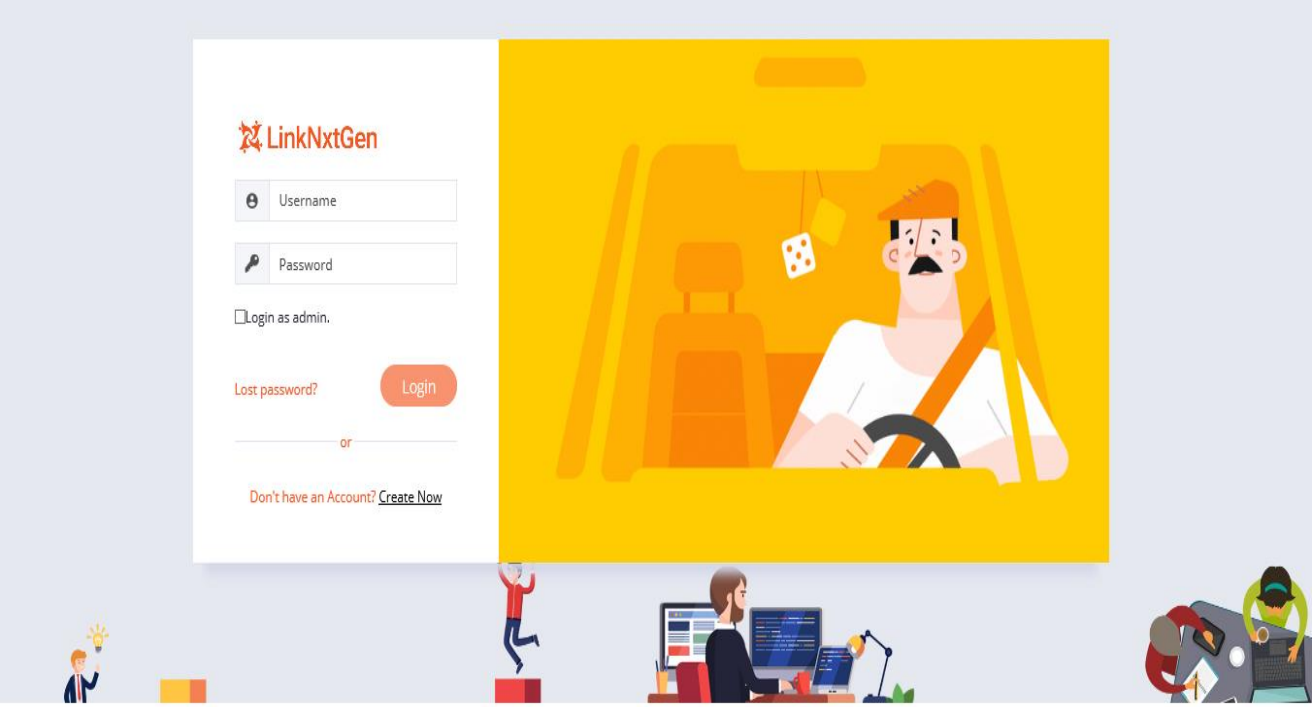
LinkNxtGen

Process Manual

April 8, 2020 v3



Version Control

Document Name	Date Issued	Issued By
LinkNxtGenProcedural Document Manual April 1, 2020	April 1, 2020	Tamra Blake
LinkNxtGen Procedural Document Manual April 4, 2020	April 4, 2020	Tamra Blake
LinkNxtGen Procedural Document Manual April 8, 2020	April 8, 2020	Tamra Blake

Table of Contents

1 GETTING STARTED- INFORMATION TO COLLECT 6

2 APPLICATION LOGIN 6

3 SETTING UP YOUR ORGANIZATION NAME IN THE APPLICATION 7

4 ORGANIZATION CHART-DETERMINE HOW YOUR ORGANIZATION SHOULD BE REPRESENTED 7

5 DEFINITION OF TABS IN THE APPLICATION 8

5.1 Organization 8

5.2 Configuration Logical Level 9

5.3 Config Levels 9

5.4 Users 9

5.5 Labor Category 10

5.6 Project 10

5.7 Task 11

5.8 Step 11

5.9 Process 11

5.10 Procedure 12

5.11 Roles 12

5.12 Groups 12

5.13 Config Status 12

6 DOWNLOADING TEMPLATES TO POPULATE INFORMATION 13

7 DETERMINE USERS OF THE SYSTEM 13

8 DETERMINE THE LABOR CATEGORIES 13

9 EMPLOYEE DATA ENTRY SHEET 14

10 UPLOAD THE ORGANIZATION TO THE APPLICATION 14

11 UPLOAD THE CONFIGURATION LOGICAL LEVEL FILE 15

12 UPLOAD THE USER FILE 16

13 UPLOAD THE LABOR CATEGORY CSV FILE 17

14 SYSTEM GENERATED ID'S 17

15 UPLOAD YOUR PROJECT/ TASK/ STEP FILE – Process Upload File 18

16 MASS UPLOADING LARGE VOLUME OF DATA 18

17 PROCESS AND PROCEDURES 18

18 DASHBOARD LEVEL REPORTING SAMPLES/ TYPES 19

18.1 **Executive Reporting Results** 19

18.1.1 Labor Category Performance 19
18.1.2 Portfolio Health 20
18.1.3 Portfolio Health Detail 20
18.1.4 Portfolio Financial Performance 21
18.2 Operational Report 21
18.3 Tactical Report 22
19 MANAGERIAL AND OPERATOR REPORTS- UPDATES/ADMIN 22
19.1 Managerial Report 22
19.2 Operator 24
20 REPORTS 25
20.1 Cost Report 25
20.2 Process Report 26
20.3 Procedure Report 26
20.4 Labor Category Distribution Report 27
20.5 Insights of Critical Projects 27
20.6 Optimize / Forecast 28
20.7 Analyze Projects 28
20.8 Duplicates 29
21 ROLES /PERMISSIONS 29
22 GROUPS 30
22.1 Manage Users 30
22.2 **Manage Group** 31
23 CREATE APPROVAL GROUPS 31
24 AUDIT CONTROLS 32
25 END USER MANUAL 34
26 USER LOGIN 34
27 PROFILE SETUP 34
28 INSIGHTS 35
29 NAVIGATING INFORMATION 36
30 LISTS 38
31 REASSIGNING A PROJECT TO NEW USER 39
32 FUNCTIONS: Editing, Attaching a Document, Suggestions and Sharing 40
32.1 **EDITING** 40

32.2 ATTACHING A DOCUMENT 41
32.3 SUGGESTION 41
32.4 SHARE 42
32.5 DELIVERABLE 42
33 CREATING A NEW PROJECT 43
34 CREATING A NEW TASK UNDER EXISTING PROJECT 43
35 CREATE A PROCESS 44
36 CREATE A PROCEDURE 44
37 AUDITING / ARCHIVING 45
38 MEMBERS 45
39 ADDING A NEW USER 45

1 GETTING STARTED- INFORMATION TO COLLECT

Key documents to collect to begin the process of loading your organization into the application:

- Organization chart that outlines the reporting structure of your organization
- List of all employee first and last names
- List of all employee email addresses
- City, State and Country where each employee works
- Labor category name associated with each employee (we have 125 predefined labor categories)
- Labor rate associated with each category
- Number of hours per year that each employee works (default to 1880)

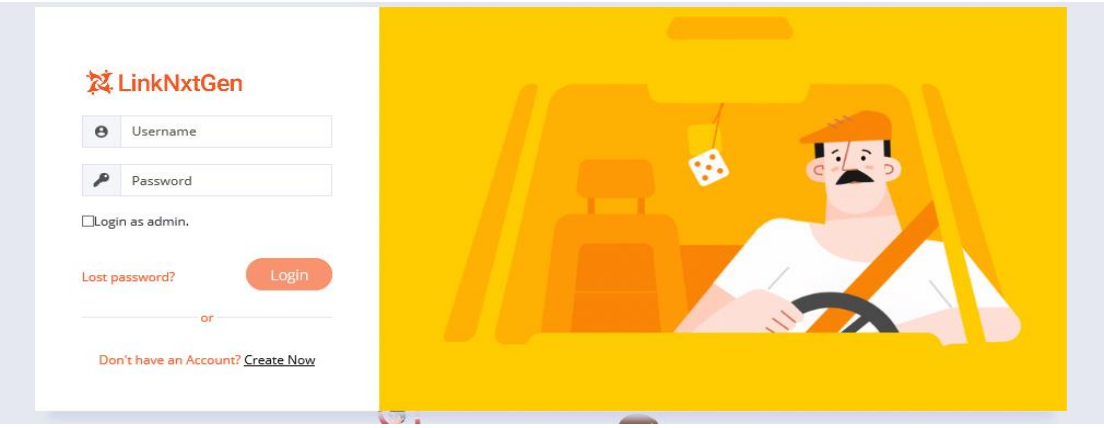
Once you have this information you have the key data to begin to fill out the following templates in the system (csv files from Excel) to be able to populate the following: The definition of these categories can be found in section 6,

- Configuration Level
- Users
- Labor Categories

2 APPLICATION LOGIN

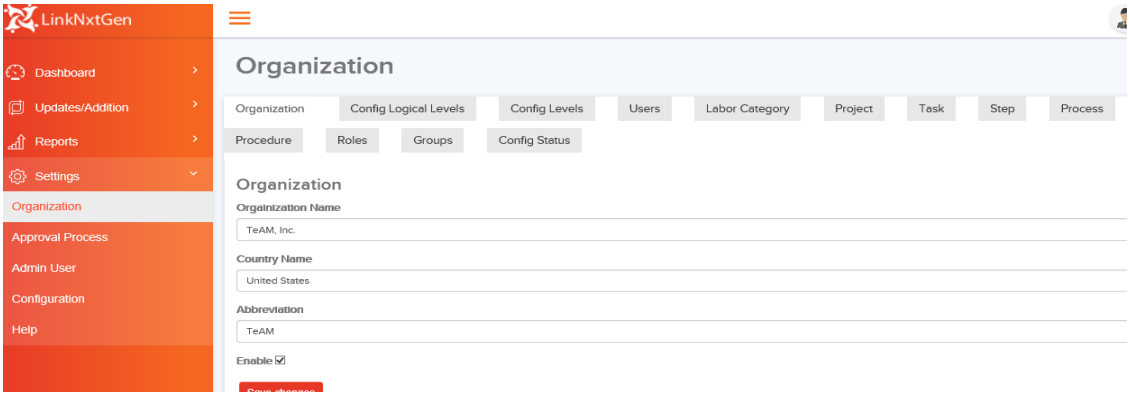
- Users will be assigned a user name and password to the application.
- The application has two factor authentication to reduce fraud risk

Note: If you are the "Admin" for the application you need to check the "Login as Admin" box
If you are not defined as an Admin in the system, you will not be allowed to check the "Login as Admin" box
Only Users with Admin privileges will be allowed to login as an Admin.



3 SETTING UP YOUR ORGANIZATION NAME IN THE APPLICATION

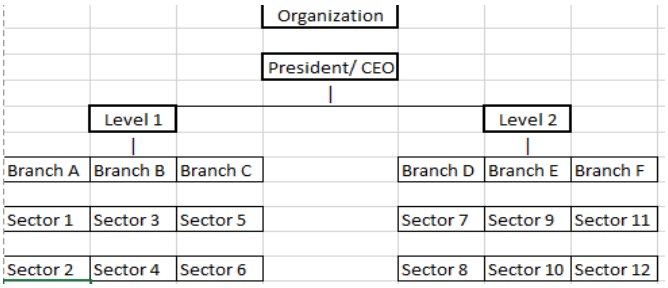
- This process allows you to set up the name of your organization (Ex. IBM, TeAM Inc, Xerox)
- To set up the name of your organization, click on Settings and then Organization
- Go to the Organization tab and type in:
  - The name of your organization
  - The country where your organization is headquartered
  - Provide an abbreviation for your firm (if you have one)
  - Check the enable box and hit continue



4 ORGANIZATION CHART-DETERMINE HOW YOUR ORGANIZATION SHOULD BE REPRESENTED

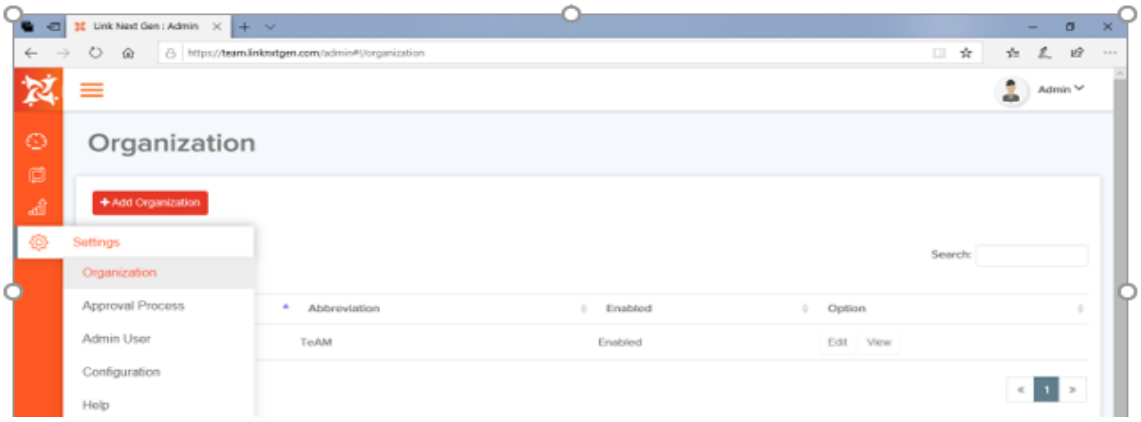
This is a very important step in the overall process. You should meet with your leadership team and determine how you want to represent your company. This will be particularly important in order to obtain the reports; with key metrics, to help your mid, senior and executive level managers make key decisions for their respective divisions/ branches or sectors based on data driven results.

- Determine who will see various reports from the system (President, Treasurer, Finance Manager, Legal Advisor, Division Lead, Branch Lead, Sector Lead, etc.)
- /'The application can handle multiple levels of reporting based on the requirements of the organization (For reports see section 20 and 21)

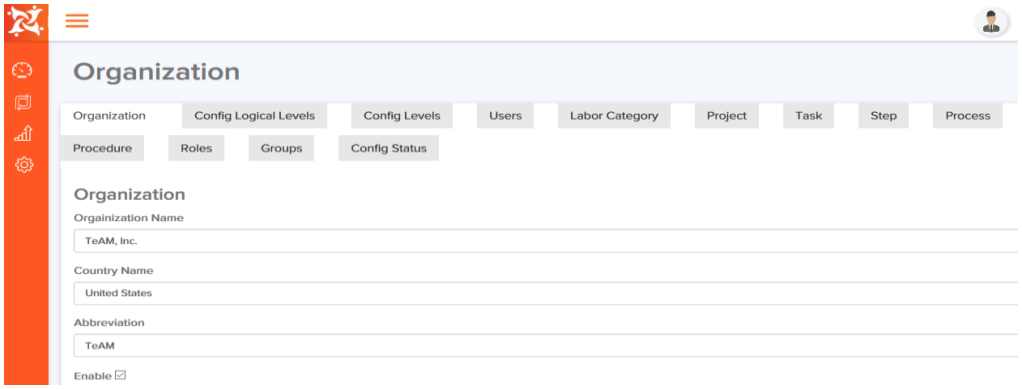


5 DEFINITION OF TABS IN THE APPLICATION

- To get started, basic data is collected to build the framework of the application
- Once you set the name of the organization you will be able to access the following tabs by going to Settings>> O*organization>> View: . The below screen will appear.



- Once you click on "View", the following screen will appear



[redacted] Organization

- The organization tab will display the overarching organization name
- The country where the organization is headquartered
- An abbreviation of the organization's name
- A box that you need to check to "Enable " the organization in the system

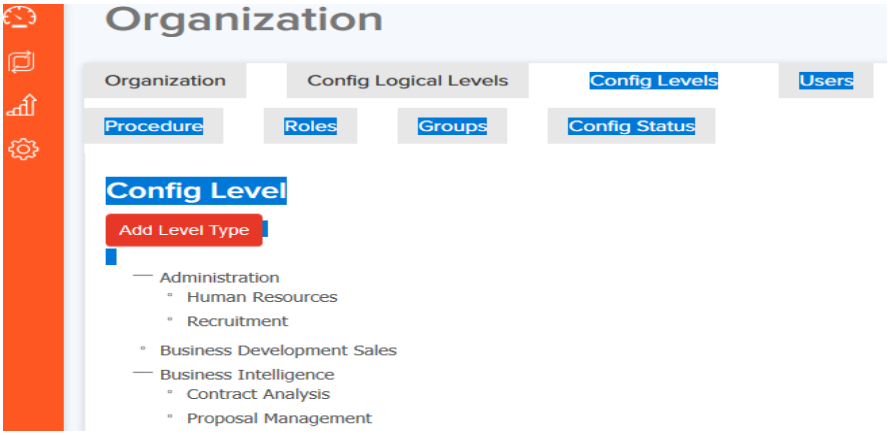
[redacted] Configuration Logical Level

- This tab defines how you want to define the levels within your organization
- An organization can have multiple levels
- Below is an example of the template that needs to be completed to create the organization structure

Logical Level1	Level1	Level1 Description	Logical Level2	Level2	Level2 Description	Logical Level3	Level3	Level3 Description
Directorate	Dir1		Branch	Branch1		Division	Divison1	
							Divison2	
				Branch2			Divison3	
							Divison4	
	Dir2			Branch3			Divison5	
				Branch4			Divison6	
							Divison7	
							Divison8	

[redacted] Config Levels

- This tab displays the layout of the levels within the application
- Drills down into the organization



[redacted] Users

- This tab is used to upload the User file.
- The User file is a list of all the Users/ Employees that will be using the system
- In order to use the system, a User must be added
- This feature allows the Admin to upload your full employee roster via an excel CSV file
- This is the template needed :

first_name	last_name	labour_category_	email	is_manager	manager_email
A	B	1	ab@yopmail.com		gh@yopmail.com
C	D	2	cd@yopmail.com		gh@yopmail.com
E	F	2	ef@yopmail.com		gh@yopmail.com
G	H	2	gh@yopmail.com	1	mn@yopmail.com

[redacted] Labor Category

- This tab is used to upload the Labor category file
- The system has a list of predefined 125 labor categories
- You can add additional labor categories to the list
- You need the labor category bill rate, the billable hours per day, the billable hours per year, the country , city and state where the labor category resides
- This is the template needed to upload
- Note for removal : The labor category has been dropped from the Project Import and is associated in the User file only. Need a screen shot

abbreviation	name	description	rate	billable_hr	fte	country	state	city
Management Ar	Management Analyst	Demonstrated experience an	68.86	8	1880	United States	Virginia	Falls Church
Management Ar	Management Analyst	Demonstrated experience an	68.86	8	1880	United States	Virginia	Falls Church
Project Manage	Project Manager	Demonstrated experience an	107.61	8	1880	United States	Virginia	Falls Church
Network Systen	Network Systems Engineer	Ability to perform supervised	145.44	8	1880	United States	Texas	San Antonio

[redacted] Project

- The Project tab is where you would upload the Project, Task and Step Data for the initial upload
- Users provide the Project Name, list the Task then the Steps associated with the Task
- Start and End dates in YYYY-MM-DD format are entered. Every level must have a start and end date even if it is a projected end date
- The assign_to represents the User Id that gets created after you upload the User file
- The level_id is determined after the Config Level file is uploaded
- The repeat_type is how often the step is performed. Values are Daily, Weekly, Quarterly, Annual
- The status field represents the current status of each Project, Task and Step
- The status values are Not Started, In Progress and Completed. You can add additional statuses on the Configuration tab if desired

project_name	task_name	step_name	description	outcome	percentage_of_time	expected_working_hr	start_date	end_date	assign_to	level_id	labour_cate	repeat_type	status
Project I			X	ABCD	60%		2019-01-19	2019-06-19	U0000000000438	1			In Progress
	Task IA		X	ABCD	20%		2019-01-20	2019-01-28	U0000000000434	1			Completed
		Step IAA	X	ABCD	20%		2019-01-20	2019-01-28	U0000000000426	1	3	DAILY	Completed
		Step IAB	X	ABCD	20%		2019-01-20	2019-01-28	U0000000000426	1	4	DAILY	Completed
	Task IB		X	ABCD	20%		2019-01-20	2019-01-28	U0000000000434	1			Completed
		Step IBA	X	ABCD	20%		2019-01-20	2019-01-28	U0000000000426	1	3	DAILY	Completed
		Step IBB	X	ABCD	20%		2019-01-20	2019-01-28	U0000000000426	1	4	DAILY	Completed

[redacted] Task

- This tab is used to upload additional Task data into the system
- Description of the fields are mentioned above
- Below is the template used to prepare additional task uploads
- Note: Once the mass upload is done at the Project Level, employees will use the Create Task tab (see section ____)

project_id	name	description	outcome	percentage_of_time	expected_working_hr	start_date	end_date	created_by	level_id	labour_category_id	repeat_type
ACT-1	Task 11	Description text	Outcome te	20-30		2018-05-20	2018-06-20	U000000000016	550	2	DAILY
ACT-1	Task 12	Description text	Outcome te	50-60		2019-08-30	2019-10-30	U000000000016	550	5	DAILY
ACT-2	Task 22	Description text	Outcome te	20-80		2020-07-31	2020-12-31	U000000000016	551	4	DAILY

[redacted] Step

- This tab is used to upload additional Step data into the system
- Description of the fields are mentioned above
- Below is the template used to prepare additional step uploads
- Note: Once the initial upload is done at the Project Level, employees will use the Create Step tab to add additional Steps (see section ____)

project_id	task_id	name	descriptio	outcome	percentag	expected_	start_date	end_date	created_by	level_id	labour_ca	repeat_type
ACT-1	TSK-1	Step 111	Descriptic	Outcome	30-40		2019-09-30	2019-10-30	U0000000000162	550	3	WEEKLY
ACT-1	TSK-1	Step 112	Descriptic	Outcome	40-50		2018-05-20	2018-06-20	U0000000000162	550	4	MONTHLY
ACT-1	TSK-2	Step 121	Descriptic	Outcome	60-70		2018-04-20	2018-06-20	U0000000000162	550	6	MONTHLY
ACT-1	TSK-2	Step 122	Descriptic	Outcome	20-40		2020-10-31	2020-12-31	U0000000000162	550	1	DAILY

[redacted] Process

- This tab is used to assign Tasks to a Process Name
- Below is the template along with a sample file with data

process_nan	task_id	created_date	created_by
Process 1	TSK-1,TSK-2	9/30/2019	U0000000000162
Process 2	TSK-3,TSK-4	5/20/2018	U0000000000162

name	task_list	created_date	created_by
Organization Corporate, Certifi	TSK-113,TSK-114,TSK-115,	4/3/2020 9:04	U00000000005
BUMED Program Management	TSK-291,TSK-292,TSK-293,	4/3/2020 9:04	U00000000005
BUMED CDIS - Lot H Okinawa	TSK-414,TSK-415	4/3/2020 9:04	U00000000006
Deployment and Transition Sup	TSK-1315,TSK-1316,TSK-13	4/3/2020 9:04	U00000000007

[redacted] Procedure

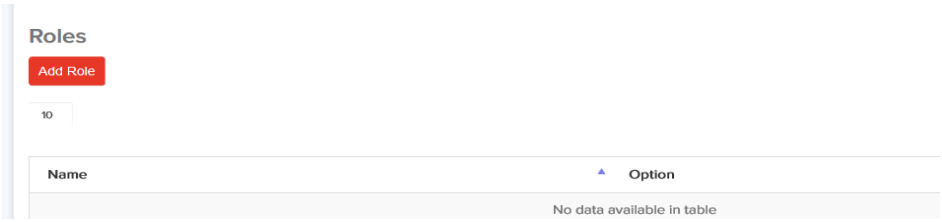
- This tab is used to assign Step data to a Procedure
- Below is the template along with a sample file with data

procedure_nam	step_list	created_date	created_by
Procedure 1	STP-1,STP-2	9/30/2019	U0000000000162
Procedure 2	STP-3,STP-4	5/20/2018	U0000000000162

name	step_list	created_date	created_by
Corporate Oversite	STP-373,STP-374,STP-375,S	4/3/2020 9:04	U00000000003
Manage and maintain HCaTS SB mast	STP-377,STP-378,STP-379,S	4/3/2020 9:04	U00000000003
Manage and maintain ITES-3S maste	STP-383,STP-384,STP-385,S	4/3/2020 9:04	U00000000003
Review and assess solicitations	STP-391,STP-392,STP-393,S	4/3/2020 9:04	U00000000003

[redacted] Roles

- Use this tab to create a Role
- Users are assigned to the role. (Is this correct)

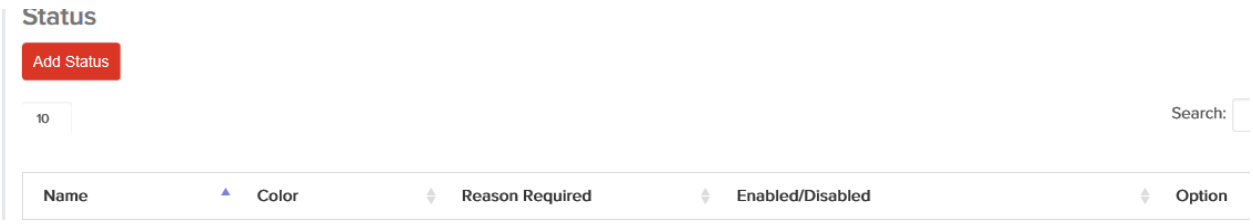


[redacted] Groups

- Used to create a Group that would be assigned the same Permissions
- See Group section 22

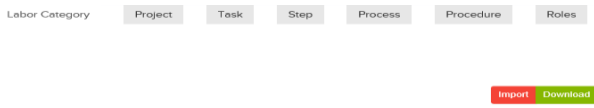
[redacted] Config Status

- Used to color code the status of each Project/ Task and Step
- System defined statuses are **Not Started, In Progress and Completed**



6 DOWNLOADING TEMPLATES TO POPULATE INFORMATION

- The application uses Excel CSV files to upload data into the application
- To obtain the templates for configuration level, user and labor category , follow these directions:
  - ➢ Settings/ Organization/ View (Under Options)
- Click on tab that you need the template for – select one: (ex. Config Level, User or Labor Category)
- Click on "Sample File"



- The system will open up the excel csv template to be used to collect and upload your data.

7 DETERMINE USERS OF THE SYSTEM

- Use the systems generated excel,csv user template to populate it with the employees in your organization
- ***Note: Do not change the headers of the columns. The column names must remain as is in order for the upload to be successful***
- ***Note: Do not add additional columns to the file – the upload will fail if you do***

first_name	last_name	labour_category_i	email	is_manager	manager_email
A	B	1	ab@yopmail.com		gh@yopmail.com
C	D	2	cd@yopmail.com		gh@yopmail.com
E	F	2	ef@yopmail.com		gh@yopmail.com
G	H	2	gh@yopmail.com	1	mn@yopmail.com
I	J	1	ij@yopmail.com		mn@yopmail.com
K	L	2	kl@yopmail.com		mn@yopmail.com

- ➢ Collect employee first and last names
- ➢ Provide the employee email address
- ➢ Put an "1" beside the email / employee that is a manager in the Is_manager field
- ➢ List the managers email in the manager_email column

8 DETERMINE THE LABOR CATEGORIES

abbreviation	name	description	rate	billable_hrs	fte	country	state	city
MNG	Manager	Manager	$10.00	8	2080	United States	Alabama	Alabaster
MNG	Manager	Manager	$12.00	8	2080	United States	Alaska	Bethel
TL	Team Lead	Team Lead	$5.00	8	2080	United States	Arizona	Flagstaff
TL	Team Lead	Team Lead	$7.00	8	2080	United States	Florida	Bayshore Gardens
DV	Developer	Developer	$7.00	8	2080	United States	Georgia	Bainbridge
DV	Developer	Developer	$6.00	8	2080	United States	Delaware	Seaford

- ➢ Labor category Names (see above)
- ➢ The bill rate of the labor category if positions are paid
- ➢ Number of hours each person works
- ➢ The country that the labor category resides (all in Price George County)
- ➢ The city and state of the labor category (all in Laurel or Bowie Maryland)

9 EMPLOYEE DATA ENTRY SHEET

We have created an Excel Data Entry Form for employees to document the projects they are working on.
Below you will find a snapshot of what the data entry form looks like: Update this screenshot

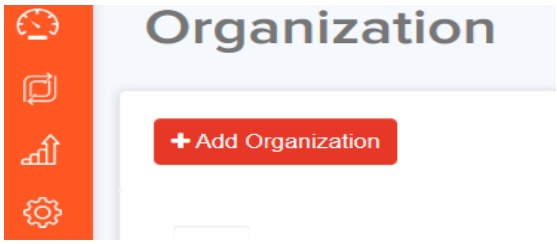
Project Branch/Division,etc	project_name	task_name	step_name	description	outcome	percentage_of_time	Hours	start_date	end_date	assign_to	repeat_type	status	labour_category_id
Executive Office	Venue			Location		5%		02-15-2020	04-01-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office		Determine Conference Venue				0%		03-01-2020	04-01-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office			Research venues that can support 600 attendees			100%		03-01-2020	04-01-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office			Select a date			0%		03-01-2020	04-01-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office			Sign contract with venue			100%		03-01-2020	04-01-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office	Funding					100%		03-01-2020	04-01-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office		Community Partnership Grant		Funding		100%		03-01-2020	05-10-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office			Complete the CPG for funding support			100%		03-01-2020	05-10-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office			Research the Ford Foundation Grant for funding			100%		03-01-2020	05-10-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office			Complete the Ford Foundation Grant Application			100%		03-01-2020	05-10-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office			Complete the Common Grant Application with PG County			100%		03-01-2020	05-10-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office	Marketing					100%		04-01-2020	05-10-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office		Market Conference		Marketing		75%		04-01-2020	09-30-2020	Tamra Blake	Weekly	In Progress	Executive Director
Executive Office			Create a target market list			100%		04-01-2020	09-30-2020	Tamra Blake	Daily	In Progress	Executive Director
Executive Office			Create a sponsorship booklet			75%		04-01-2020	09-30-2020	Tamra Blake	Daily	In Progress	Executive Director

The key fields are as follows:

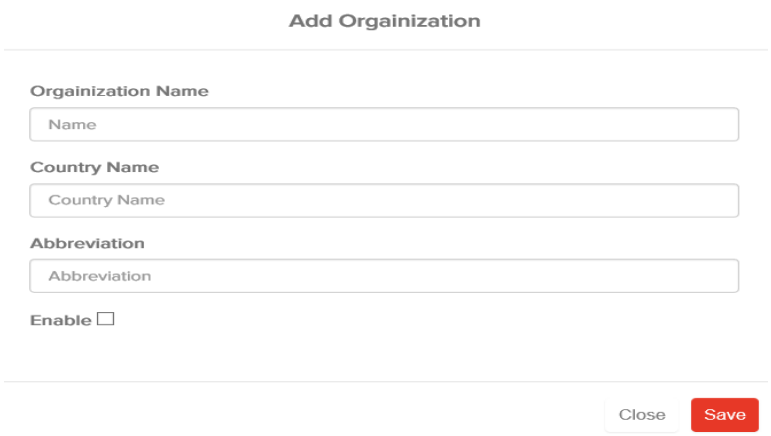
- Project Branch / Division (from a drop down menu)
- Project Name
- Task Name (notice task is dropped down one line under the project)
- Steps (notice steps are dropped down one line under the task)
- % Time Spent or Hours Spent performing the step – this is the % of time you spend on completing this task. If you cannot determine a % of time, then you can assign hours in the hour column. (***You must only assign one – either the % or hours***)
- Project Start Date (**Note: Dates MUST be in YYYY-MM-DD Format)**
- Project End Date (must have an end date even if it is a projected future date)
- Who it is assigned to (the employee name selected from a drop down menu)
- Frequency- Repeat type : Choose from the drop down
- Status: Select from drop down values: In Progress, Completed, Not Started
- Labor Category- choose from the drop down

10 UPLOAD THE ORGANIZATION TO THE APPLICATION

- Click the settings icon
- Go to Organization
- Click add an organization
-

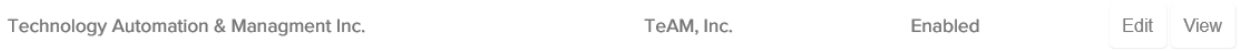


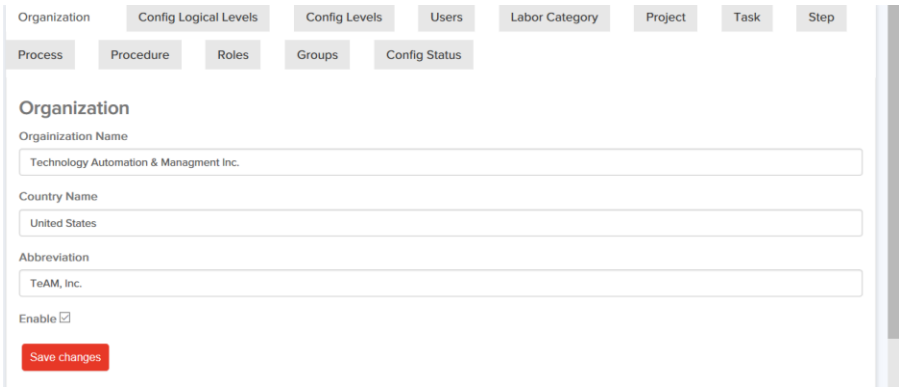
- Fill in the fields below
- Be sure to check the Enable box and click “SAVE”



11 UPLOAD THE CONFIGURATION LOGICAL LEVEL FILE

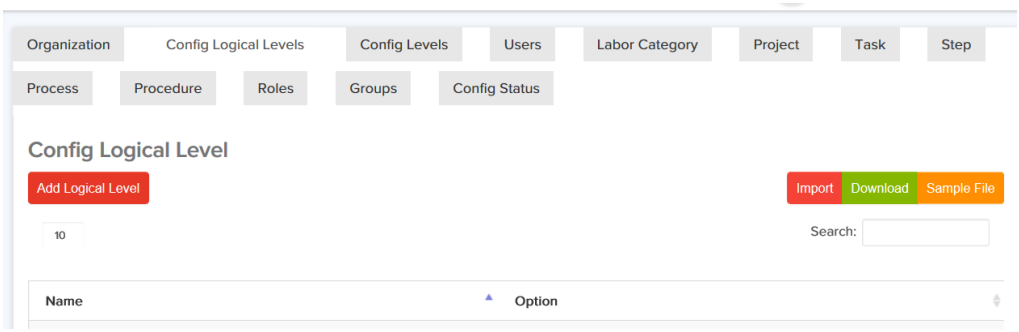
- Find your organization and click on “View”
- Select the Config Level tab

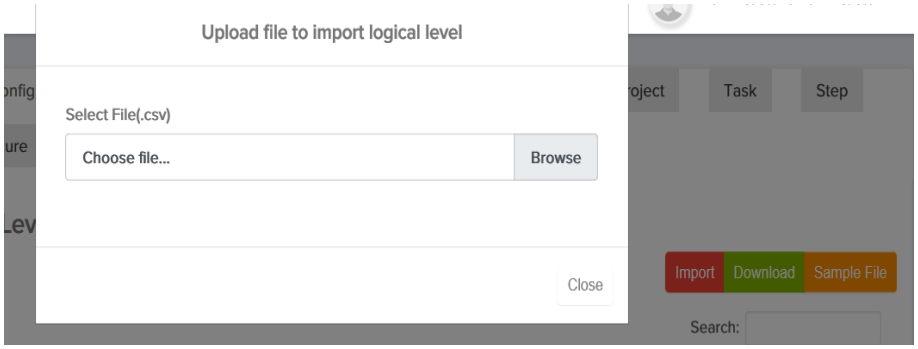


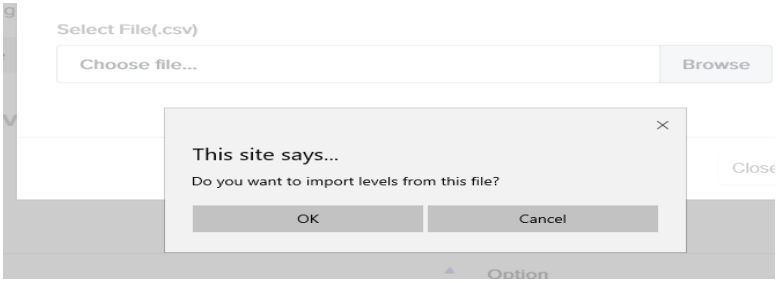


- Select import:

- Browse your system/documents, find your csv excel config level import file that you created on your machine







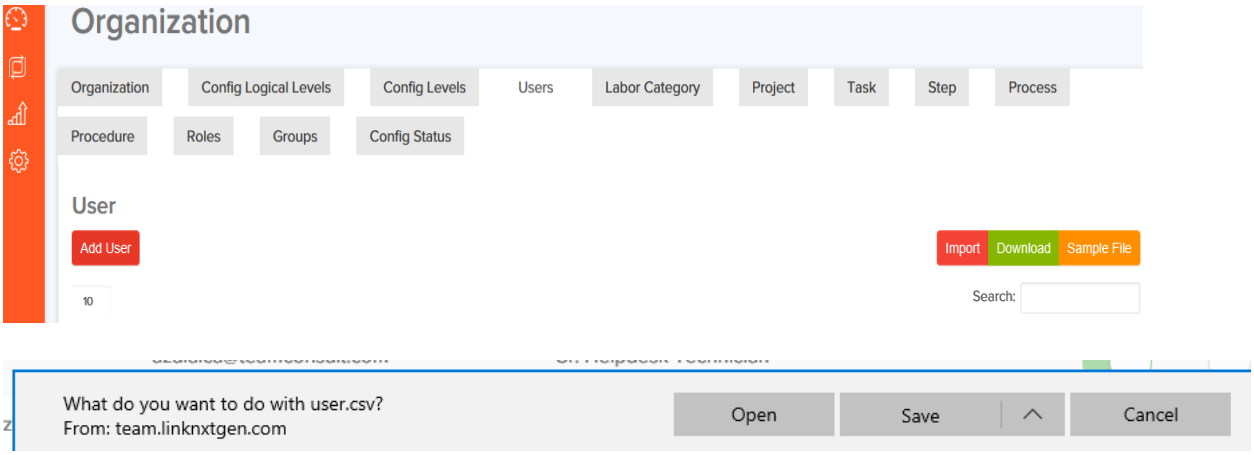
- Select “Ok” and import the config_level information
- Result: You then need to download the config level report from the system to get the level ID created by this upload
- You will have to go back to the process procedure task and step file and update the data source tab with the level ID
- Data Source Table Example:
- Column one below is a snapshot of the Data Source table

	Level Information	assign_to	Person	Labour Category	Labour Category Name	Status	Request Type
1	President	U00000000001	Tamra Blake	1	Executive Director	Active	Daily
2	Executive Directo	U00000000002	Charles Davis	2	Founder	In Progress	Weekly
3		U00000000003	Letitia Janifer	3	Treasurer	On Hold	Monthly
4		U00000000004	Glen Mahone	4	Marketing Manager	Completed	Quarterly
5		U00000000005	Debra Mahone	5	Legal Advisor	Not Started	Annual
6		U00000000006	Jerry Sherman				

12 UPLOAD THE USER FILE

- Repeat the process outlined above by choosing the user file tab
- Click import
- Browse for and select the user csv file in excel
- Click ok
- Once uploaded, then download the file to get the User ID’s
- To download the file go to Settings>> View> Users >> Download

- The system will ask you “What do you want to do with user.csv? You click on “Open”



- The following table/ report will be generated and will assign a user_id to each employee

user_id	email	first_name	last_name	labour_category_id
U00000000001	admin@teamc	Admin		4
U00000000002	cdavis@teamc	Charles	Davis	17
U00000000003	jedgar@teamc	John	Edgar	19
U00000000004	kclark@teamc	Kyle	Clark	22

- The Administrator should then copy the name and user_id to the Data Source Table in the upload workbook which includes y-our project, task and step data

13 UPLOAD THE LABOR CATEGORY CSV FILE

- Repeat the process outlined above by choosing the labor category file tab
- Click import
- Browse for and select the labor category csv file
- Click ok
- Download the labor category file to get the Labor category ID
- Go back to your project, process, task and step document and put in the Labor Category ID in the Data Source Tab

14 SYSTEM GENERATED ID'S

- Once the Configuration Level, User and Labor Category data is uploaded, you will need to download each of these files to obtain the ID's that have been generated for each of these items.
- A Master Workbook has been created to assist with the ease of capturing and uploading data into the system. The Master Workbook has three (3) tabs:

  Employee Data Entry Tab– This is where users input their project, task, step information

  Data Source Tab– This tab is where the Admin will copy all the ID data from the Configuration Level, User and Labor Category File uploads so that ID's can be associated with the appropriate Employee Data Entry Tab

Process Upload File– This is the Process Template file that is used to upload the data into the system. This file blends the input tab data along with the data from the data source tab to create the final upload file.

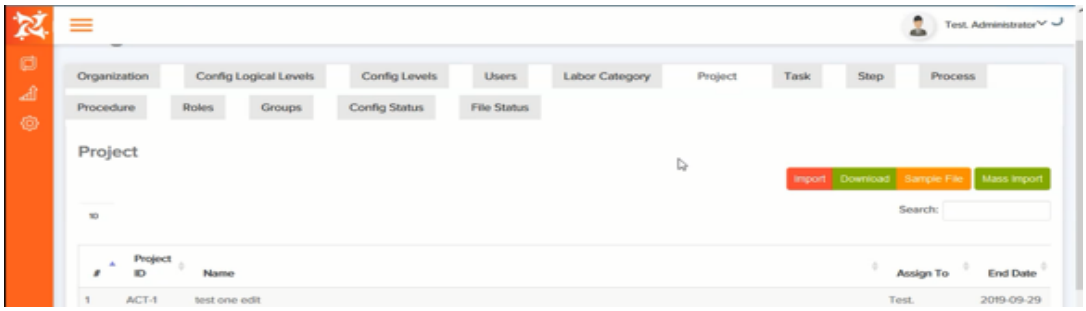
15 UPLOAD YOUR PROJECT/ TASK/ STEP FILE– Process Upload File

- Once your project / task and step file has the level. Labor and user id entered into the Data source tab, the final upload file will be ready to upload all the project, task, and step information.
- The final upload file looks like this.
-

project_name	task_name	step_name	description	outcome	percentage_of_time	expected_working_hr	start_date	end_date	assign_to	level_id	labour_category_id	repeat_type	status
Venue	0	0	Location	0	5%	0	02-15-2020	04-01-2020	Executive Director	2	1	Weekly	In Progress
0	Determine Conference Venu	0	0	0	0%	0	03-01-2020	04-01-2020	Executive Director	2	1	Weekly	In Progress
0	0	Research venues that can support 600	0	0	20%	0	03-01-2020	04-01-2020	Executive Director	2	1	Weekly	In Progress
0		Select a date	0	0	0%	0	03-01-2020	04-01-2020	Executive Director	2	1	Weekly	In Progress
0	0	Sign contract with venue	0	0	20%	0	03-01-2020	04-01-2020	Executive Director	2	1	Weekly	In Progress
Funding	0		0	0	20%	0	03-01-2020	04-01-2020	Executive Director	2	1	Weekly	In Progress
0	Community Partnership Grar		Funding	0	5%	0	03-01-2020	05-10-2020	Executive Director	2	1	Weekly	In Progress
0	0	Complete the CPG for funding support	0	0	5%	0	03-01-2020	05-10-2020	Executive Director	2	1	Weekly	In Progress
0	0	Research the Ford Foundation Grant fo	0	0	5%	0	03-01-2020	05-10-2020	Executive Director	2	1	Weekly	In Progress
0	0	Complete the Ford Foundation Grant A	0	0	5%	0	03-01-2020	05-10-2020	Executive Director	2	1	Weekly	In Progress
0	0	Complete the Common Grant Applicati	0	0	5%	0	03-01-2020	05-10-2020	Executive Director	2	1	Weekly	In Progress
Marketing	Market Conference		0	0	5%	0	04-01-2020	05-10-2020	Executive Director	2	1	Weekly	In Progress
0		0	Marketing	0	5%	0	04-01-2020	09-30-2020	Executive Director	2	1	Weekly	In Progress
0	0	Create a target market list	0	0	5%	0	04-01-2020	09-30-2020	Executive Director	2	1	Daily	In Progress
0	0	Create a sponsorship booklet	0	0	5%	0	04-01-2020	09-30-2020	Executive Director	2	1	Daily	In Progress

16 MASS UPLOADING LARGE VOLUME OF DATA

- For your initial upload of data within your organization, if you have less than 2,000 lines of data in your CSV file, you can use the Project Upload process noted above
- If you have more than 2,000 lines of data in your upload file, then you will want to choose the mass upload button below. This will put your data into a batch mode and upload data in segments. As the data is uploaded, you will see stats on how many records uploaded in the dashboard below. (Need a screen shot of this information)



17 PROCESS AND PROCEDURES

TIMS Reporting

- Process is defined by the sum of all the tasks
- Procedures are defined by the sum of all the STEPS taken to complete the task

Procedure : TIMS Reporting	
Steps	Prepare the TIMS Monthly Status Report
	Obtain input from Frank and Dearl and consolidate it into report
	Track the number of help desk tickets completed on a monthly basis to show metrics

18 DASHBOARD LEVEL REPORTINGSAMPLES/ TYPES

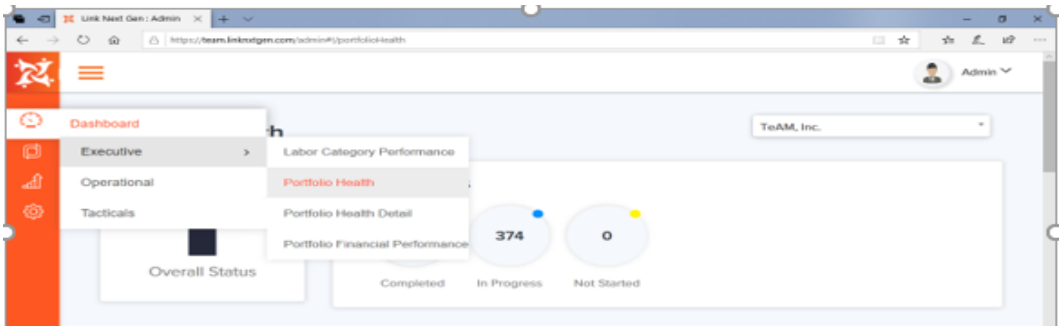
- Dashboard level reporting includes reports at the Executive, Operational and Tactical level.
- Reports can be accessed by clicking on Dashboards and the list of reports will appear
- Below is a screen shot of how to navigate to these reports

Executive Reports include:

- Labor Category Performance
- Portfolio Health
- Portfolio Health Detail
- Portfolio Financial Performance

Operational
Tactical

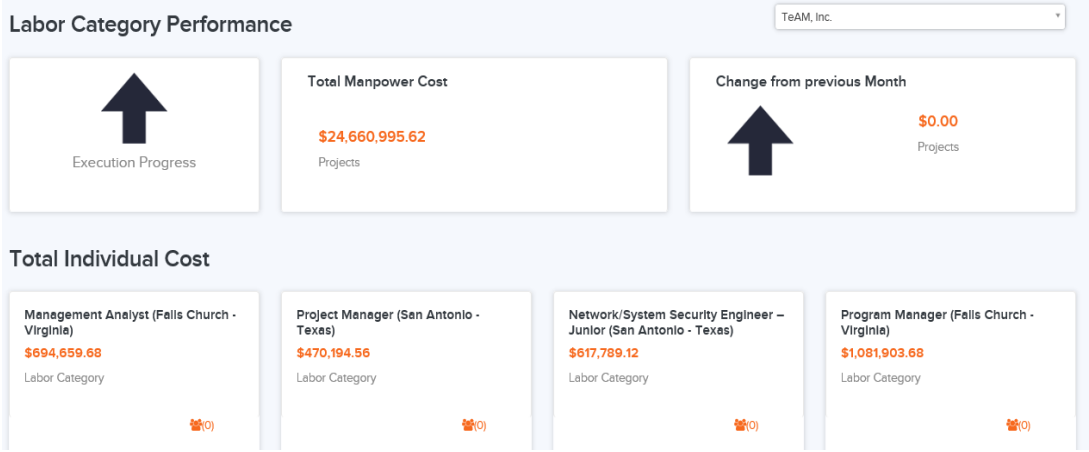
:



[redacted]Executive Reporting Results

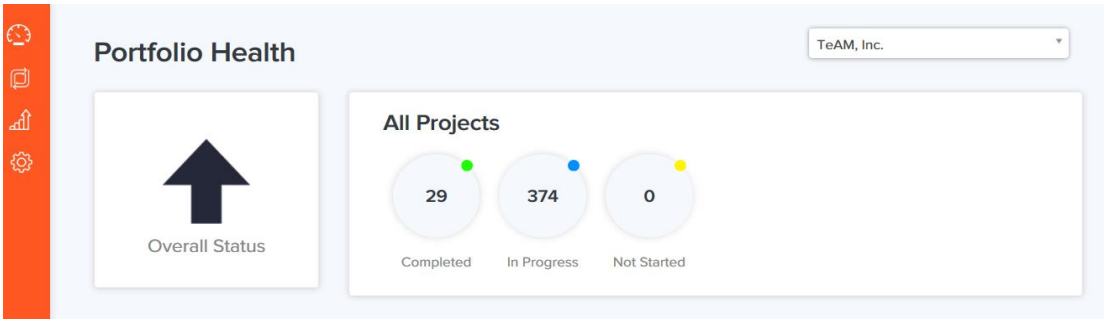
18.1.1 Labor Category Performance

- The Labor Category Performance Report displays the organizations total manpower costs plus the dollar change from last month (at the highest level)
- In addition, it displays the cost by individual labor categories



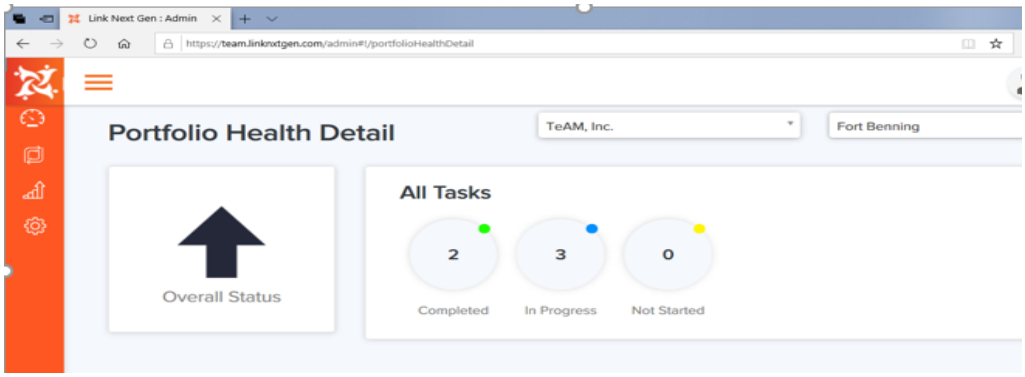
18.1.2 Portfolio Health

- The Portfolio Health Report provides an overall status of the Projects in the system for the **Organization**
- It depicts the number of Projects : Completed/ In Progress / Not Started at the Organization level



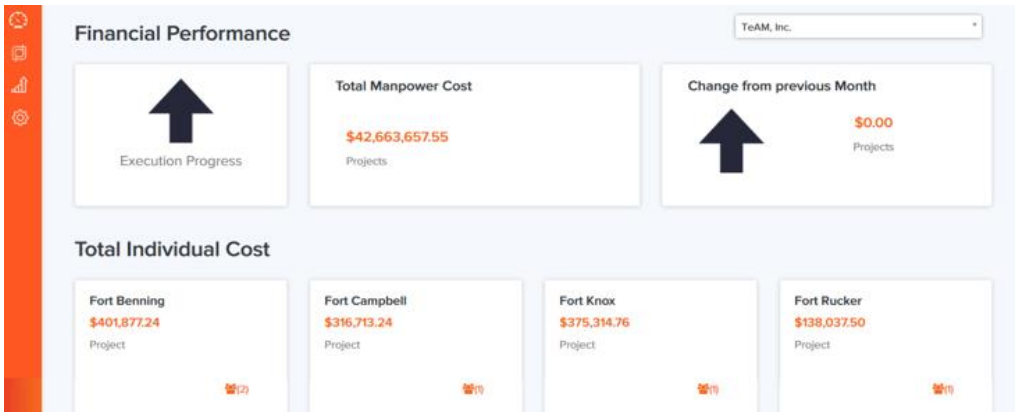
18.1.3 Portfolio Health Detail

- The Portfolio Health Detail Report provides an overall status of the **TASKS** associated with a particular **Project**
- It depicts the number of TASKS by status for a specific Project : Completed/ In Progress / Not Started



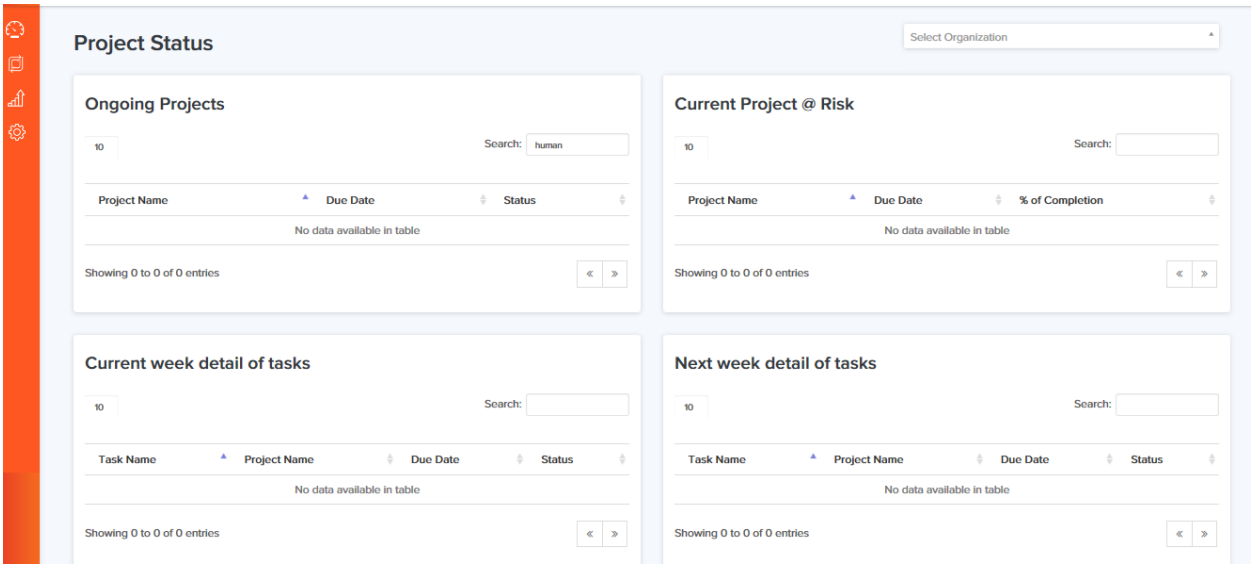
18.1.4 Portfolio Financial Performance

- The Portfolio Financial Performance Report displays the overall Financial Performance of the Organization
- It depicts the Total Individual Cost for each Project



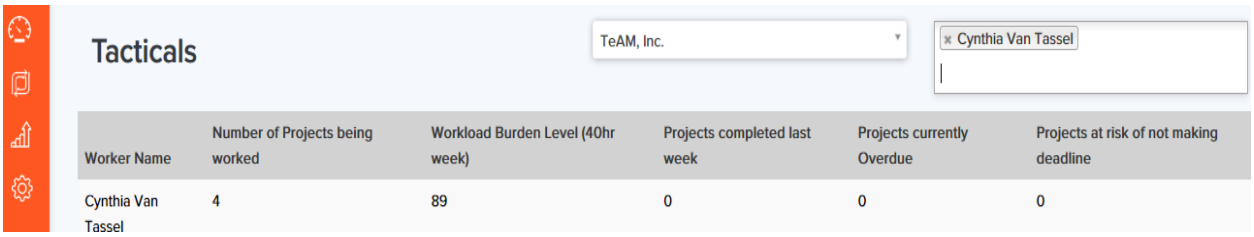
[redacted] Operational Report

- The Operational Report displays :
  - Ongoing Projects: Project Name/ Due Date and Status
  - Current Projects at Risk: Project/ Due Date / % Complete
  - Current Week Detail of Tasks: Task Name/ Project Name/ Due Date /Status
  - Next Week Detail of Tasks: Task Name/ Project Name/ Due Date/ Status



[redacted]Tactical Report

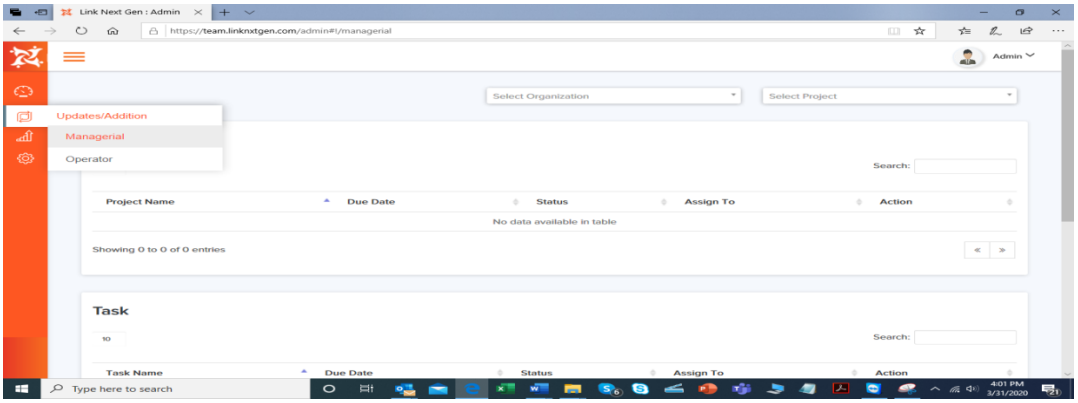
- The Tactical Report displays the Organization, then you choose the employees/ workers
- Tactical report displays the following:
  - the workers name
  - the number of projects being worked on by the worker
  - the workload burden level based on a 40 hour work week
  - the number of projects completed last week
  - the number of projects currently overdue
  - the number of projects at risk of not making the deadline



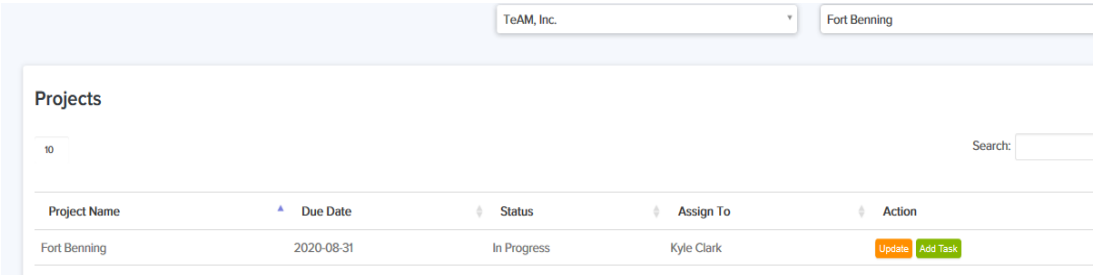
19 MANAGERIAL AND OPERATOR REPORTS- UPDATES/ADMIN

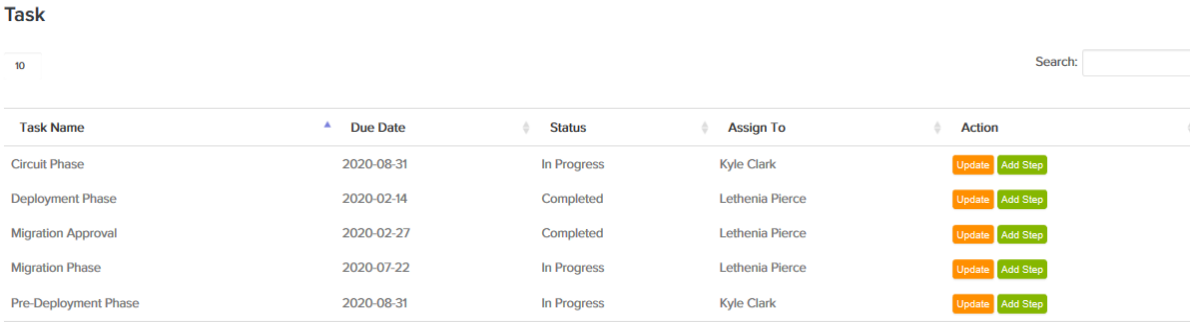
[redacted]Managerial Report

- The Manager Report can be accessed by going to Updates/ Addition as seen in the screen shot below
- Then click on Managerial



- This report displays one Project, the Tasks associated and the Steps
- Within this report, you have the ability to update/or adda Task or a Step under the Project
- There are Action buttons where you can Update/ Add a Task or Update / Add a Step or simply update a Step.
- Below is an example of what you will see.





Step Name	Due Date	Status	Labor Category	Assign To	Action
Complete Local Core Infrastructure (LCI) Deployment	2018-03-16	In Progress	Cost Analyst - Middle	Lethenia Pierce	Update
Complete mJAD architecture	2018-08-29	Completed	Cost Analyst - Middle	Lethenia Pierce	Update
Complete T-120 Day Activities	2019-03-07	Completed	Cost Analyst - Middle	Lethenia Pierce	Update
Complete T-30 Day Activities	2019-07-31	Completed	Cost Analyst - Middle	Lethenia Pierce	Update
Complete T-60 Day Activities	2019-05-31	Completed	Cost Analyst - Middle	Lethenia Pierce	Update
Complete T-90 Day Activities	2019-04-06	Completed	Cost Analyst - Middle	Lethenia Pierce	Update
GSU WAN Circuit Established- North Columbus Medic	2019-07-31	Completed	Chief Data Officer	Kyle Clark	Update
Install or upgrade security stack (SSA)	2017-01-17	Completed	Cost Analyst - Middle	Lethenia Pierce	Update
IP Plan Approved and Published	2019-07-24	Completed	Cost Analyst - Middle	Lethenia Pierce	Update
Kick-off with Exec Site Staff (T-130)	2019-02-25	Completed	Chief Data Officer	Kyle Clark	Update

[redacted] Operator

- This report displays one Project, the Tasks associated and the Steps
- This report displays the Due Date, Status, Labor Category, the % Completion and % Time at the Project, Task and Step level
- Within this report, you have the ability to update Expected Hours
- Below is an example of what you will see.

Projects

10 Search:

Project Name	Due Date	Status	% Completion	% Time
Fort Benning	2020-08-31	In Progress	76.19	

Tasks

10 Search:

Task Name	Due Date	Status	% Completion	% Time
Circuit Phase	2020-08-31	In Progress	100.00	
Deployment Phase	2020-02-14	Completed	83.33	
Migration Approval	2020-02-27	Completed	100.00	
Migration Phase	2020-07-22	In Progress	0.00	
Pre-Deployment Phase	2020-08-31	In Progress	100.00	

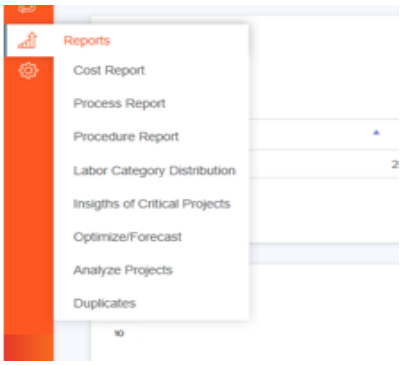
Steps

10 Search:

Step Name	Due Date	Status	% Time	Action
Complete Local Core Infrastructure (LCI) Deployment	2018-03-16	In Progress	100%	Update Expected Hrs
Complete mJAD architecture	2018-08-29	Completed	0%	Update Expected Hrs
Complete T-120 Day Activities	2019-03-07	Completed	100%	Update Expected Hrs
Complete T-30 Day Activities	2019-07-31	Completed	75%	Update Expected Hrs
Complete T-60 Day Activities	2019-05-31	Completed	100%	Update Expected Hrs
Complete T-90 Day Activities	2019-04-06	Completed	100%	Update Expected Hrs
GSU WAN Circuit Established- North Columbus Medic	2019-07-31	Completed	100%	Update Expected Hrs
Install or upgrade security stack (SSA)	2017-01-17	Completed	75%	Update Expected Hrs
IP Plan Approved and Published	2019-07-24	Completed	100%	Update Expected Hrs
Kick-off with Exec Site Staff (T-130)	2019-02-25	Completed	100%	Update Expected Hrs

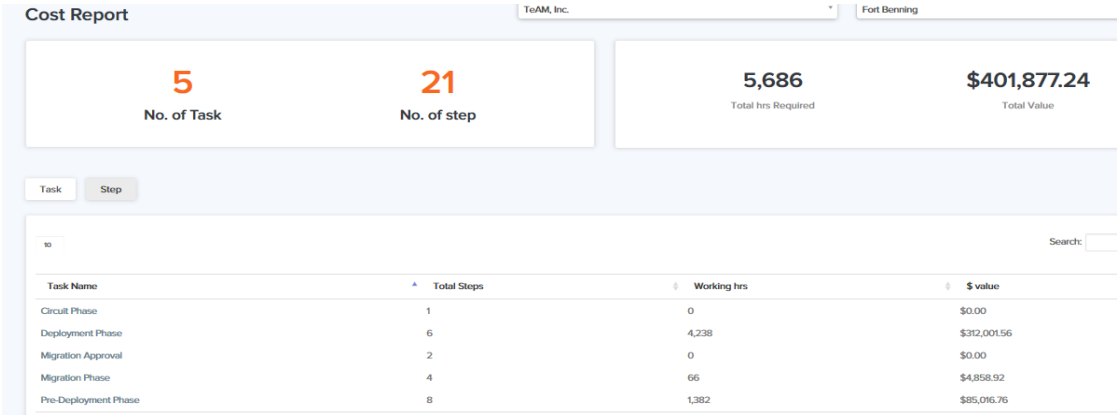
20 REPORTS

- The system has a host of reports for managers to review to make strategic decisions
- You will find the report listing by clicking on the icon shown below which will bring up the list of reports available
- Under the reporting icon, managers can run any one of the below reports, examples follow:



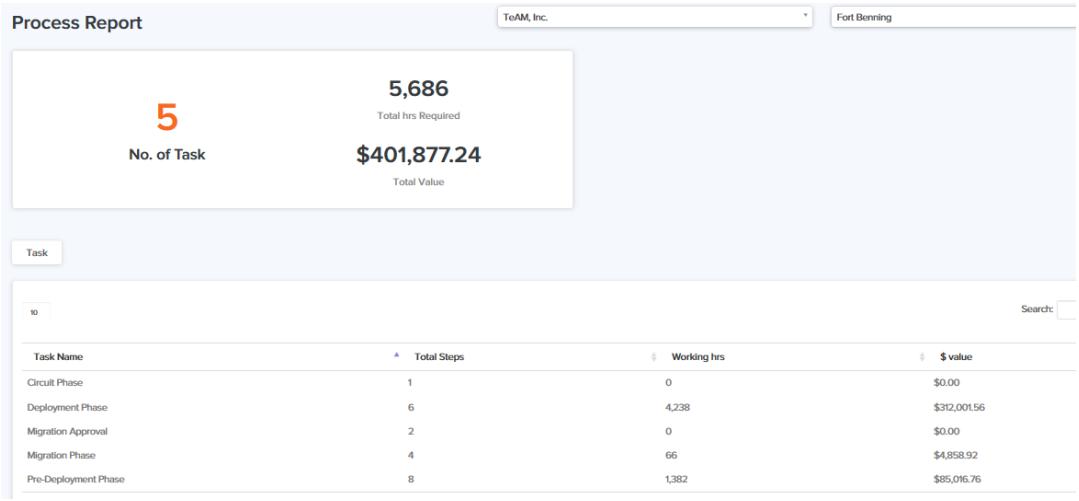
[redacted] Cost Report

- The Cost Report displays the number of Tasks and Steps associated with one Project along with the total number of hours required and the total value associated with the hours
- It list lists out the Tasks, the total number of Steps, the number of working hours and the value associated



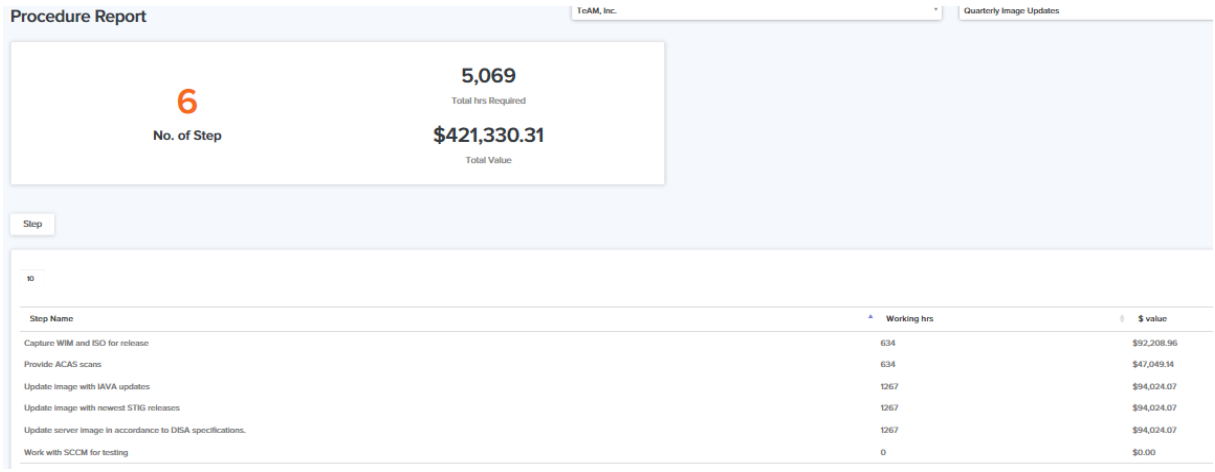
[redacted] Process Report

- This report displays the number of Tasks , Total Hours Required, Total Value for a Project
- It lists the Task Name, total number of Steps, Working Hours and dollar value



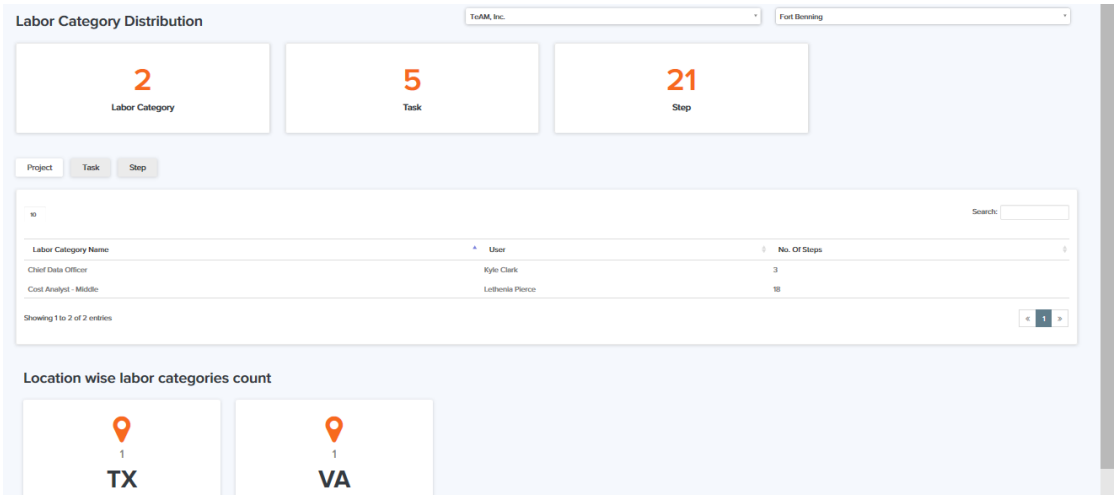
[redacted] Procedure Report

- The Procedure Report allows you to choose a Procedure, delve into the number of Steps, the Total Hours associated with those Steps along with the Total Value of those Steps
- The report displays the detailed Step Name, the Working Hours associated with the Step and the dollars associated with the respective Step



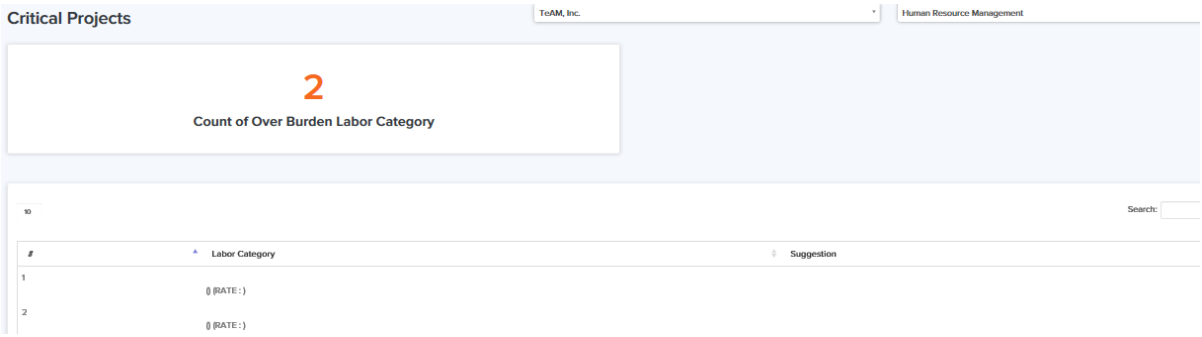
[redacted] Labor Category Distribution Report

- The Labor Category Distribution Report is where you select a Project and the report displays the number of Labor Category FTE's working on the Project, the number of Tasks and Steps
- It displays the Labor Category Name, the User Name and the number of Steps for each user
- It displays the location of the Labor Category User by State



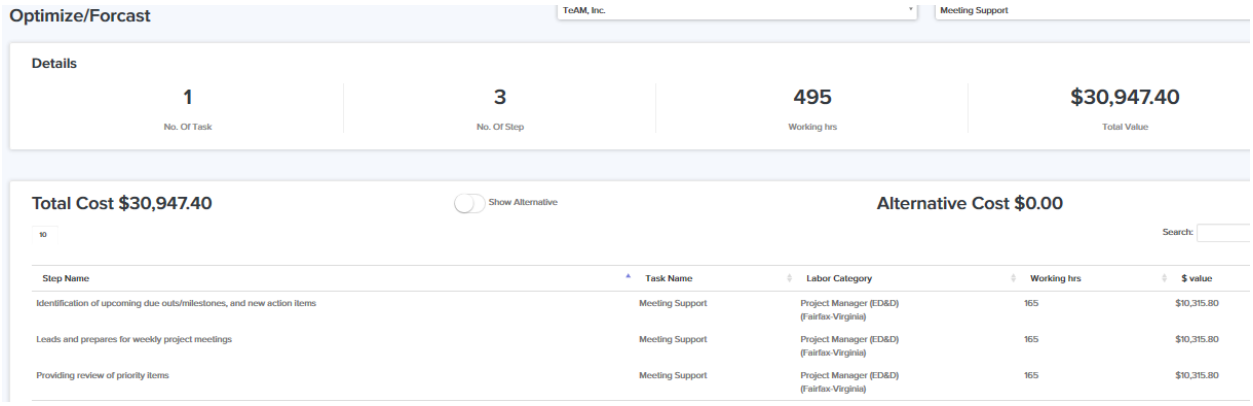
[redacted] Insights of Critical Projects

- The Insights of Critical Projects looks at one Project
- It displays the Count of Over Burdened Labor Category
- The bill rate
- Any suggestions



[redacted] Optimize / Forecast

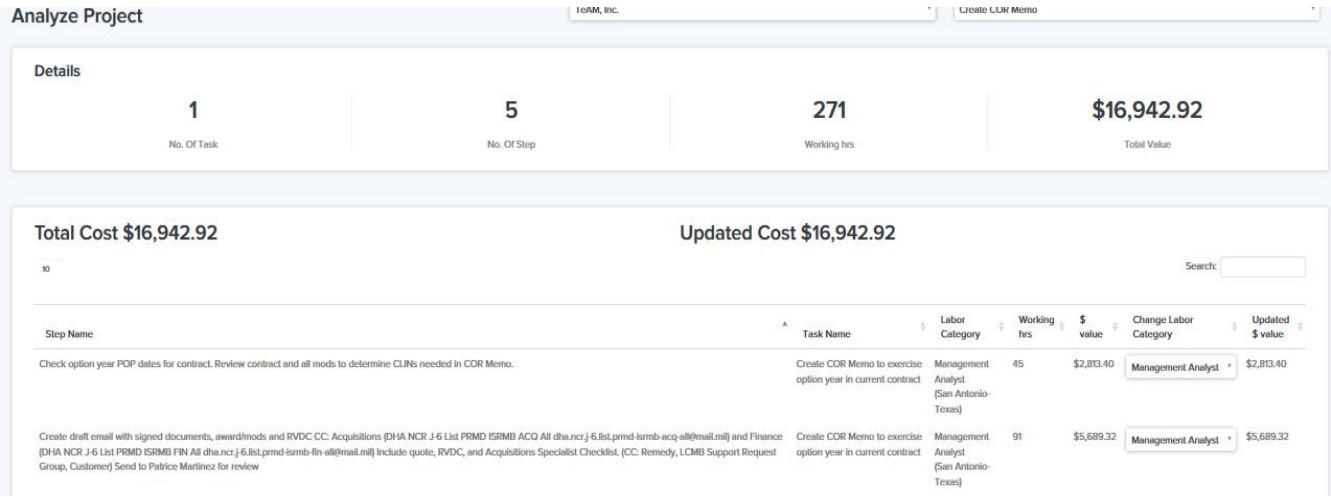
- The Optimize/ Forecast Report looks at a particular Task, displays the number of Steps, the Working Hours and the Total Value
- The Total Cost is then broken down into detail providing the actual Step Name, the Task Name, Labor Category, Working Hours and Value
- There is a toggle that you can activate to show Alternative _____?



*

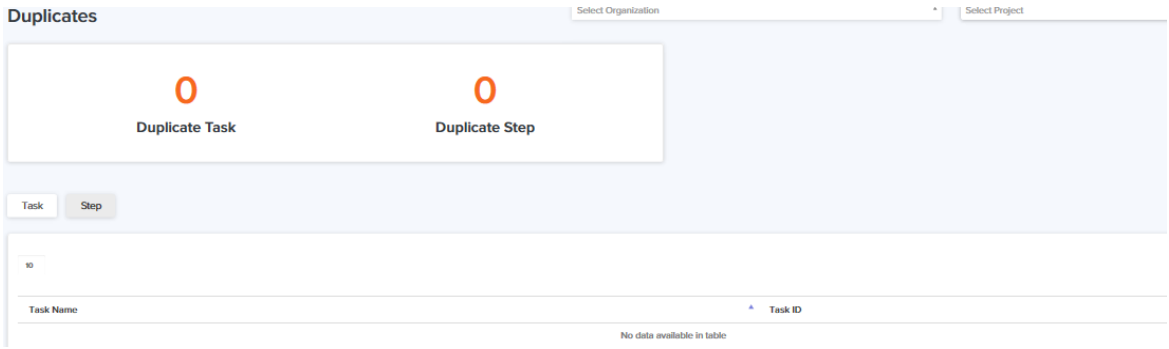
[redacted] Analyze Projects

- In this report you look at the Project level and can change the Labor Category to see the new value if you reallocated the Step to a different Labor Category
- It displays the Number of Tasks, Number of Steps, the Number of Working Hours, the Total Value
- It displays in detail, the Step Name, the Task Name, Labor Category, Working Hours, Dollar Value, a place for you to change the Labor Category and the Updated Value.



[redacted] Duplicates

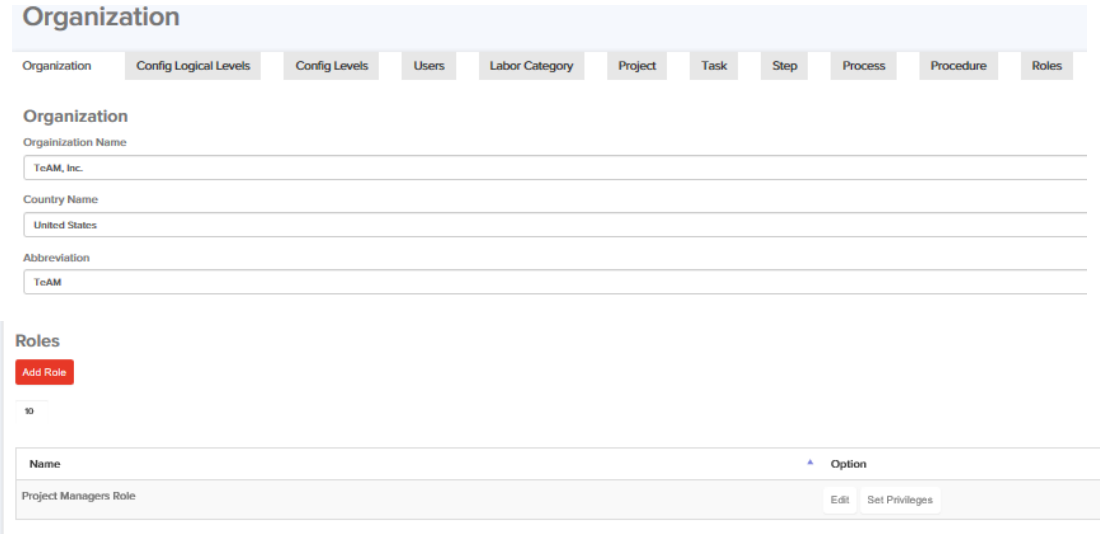
- The Duplicate Report allows you to see duplicates by selecting the Project within the Organization
- If there are Duplicate Tasks or Duplicate Steps, the number would appear below along with the detail of the Task or the Step



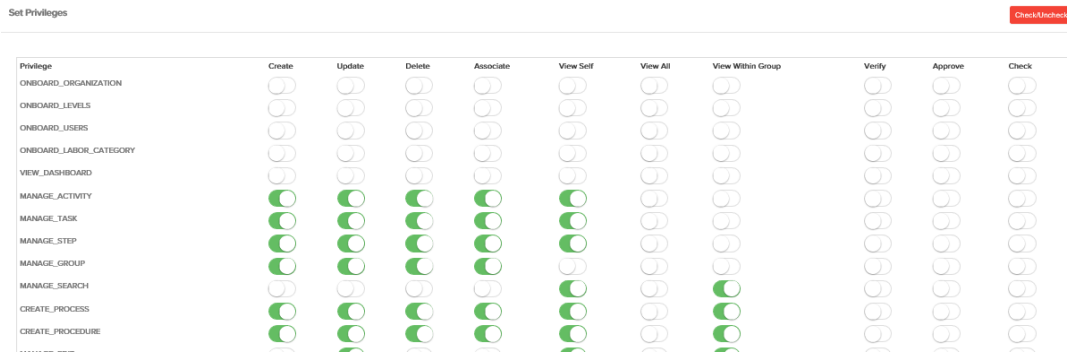
21 ROLES /PERMISSIONS

The application allows for the network admin to assign permissions to individuals limiting the information that any one person can see in the application. Data is restricted in the admin portal end of the application. This allows for visibility of information on a need to know basis.

Choose the ROLES tab



Select “Set Privileges”- The system has a set of default permissions that are granted when a new user is created.



22 GROUPS

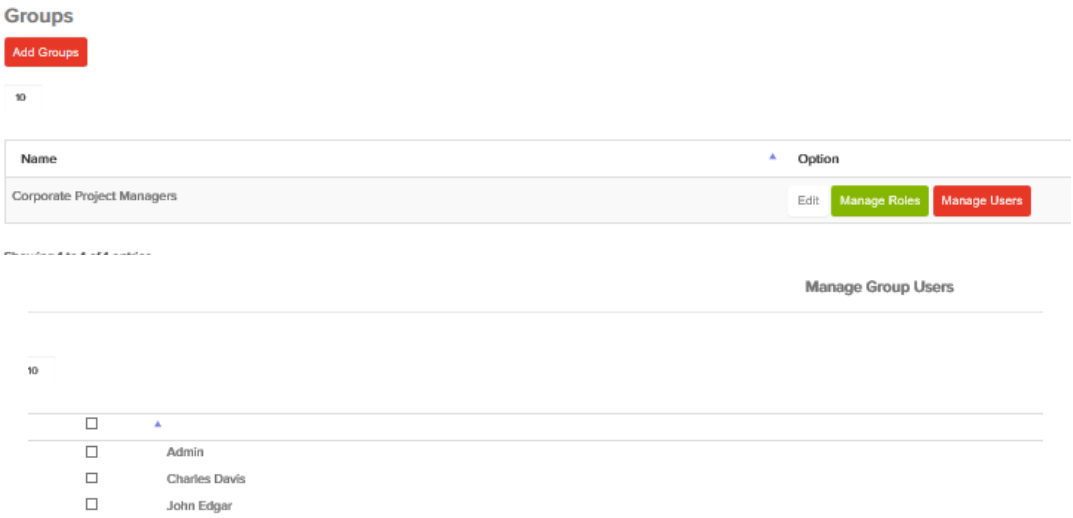
[redacted]Manage Users

The system has the capability to assign employees to a group.

A Group is defined as a set of users that you define that have a similar role and would therefore have the same permissions to perform functions

You select the users that you want to be part of a group and name that group. In this example, the employees are assigned to the Corporate Project Managers Group.

Click on Manage Users and select those users that should be a part of the group

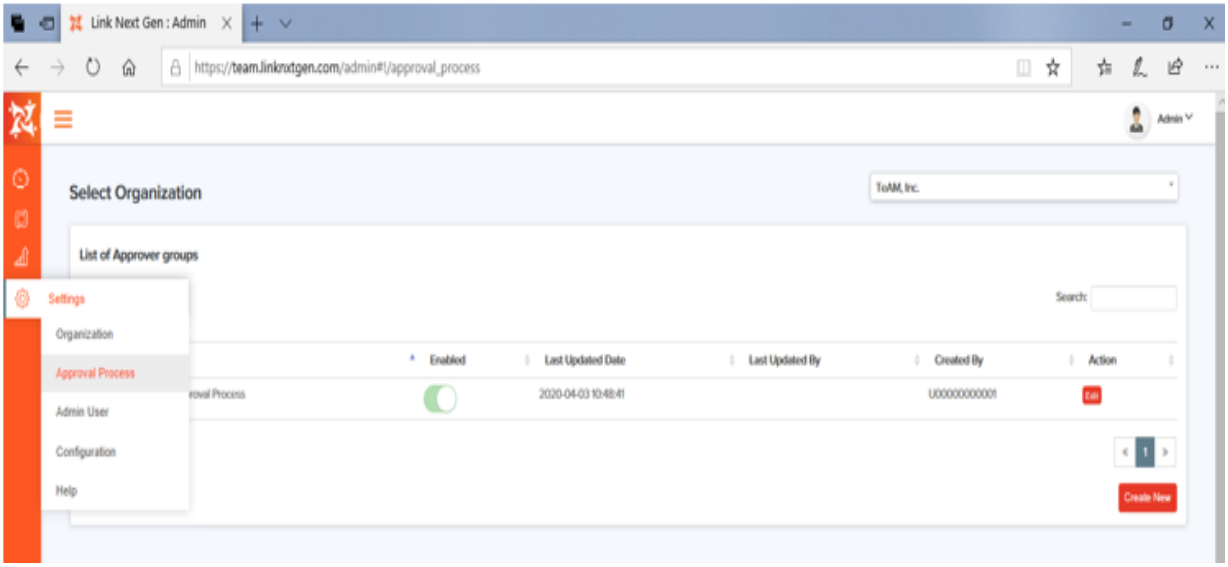


[redacted] Manage Group

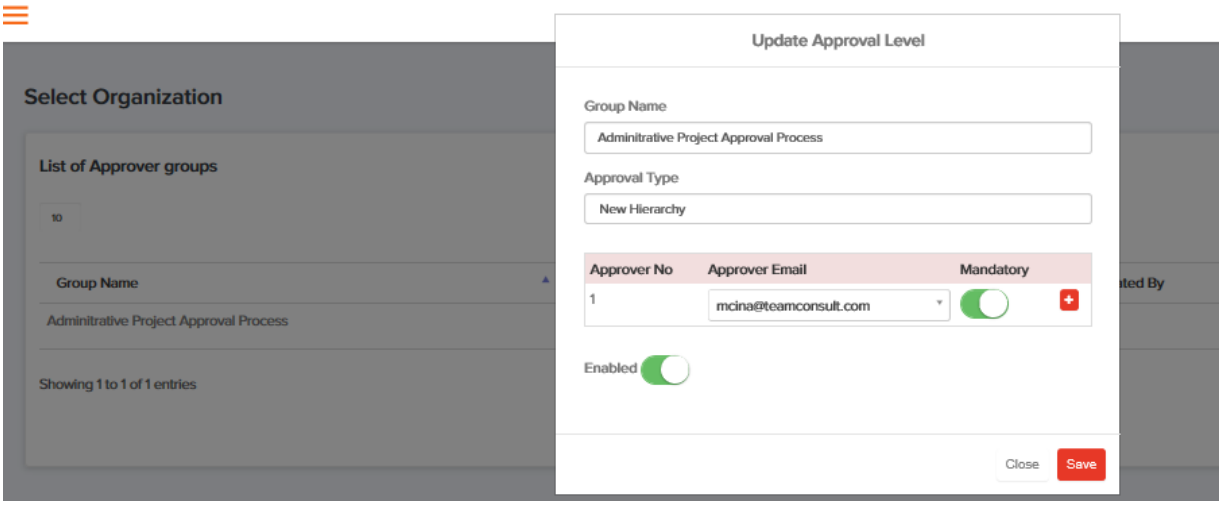
- Need to get a screen shot and put in here. I could not enter this field when I hit edit. Ask Developers

23 CREATE APPROVAL GROUPS

- The system allows for approvals for changes made to a record in the system
- All changes require approval and will be written to an audit file to keep an audit trail.
- You create approval groups and enable them

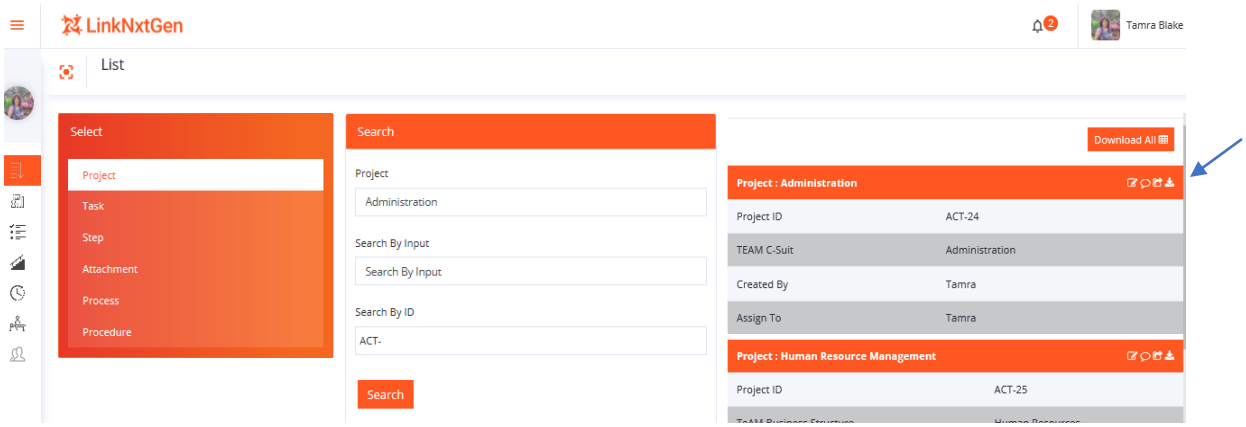


- The approval is only required if the mandatory check box is enabled next to the user, If the mandatory box is not checked, that user will get a notification but his/her approval is not required for the change to go through.

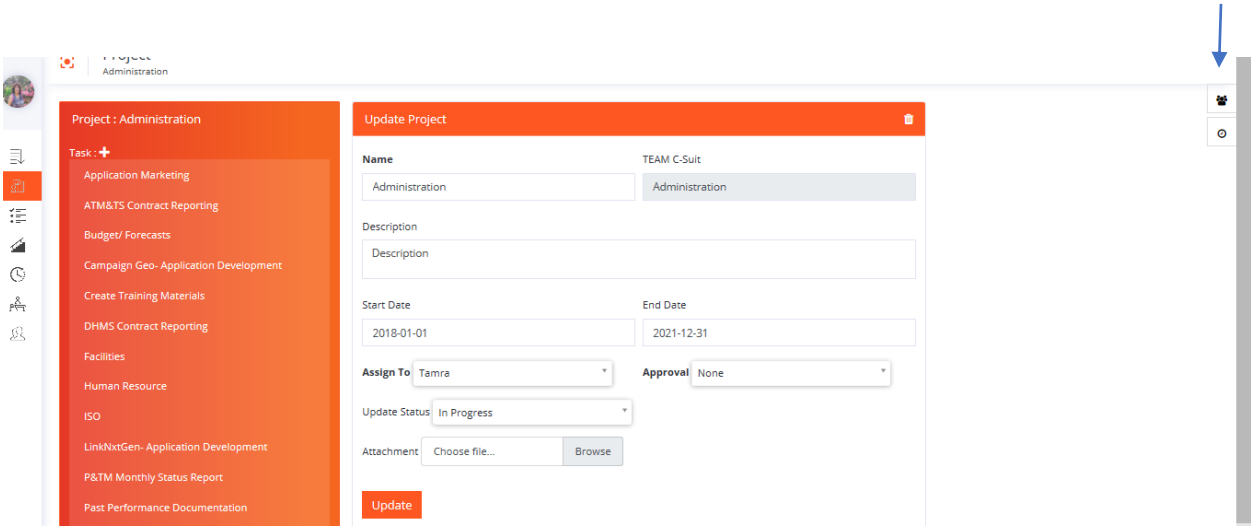


24 AUDIT CONTROLS

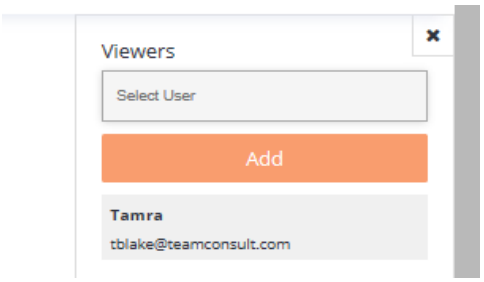
- The system has the functionality of being able to add viewers to a project and the ability for people to see all the changes made on the Project via an audit log .
- To access the Audit Log and the Viewers, you go to Project, search for the Project and then click on the edit button



- Once you click the Edit button, then these two icons will appear:



- When you click on the button you will see a list of those that you can select as a Viewer



- When you click on the button, you will see the Audit Trail outlining the updates made to the Project.

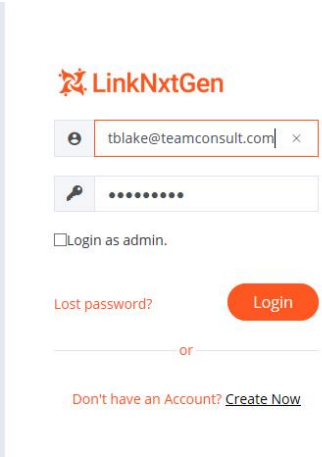
AUDIT TRAIL

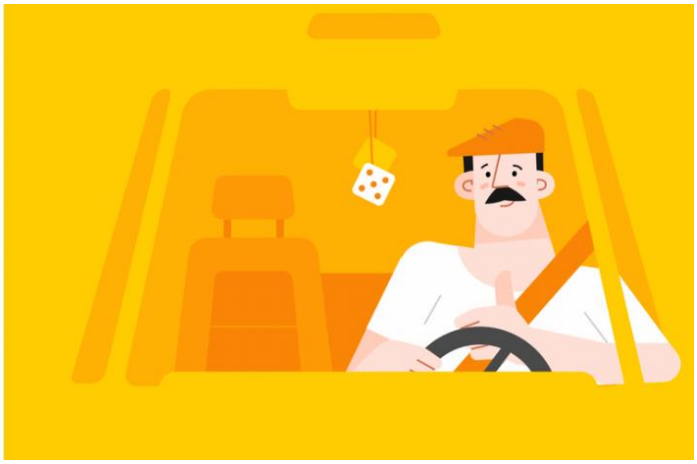
Date	Updated By	Changed Fields
03 Apr 2020 10:51AM	Tamra	**Workflow** None
03 Apr 2020 10:50AM	Tamra	**Workflow** Adminitrative Project Approval Process

25 END USER MANUAL

26 USER LOGIN

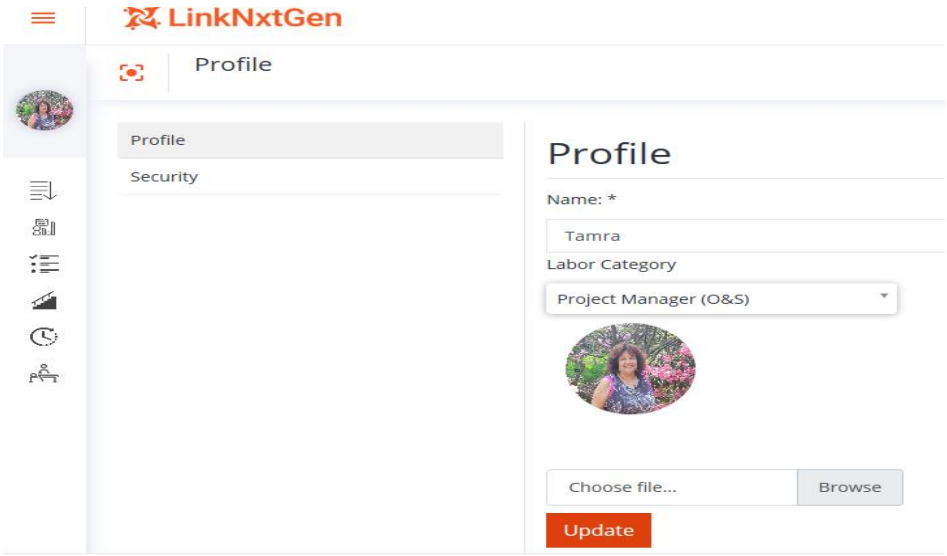
- User Logs into the system with their assigned email address that was used in the user upload file
- User creates a password that has upper, lower, number and symbol
- Note: Users do not check the Admin box





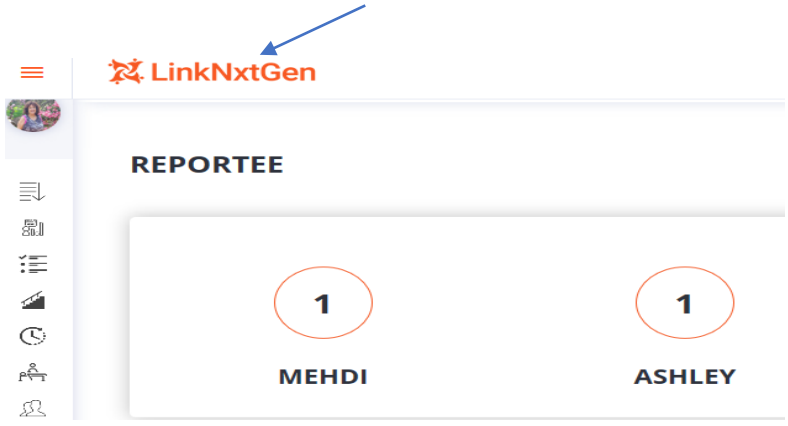
27 PROFILE SETUP

- User selects labor category (may already be assigned)
- User can select a picture /photo for their profile



28 INSIGHTS

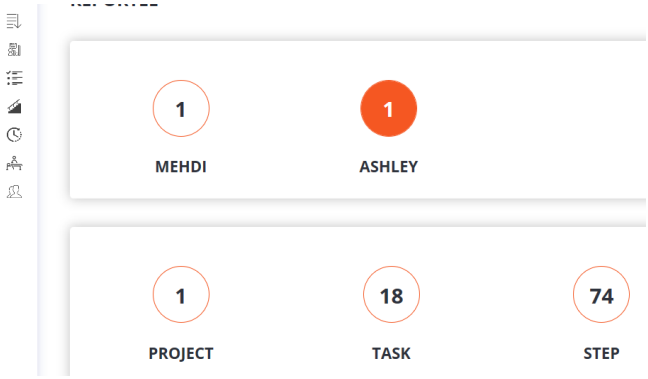
- When you login as the end user you will come to the Insights screen
- The Insight screen is a high level overview of your portfolio of projects
- If you are a user with no direct reportees, you will see just your information
- If you are a user and have staff members reporting into you, you will see circles for each of the staff that report into you (see below)
- In this example below, this person has 2 reportees.
- *Note: to reach the insight tab, you have to click the LinkNxtGen icon*



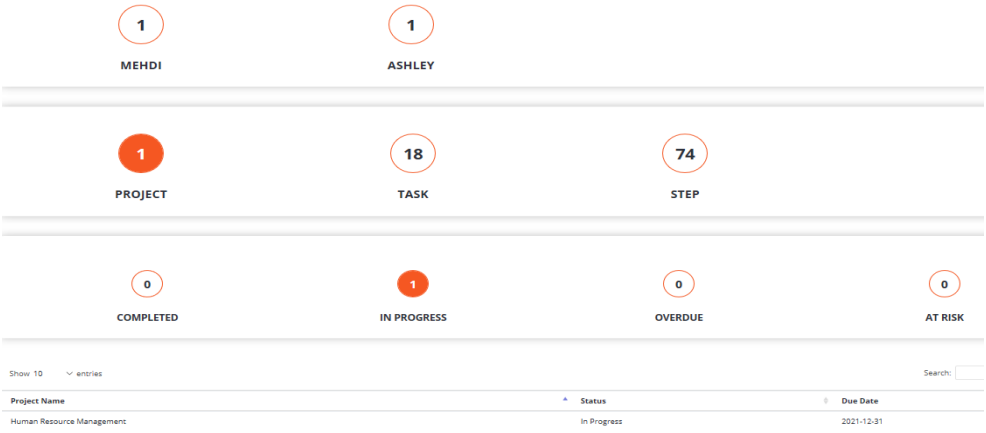
29 NAVIGATING INFORMATION

- For the employee and a manager to see their information or their direct report data the system is built to view data at a high level then allows you continuously drill down lower and lower to see the projects, tasks and step associated with the employee and determine the status of the project.
- You start by looking at the reportee: Select/ click on one.

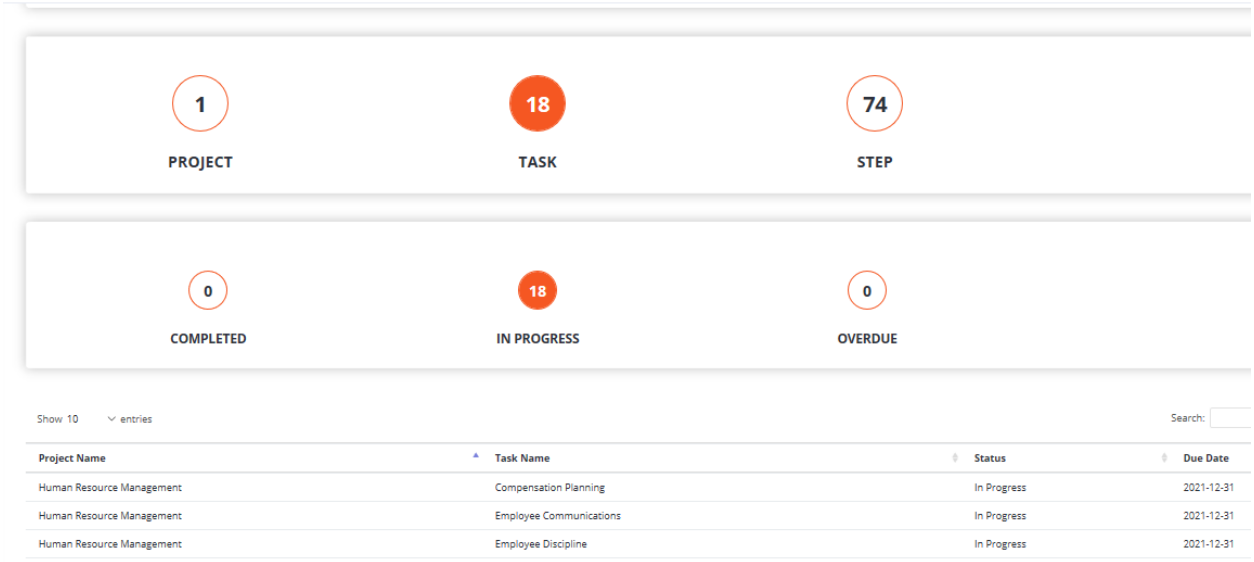
- Once you click on the employee, the circle will highlight as seen below.
- This displays the number of projects, tasks and steps associated with the employee



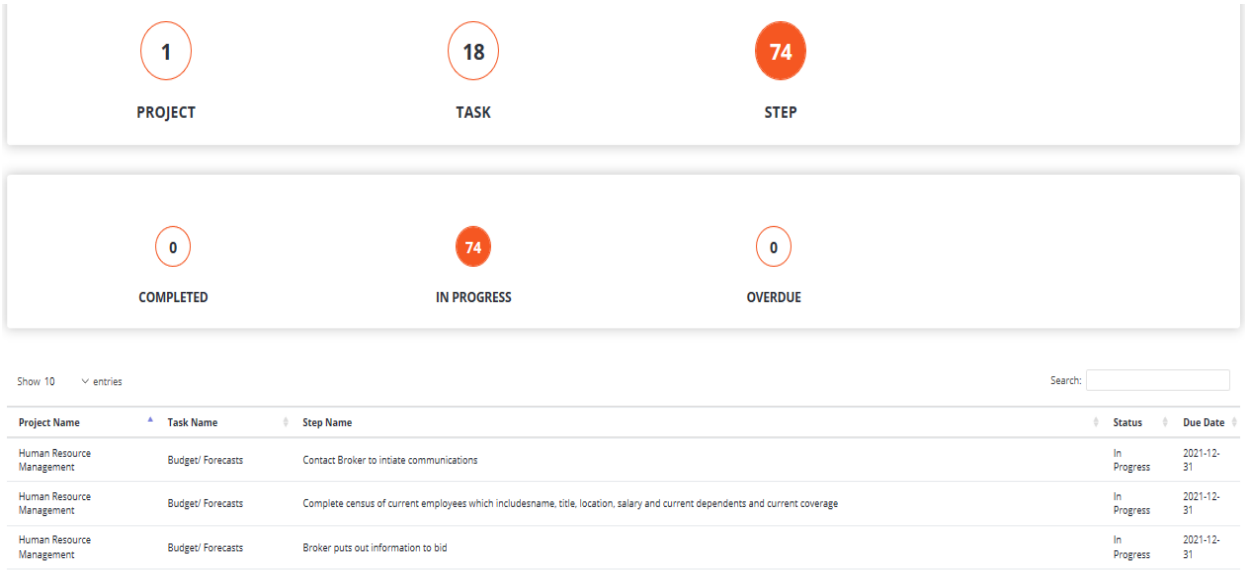
- If you want to see the projects associated with the employee, click on the "Project" button and the system displays the project names being worked on plus provides the status of the project: The status is displayed as completed, in progress, overdue or at risk.*Note:Project Name is at the bottom. In this example it is Human Resources*



- Drill down into the data to see the tasks associated with this project
- In the example below there are 18 tasks, 18 are in progress and the 18 tasks are listed below at the bottom.



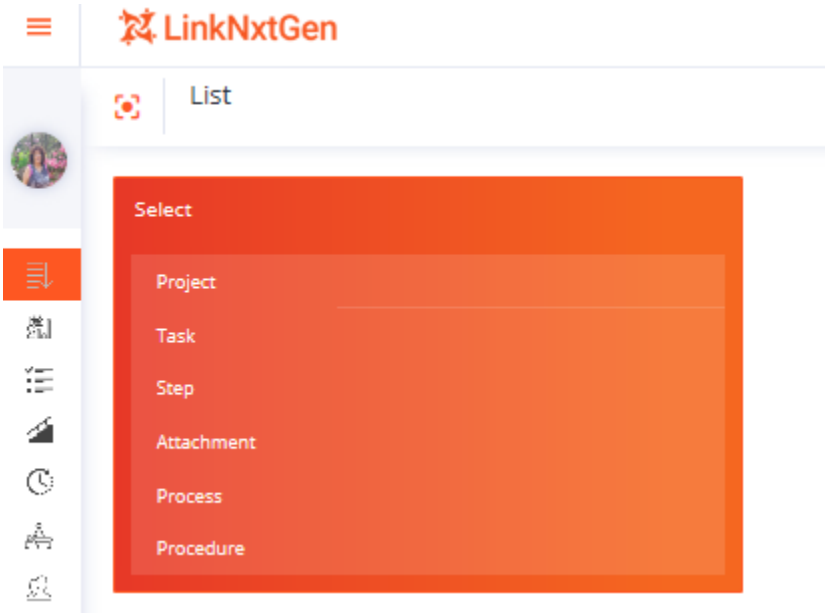
- Drill down further into the step level to see the steps associated with this project
- For this example there are 74 steps, 74 are in progress and the list of the 74 steps would appear below with the anticipated due date

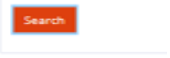


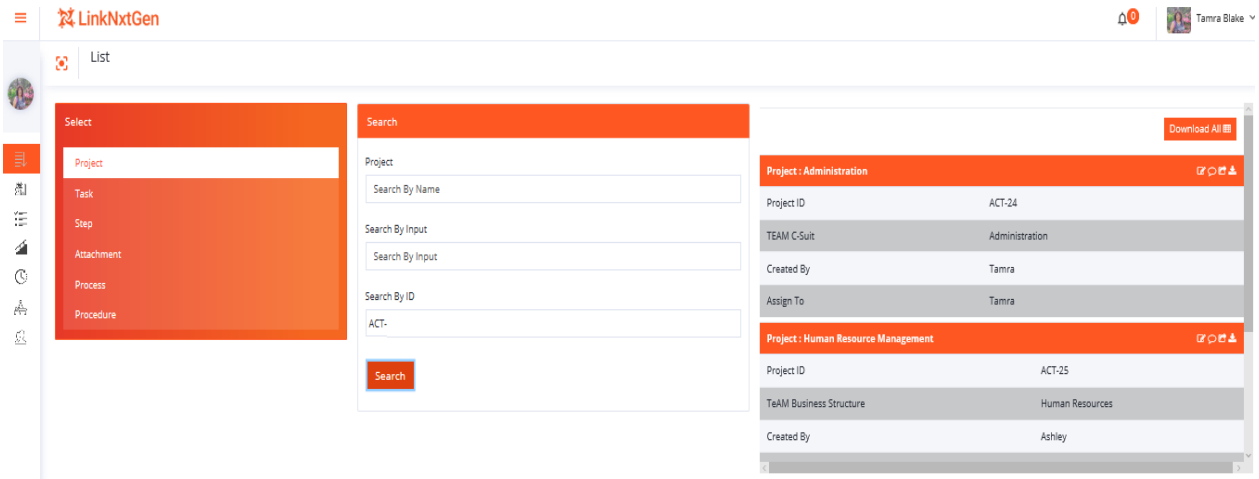
30 LISTS

- Employees can search in the lists area for their projects, tasks, steps, attach documents associated with the project, look at process and procedures.

NOTE: This procedure is the same for Project, Task and Step.



- Select Project
- Click on the “Search”  button which is found at the bottom of the middle column below:
- After you select “Search”, your projects will appear in the far right column



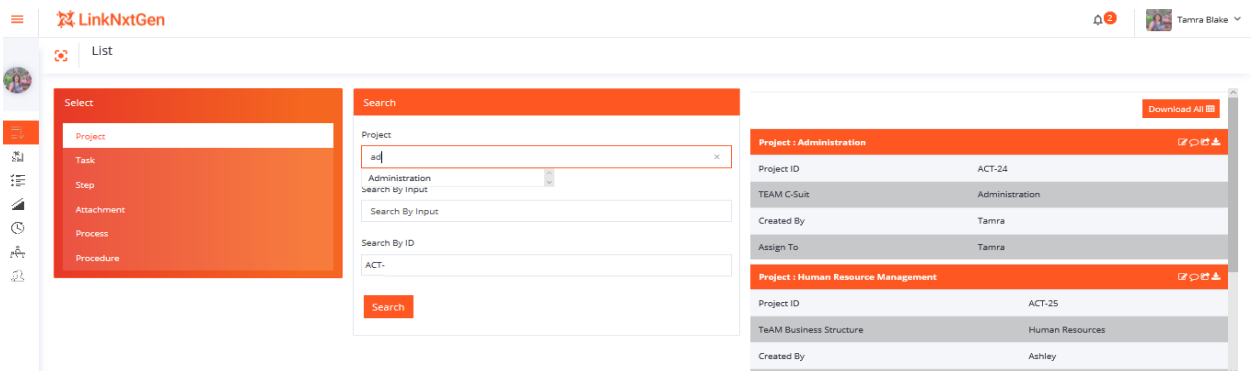
- In the Project area, you see the Project name along with icons displayed on the far right

- The icons are: Edit, Suggestion, Share, Deliverables (in this order)

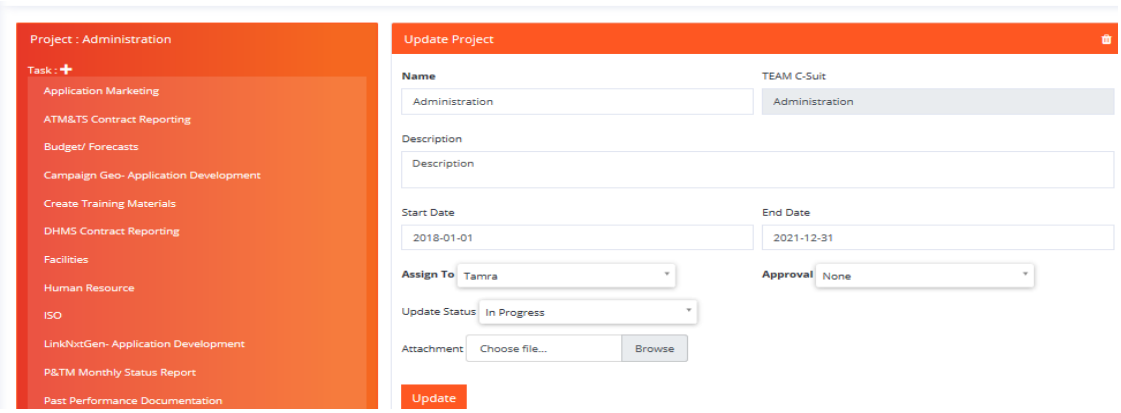
- ***The only exception is that the Task and Steps only have the Edit, Suggestion and Share icon)***

31 REASSIGNING A PROJECT TO NEW USER

- Projects, Tasks and Steps can reassign to another user in the system
- For example you can reassign a Project to a new user by clicking on Lists>Projects> Search
- Find the Project in the drop down menu
- Click on the EDIT button on the far right



- The system displays a field that says Assign to: You select the person you want to send this Project to.

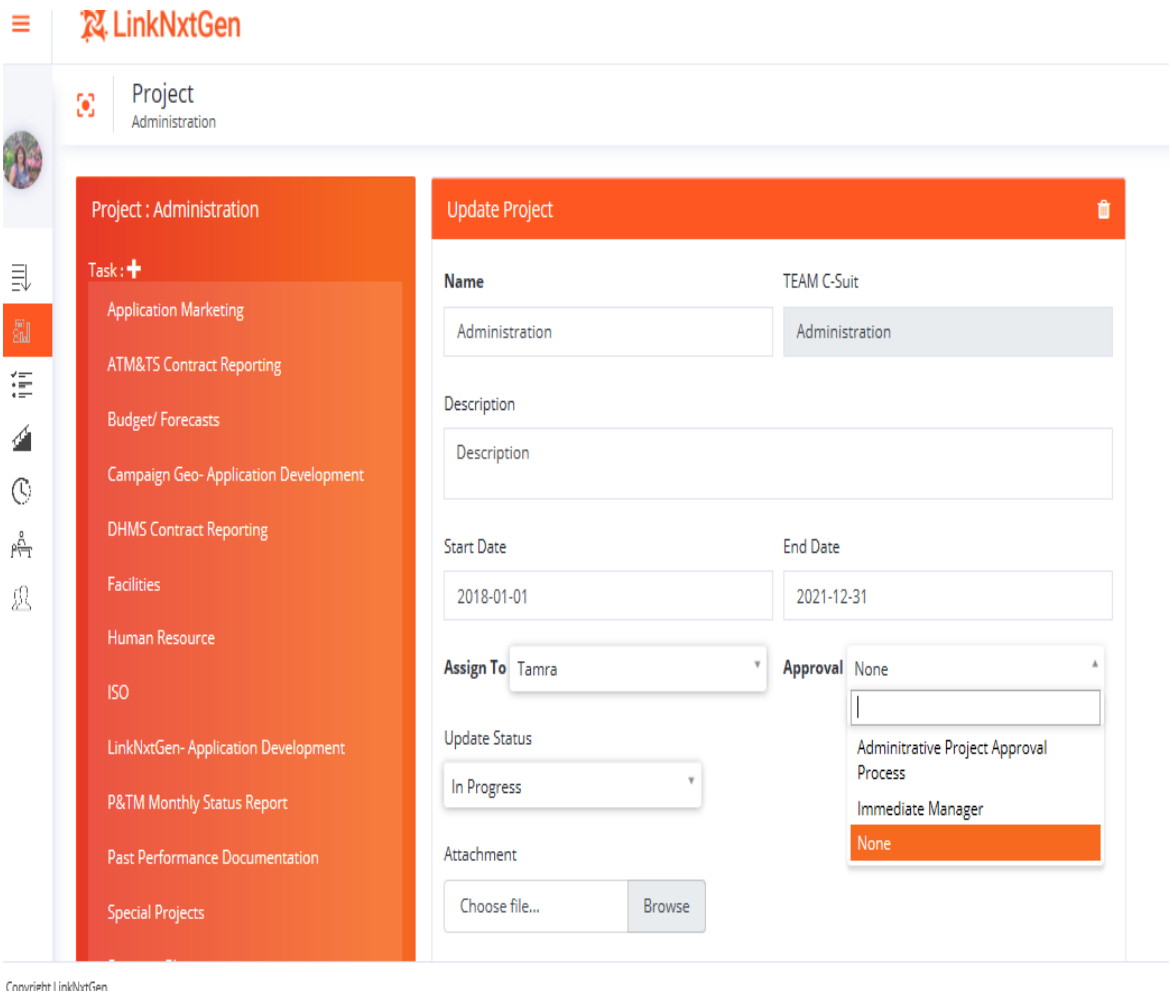


32 FUNCTIONS: Editing, Attaching a Document, Suggestions and Sharing

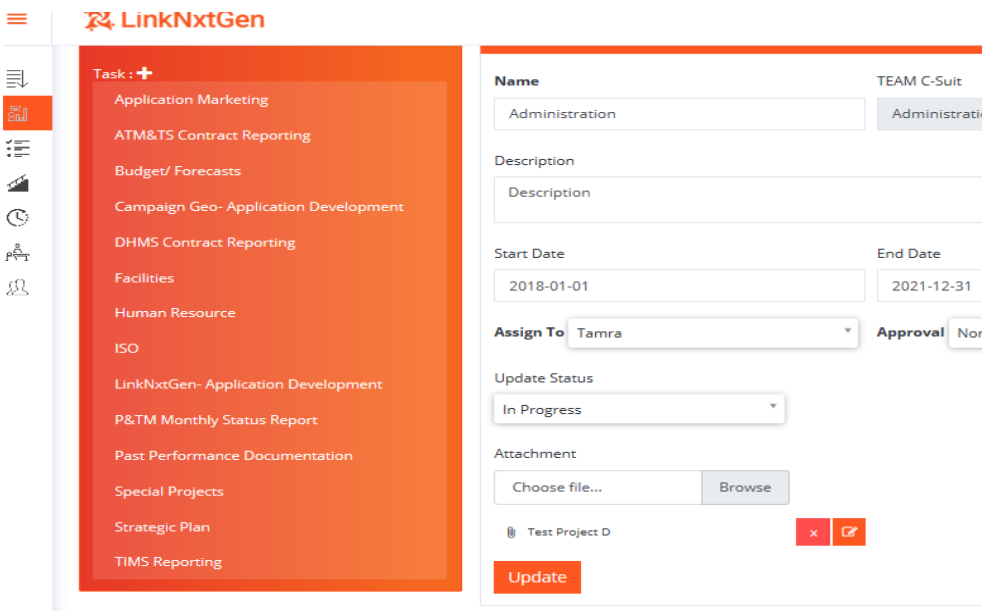
[redacted] EDITING

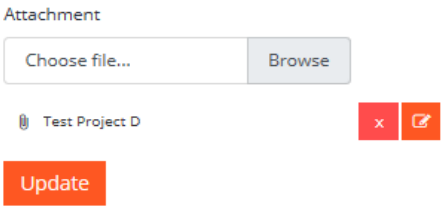
The "EDIT" Screen includes a host of information that is critical to the process flow. Here is where you can:

- add a description of the Project
- update the start and end dates of the overall project
- assign the project to another individual
- update the status
- add attachments pertinent to the project
- determine who needs to approve the edits (this is done by the manager.
- The default approver is set to None
- If a manager wants to approve every change for a project/ task / step then the approver needs to be set to the Immediate Manager for that item



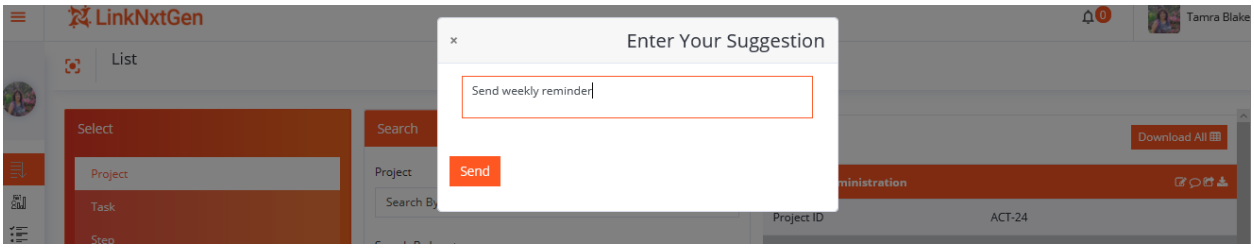
[redacted] ATTACHING A DOCUMENT





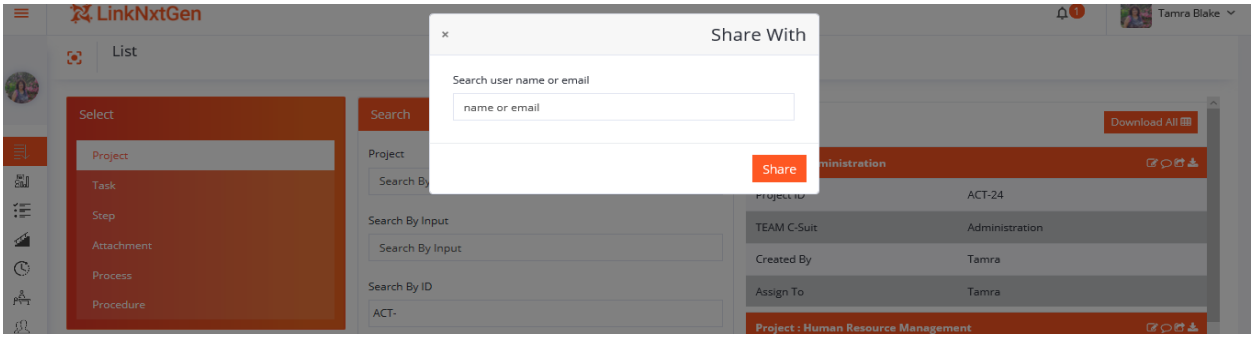
[redacted] SUGGESTION

- The system allows for the employee to make suggestions
- Hit the suggestion button and the dialogue box will appear. You type in your suggestion and hit send. The suggestion will go to your manager Need to verify this..



[redacted]SHARE

- You can share the project with others.
- Type in their email address and hit send
- An Admin must grant a user access rights before the user can access shared content



[redacted]DELIVERABLE

- The Deliverable icon; when selected, produces a report of all the key deliverables in a report format
-

ADMINISTRATION (ACT-24)

Node :	Administration	Description:	
Outcome:		End Date:	2021-12-31
Status:	In Progress		

STRATEGIC PLAN (TSK-158)

Project:	ACT-24	Description:	
Outcome:	18 Month Plan	End Date:	2021-12-31
Status:	In Progress		

18 MONTH STRATEGIC PLAN FOR TEAM (STP-573)

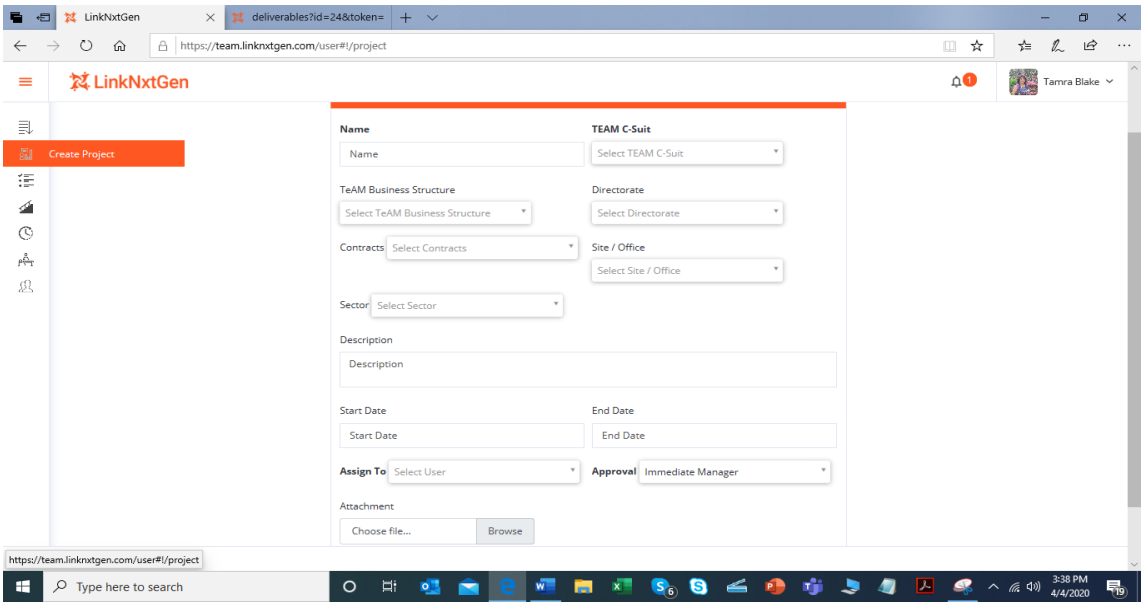
Project:	ACT-24	Task:	TSK-158
Description:		Outcome:	18 Month Plan
End Date:	2021-12-31	Status:	In Progress
Expected Working Hr:	836		

REVIEW 18 MONTH STRATEGIC PLAN AND UPDATE SECTIONS AS THE COMPANY DIRECTION EVOLVES (STP-574)

Project:	ACT-24	Task:	TSK-158
Description:	Review 18 Month Strategic Plan and update sections as the company direction evolves	Outcome:	18 Month Plan
End Date:	2021-12-31	Status:	In Progress
Expected Working Hr:	167		

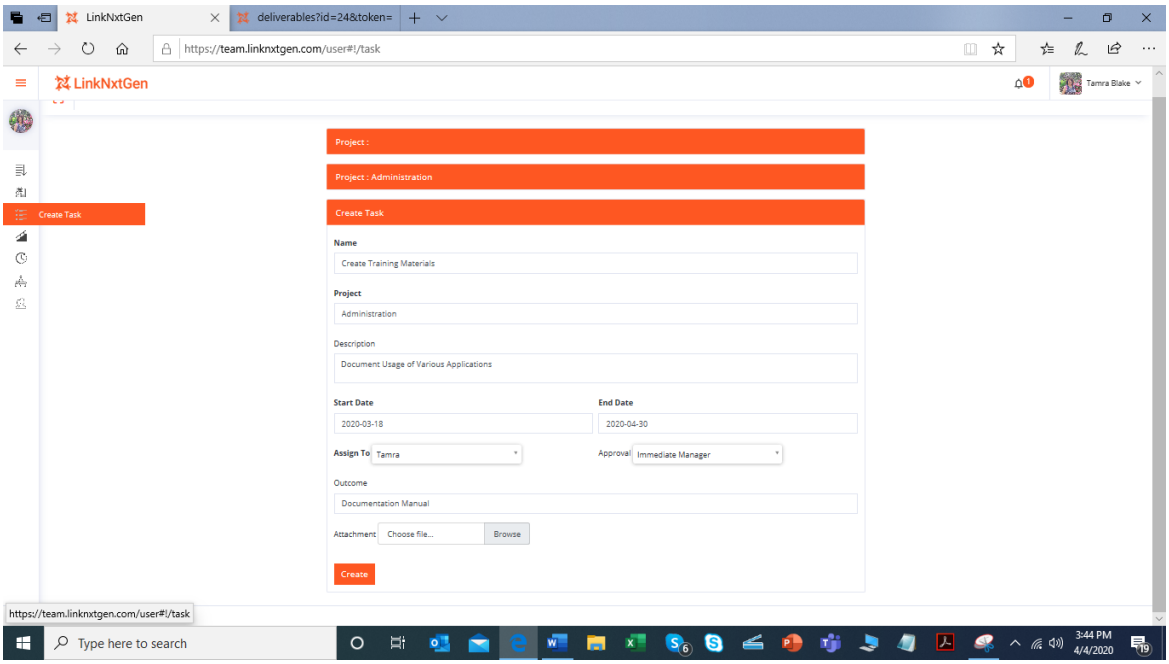
33 CREATING A NEW PROJECT

- To create a new project you go to Create Project and fill out the below form
- **You must be an Admin to create a new project (is this true?)**
- Have Developers look at this form as it should contain drop downs and does not



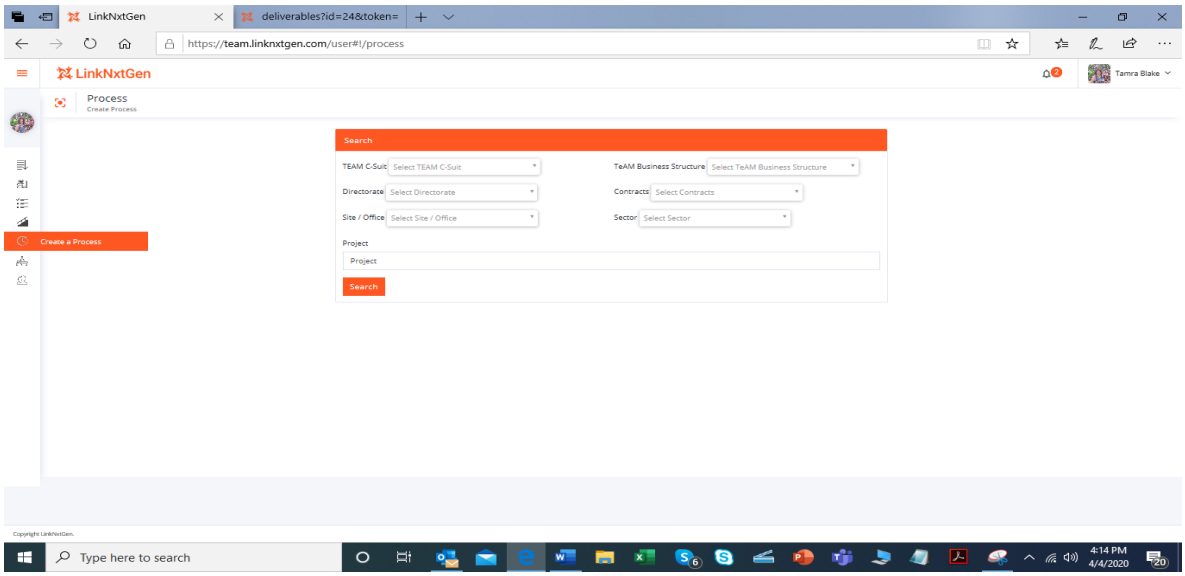
34 CREATING A NEW TASK UNDER EXISTING PROJECT

To add a task to an existing Project youwould complete the following screen



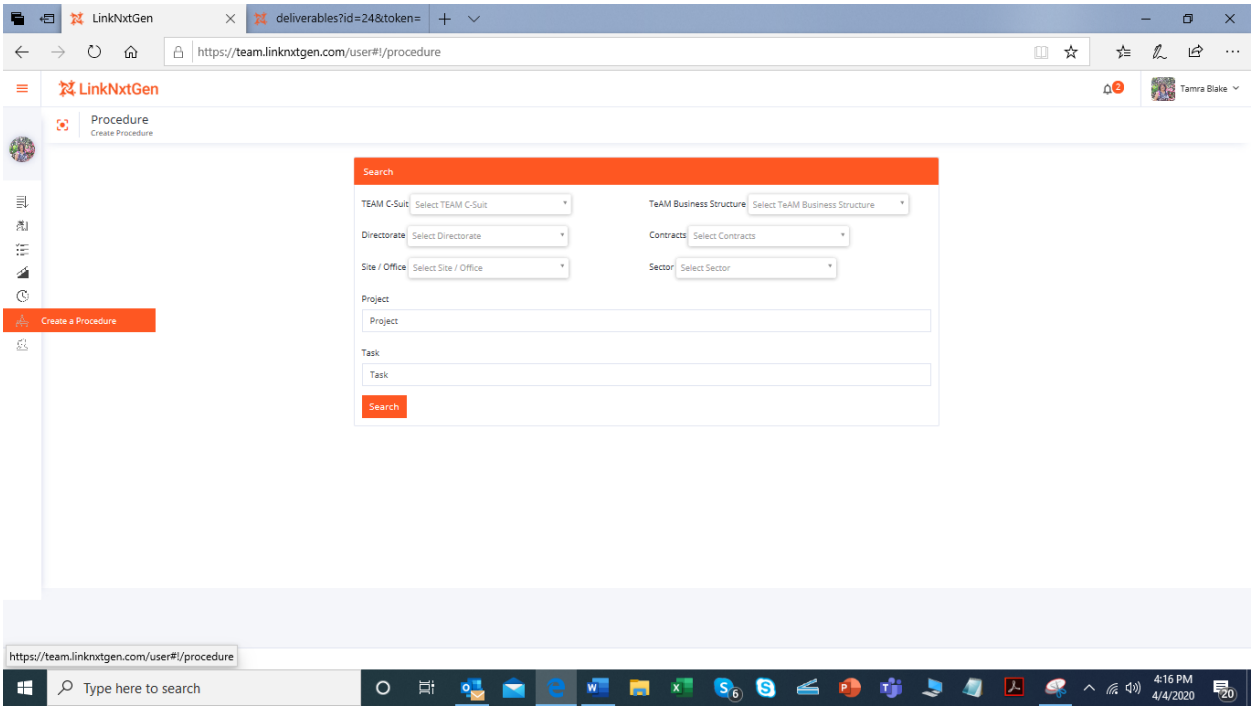
35 CREATE A PROCESS

- Complete the below fields to create a new process which is the sum of all the tasks



36 CREATE A PROCEDURE

- Complete the below fields to create a new procedure which is the sum of the steps

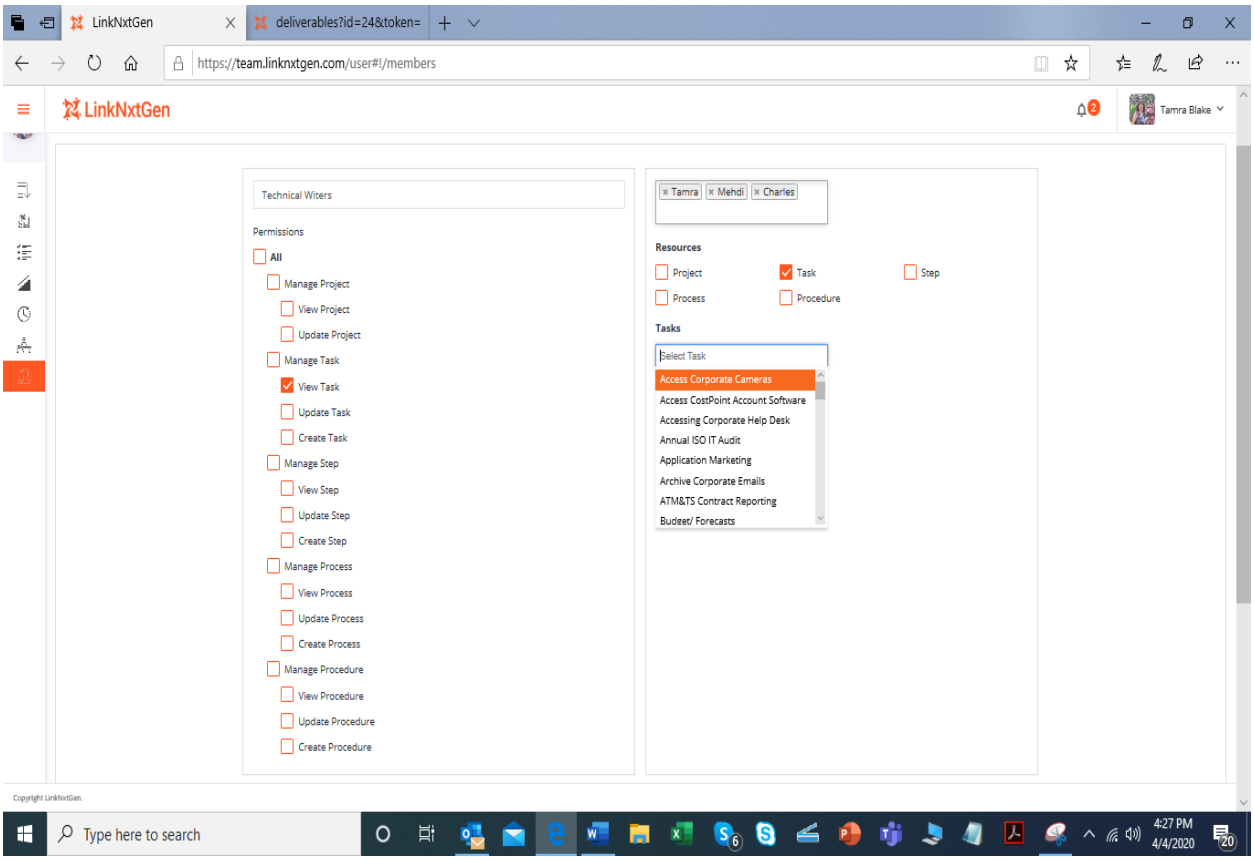


37 AUDITING / ARCHIVING

- See above section 24

38 MEMBERS

- The system allows for the creation of Members and the assignment of employees to specific Member Groups
- Example: You have a group of Technical Writers and you wanted to give everyone in that group the ability to View Tasks.
- You would click on view tasks under the Permission column
- Type in the users names that should be a part of that member group
- Decide what level they can view
- Select the specific task they can view



39 ADDING A NEW USER

- Need to document how to add a new user to the system