

Performance Logic, Inc.

# DSRIP Tracker Tips

A reference document to answer the most often cited user questions.

## Contents

|  |   |
|--|---|
| Introduction .....   | 3 |
| DSRIP Tracker Overview .....   | 3 |
| Tips for Logging in – Usernames and Forgotten Passwords .....                      | 3 |
| Failure to Install DSRIP Tracker Plug-Ins .....                                    | 4 |
| User Profile – Name/Title/E-Mail & Starting Page .....                             | 4 |
| My Status Tab/Personal Dashboard & Tab Views .....                                 | 5 |
| Common Project Issues – Can’t Find Projects, Editing Projects, Project Locks ..... | 5 |
| Project Permission .....   | 6 |
| Status Reports .....   | 6 |
| E-mail Preferences .....   | 6 |
| Uploading, Editing, & Viewing Documents .....                                      | 7 |

## Introduction

Performance Logic has created this reference document to answer the most often cited user questions.

## DSRIP Tracker Overview

1. DSRIP Tracker has been optimized for use in Internet Explorer 8.0 and higher.
2. DSRIP Tracker is a single click system. A single click will allow the user to navigate all areas of the program.
3. On many pages, there appears a gray band at the bottom of the page. This gray band adds additional buttons and functionality, such as "Tools", "Print," and "Export".
4. Edits in DSRIP Tracker will be saved automatically. However, it is imperative that when entering data, that the "Ok" button of individual windows is pressed before leaving the tool.
5. The Support page is accessible by all users from the Main page of the DSRIP Tracker and at the top right corner of all other areas of the tool. The Support page features:
  - i. Training on Demand - 3 minute video tutorials
  - ii. User Guides - Covering such topics as adding new Milestones and Metrics, creating Status Reports, and many other features and functionality
  - iii. Frequently Asked Questions
  - iv. Release Notes

## Tips for Logging in – Usernames and Forgotten Passwords

1. Usernames are a combination of the first letter of a first name and full last name. John Doe's username would be "jdoe".
2. When a password is forgotten, its reacquisition is quite simple. From the login page, click "Request Password". Next, enter your username (first letter of your first name + full last name) and your organization e-mail address. Your login credentials will be sent to the user by email.
3. But I tried to request my password and nothing happened. What do I do now?
  - i. Contact Performance Logic Support at [support@performancelogic.com](mailto:support@performancelogic.com) or by phone at (888)-407-1705

## Failure to Install DSRIP Tracker Plug-Ins

**Q:** I've logged in and clicked the Project Manager Icon. Why did I get the error message "**The Performance Logic plug-in failed to install**"?

**A:** Several settings on the user's computer can cause this error message to appear. The following are the steps a user should take in order to resolve this problem.

1. Verify that [https://\\*.perflogic.com](https://*.perflogic.com) is listed in "Trusted Sites" on your Internet Explorer browser.
  - 1) From your browser window, click Tools
  - 2) Choose Internet Options then in the Internet Options window, select the Security tab
  - 3) Click Trusted Sites then Sites
  - 4) Paste "[https://\\*.perflogic.com](https://*.perflogic.com)" into the "Add this Website to the zone" field then click Add
  - 5) Confirm your changes by clicking Ok
2. You may need to remove Performance Logic Appdata. The Appdata folder is found in the following file path: C:\Users\~username\AppData\Local\Performance Logic. Delete the "Performance Logic" folder then try to access the tool again. You may be asked to give permission to download new Performance Logic Modules. Select Allow.

## User Profile – Name/Title/E-Mail & Starting Page

**Q:** My name/title/e-mail has changed, how can I reflect these changes in the DSRIP Tracker?

**A:** From the Main page, select User Profile. There are several details that the user is capable of editing manually. These include: Name, Password, Title, Phone Numbers, E-mail, and Start Page. All other fields in the User Profile must be edited by a system administrator or Dept. Administrator. After making your desired changes, click Update.

**Q:** My Department has changed, how do I reflect this in the DSRIP Tracker?

**A:** Department cannot be modified by normal users. Contact your system Administrator or Performance Logic Support.

**Q:** Whenever I launch DSRIP Tracker, I'm taken to **Page X**, how can I change my default start page to **Page Y**?

**A:** From the User Profile, select the Start Page dropdown. There are Three Options: Subscriber Home, Project Manager, and Personal Dashboard. Performance Logic recommends using Personal Dashboard.

## My Status Tab/Personal Dashboard & Tab Views

**Q:** I need a new Pane, how can I add a new one?

**A:** By default, this Dashboard is set to display three Panes: My Projects: All projects that a user is team member. Issues: All issues that a user is assigned. Assignments – All assignments such as meeting Agenda items that a user is assigned.

1. Click the “Add Pane” button at the bottom of the page, choose a desired size/shape and click Ok.
2. Click custom to choose the pane’s data source and title. Click Ok.

**Q:** The Status/Measure Tab opens to a blank white page. What do I do?

**A:** At the bottom of the Status/Measure Tab click the button “Load View”.

1. For the Status Tab click Load View, then select “Project Status View” in the Load Status View popup window.
2. For the Measure Tab, click Load View, then select “Measure Tab Default” in the Load Status View popup window.

## Common Project Issues – Can’t Find Projects, Editing Projects, Project Locks

**Q:** I’ve logged in but I don't see any projects.

**A:** This most likely occurred because you have not been assigned to the Team Tab to any projects. Contact your Project Manager or Administrator and they will have the capability to add you to the appropriate projects.

**Q:** I can see my projects, but I can’t make any edits!

**A:** If you need to make edits to a particular Milestone/Metric, contact your Project Manager and request that you be assigned to the Milestone/Metric(s) necessary. If you need to make edits to the entire project: Contact your Project Manager and request that on the Team Tab, your role be changed to “Project Analyst”.

**Q:** Why did I get the popup, “This project has already been locked by (User). It is opened in read-only mode. You will be notified if the lock is released”?

**A:** A locked project is a project that can only be read but not edited because a user has already entered and is editing the project that has been locked. Locks prevent concurrent and overlapped editing.

**Q:** My project is locked but I need to get in.

**A:** If you are locked out of a project, wait for the current user to exit or request that they leave the Project. From the Project list, the “Lock” column will display the name of the Locking user.

**Q:** The tool crashed and the project I was working in has been locked by myself?

**A:** Wait 5 minutes and the lock will be lifted. Restarting your internet browser can also release the lock made by yourself.

## Project Permission

**Q:** What are the different project team members and what can they do?

**A:** There are five different roles that a member of a project can be assigned.

1. Project Manager – Read/write permission in the entirety of the project. There can only be one.
2. Project Analyst – Read/write permission in the entirety of the project. There can be multiple.
3. Team Member – Full read permission in project. Can edit details of assigned tasks. There can be multiple.
4. Project Sponsor– Full read permission in project. Can edit details of assigned tasks.
5. Stakeholder– Full read permission in project. Can edit details of assigned tasks.

## Status Reports

**Q:** I e-mailed my Status report, but I can't find it anywhere in the project.

**A:** Status Reports can be emailed before they are saved. Remember to press "OK" when you have completed a Status Report or it will not be saved.

**Q:** I added an issue to last month's status report, but it does not appear on the list of issues in this month's status report.

**A:** Issues will only appear in the "Add Issues" list in a Status Report when an issue is added to the Issues Tab of the project.

## E-mail Preferences

**Q:** Can I send automated e-mails to my team?

**A:** As a project Manager you are capable of sending automated e-mails to your team members. Enter a project, and by clicking its title located in the top left corner of the page, select "Email Notification Preferences". You can select checkboxes for a variety of email notification types, including when Tasks and Issues, and agenda items are assigned. Outside of the automated e-mails, users have the capability to manually send e-mails from various sections of a project at any time by clicking the e-mail button at the bottom of the page.

## Uploading, Editing, & Viewing Documents

**Q:** What document types are supported by DSRIP Tracker?

**A:** DSRIP Tracker supports the Microsoft Office Suite of applications as well as other file types such as jpeg, csv, etc.

**Q:** How can I attach files to my projects?

**A:** Enter the project you wish to attach a file to. Select the Documents Tab and click “Add Files” at the bottom of the page. A file search window will appear, from which you will be able to search and select your desired file.

**Q:** Who can view and edit the documents that I have uploaded?

**A:** By default, all users in the Team Tab along with those with Administrator privileges are capable of viewing and editing the files uploaded to folders and projects. Read (view) and Write (edit) privileges can be modified for individual projects by doing the following:

1. Highlight a single document
2. Click Tools
3. Click Properties
4. Next to Team Member Names, select the members’ privileges.

**Q:** The document I would like to use is “**Checked Out**”. What does that mean?

**A:** Documents have two potential statuses, Checked In and Checked Out. When a document is Checked In, it is available to be viewed and edited. When a document’s status has been changed to Checked Out, (by clicking Edit at the bottom of the page) someone is in the process of editing that document. The document in question can still be viewed, but it cannot be edited until it has been checked back in.

**Q:** I Checked Out a document by clicking Edit, after making changes, do I have to re-upload it?

**A:** No. Save then close the document and your changes will be automatically reflected.