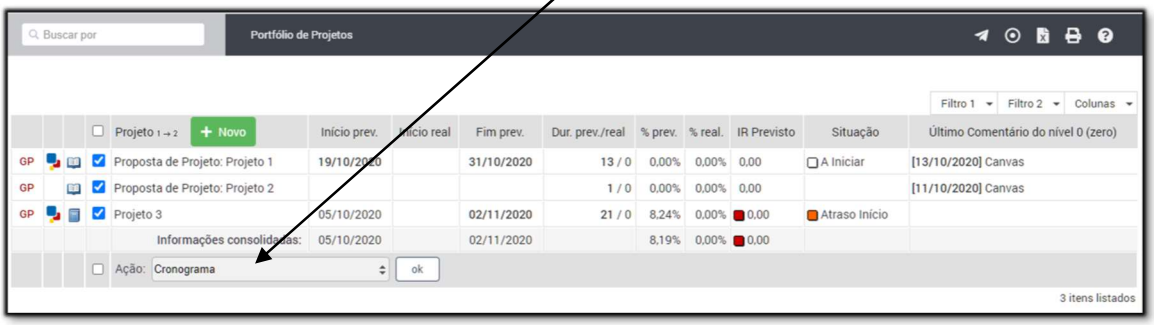


Para exibir apenas os Favoritos clique aqui e em [Aplicar]

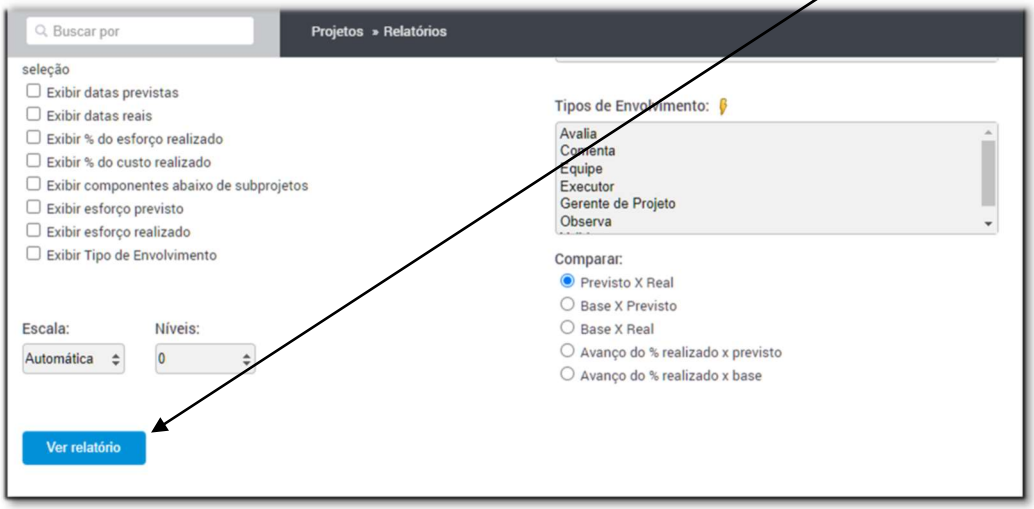
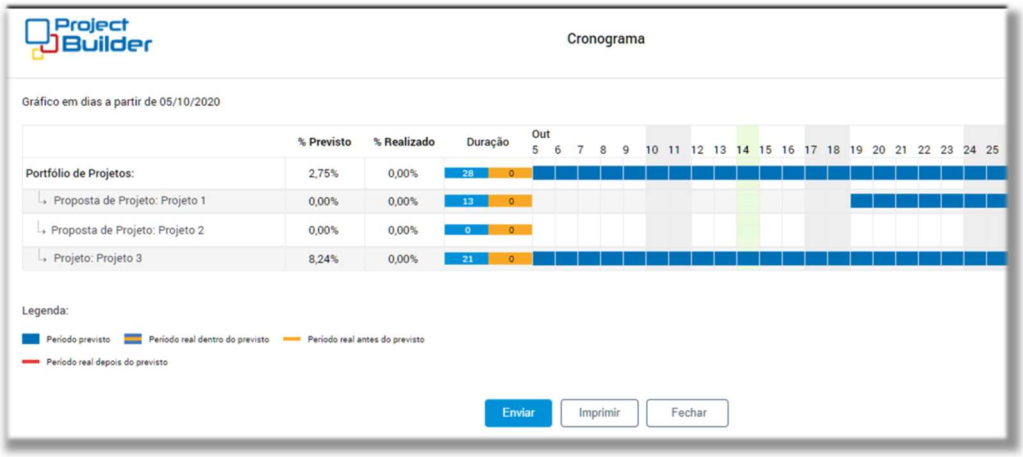


4 Extrair Cronograma

Em Portfólios, selecione Cronograma aqui e clique em [OK]



Defina os critérios para exibição do Cronograma e clique aqui



Cronograma