HealthCommander

Project Manager User Guide

Version 6.0

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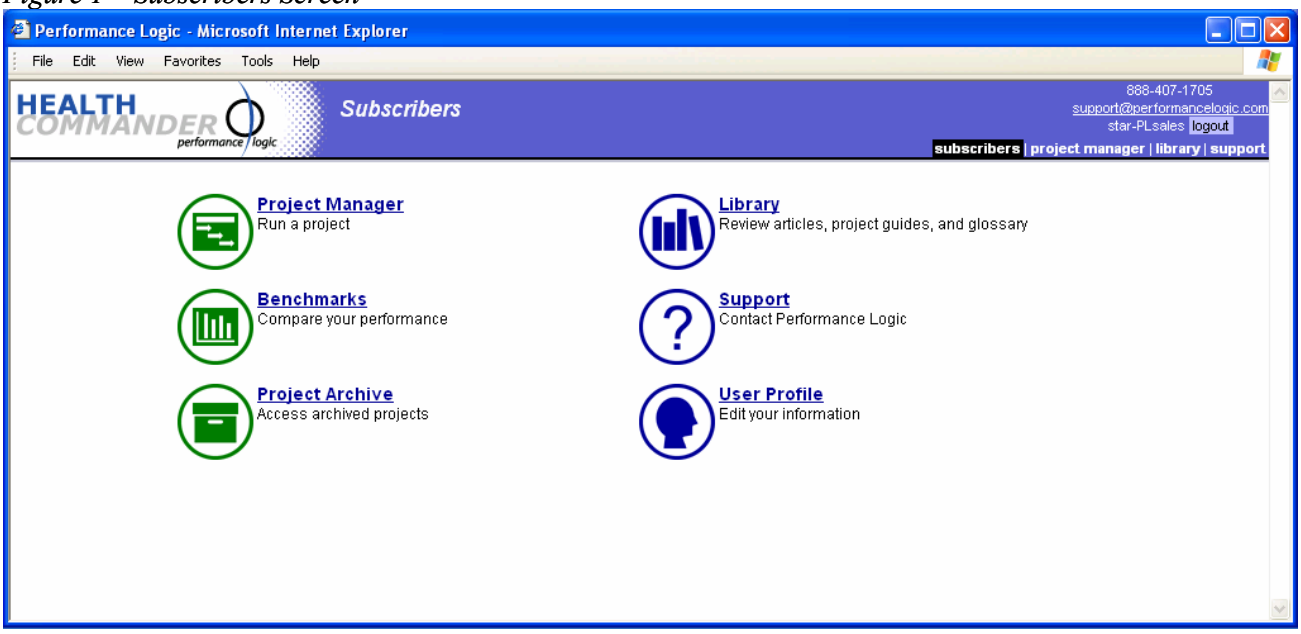
Project Manager Overview

The backbone of the *HealthCommander* product is the Project Manager, Performance Logic's project management program. The Project Manager has been designed using a step-by-step screen format, so that users with no prior project-management experience can still successfully run a project from setup through idea implementation and tracking. Project can be large or small in terms of length and complexity, having any number of project team members.

Project Manager Navigation

To access the Project Manager, log into the subscribers area. From the Subscribers screen, you may select the Project Manager program by clicking either the Project Manager icon on the screen or the same topic from the top menu bar (see *Figure 1*). All mouse navigation in Performance Logic (PL) occurs with a single mouse click. When the Project Manager is selected, you may encounter a delay of several minutes while the program downloads; messages on the screen will alert you as each component is installed on your computer. Once the program has finished downloading, the default screen for the Project Manager appears, the Current Projects screen (see *Figure 2*). This screen contains a list of all projects and folders that you are authorized to access in the Project Manager. On the Current Projects screen you may create new projects and folders, open existing projects, and remove or archive projects. You may also use the tabs at the top left above the content screen to utilize the Reports tab, the Resources tab, the Requests tab, and the Profile tab (each explained at the end of this guide).

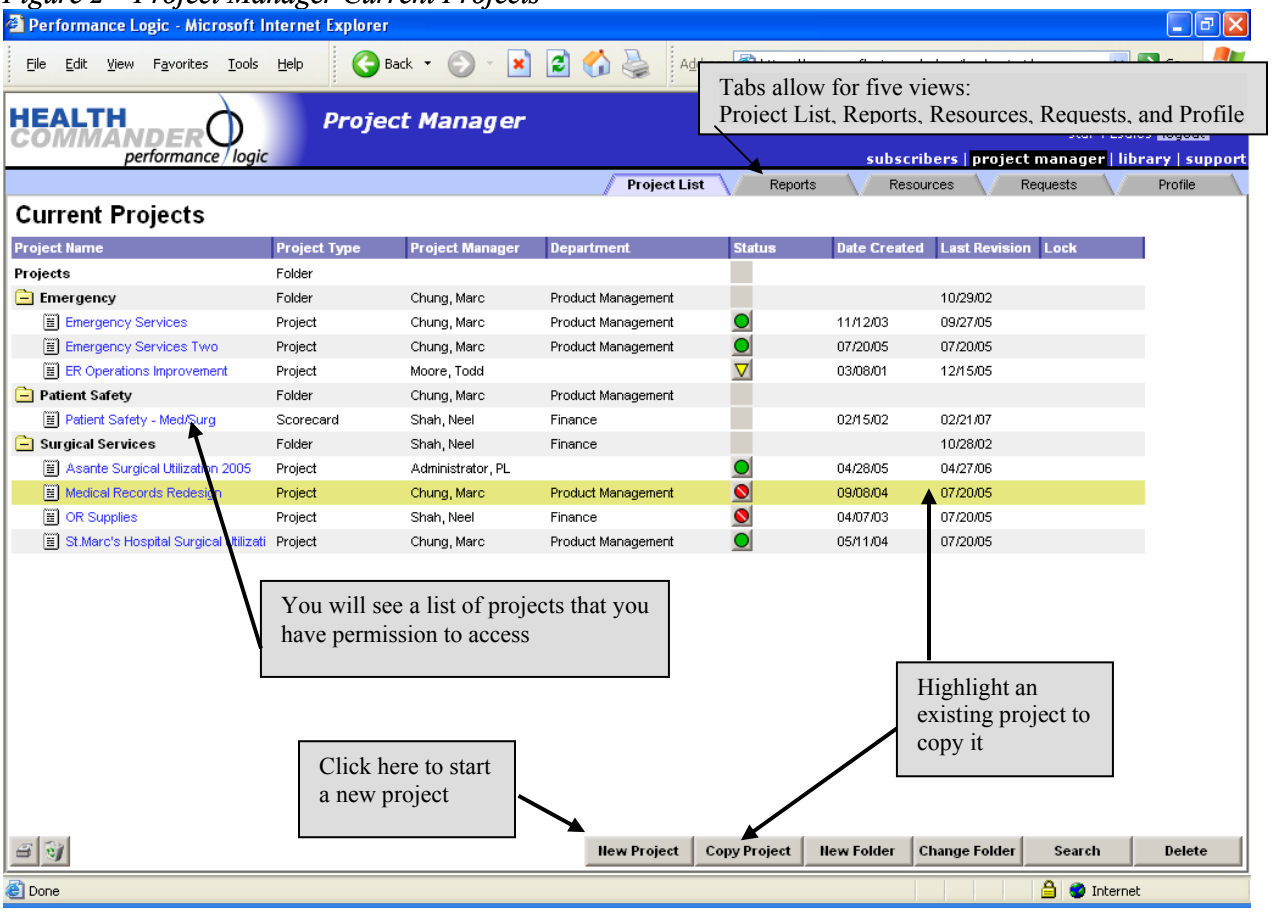
Figure 1 – Subscribers Screen



The top menu bar remains fixed above the content screen, allowing the user to access any of the site's service areas from within the Project Manager program. To navigate using the menu bar, simply click the desired word. This action will navigate you away from the Project Manager to the area you have just selected (e.g., Library). To return to the Project Manager, click Project Manager from the menu bar. If you would like to log out as a user but remain on the Performance Logic website, click the Logout button at the top of the screen next to your user name.

When the Current Projects screen first appears, any folders that have been created will be collapsed so that projects within the folders are not seen. To view a list of projects within a folder, click the plus sign (+) inside the yellow folder icon. Do not click the name of the folder in blue text because this action will open a unique folder view that is different than viewing a list of projects within the folder. (See the Project Folders topic below for information about project folders.)

Figure 2 – Project Manager Current Projects



The blue column headings on the Current Projects screen have two special features that all blue column headings have in the Project Manager. First, each column may be resized by placing the mouse cursor over the border between column headings so that the cursor turns into a double-pointed arrow, holding down the left mouse button, dragging the border to the desired position, and then releasing the mouse button. Second, the projects on the screen may be sorted by any of the columns on the Current Projects screen (e.g., Project Name, Project Manager, Date Created, etc.) by clicking the column name. Projects will first sort in ascending order; clicking the column name again will sort in descending order.

The Status column displays a green, yellow, or red light for each project and folder. This light was chosen inside the project in its most-recent project update. The light was chosen arbitrarily to visually show how well the project is going at that point in time. A green light indicates the project is on-track; a yellow light indicates caution; a red light indicates trouble. Click a light in the Project Status column to easily view its project update—complete with detailed notes—that was created inside the project.

Users can tell whether a project has been locked by another user before opening it by looking at the Lock column on the Current Projects screen (see *Figure 2*). If a user's name is displayed in the Lock column (e.g., "Smith, Jane"), the stated user is currently working in the project online. If a user's name is followed by the letters LT in the Lock column (e.g., "Smith, Jane (LT)"), the stated user has placed a long-term lock on the project for use offline (see the Project Locking topic under the Status Tab section of this guide for information on long-term locks). The information in the Lock column is updated every 30 seconds. If others open a locked project, they will see a message telling them that the project has been locked and by whom. Locked projects can still be viewed by others in read-only mode.

Project Folders

You can group projects together on the Current Projects screen by creating a folder and then placing the projects in it. Click the New Folder button at the bottom of the screen to create and name a folder. On the pop-up screen you can also select the users in your organization whom you want to see your folder and place projects in your folder. (Any pop-up screen in the Project Manager can be moved by dragging the screen with your mouse in order to view pertinent information on the background screen.) After you give the folder a name and click OK, the folder will appear on the Current Projects screen. Folders can be created within other folders by highlighting a parent folder and then clicking the New Folder button to create a folder under it. Place desired projects into a folder by highlighting the project anywhere except the blue project name (clicking the blue name will open the project) and clicking the Change Folder button. A list of created folders that you have access to will appear when this button is clicked. Open subfolders in this list by clicking the plus sign (+) in the yellow folder icon next to the folder's name. Highlight the folder into which you wish to put your highlighted project and click OK. The highlighted project will now be transferred into the folder you selected. Click the plus sign (+) in the folder icon next to the folder name to see a list of all projects within it, listed below the folder's name. Select multiple projects to group at the same time by holding down the Shift key before highlighting them (to select a group of consecutive projects) or the Control key (to select nonconsecutive projects). You may delete a folder by highlighting it and clicking the Delete button, but folders cannot be deleted while projects are stored in them.

Once a folder is created, it can be opened to view summary status information about the projects stored in the folder. Open a folder by clicking the name of the folder in blue text. Once a folder is open, the folder tabs are very similar to the tabs and features available within specific projects. The difference is that the features in a folder are a portfolio roll-up of all subfolders and projects within the folder. This user guide will not detail the features of folder tabs because the same features are documented in the corresponding project tab sections of this guide.

To rename a folder, open it by clicking its name in blue text. In the folder's default Status tab, click the Properties button at the bottom of the screen to open a pop-up screen. Rename the folder as desired on the Project Name text line.

As an optional folder security measure, clients can choose to restrict "write" access to any folder, so that only those users who have been given "write" access to a folder can create projects and folders underneath it. If your organization desires this added level of folder security, contact your Client Services manager to activate the feature for your site.

Creating a New Project

When you first begin using the Project Manager, there will be no projects on the Current Projects screen unless another user has assigned you onto a project's team. You will only see projects you have created or projects to which you are assigned (unless you are a user with Administrator, Executive, or Department Executive status). To start a new project, click the New Project button at the bottom of the Current

Projects screen. A new project will open and you will navigate through four initial setup steps, detailed in the next section, Project Setup.

Copying an Existing Project
To copy an existing project, highlight the project you would like to copy from the Current Projects screen. This is done my clicking any part of the project other than the project name. (Clicking the name will open the project.) For example, click the area under the Project Manager, Status, or Last Update fields. Once the project is highlighted, click the Copy Project button at the bottom of the screen. You will be prompted to rename the project to differentiate it from the original. Once you rename the project, click OK and the new version will appear on your Current Projects screen with the current date as the date created. You may now open and edit the copied project. Only users with the Project Manager or Project Analyst team roles in a particular project may copy it (team roles are explained in the Team Tab section of this guide).

Deleting an Existing Project
To delete a project, highlight the project from the Current Projects screen by clicking any part of the project other than the name. You may select several projects at once by holding down the Shift key (to select consecutive projects) or Control key (to select nonconsecutive projects). Once the project(s) is/are highlighted, click the Delete button at the bottom of the screen. You will be asked to confirm that you want to delete this project; click OK and your project(s) will be deleted from the list.

Restoring a Deleted Project
When projects are deleted, they go to a Recycle Bin. This feature allows Project Managers to recover deleted projects without having to call Performance Logic's Customer Support. To restore a deleted project, click the Recycle Bin icon at the lower left corner of the Current Projects screen. On the pop-up screen, highlight the project to restore and then click the Recover button. To permanently delete a project, highlight it in the Recycle Bin and then click the Delete button.

Archiving an Existing Project
When projects are completed or inactive, you may wish to archive them so they no longer show on the Current Projects screen in the Project Manager. The archive feature in *HealthCommander* must be turned on by your PL client manager. To archive a project, highlight the project from the Current Projects screen by clicking any part of the project other than the name. You may select several projects at once by holding down the Shift key (to select consecutive projects) or Control key (to select nonconsecutive projects). Once the project(s) is/are highlighted, click the Delete button at the bottom of the screen, then click the Archive button on the pop-up screen. Archived projects can be accessed by clicking the Subscribers link on the top menu bar to go to the Subscribers screen (see *Figure 1*), and then clicking the Project Archive icon. When a project is archived, the project's folder structure from the Project Manager is recreated in the Project Archive, which helps users to easily find their archived projects. To copy an archived project from the Project Archive back to the Project Manager, highlight the project in the Project Archive and then click the Copy Project button at the bottom of the screen. Choose a name for the copied project and click OK to return the copied project to the Project Manager. Click the Project Manager link on the top menu bar to access the Project Manager and open the project copied from the Project Archive.

Opening a Current Project
To open a project, click once the project's name shown in blue on the Current Projects screen.

Searching for a Project, Document or Measure
Click the Search button at the bottom of the Current Projects screen to search for specific projects, documents, and measures. When the pop-up screen opens, the default search is for projects. Select a search parameter from the pull-down list in the first column and then select the specific search criteria in

the second column. Click the Search button to perform the search. A list of projects matching the criteria will display on the pop-up screen. Projects can be opened from the search results by clicking the project's name in blue text. To search for documents or measures, click their respective tabs at the top of the pop-up screen and then perform the search.

Project Setup

New Project Setup

When you create a new project, you will navigate through four initial setup steps to select and customize the desired project template. These steps are: Name Project, Select Template, Customize Template, and Select Content Support.

Name Project

The first screen in project setup is called Name Project. Overlying this screen will be a pop-up screen welcoming the user to the project setup. Click OK to close the screen and start the setup process. Click the underlined default project name on the screen to highlight the text. Enter a new project name in the underlined field. Once you have named the project, click the Complete button in the lower left corner to automatically advance to the next step: Select Template.

Select Template

The user chooses a project template on the Select Template screen. Four PL template choices are listed at the top of the screen, followed by any custom templates that have been created by the client organization. The most commonly used template is the Project template with its four modules (Project Planning, Performance Measures, Analyses, and Idea Development). The Scorecard template tracks only performance measures. The Business Plan template provides a step-by-step process for creating a business plan for your selected area. The Ideas template provides a repository of idea details to be tracked as a project of its own. To view a PL template's definition, click its name in blue. The user may also choose a custom template if any have been created by your organization. Either your onsite PL administrator or the PL client manager assigned to your organization can easily set up custom templates for your organization if desired. Select a template by checking the box next to the name, and then click the Complete button to advance to the Customize Template step.

Please note that the remainder of this guide focuses on the commonly used Project template. If you select the Scorecard template, please refer to the Performance Measures section of this guide for assistance in constructing and analyzing performance measures.

Customize Template

The Customize Template screen allows the user to remove unwanted modules in the Project template. You may also remove specific unwanted steps within the Project Planning and Idea Development modules. This screen will not appear if you chose the Business Plan or Scorecard or custom templates in the previous step. To remove an element in any of the modules, uncheck the red check mark seen in the box to the left of the description. Click the Complete button in the lower left corner to automatically advance to the last step: Select Content Support.

Select Content Support

The last screen in project setup is called Select Content Support. The screen contains a list of twenty-two specific functional areas. If you desire the program to load sample performance measures or analyses for one of the specific functional areas listed, check the box next to the department name. Click a blue

functional area name to see a brief definition of that area. (Throughout the Project Manager, all blue text titles indicate a link to another screen for explanatory definitions or related screens.) Once you have chosen content support, click the Complete button to finish the project setup and advance to the Project Status screen. If you want to modify this screen at any time during your project, you may do so by clicking the Plan tab and then clicking the Project Properties category from the left navigation menu (further explained in the Plan tab section).

Completing Project Setup

Once you have completed the four setup tasks to create your project, the program will display a pop-up screen stating that you have completed the project setup. Click OK to close the screen. Now visible is the project's default screen: the Project Status screen (see *Figure 3*).

Status Tab

Once the setup tasks are completed in a new project, eight content tabs run across the top of the project, just below the top menu bar. They are: Status, Steps, Plan, Issues, Tracking, Team, Meetings and Outputs. These tabs house various functions or outputs of the Project Manager program. When you open a project, the default Project Status screen lies within the Status tab. The user can access information from the other tabs at any time by clicking the tab name. The information within many of these tabs will be automatically updated as you complete project steps. Each tab will be explained individually in the guide.

The left navigation menu shows the specific categories within each tab. Clicking a category on the left navigation menu will display the information on the screen. The contents of the left navigation menu change within each tab in order to guide the user through all the information housed within each tab.

Project Status Screen

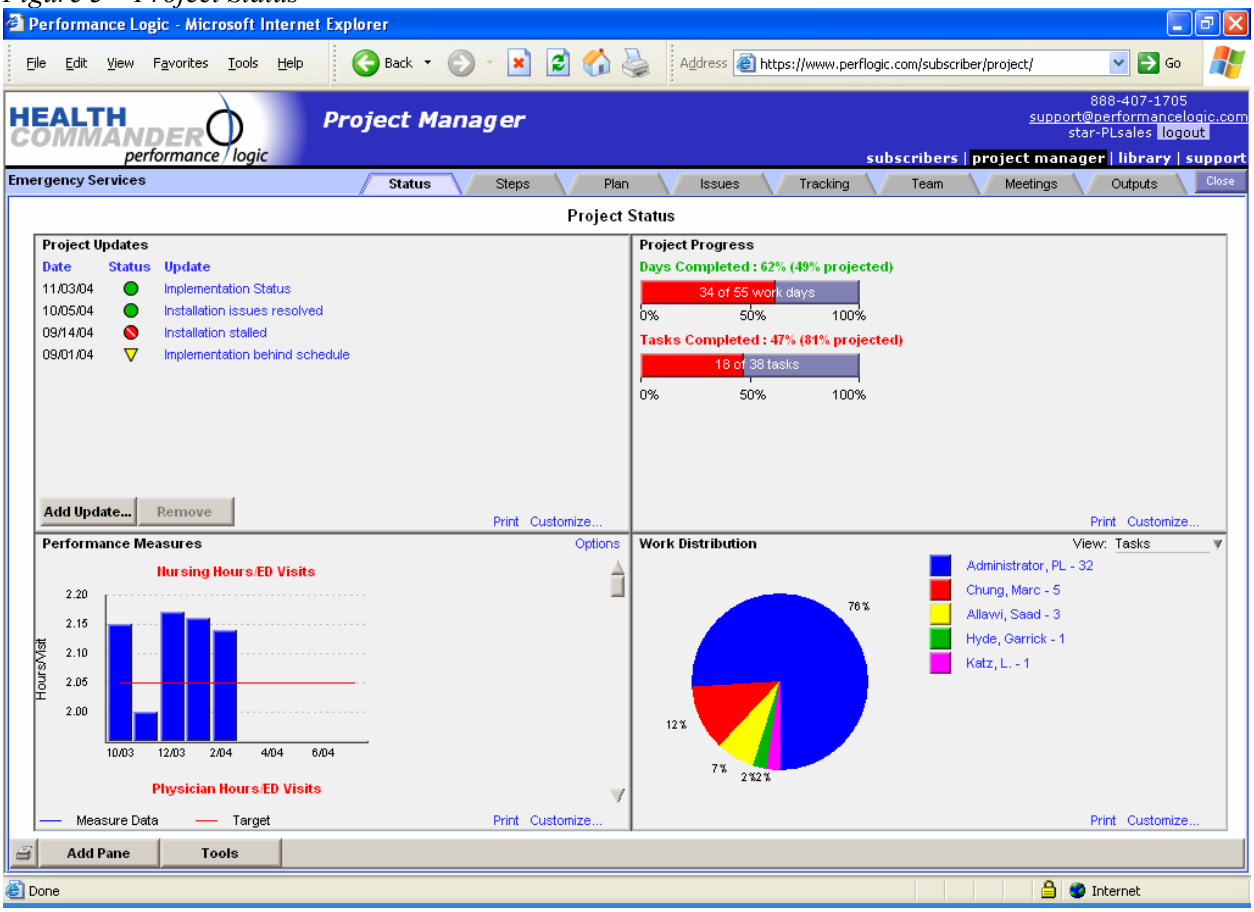
The default Project Status screen can be viewed at any time by clicking the Status tab (see *Figure 3*). This screen is a dashboard view of important project information that is automatically updated as you work through a project.

Users may customize the appearance of this screen so that information is displayed according to each user's preferences. Begin the customization by clicking the Add Pane button at the bottom of the screen to choose a layout. The user chooses the layout by creating any number of status windows in four available sizes: quarter screen, vertical half screen, horizontal half screen, or full screen. To resize a window, click the blue Customize link in the window and then check a different layout box. To remove a window, click the blue Customize link in a window and then click the Remove button.

Once a layout has been chosen for the screen, the user then selects the information that will be displayed in each layout window by clicking the blue Customize link in a window. The eight content choices in a *project* are: My Alerts, Performance Goals, Performance Measures, Project Exceptions, Project Progress, Project Updates, Saved Reports, and Work Distribution. The ten content choices in a *folder* are: Folder Updates, Idea Savings and Revenue Chart, Performance Goals, Performance Measures, Portfolio Goals, Portfolio Summary – Charts, Portfolio Summary – Data, Project List, Saved Report, and Work Distribution. These features are described below, or simply click the name of a topic in blue text to see its definition. After clicking the Customize link, check the desired content in the pop-up screen. You can also enter a custom name for the window at the top of the pop-up screen. Repeat the process by clicking the blue Customize link in each window on the screen. The same topic can be displayed in multiple windows.

For example, the user may want two Performance Measures windows: one filtered for a certain time period and the other filtered for only measures assigned to the user.

Figure 3 – Project Status



Folder Updates – See the Project Updates topic below.

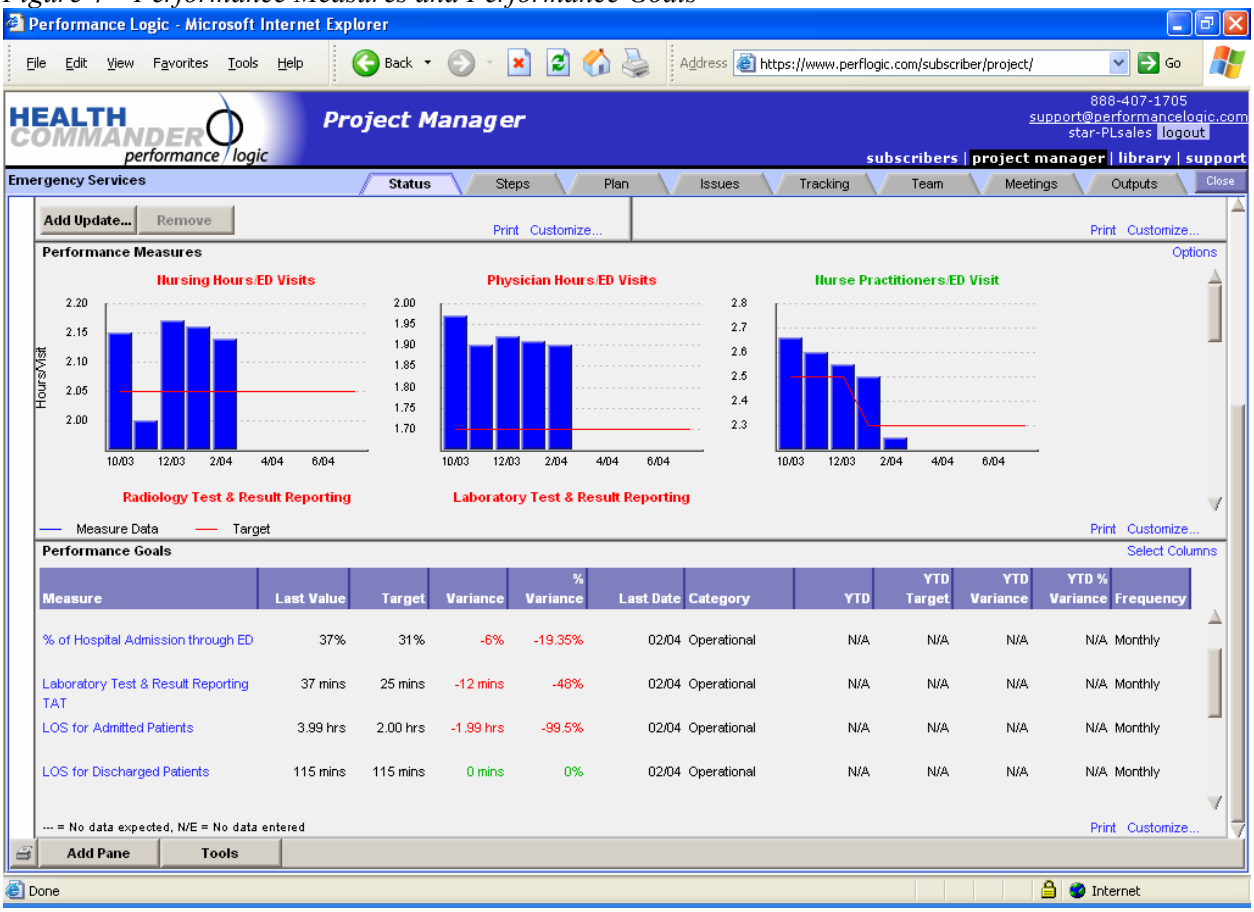
Idea Savings & Revenue Chart – This area is a graphical summary of savings captured from all project ideas contained within a specific folder.

My Alerts – In contrast to the Project Exceptions area that lists items of attention for the entire project, the My Alerts area contains information only for your own tasks, issues, meetings, and measures requiring attention. Select the desired time period to include in My Alerts by clicking the View pull-down list at the upper right corner and choosing the desired option.

Performance Goals – This area displays a list of any performance measures that have been set up in the Performance Measures category of the Steps tab (see *Figure 4*). For each measure, both current (last) data value and target value are listed. Also listed are both the numerical variance and percent variance between the current value and target value. Measures where the actual data is meeting the target value will show the variance numbers in green, while measures that are not meeting target values will show the change numbers in red. Specific categories of measures (financial, operational, quality, service, or custom) are displayed in the Category column. Click the blue Select Columns link at the upper right corner to select or deselect which columns will display in the Performance Goals area. To reorder the columns, highlight a

column name in the Column Selector pop-up screen and then click either the Move Up or Move Down button. Custom columns can be created in the Select Columns link by clicking the Create button. The custom columns aggregate performance measure data when both a time period and aggregation method are defined.

Figure 4 – Performance Measures and Performance Goals



Performance Measures – This area displays small graphs of any performance measures that have been set up in the Performance Measures category of the Steps tab (see *Figure 4*). The graphs display actual data. Click the blue Options link in the upper right corner to customize both the list of measures displayed in the window and features on the graphs themselves. Under the Measures Used topic, specific categories of measures (financial, operational, quality, service, or custom) can be displayed by choosing the desired category from the pull-down list in the Category field. Enter desired keyword terms in the Tags field to display only measures with those tag keywords. Under the Graph Options topic, the date range displayed for all graphs can be customized. The user can choose to display the measure data as lines or bars. Target and/or control limit values can be displayed with the actual data by choosing the desired option. Quarterly measures can be displayed in either quarterly notation (1Q F06) or monthly notation (01/06).

Measures where the actual data are meeting the target value will have a green title, while measures that are not meeting target values will have a red title. Click a measure's title to view a large graph of the measure with data values labeled. On the large-graph screen, click the tabs at the top of the screen to view and/or modify the data values, measure setup details, and a list of all projects that have been linked to the measure. When viewing the large graph, the user can email the graph to team members using the E-mail

button or export it using the Export button at the bottom of the screen. These same measure features are available in the Performance Measures category of the Steps tab.

Portfolio Goals – This area contains a table summarizing performance measures across projects in a folder, with indicators for being on/off target.

Portfolio Summary: Charts – This area is a graphical dashboard summarizing the projects in a folder portfolio.

Portfolio Summary: Data – This area is a numerical summary of the projects in a folder portfolio.

Project Exceptions – This area lists possible problem areas in the project. The area first lists the number of project tasks, issues, and meeting assignments that are overdue for completion or resolution. The area then lists the number of performance measures that are underperforming their targets. To see the details in each of these problem areas, click the blue plus sign (+) next to a topic. When the details are displayed, click each item to view specific details.

Project List – This area contains a list of all projects within the specific folder and subfolders. The list has selectable columns and custom filtering.

Project Progress – This area shows two project-progress gauges. The top gauge shows how many of the project's days have been completed, while the bottom gauge shows how many of the project's tasks have been completed. This information is updated automatically as tasks are completed in the project plan.

Project Updates – This area allows users to add updates to keep the team informed about the current overall status of the project or folder. To add updates, click the Add Update button to open an update screen. Once the screen is open, rename the update with a meaningful topic by clicking the default name and typing over it. Change the date if desired by clicking the blue date link. Select the name of the user submitting the update by clicking the pull-down list in the Submitted By field. Choose an arbitrary project status of green, yellow, or red from the pull-down list in the Project Status field; definitions of the three status colors can be accessed by clicking the blue question-mark icon next to the status pull-down list in this field. (When the project is closed, the project status color selected in the project's most-recent project update will display next to the project's name in the Project Status column of both the Project List and Reports tabs. The functionality of the Reports tab is described at the end of this guide.) Click the Add Note button at the bottom of the screen to add the note's text. Click the Add Note button again to add additional bullet points. To remove a bullet, highlight it and click the Remove Note button. Once the update is complete, you may send it via email to project members by clicking the E-Mail Update button. The email that each person receives will also contain an attached PDF file. When you have finished entering the update, click the OK button to save and close it. To delete an update from the list of updates, highlight the update and click the Remove button. To delete an update that is open on the screen, click the Delete Update button at the bottom of the screen.

Saved Reports – This area displays full custom reports that have been saved by the user in the Outputs tab of the project. Click the blue Select Report link in the upper right corner of the window to choose from your list of custom reports.

Work Distribution – This area displays a pie chart showing the distribution of work among the various project team members. Work distribution can be shown for hours, tasks, issues, meeting topics, measures, and analyses. Select the desired distribution by clicking the View pull-down list at the upper right corner and choosing the desired option.

Project Status Tools

The Project (Folder) Status screen also contains additional features in the Tools button at the bottom of the screen that apply to the entire project.

Project Properties – This feature allows the user to set some properties that apply to the entire project. First, users can rename the project by editing the text in the Project Name field. Second, users can decide whether to use their organization's default fiscal period for year-to-date calculations in the project, or use a custom start date by unchecking the Use Organization's FY box. Third, users can decide whether this project will accept requests from the Requests tab by checking the Accept Requests box.

Select Tabs – This feature allows the user to select and order which tabs will be displayed in a project or folder. Check the tab names that you want to appear in the project, and uncheck those you do not want. You may change the default tab order by highlighting a tab and clicking the Move Up or Move Down button. Tabs that are selectable in *projects* are: Issues, Meetings, Outputs, Plan, Steps, Team, and Tracking. Tabs that are selectable in *folders* are: Documents, Ideas, Issues, Measures, Projects, Reports, Requests, Resources, and Team.

Offline – This feature takes a project offline for use away from the Internet. *HealthCommander* is an online application, so access to any project in the Project Manager program requires a web browser and an Internet connection. Sometimes a user may wish to work on a project without being connected to the Internet, such as while traveling on an airplane. To allow users access to projects offline, the Project Manager program can download the online version of your project to your hard drive so the program will run as a desktop application without the Internet. To access the project-locking feature, click the Tools button at the bottom of the Project Status screen. Then click the blue Offline link. Locking and releasing instructions are provided in the pop-up screen. To download and lock your project to your hard drive, click the Acquire Lock button on the pop-up screen. When the button is clicked, the program will download this project to the user's hard drive and lock the online version of the project so that no one else can write to the project while it is on the user's hard drive. To access the offline version of your project after you have locked it, click the Start button on your Windows desktop and then click the menu option called "Performance Logic – Offline." This action will open your web browser and show the Current Projects screen, where you can open any of the projects you have locked offline. Work on your project as you normally would and close the project when finished.

To bring your project back online, go to Performance Logic's web site while connected to the Internet and log in as normal. Open your locked project from the Current Projects screen and click the Tools button at the bottom of the Project Status screen. Then click the blue Offline link. Click the Release Lock button on the pop-up screen. This action will upload your locked project back online so that others can access the project with the changes you made when the project was offline.

Note that when a user has a project locked offline, others can still view a read-only version of the project online, but no one can make changes to the project until the user releases the lock by uploading the project online again. When others open a locked project, they will see a message telling them that the project has been locked and by whom. Users can tell whether a project is locked before opening it by looking at the Lock column on the Current Projects screen (see *Figure 2*). If a user's name is displayed in the Lock column (e.g., "Smith, Jane"), the stated user is currently working in the project online. If a user's name is followed by the letters LT in the Lock column (e.g., "Smith, Jane (LT)"), the stated user has placed a long-term lock on the project for use offline.

Manager Lock – This feature allows the Project Manager of the project to lock the project for an indefinite period of time so that no one else on the project team can modify it until the Project Manager releases the lock. When the Manager Lock is on, the other team members can still view all screens of the project, even though they cannot write to the project.

Status Tab Properties – This feature allows the user to return the layout of the Project Status screen to its default layout by clicking the blue Restore Project Default View link. Or, after customizing the layout of the status windows, the user can memorize the new layout (to become the default layout) by clicking the blue Use Current View as Project Default link.

Steps Tab: Overview

The Steps tab houses PL's four modules of the Project Manager program. The four modules of the standard Project template are listed on the left navigation menu:

- **Project Planning**
- **Performance Measures**
- **Analyses**
- **Idea Development**

Only the module you have chosen during the project setup on the Select Template screen will be displayed on the left navigation menu. If you chose either of the PL Scorecard or Business Plan templates, the modules on the left navigation menu will be different than those above. If you chose one of your organization's custom templates, the modules on the left navigation menu may also be different than those above. You may add any of the modules above to a custom template by going to the Plan tab and clicking Project Properties from the left navigation menu. Then select Customize Template (further explained in the Plan tab section).

In the Steps tab, the user is guided through each module in step-by-step fashion using the left navigation menu. Within each module are tasks and within tasks are steps. Click the module you want to work in to open a list of all tasks and steps within the module. At the beginning of each module, you may review the objectives, instructions and success keys by clicking the desired title in the left navigation menu. This action displays an overview of the objectives and expectations for the specified module, task, or step.

Each step in each task or module has its own screen. Once you have finished a step, you must click the Complete button at the bottom left corner to save your work on the current screen and advance you to the next sequential step in your task or module. Click the Complete button on each screen when finished with the step. If you need to return to a step to modify any information, open that step by clicking its name in the left navigation menu. To modify a completed screen, click the Modify button at the bottom left corner. A completed screen will be blue when you come back to modify it; clicking Modify will turn the screen white again. If you choose to skip ahead to a step not in the project's chronological order, you will notice that the Complete button is now a Begin button. You must click the Begin button before you may work on the nonsequential step. Notice that a nonsequential screen with a Begin button is pink or green; clicking Begin turns the screen white.

Clicking the Properties button at the bottom of each screen in the Steps tab shows the Task Properties pop-up screen for the specific step on the screen. The projected start and end dates for this step are shown here as they have been recorded in the project plan in the Plan tab. The team member assigned to the step

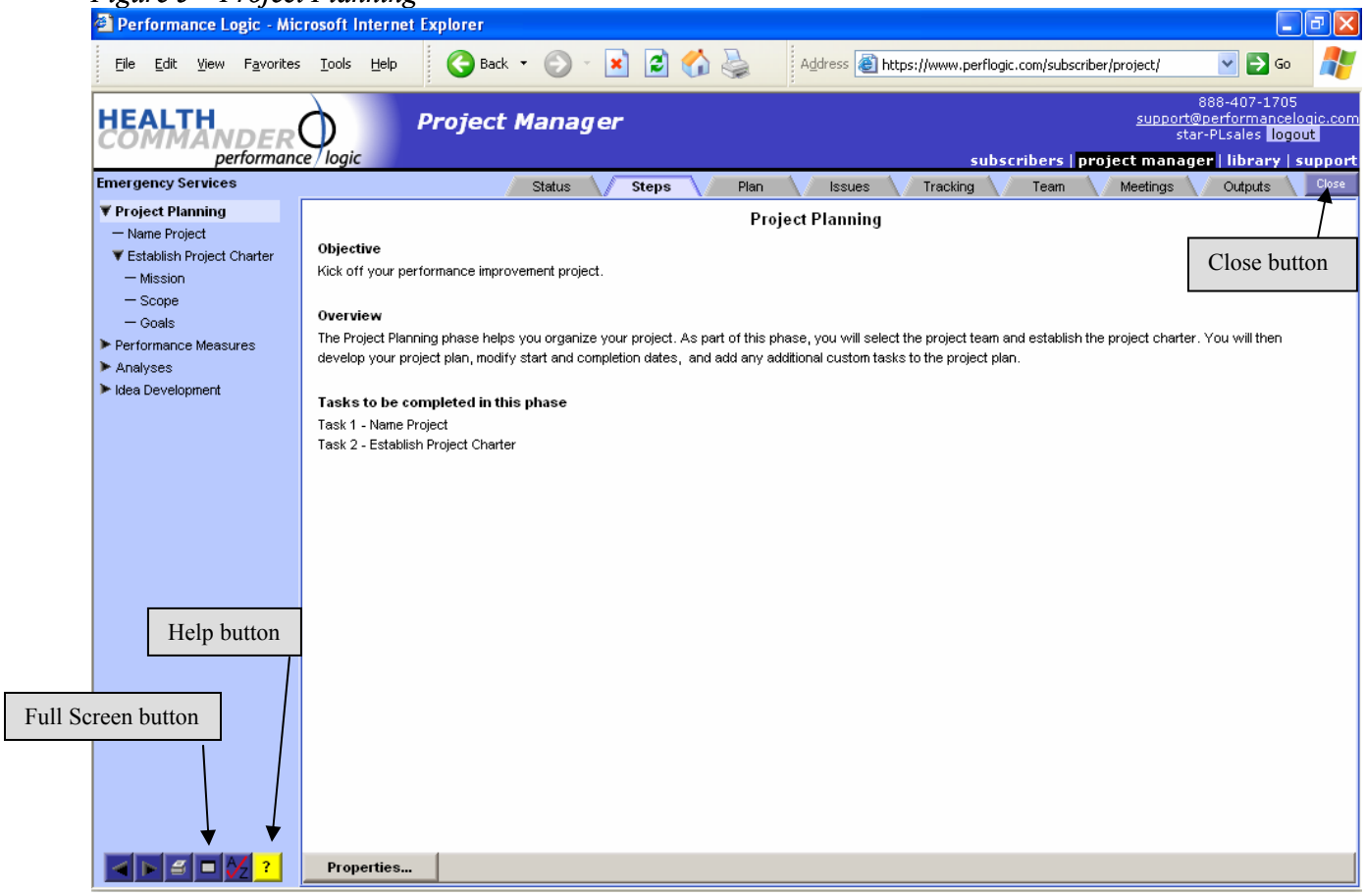
is also shown as it has been recorded in the project plan. Relevant notes and files can be attached to the step by clicking the blue text link after each option. Clicking the Notes link opens a blank screen in which the user may add notes by typing or pasting text. These notes will also be accessible in the Notes column of the project plan in the Plan tab. Clicking the Files link opens a screen with a list of all files that have been uploaded to the project's Document Repository, located in the Outputs tab. The Files link allows you to associate specific files in the Document Repository with specific steps in your project.

When you have completed all the tasks in a project module, a pop-up screen will congratulate you for completing the module and instruct you to click OK to continue. Once you click OK, you can work on another module by clicking its name on the left navigation menu.

Steps Tab: Project Planning

Project Planning is the first module of the standard Project template in the Project Manager. You can customize a project to exclude this module, yet most projects will retain it (see *Figure 5*). Any module in the Steps tab can be excluded by clicking the Plan tab at the top of the screen, then clicking Project Properties on the left navigation menu. Then select Customize Template (further explained in the Plan tab section).

Figure 5 – Project Planning



Name Project

In this task you will enter a name for your project if you did not already enter a project name during the project setup. Change the default name by highlighting it and typing over it with a specific project name. Project names can be modified at any time during the project. Click the Complete button to advance to the next sequential task.

Establish Project Charter

The second task in the Project Planning module has three steps.

Step 1: Mission – This step allows you to create a mission statement. You can either use Performance Logic's sample mission statement or create your own. Selecting the View Sample button will display our sample mission statement. If you wish to accept this statement, click the Use Sample button. You may modify the sample statement to reflect any desired customization. If you wish to create your own mission statement, click the Add Bullet button and enter your desired statement (adding additional bullets as desired). You can also copy and paste text into this area from any Windows application. Click the Complete button to advance.

Step 2: Scope – This process is similar to the mission statement in Step 1. You can create your own project scope or accept and modify the sample provided. Click the Add Bullet button to add additional points. Click the Complete button to advance.

Step 3: Goals – This process is similar to Steps 1 and 2. This step allows you to create your own project goals or accept and modify the sample provided. Click the Add Bullet button to add additional points. Click the Complete button to advance.

When you have completed all steps in the Project Planning module, a pop-up screen will congratulate you for completing the module and instruct you to click OK to continue. Once you click OK, you can begin working on another module by clicking its name on the left navigation menu.

Project Buttons

In the Steps tab, several new buttons are displayed on the screen. The first five buttons mentioned below are located at the bottom left of the screen, while the Close button is located at the top right of the screen (see *Figure 5*).

Previous and Next Buttons – The Previous and Next buttons, which look like left and right arrows, allow the user to navigate through the Project Manager's screens without clicking the Complete button on each screen to automatically advance to the next screen.

Print Button – The Print button allows the user to print everything in the content screen using your computer's printer driver. When printing in the Project Manager, always use this Print button rather than the browser's own printing command (which will not print correctly).

Full Screen Button – The Full Screen button enlarges the content screen by hiding the left navigation menu. To view the left navigation menu again, click the toggle Show Sidebar button.

Spell Check Button – The Spell Check button is available on screens that contain text entered by users. Click the Spell Check button to check the spelling on the current screen. When Spell Check finds a word that is not in the default dictionary, the user can add the word to a personal dictionary by clicking the Add

button. The user's personal dictionary is located in the Profile tab. See the Project Manager Profile Tab section at the end of this user guide for instructions on managing the personal dictionary.

Help Button – Click the yellow Help button (question mark) to view help text for the current screen's content. The displayed help text will be specific to the screen that you are currently working on. Information that you find here includes learning guides, troubleshooting guides, facilitator guides, and communication strategies. To close the open help text, click the Help button again to close it.

Close Button – Clicking the Close button at the top of the screen ends your current session and closes your project while saving all the work you have done during the session.

Steps Tab: Performance Measures

This module involves selecting performance measures and identifying how you measure the success of your project moving forward. In addition, you are able to create various measures for a departmental area and track its improvement over time.

Construct Measures

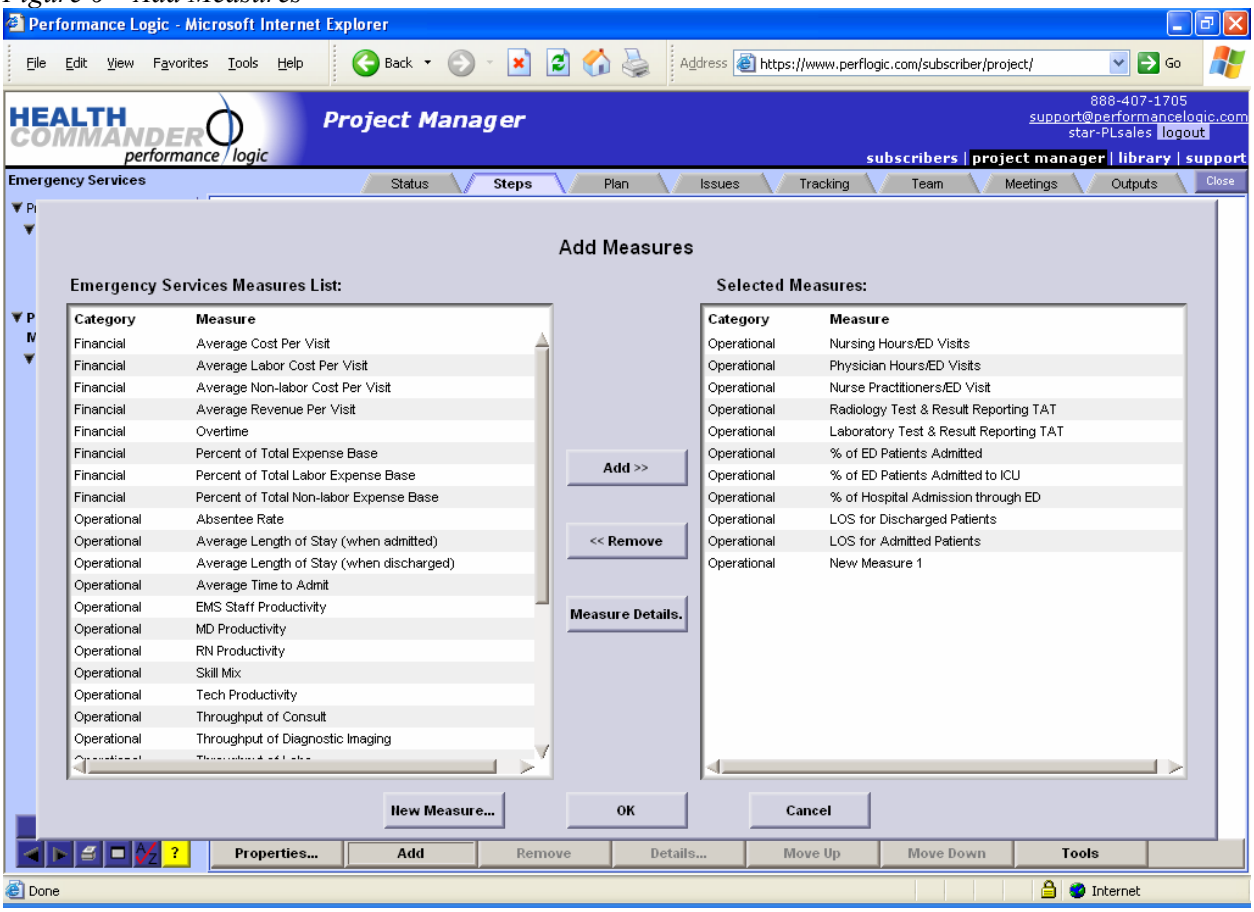
The first task in the Performance Measures module is to determine which performance measures will be used to measure the success of the project.

Select Measures – To select performance measures, click the Select Measures task under the Construct Measures step on the left navigation menu. Click the Add button at the bottom of the screen. The Add Measures pop-up screen opens (see *Figure 6*), displaying measures created by Performance Logic in four categories: Financial, Operational, Quality and Service (balanced scorecards generally track measures from each category). The PL measures listed on the screen are specific to the departmental area that was selected during the project setup—the departmental area is listed at the top left side of the pop-up screen (e.g., Surgical Services Measures). Different PL measures can be accessed at any time by changing the project's departmental area. (To change the area, go to the Plan tab and click Project Properties on the left navigation menu, and then click Select Area to choose a different area.)

To view a measure's definition on the pop-up screen, highlight it and click the Measure Details button. Highlight a measure and click the Add button to place the measure in the Selected Measures box. You may add the same measure more than once using unique names to distinguish the same measures from each other. Add as many measures as desired. If you do not see a desired measure within the list provided, you can click the New Measure button and add your own. To remove a measure, highlight the measure and click the Remove button. When you have completed your selections, click OK to return to the Select Measures screen.

On the Select Measures screen you will assign each measure to a team member to ensure that someone is responsible for tracking each measure. You may choose an existing team member from the list or assign the measure to someone else by selecting Add New Member at the bottom of the list. You can assign the measure to multiple people by clicking the Add Multiple option. If desired, you may edit a measure's category using the pull-down list or edit a measure's name by clicking it and editing the text. Click the View button to immediately view a measure's graph and details without having to open the measure from the left navigation menu. When viewing the graph using the View button, the user can email the graph to team members using the E-mail button or export it using the Export button.

Figure 6 – Add Measures



The order in which measures are listed on the Select Measures screen determines the order in which they will appear in the Performance Measures section of the Status tab and the project reports in the Outputs tab. To reorder the measures on the Select Measures screen, highlight the desired measure and click the Move Up or Move Down button at the bottom of the screen. The user can also simply click the measure number link in blue text and then enter a new number to move the measure.

In addition to adding measures using the Add button, measures can also be copied, imported, or exported on the Select Measures screen using the Tools button. Measures can be quickly copied in a project by highlighting the measure from the list and then clicking the Tools button and choosing the blue Copy Measure link. Enter a new name for the copied measure and click OK. This copy measure feature is useful for quickly creating measures that share the same setup characteristics, such as tracking the same measure at various locations within the organization. To import a measure into your project from a different project, first export the measure from the Select Measures screen in the other project onto your hard drive. Export by highlighting the measure from the list and then clicking the Tools button at the bottom of the screen and choosing the blue Export Measure to Dat link. Then open this project, go to the Select Measures screen, click the Tools button and choose the blue Import Measure from a File link. Select the exported measure file from your hard drive and click the Open button to import. Measures can be exported to CSV format in order to manipulate the data in a spreadsheet by highlighting the measure from the list and then clicking the Tools button and choosing the blue Export Measure to CSV link.

An additional type of importing and exporting measures is the feature of sharing measures across projects and folders. Any measures that are created in folders can be shared to various projects and folders by clicking the Tools button on the Select Measures screen of the project and then choosing the blue Import a Shared Measure link. Select the shared measures you wish to use in your project and then click OK. Changes made to the shared project in other projects will automatically be reflected in your project, and vice versa. To make a measure from your project a shared measure, highlight it on the Select Measures screen, click the Tools button and choose the blue Share Measure link. Then highlight a parent folder for the measure on the pop-up screen and click OK. You will know that the measure is now a shared measure because the name of the parent folder will appear in the Parent column on the Select Measures screen. Parent folders for shared measures can be changed by clicking the blue folder name in the Parent column and then highlighting a new parent folder. To stop sharing a measure, click the blue folder name in the Parent column and then click the Make Local Copy button. When deleting a shared measure from its parent folder, shared instances of the measure will revert to being independent local copies of that measure.

Administrators can restrict the ability to add or remove measures from a project by click the Tools button on the Select Measures screen and then selecting the blue Administrative Control link. This feature allows Administrators to restrict permission so that only they can add and remove measures on that project.

Each Measure you construct will be developed by completing two steps: Setup, and Enter Data. These steps are listed under each measure name on the left navigation menu.

Measure Step 1: Setup – Click the name of your measure on the left navigation menu to show the steps below it, and then click the Setup step (see *Figure 7*). On the Setup screen, the measure's category and Assigned To fields are already populated from the previous Select Measures screen.

Definition – The user can modify the measure's definition by clicking the text in the Definition category to edit.

Tags – The user can enter any keyword text terms, each separated by a comma. This optional field is linked to the Search feature on the Current Projects screen, where users can search for all measures in all projects that have certain tag keywords.

Linked Projects – The user can link the measure to selected projects whose outcome is expected to have an effect on the measure's values. Click the blue Add link to open the Link Projects pop-up screen, and then open the folders listed on the screen to check the box next to desired project names.

Value Label – The user can enter a custom name for the value that will be graphed in the measure, like "Volume" or "Error rate."

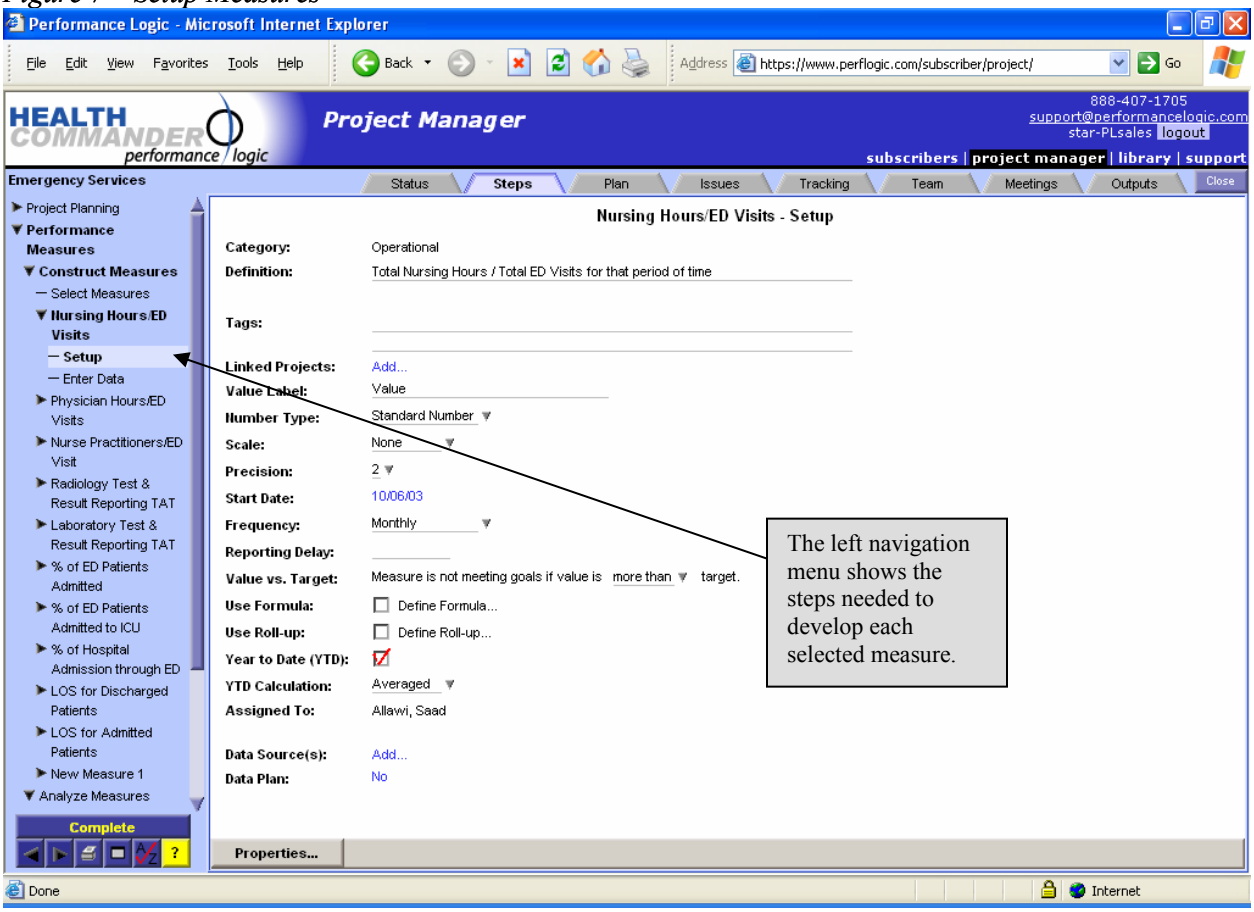
Number Type – The user can define the number type for the measure (e.g., dollars or percent) from the pull-down menu. All number types are numeric except the Status type, which allows the user to track compliance against defined status levels, such as "Good" and "Bad" or "Yes" and "No."

Scale – The user can scale large numbers to the thousands or millions using the pull-down menu. This feature streamlines data entry and provides cleaner graphing.

Precision – A number's precision is the number of decimals to display for each data point

Start Date – Choose the start date that data will be entered into the measure. Choose a historical data if you wish to enter data from past periods. It is important to choose the start date carefully because changing the start date once data have been entered for the measure will erase all data.

Figure 7 – Setup Measures



The left navigation menu shows the steps needed to develop each selected measure.

Frequency –Choose the frequency of data collection (e.g., weekly, monthly, or quarterly). It is important to choose the frequency carefully because changing the frequency once data have been entered for the measure will erase all data.

Reporting Delay – Data for your measure may not be available for a few days or weeks after each frequency in the measurement period. Since the program tracks the due date for the most current data value in each measure, this field allows the user to enter the lag time in number of days that is allowable after the value date before the measure is considered overdue by the program.

Value vs. Target – This feature allows the user to choose whether the measure's actual value is not meeting the target value when the actual value is either greater than or less than the target. The results of this choice will appear on the second screen in the measure, the Enter Data screen. On that screen, the calculated variance between actual and target values can be displayed in either green or red text depending on which option was selected for this feature on the Setup screen. Green variances mean that actual values are meeting (exceeding) the target value; red variances indicate that targets are not being met.

Use Formula – This optional feature allows you to create a formula using up to 26 data components so the program will calculate measures from raw components that you input. If you check the feature, the Define Formula link becomes active; click the link to define the formula. On the pop-up screen, defining the formula involves three steps. First, select the number of data components or variables that will be in your formula. For example, if you want to track expense per volume measure in your department, you would select two components so you can enter expenses (numerator) and volumes (denominator) in the measure. Second, after you select the number of components the program will create lines for each component. Enter the name of each component on its respective line. If you want to import data into your formula from another measure, click the blue link called Create Link to select components from other measures. For example, you can link the expense data from one measure and the volume data from a different measure into your new measure so that you can calculate expense per volume. Formulas can include linked measures whose frequency is different than the desired outcome. For example, a linked monthly measure will sum every three points if used as a component of a quarterly measure's formula. Third, go to the Formula field and create the desired formula so the program will do the appropriate math for your measure. In our example of expense per volume measure, the appropriate formula is the numerator (A) divided by the denominator (B), or A/B. If you want a percentage to display a number greater than 1, the formula would be A/B*100. All math symbols are listed for easy reference. If you need more help in defining the formula, click the Help button. When you advance to the Enter Data screen, you will see your defined components on the screen so you can enter data for each component and then the program will calculate a value from them. If you import data from other measures, the number of decimals in each column on your Enter Data screen will be identical to the number of decimals used in each original measure.

Use Roll-up – This feature turns your performance measure into a roll-up of values from other measures, so that you are not entering any unique data values. For example, you already have four performance measures that track expense per volume at four locations. If you check the Use Roll-up box, you can define this measure to calculate the sum or average or summed components (weighted average) of the expense per volume for all four locations.

Year to Date (YTD) – The Year to Date (YTD) feature is optional. It allows the user to analyze data for a desired YTD period. The default begin date for YTD calculations that appears at the top of the Enter Data screen will be the begin date of the organization's fiscal year, or whatever begin date was selected for the project by clicking the Status tab, then the Tools button, and then the blue Project Properties link.

YTD Calculation – If you selected the YTD option, choose the desired calculation method from the pull-down menu. YTD calculations options are: Averaged, Summed, Last Value, or Summed Components. The Summed Components option works only with components in a formula; it is a weighted average that sums data in each component before dividing by other components for percentages. When you advance to the Enter Data screen, you will choose when your YTD period begins and ends. For example, you may choose the YTD start date as the beginning of your fiscal year or the beginning of your project. Then the program will calculate the YTD value at the top of the Enter Data screen. This value can also be graphed in your performance measure.

Data Source(s) – In order to be sure you are getting the correct data for a measure, you may need to determine the source and the collection procedure for the data. During the Setup step, you can add data sources and data plans as needed by clicking their respective links. Data sources and data plans may not be needed with each measure, but they are offered as an aid to clearly define what will be measured and how each source will evolve. Remember that a performance measure is tracked over time; it is not a snapshot of performance at any one time. Unlike the analyses in this program, performance tracking is an on-going process. Therefore, ensure that the data collection process continues to be viable over time.

Clicking the Data Source(s) link allows the user to input the source(s) for the measure data (for example, financial reports). Select the data's source type from the drop-down box. Does the data exist or will you collect data as you move forward? Make the relevant selection in the Status column.

Data Plan – Clicking the link allows the user to document the tasks involved in collecting data. Create tasks by clicking the Add Task button at the bottom of the screen. Set completion periods and assign a team member to each task. Choose team members who have the time and are committed to the project.

Measure Step 2: Enter Data – The Enter Data screen allows you to enter data for each measure you are tracking. The blue Details link at the top of the screen allows the user to hide or display all the measure details by clicking the link. The View Range parameters at the top of the screen allow you to filter how many lines of data you see on the screen. The range uses the start date you chose on the Setup screen as the default beginning view date and today's date as the default end view date. You can modify the range to view on your screen by clicking the blue date links; this action will display or hide lines of data, but not delete them. If you wish to modify your data collection period, you must go back to the Setup screen and modify the start date there. If you wish to change the data frequency, number type, or formula, you must also go back to the Setup screen and modify the options there. If you chose the year-to-date (YTD) option on the Setup screen, you can customize the YTD range on the Enter Data screen by clicking the blue date links as desired. Under the YTD range, the averaged or summed YTD value of all the data values is displayed (if you chose the YTD option on the Setup screen).

Enter data in the column or columns on the Enter Data screen. You can quickly copy existing data into your measure by highlighting one column of data from another application, copying it using the Ctrl-C command on your keyboard, and then pasting it into your measure by placing your cursor in the desired column and using the Ctrl-P command on your keyboard to paste. If you are entering the same value for multiple periods, you can enter the value in the first row and then click the Fill Down button at the bottom of the screen. Enter any desired notes in the Notes column. If you want a note to appear on the measure's graph, check the box in the Show Graph Notes column.

You may also import data into the Enter Data screen or export data. Data are imported from or exported to Comma Separated Value (CSV) files, which is a standard spreadsheet format. To import, click the Tools button at the bottom of the screen and then click the blue Import Data link. The pop-up screen contains detailed instructions on the necessary format of your CSV spreadsheet data prior to importing, including a link to an example spreadsheet that you can download to your computer and view in your spreadsheet application. Clicking the Import button on the pop-up screen will prompt you to identify the spreadsheet on your computer that you want to import into this performance measure. To export, click the Tools button at the bottom of the screen and then click the blue Export Data link to save the CSV file to your hard drive.

Targets – If you wish to compare your measure data against a target value, check the box next to the Target & Performance topic at the top of the screen. This action will display a Target column and variance columns on the screen. Enter your target value in the Target column. Your target can change with each time period, or you can keep the same target value for all periods by clicking the Fill Down button at the bottom of the screen. The program will transfer the most current target value forward when new data lines are created automatically by a measure's frequency. The program calculates the variance between the Value column and the Target column. You can choose whether this variance is displayed as a positive or negative number by clicking the blue column heading called Variance (V-T). The variance will be displayed in either green or red text depending on which option was selected for this feature on the Setup screen. Green variances mean that actual values are meeting (exceeding) the target value; red

variances indicate that targets are not being met. The program also calculates a percent variance between the current and target values.

Benchmarks – You may add benchmark values to the measure's graph by clicking the Tools button at the bottom of the Enter Data screen and then clicking the blue Edit Benchmark link to enter benchmarks from various sources.

Control Limits – If you wish to enter upper and lower control limits for your measure, click the Tools button at the bottom of the Enter Data screen and then click the blue Control Limits & Data Support link. On the pop-up screen, calculated control limits of 99% and 95% confidence—as well as mean (average), minimum, and maximum values—are automatically calculated by the program using your data values from the Enter Data screen. These calculated values will aid you in setting control limits. Enter your optional upper and lower control limits on the lines provided. You can view calculated control limits for unique periods by clicking the blue Select Columns link on the pop-up screen. The control-limit text labels at the top of the pop-up window can be edited by simply typing over the default text.

View Graph – Once you have entered data in your measure, you may view the values in graphical format by clicking the View Graph button at the bottom of the Enter Data screen. The Show Values button under the graph displays the data values on the graph. The Customize button is separated into Basic and Advanced views. The default screen setting is the Basic view. On this pop-up screen, the user can check boxes to display additional data (mean, target, YTD, control limits, benchmarks, etc.) on the graph and to view data points as bars instead of a line. The user can also select the Smooth Lines on Graph option to remove all data markers from the graph lines.

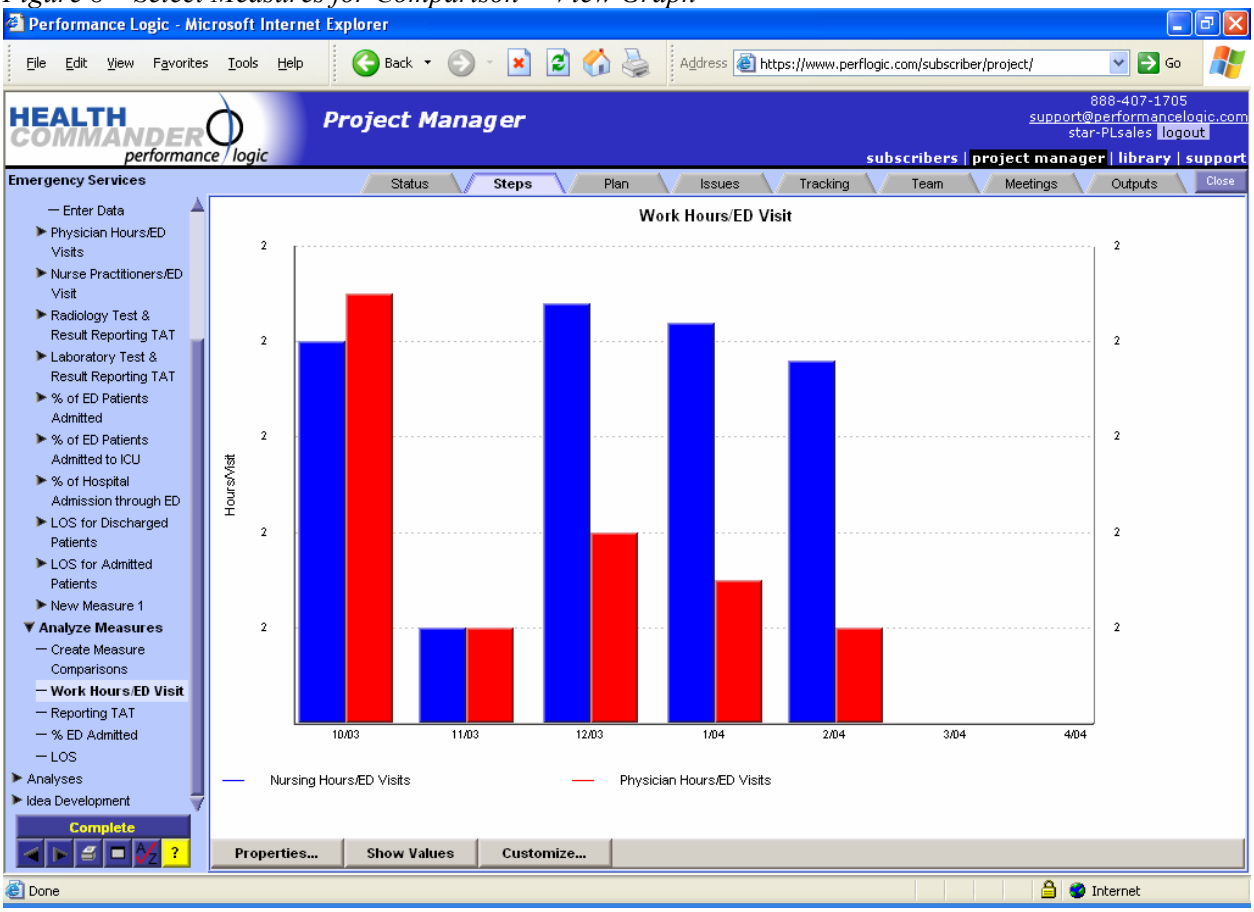
From the Basic view for the graph's data display, the user can click the Advanced button to view additional graph features. In the Advanced view, use the fields at the top of the screen to customize graph options. Target lines can be set to show either all data points or just end-points for non-variable targets by checking the Show Target End Points Only box. Enter left and right Y-axis labels and select their number type from the pull-down lists. Click the blue Automatic Y-axis Scaling link to adjust the Y-axis scaling.

Under the Graph Lines heading of the Advanced view, lines created by the Basic view are marked with an asterisk in the Series column. In the Advanced view, the user can add additional data, such as multiple components of a value or multiple benchmarks, to view on the graph by clicking the Add Line button at the bottom of the screen and then choosing the desired data series. Data series listed on the screen can be copied by highlighting the desired data series and then clicking the Copy Line button. Custom parameters, such as constant or moving averages and constant or moving control limits, can be chosen by clicking the blue link in the Parameters column. The Period to Date parameter will calculate cumulative averages or sums of the source data, allowing for more useful representations of Year to Date values. Custom labels for each data series can be entered in the Label column. Specific time periods to graph for each data series can be chosen in the Line Start and Line End columns. Check the box in the Bar column to graph one or more measure series as bars. Colors for each data series can be chosen by clicking the color box in the Color column. Choose whether a data series will use the left or right axis labels by using the pull-down list in the Axis column. For step-by-step examples of these advanced graph features, click the Help button at the bottom of the screen.

Analyze Measures

After you finish constructing your performance measures, you may easily create a comparison graph showing multiple measures (see *Figure 8*).

Figure 8 – Select Measures for Comparison > View Graph



The Analyze Measures feature is especially useful for comparing performance measures that are related to or affect each other in some way. To create a comparison, click the Analyze Measures task under Performance Measures and then click the Select Measures for Comparison step. If the screen has a colored background (like pink or blue), click the Begin or Modify button in the bottom left corner to turn the content screen white. Create a comparison by clicking the Add Comparison button at the bottom of the screen. Name the comparison by typing on the provided line, then check the performance measures you wish to compare against each other and click OK. You may check as many measures as desired. Once you have created the comparison, you can further define it by selecting the comparison's name from the left navigation menu. Choose the desired X-axis frequency, the left and right axis labels, and the data view range to show on your graph. The default graph type for each measure is a line; if you would like to change any of the measures to a bar graph, check the appropriate box under the Bar column heading. Choose whether the right or left axis will represent each measure by clicking the desired box. When you have finished setting up the comparison, click the View Graph button to view and print the selected measures on the same graph.

When you have finished analyzing performance measures, you are ready to begin working on the next module of the Steps tab, called Analyses. Click the module name on the left navigation menu to begin.

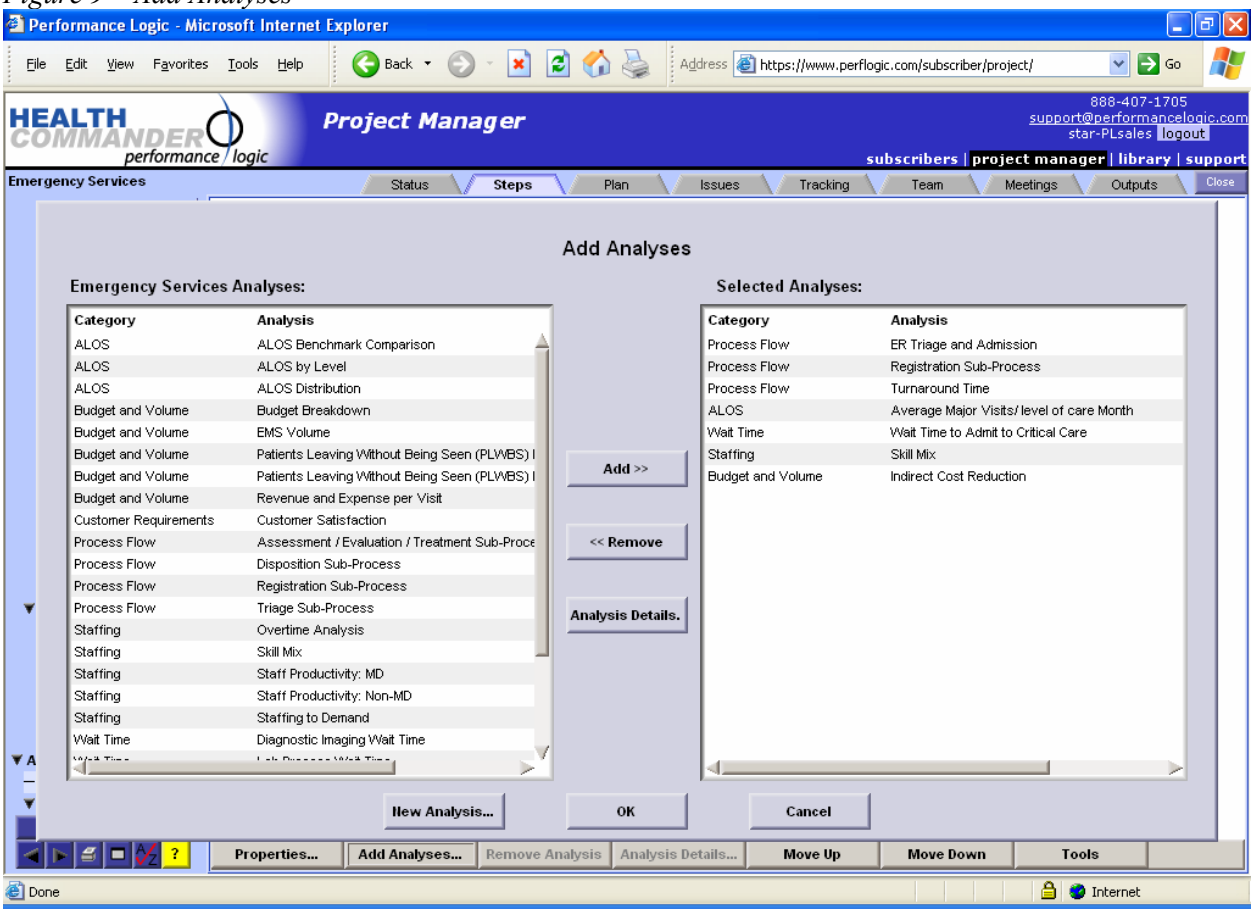
Steps Tab: Analyses

The Analyses module provides analysis templates that help you determine the cause of problems in your selected project area. As stated on the overview screen, this module helps the user to understand performance issues and begin identifying opportunities for improvement. Unlike performance measures, these analyses are usually not updated each week or month. You will conduct these analyses as a one-time snapshot to help you understand why your performance measures may not be achieving their target values.

Select Analyses

The process for selecting analyses is the same as selecting measures in the Performance Measures module. To select analyses, click the Select Analyses category on the left navigation menu. Click the Add Analyses button at the bottom of the screen. A pop-up screen shows a list of analysis templates from many categories created by Performance Logic (see *Figure 9*). The PL analyses listed on the screen are specific to the departmental area that was selected during the project setup—the departmental area is listed at the top left side of the pop-up screen (e.g., Surgical Services Analyses). Different PL analyses can be accessed at any time by changing the project's departmental area. (To change the area, go to the Plan tab and click Project Properties on the left navigation menu, and then click Select Content Support to choose a different area.)

Figure 9 – Add Analyses



Analyses can also be attached directly to a specific task in the project plan instead of adding them to the Analyses module in the Steps tab. To add an analysis to a project plan task in the Plan tab, highlight the task, click the Properties button, and then click the blue Select link next to the Analysis category to define the type of analysis to add.

To view an analysis' definition on the pop-up screen, highlight it and click the Analysis Details button. Highlight an analysis and click the Add button to place it in the Selected Analyses box. You may add the same analysis more than once using unique names to distinguish the same analyses from each other. Add as many analyses as desired. If you do not see a desired analysis within the list provided, you can click the New Analysis button and add your own. If you create a new analysis, enter the analysis' name, graph type, and category. Graph types include: Bar, Stacked Bar, Line, Pie, Process Map, Root Cause, Pareto, Flow Chart, XmR, Time Variance, and Indirect Cost Reduction. The time variance analysis allows users to import clinical data and then analyze the difference in time between various events in the group of cases. To remove an analysis, highlight it and click the Remove button. When you have completed your selections, click OK to return to the Select Analyses screen. Here you will assign each analysis to a team member to ensure that someone is responsible for tracking it. You may choose an existing team member from the list or assign the analysis to someone else by selecting Add New Member at the bottom of the list. You can assign the analysis to multiple people by clicking the Add Multiple option. If desired, you may edit an analysis' category using the pull-down list or edit an analysis' name by clicking it.

In addition to adding analyses using the Add Analyses button, analyses can also be copied, imported, or exported in your project on the Select Analyses screen using the Tools button. Analyses can be quickly copied in a project by highlighting the analysis from the list and then clicking the Tools button and choosing the blue Copy Analysis link. Enter a new name for the copied analysis and click OK. To import an analysis into your project from a different project, first export the analysis from the Select Analyses screen in the other project onto your hard drive. Export by highlighting the analysis from the list and then clicking the Tools button at the bottom of the screen and choosing the blue Export Analysis link. Then open this project, go to the Select Analyses screen, click the Tools button and choose the blue Import Analysis link. Select the exported analysis file from your hard drive and click the Open button to import. You may also export an analysis from this project into other projects by following the same export/import instructions explained previously.

Perform Analyses

After you have selected the desired analyses, begin the second task by clicking Perform Analyses on the left navigation menu. For each analysis displayed on the left navigation menu, click the analysis name to display an overview and purpose on the screen. The data collection and posting methods will vary by analysis, so review each analysis' overview before beginning the data collection. Some analyses may require a spreadsheet type of data entry while others will require processes to be plotted out or causes to be determined. For example, if you choose a root cause analysis, you will be prompted to list causes or reasons for a practice or an outcome. Once you have listed the causes, you will review the analysis' graph to determine which issues can be remedied. Once you have reviewed the analysis overview and feel comfortable with the collection method, begin to collect the data.

Please note that the following steps apply to all analysis types *except* the indirect cost reduction analysis, which is a very unique analysis of five steps. You may create an indirect cost reduction analysis by going to the Select Analyses task, then clicking the Add Analyses button at the bottom of the screen, and then clicking the New Analysis button on the pop-up screen. When prompted to name the new analysis, choose Indirect Cost Reduction from the Type pull-down list.

Step 1: Collect Data – Open an analysis and go to the Collect Data step to enter data. Enter the data source and the time period for the data. When available, enter the name for the Y-axis label that will appear on the graph (not all graphs have a Y-axis label). Each analysis type has its own unique template, but for most templates you can add or remove rows and columns on the screen by clicking the desired buttons at the bottom of the screen. Any row or column field that is underlined means that you may type in the field, even if the fields are already populated with default labels or data. Once you have entered the relevant data, you may view your data graphically by clicking the View Graph button. You can choose to display or hide data values on your graph by clicking the Show/Hide Values button. Several graph types allow you to change the display of the X-axis labels from vertical to horizontal by clicking that button on the graph.

On the analysis' Collect Data screen, you may also export your data for use in another spreadsheet application. Click the Export button to save your data onto your hard drive in a Comma Separated Value (CSV) format file. Then open your spreadsheet application and import the saved CSV file from your hard drive.

Step 2: Analyze – Only analyses containing certain graph types, like process map and root cause, contain this step. The analyses containing this step require the user to analyze a chart or a map or a diagram (depending on which graph type was chosen). The diagrams to analyze are automatically populated from the previous Collect Data step. Complete the instructions on the screen to determine effects and potential issues.

Step 3: Assess Results – For every analysis, you will assess your results in this step in order to determine the key findings. The program stresses the need to interpret your data results—to begin thinking about the data's implications. For some predefined analyses, PL suggested findings can be accessed by clicking the Suggested Findings button at the bottom of the screen. You can use and modify these suggestions, or add your own findings by clicking the Add Finding button.

Summarize Analyses

Step 1: Summarize Key Findings – In this step, summarize the findings for the analyses you have conducted in the previous task. Add or remove findings by clicking the buttons at the bottom of the screen.

Step 2: Determine Redesign Opportunities – Identify the opportunities for redesign in this step. Use the key findings from the previous step to create a prioritized list of opportunities with potential methods for tackling these redesign opportunities. Add or remove opportunities by clicking the buttons at the bottom of the screen.

When you have finished all tasks and steps in this module, click the Complete button at the bottom left corner. A pop-up screen will congratulate you for completing this module. Click OK to close the screen. To begin working on another module, click its name on the left navigation menu.

Steps Tab: Idea Development

In the Idea Development module, the user generates a list of ideas that will be ranked and developed in order to identify the ideas that are suitable for implementation. Click the Idea Development category on the left navigation menu to see the overview instructions for this module. Ideas in this project module also roll up into an Ideas tab within folders; to view all ideas within all projects in a folder, open the folder and

click the Ideas tab. The folder view displays summary data from all ideas that roll up under the folder, including total savings by project, total HR impact, total financial impact, and master implementation schedule. Extra financial reporting features in folders include summary reports across projects for estimated idea savings, budgeted savings, and actual savings.

Determine Evaluation Criteria

Using evaluation criteria in Idea Development is an optional feature that can be turned on or off at any time in your project. If the feature is turned off, the Determine Evaluation Criteria topic with its steps will not appear on the left navigation menu. To turn the feature on or off, click the Plan tab at the top of the screen. Click Project Properties on the left navigation menu and then click Customize Template. The project's current template settings are displayed on the screen. Under the Idea Development heading on the screen, choose *Yes* or *No* from the pull-down list next to the Use Evaluation Criteria topic. After customizing the template, click the Update Plan button at the bottom of the screen to generate a new project template. Then return to the Steps tab.

Select Evaluation Criteria – Before ideas are created, the user can select the criteria against which the ideas will be scored to determine their suitability for implementation. On the Select Evaluation Criteria screen, you may choose from the performance measures that you created in the Performance Measures module and/or the analyses you created in the Analyses module, or create your own criteria. To create your own criteria, click the Add Criteria button at the bottom of the screen. On the pop-up screen, enter the name, definition, current performance and target performance for the custom criterion. You may create as many custom criteria as desired. To remove custom criteria, click the name of the criterion in blue text and then click the Remove button on the pop-up screen. Select the desired evaluation criteria by checking the box to the left of the criteria. Click the Complete button to go to the next step.

Assign Weights – In this step you will assign a weight to each criterion, so criteria that are more or less important than others can be weighted to reflect their relative importance. Enter decimal numbers in the Weight column so that the sum of all values equals 1.0. For example, if you have four criteria and two are very important while two are less so, you might assign numerical weights of 0.4, 0.4, 0.1, and 0.1 respectively to total 1.0. If your evaluation criteria are equally important in the previous example, assign numerical weights of 0.25, 0.25, 0.25, and 0.25. The program will use these weights in a future step when your ideas are scored and ranked against your evaluation criteria. Click the Complete button to begin developing ideas.

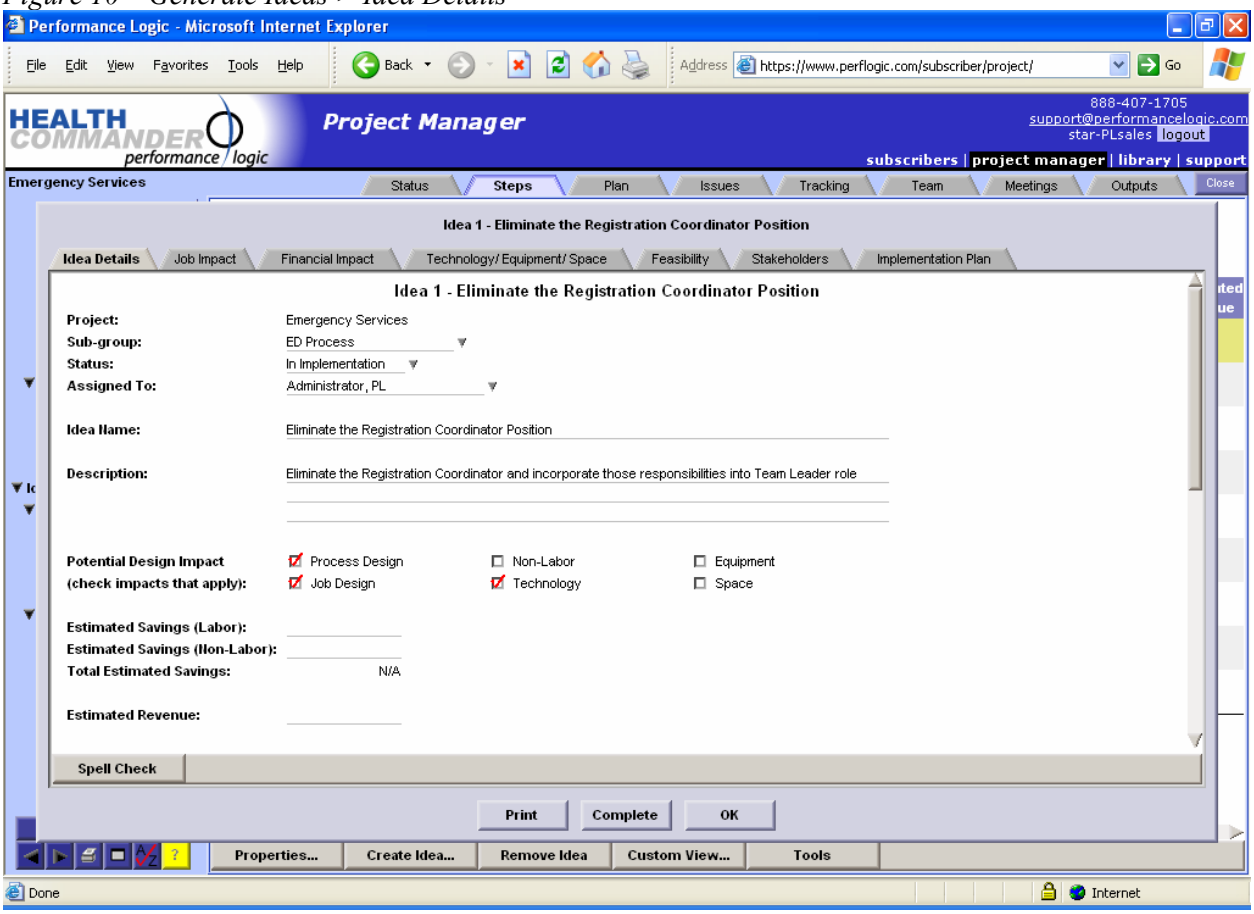
Develop Ideas

Once you have established the optional evaluation criteria, you are ready to develop meaningful ideas or solutions in your project. You may create as many ideas as you like. After creating a list of ideas, you will determine the impact and the relevance of these ideas on your evaluation criteria. After scoring and ranking your ideas, you may choose not to implement any ideas that ranked poorly.

The default process for developing ideas follows five steps, which are outlined below. Users can choose an accelerated process for idea development, which compresses the five steps of the process into one step. To accelerate the process, click the Plan tab at the top of the screen. Click Project Properties on the left navigation menu and then click Customize Template. The project's current template settings are displayed on the screen. Under the Idea Development heading on the screen, choose *Yes* from the pull-down list next to the Accelerated Idea Development topic. Click the blue Learn More link to view detailed instructions about this accelerated process. After customizing the template, click the Update Plan button at the bottom of the screen to generate a new project template. Then return to the Steps tab and note that the five steps on the left navigation menu under Idea Development have been replaced with one step.

Step 1: Generate Ideas – Begin generating ideas in this step by clicking the Create Idea button at the bottom of the screen. On the New Idea pop-up screen (see *Figure 10*), enter a brief name for the idea in the Idea Name field. You may also add a longer description in the Description field. Assign the idea to a group if desired at the top of the screen using the Sub-group pull-down list and assign the idea to an owner using the Assigned To pull-down list. Check the potential design impacts that apply to this idea. Enter estimated labor and nonlabor cost savings and estimated revenue from implementing the idea. Choose an implementation timeframe and risk from the pull-down lists. Enter implementation notes as desired.

Figure 10 – Generate Ideas > Idea Details



Below the implementation notes, the Potential Performance Impact table only appears if you are using evaluation criteria with your idea development. This table allows you to score this idea against each of the evaluation criteria you chose in the previous Select Evaluation Criteria step. Check the impact level (from *Improve Significantly* to *Degrade Significantly*) that this idea will have on each evaluation criterion, making one check in each row. When you have completed the New Idea screen, click OK. To open an existing idea, click the idea's name in blue text on the screen.

Continue to add as many ideas as desired by clicking the Create Idea button on the Generate Ideas screen. Repeat the instructions for Step 1 for each new idea. To remove an idea from your list, highlight the idea and click the Remove Idea button at the bottom of the screen.

You may customize the display of the Generate Ideas screen by clicking the Custom View button at the bottom of the screen. The Custom View button allows the user to ideas that are displayed on the screen, using the various columns as filtering criteria. Some of the filter categories include the Sub-group, Estimated Savings, Estimated Revenue, Timeframe, Risk, Assigned To, and Status columns. Choose the desired criteria on the Custom View pop-up screen and then click OK to filter your idea list by those criteria. For example, to view only the ideas that have been assigned to a particular team member, click the Assigned To field pull-down list on the pop-up screen and choose the desired team member's name. Then click OK to see only those tasks that have been assigned to that person. Note that before using Custom View filtering criteria, a message at the top left corner of the screen reads, "Showing all ideas." After clicking OK to activate filtering criteria, the message now reads, "Showing filtered ideas. Click 'Custom View' to view or change filter settings."

The program will remember the last Custom View settings created by each team member. To clear these settings, click the Clear Filter button on the Custom View pop-up screen. To save settings for future retrieval, choose the desired settings and then click the Save/Load button to name and save the settings view. Enter a name for the view on the line and check the box to save the current settings. Saved views can be loaded by clicking the Save/Load button and highlighting the desired name from the list. Then check the box to load the filter settings and click OK. The loaded filter settings will appear on the Custom View pop-up screen. Click OK again to filter the list by the loaded settings.

Within the Custom View pop-up screen, the Select Columns button allows the user to display, hide, or reorder the idea columns according to the user's preferences. Several additional columns can be added to your view in addition to the default columns. Additional columns include: Score, Rank, Estimated Start, Estimated Complete, Next Development Step, Detailed Development, Implementation, Files, and several columns for estimated, budgeted, and actual financials. Click the Select Columns button and add columns by checking the boxes next to the column names listed on the screen. To hide any unwanted columns, uncheck the box next to the column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button.

The Tools button at the bottom of the Generate Ideas screen contains several features for ideas. Idea Sub-group names that have been created in ideas can be edited or removed by clicking the blue Edit Idea Sub-Groups link within the Tools button. To import an idea into your project from a different project, first export the idea from the Generate Ideas screen in the other project onto your hard drive. Export by highlighting the idea from the list and then clicking the Tools button at the bottom of the screen and choosing the blue Export Idea link. Then open this project, go to the Generate Ideas screen, click the Tools button and choose the blue Import Idea link. Select the exported idea file from your hard drive and click the Open button to import. You may also export an idea from this project into other projects by following the same export/import instructions explained previously.

If one or more indirect cost reduction analyses have been created in the Analyses module of this program, another feature is available in the Tools button on the Generate Ideas screen. (See the Analyses section of this user guide for instructions on creating an indirect cost reduction analysis.) Click the Tools button and then select the blue Create Ideas from Indirect Cost Analyses link to turn the changes in job outputs that were identified in the analysis into ideas for development.

When all ideas have been created on the Generate Ideas screen, click the Complete button at the bottom left corner to advance to the next step.

Step 2: Select Ideas for Detailed Development – In this step you will select the ideas from the previous step that you intend to develop further. The screen shows each of your ideas, listed in rows. In this step,

the impact levels you checked in the Potential Performance Impact table from the previous step have been converted to numerical values (e.g., *Improve Significantly* has a value of 5 points, *No Impact* has 0 points, and *Degrade Significantly* has -5 points). The program averages each idea's values into an overall score for the idea. If you weighted some criteria heavier than others in the previous task, your weighting is reflected in each idea's score. Each idea's score and rank appear in columns next to the idea name. To view or change each idea's score, click the score value in blue text next to the desired idea's name. Changing values will alter the idea's score and rank. To sort your list of ideas by rank, click the Rank column in the dark-blue column heading.

Click the View Scale button at the bottom of the screen to review the numerical values associated with each impact level. Click the View Weights button to review the weights you previously assigned each evaluation criterion. Click the Select Columns button to display, hide, or reorder the columns on the screen according to the user's preferences.

When you are satisfied with the ideas' scores and ranking, choose the ideas you intend to develop further by checking the box next to the idea's name. You may choose as many or few ideas as desired as your "semi-finalists." Take into consideration the idea's score, implementation risk, potential design impacts, timeframe, resources available for detailed development, and the project's overall goals. Click the idea's name in blue text to review these variables. If you have a list of many ideas, you may want to first develop only those ideas with the highest ranking. You can return to this screen at a later time and check other ideas for further development. Click the Complete button at the bottom left corner to advance to the next step.

Step 3: Conduct Detailed Development – In this step you will further develop the "semi-finalist" ideas that were selected in the last step. Click an idea's name in blue text to begin the detailed development. You will see tabs that run across the top of the idea screen: from left to right these tabs are titled Idea Details, Job Impact, Financial Impact, Technology/Equipment/Space/, Feasibility, Stakeholders, and Implementation Plan. Note that the tabs will not appear across the top of the idea screen until the ideas have been checked for detailed development in the previous step.

If your idea involves a change in FTEs, click the Job Impact tab. Click the Add Job button at the bottom of the screen to add lines to the screen. If you are removing FTEs, enter the number of FTEs as a negative number in the FTE Change field (if you are adding FTEs, enter the number of FTEs as a positive number). In the Average Salary field, enter the average annual salary for the job title. The FTE numbers and average salary will automatically transfer to the next tab called Financial Impact.

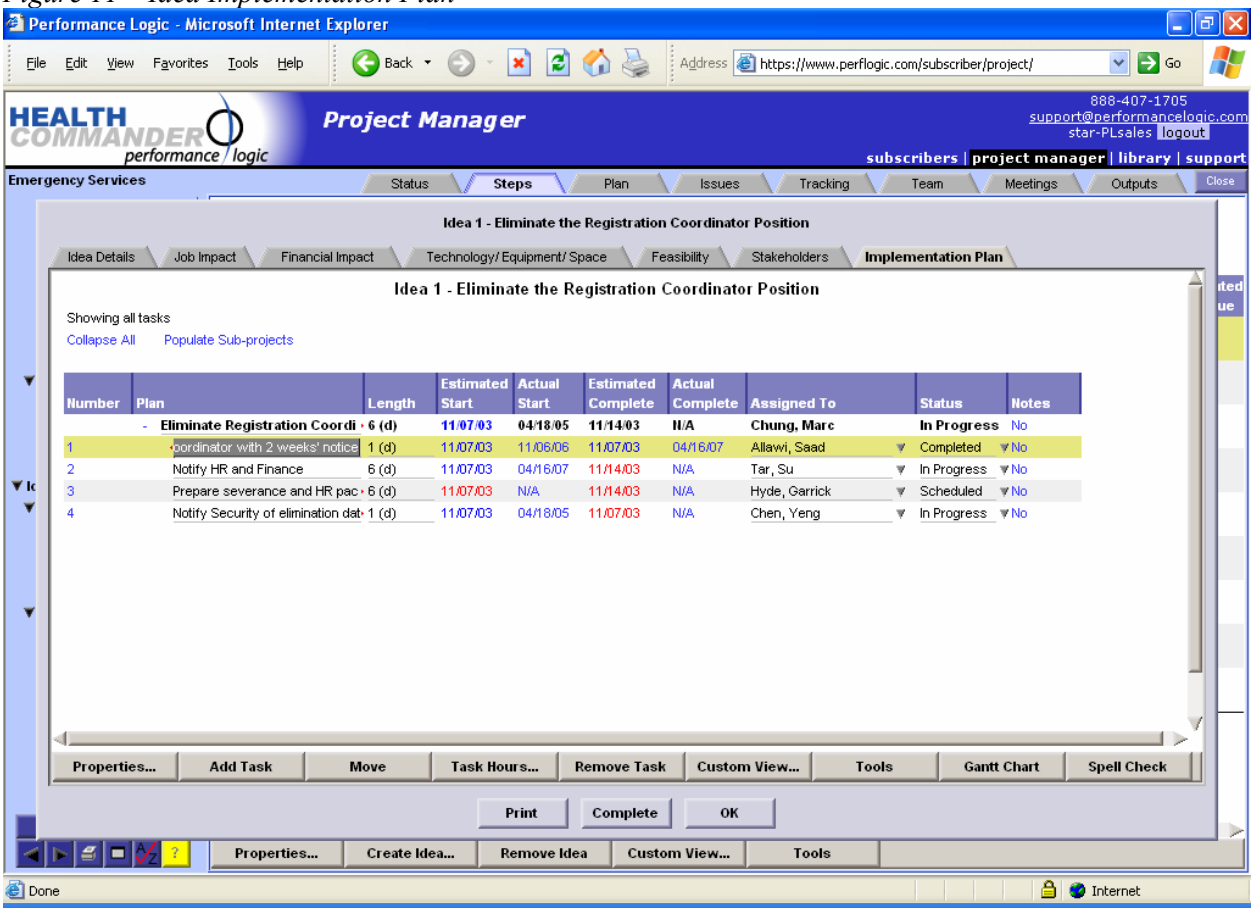
Click the Financial Impact tab to add costs and savings associated with the idea. Recurring budget costs are added in the top section, while one-time costs are added in the second section and capital expenses are added in the third sections. The FTE information from the Job Impact tab automatically transfers into the top (recurring) section and the program multiplies the number of FTEs changed by the average annual salary. Add additional savings by clicking the Add Entry button in the appropriate section and entering the savings as positive numbers in either the Labor Cost or Non-Labor Cost fields. Add expenses as negative numbers.

For the next three idea tabs, Technology/Equipment/Space/, Feasibility, and Stakeholders, add any desired documentation by adding bullets to the screens and entering the desired text.

The last idea tab on the right is the idea's implementation plan. For each idea, create an implementation plan of the tasks that need to be accomplished for the idea to be implemented (see *Figure 11*). Highlight the first line of the plan called Implementation and click the Add Sub-task button at the bottom of the

screen to add tasks in the idea's plan. You can add subtasks indented under other tasks by highlighting a parent task and clicking the Add Sub-task button to insert tasks below it. Assign start and complete dates for each task by clicking the blue Estimated Start and Estimated Complete date links in each row. Assign each task to a member of your project team by clicking the pull-down list in the Assigned To column. Change the status of each task by clicking the pull-down list in the Status column. Add notes as desired to each task by clicking the blue link in the Notes column. If you want to move tasks around, highlight a task and click the Move button at the bottom of the screen. To view a timeline picture of your project plan, click the Gantt Chart button. For detailed definitions of all columns and buttons found in the implementation plan, see the next section of this guide, titled Plan Tab. When you are finished creating an idea's implementation plan, click OK to close the idea and return to the Conduct Detailed Development screen. Work on other ideas by clicking their name in blue text.

Figure 11 – Idea Implementation Plan



When each development tab within an idea has been fully completed, click the Complete button at the bottom of each tab's screen. You can modify a completed screen's contents at any time by clicking the Modify button at the bottom of the screen. If you click the OK button instead of the Complete button, the idea's status will not advance in the column called Next Development Step on the Conduct Detailed Development screen. When all development tabs have been completed for all ideas, click the Complete button at the bottom left corner to advance to the next step.

Step 4: Select Ideas for Implementation – In this step, you will decide which of the "semi-finalist" ideas will actually become "finalists" and be implemented. Ideas that may have seemed excellent before

the third step may no longer be desirable now that more information is available from the detailed development. Review each idea again in this step and choose the winning ideas by checking the box next to the idea's name. Only the checked ideas on this screen will carry forward to the next screen. You can return to this screen at a later time and check other ideas for implementation. Click the Complete button at the bottom left corner when you have selected the ideas that will be implemented. The program will advance to the next screen called Ideas for Implementation.

Step 5: Ideas for Implementation – On this last screen in the Idea Development module, the user sees the ideas to be implemented that were checked in the previous step. If additional ideas are desired for implementation, return to the fourth step and check the box next to other ideas' names. If desired, ideas can be exported to a file using the Export Idea button so that they can be imported into other projects. If desired, ideas can be launched directly as projects using the Launch Idea button. The Transfer Idea button is explained in the next paragraph. No other action is required on the Ideas for Implementation screen. To manage the implementation plans for all ideas in one master plan, go to the Tracking tab at the top of the screen and then click the Track Ideas topic on the left navigation menu (further explained in the Tracking Tab section of this guide).

Transfer Ideas

Ideas can be transferred between projects with the permission of the Project Manager over the project. To allow ideas to be transferred to your project from other projects, click the Plan tab at the top of the screen. Click Project Properties on the left navigation menu and then click Customize Template. The project's current template settings are displayed on the screen. Under the Idea Development heading on the screen, choose *Yes* from the pull-down list next to the Allow Transferred Ideas topic. After customizing the template, click the Update Plan button at the bottom of the screen to generate a new project template. Then return to the Steps tab. Before a transferred idea is added to your idea list, you will be directed to the idea in a holding area so that you can accept or reject it.

To transfer ideas to other projects, first determine whether you are using accelerated idea development. If you are, go to the Generate Ideas screen, highlight the idea and click the Tools button. Then click the blue Transfer Idea link and choose a new project from the list on the pop-up screen. If you are not using accelerated idea development, go to the Ideas for Implementation screen, highlight the idea and click the Transfer Idea button at the bottom of the screen. Choose a new project from the list on the pop-up screen. You will only see projects on the pop-up screen that have enabled the feature to allow ideas to be transferred to them. If you want to transfer an idea to a project that is not in the list, you will need to contact the Project Manager of the project and request that s/he follow the instructions in the previous paragraph to allow transferred ideas. Then that project will appear in the list.

This concludes the documentation for all modules of the Steps tab in your project. The next several sections of this guide will detail the functionality of the other tabs in your project.

Plan Tab

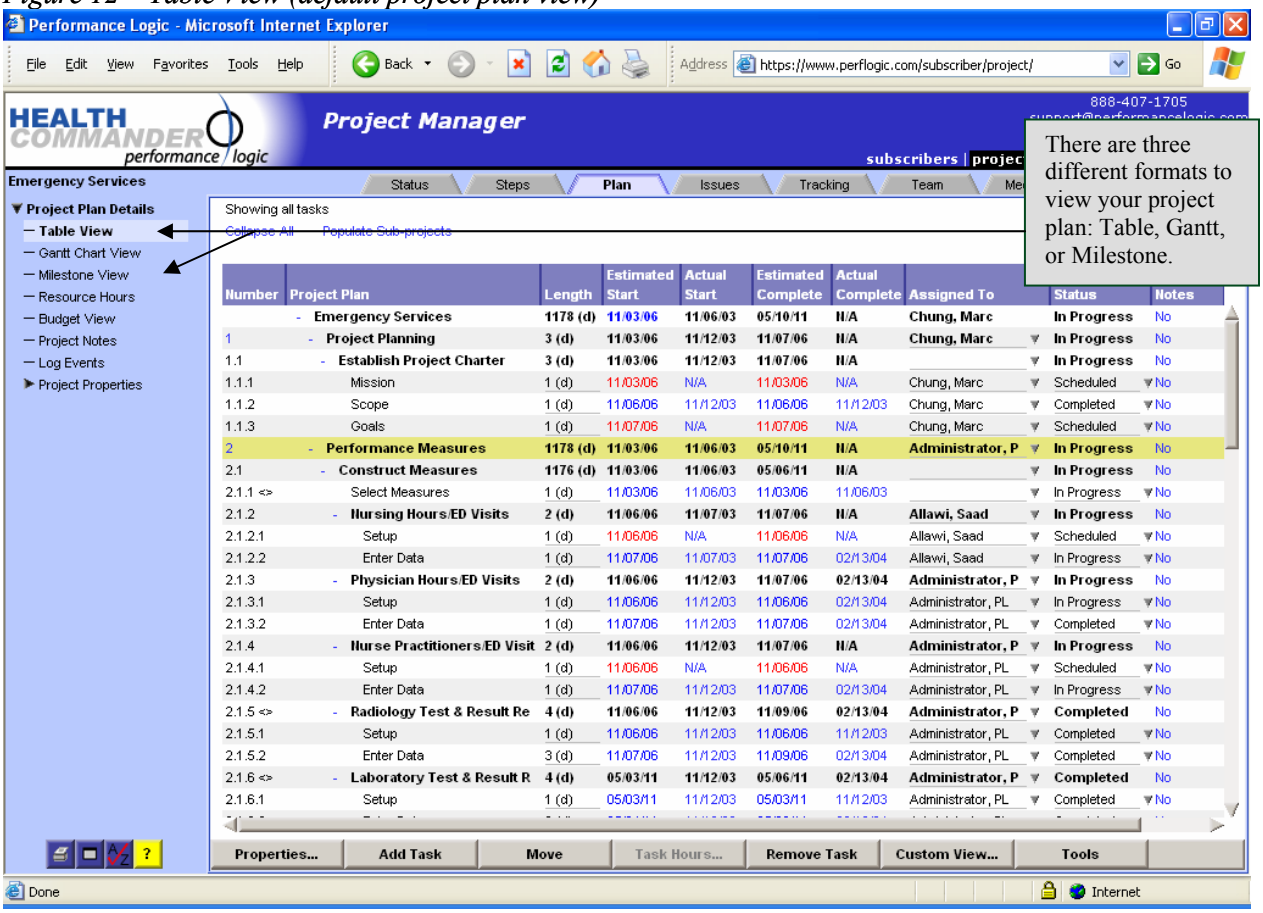
The Plan tab allows the user to create a project plan with custom tasks and steps. The customizable project features chosen in the project's setup can also be modified in this tab.

Table View

Click the Plan tab at the top of the screen to view the overall project plan for your project, called the Table View (see *Figure 12*). Performance Logic's default project plan shows the modules from the Steps tab (with corresponding steps and tasks) that you selected when you created your project. You may add custom tasks to your project plan in addition to the default PL tasks shown in the PL modules. If you add custom tasks to your plan in the Plan tab, they will also show in the Steps tab on the left navigation menu. Only custom tasks can be deleted in the project plan. To remove default PL tasks from the project plan, click Project Properties on the left navigation menu in the Plan tab, and then click Customize Template (explained in the last part of this Plan Tab section).

The project plan has many columns (fields) and buttons that require explanation. The documentation will first cover the columns and then the bottom buttons in sequential order. All columns may be resized by placing the mouse cursor over the border between column headings so that the cursor turns into a double-pointed arrow, holding down the left mouse button, dragging the border to the desired position, and then releasing the mouse button.

Figure 12 – Table View (default project plan view)



Number Column – The first column in the project plan is the Number column. Each task in the project plan is given a unique task number in order to facilitate task identification in more complex project plans. This field populates automatically when tasks are added to the project plan. The column uses decimal places to show the relationship of tasks to each other. Phases are the highest level; within each phase are tasks and within tasks are steps. For example, 2.0 is a phase-level task, while 2.1 is a step-level task and

2.1.1 is a task-level task. To move a task using its number, click the blue number link in the Number column. In the pop-up screen, enter the new number where you want this task moved to. When tasks are moved in the plan, the numbering in the Number column will adjust automatically.

Project Plan Column – The second column is simply the name of each task. If you add custom tasks to your plan, this field will have a blank line on which you can enter text for the task's name. You can add custom tasks by highlighting the task under which you want to add the new task and then clicking the Add Sub-task button at the bottom of the screen.

A blue plus or minus sign lies in front of each bolded parent task in this column. Clicking a blue plus sign will expand the sub-tasks under the bold parent task, while clicking a blue minus sign will collapse the sub-tasks under the parent task. This feature enables the user to collapse pieces of the project plan that are not currently active so the plan is focused on those phases and steps that have expanded sub-tasks. To easily collapse all sub-tasks in the project plan, click the blue Expand All link at the top left corner of the content screen. This link has a toggle function, so it becomes Collapse All after Expand All has been clicked, and vice versa. All expanded and collapsed tasks are remembered by the program's settings until the user changes them. The settings are also active when printing the project plan from the Print button at the bottom left corner.

Length Column – All PL tasks have default timeframes, measured in number of days necessary to complete each task. The default timeframe for custom tasks is one day. To replace the default number of days for any task, highlight the number in the Length column and enter the desired days. Note that any parent task with sub-tasks listed under it will be bolded, which means that the Length field for the bolded parent task is a sum of the length of the sub-tasks under it; the bolded length will automatically change when the sub-task lengths under it are changed.

Estimated Start and **Estimated Complete Columns –** The estimated start and estimated complete dates are the scheduled or due date for each task and should be entered at the beginning of the project. The program will use the number of days in the Length column and the date in the Estimated Start column to adjust the date in the Estimated Complete column. You may also work the other direction by modifying the date in the Estimated Complete field in order to change the days in the Length column. To modify a date, click the blue date link. A calendar pop-up screen will appear. Click the right or left arrow to move the calendar ahead or back to other months for date selection, or type over the underlined month or year to go quickly to the desired month or year. Click the desired date and then click OK. Instructions on setting the start and complete dates for multiple tasks at the same time are detailed in the Properties Button topic below. Note that any parent task in the project plan with sub-tasks listed under it will be bolded, which means that the Estimated Start and Estimated Complete fields for the bolded parent task are a summary of the dates of the sub-tasks under it; the bolded dates will automatically change when the sub-task dates under them are changed.

For performance measures, the Estimated Complete date will automatically change to the most recent scheduled data point in the measure's frequency, while the Actual Complete date will automatically change to the most recent date that a value has been entered in the measure.

Estimated Start dates turn red when the date has passed and no Actual Start date has been entered. Estimated Complete dates turn red when the date has passed and no Actual Complete date has been entered. Using the red color to show that the estimated dates are overdue in their initiation or completion helps the user to easily see tasks that need attention due to their overdue status.

If you try to change the start date of a task to an earlier date and that task has a predecessor with a conflicting complete date, a message will appear on the screen: "The date entered is too early to satisfy the dependencies on this task. The earliest possible date has been substituted." When this occurs, you can either move the complete date earlier for the predecessor task or remove the conflicting predecessor task number in the Predecessors column. Then you will be able to change the task's start date as desired. (For more information on predecessor relationships, see the Predecessors Column topic below.)

Actual Start and **Actual Complete Columns –** In contrast with the Estimated Start and Estimated Complete columns (which track scheduled dates for each task), the Actual Start and Actual Complete columns track the actual dates each task begins and ends. The biggest benefits of tracking "reality" dates separately from "target" dates is the ability to see which tasks have large variances between the date they were scheduled to begin or end versus the date they actually began or ended. To modify a date, click the blue date link. Click the desired date on the calendar and then click OK. Selecting a task's Actual Start and Actual Complete date will change the value in the Status column (explained in greater detail in the Status Column section below). To reset a task's Actual Start or Actual Complete date back to "N/A," click the blue date link and then click the Clear button. Instructions on setting the actual start and actual complete dates for multiple tasks at the same time are detailed in the Properties Button topic below. Note that any parent task in the project plan with sub-tasks listed under it will be bolded, which means that the Actual Start and Actual Complete fields for the bolded parent task are a sum of the actual start and actual complete dates of the sub-tasks under it; the bolded dates will automatically change when the sub-task dates under them are changed.

For performance measures, the Estimated Complete date will automatically change to the most recent scheduled data point in the measure's frequency, while the Actual Complete date will automatically change to the most recent date that a value has been entered in the measure.

Assigned To Column – Assign team members to each task by clicking the pull-down list in the Assigned To column to access a list of all members on the project. You may first wish to add all team members to your project roster in the Team tab so the members' names will appear in this pull-down list (see the Team Tab section in this guide). If you wish to assign multiple team members to the same task, select the Add Multiple option from the pull-down list. If you wish to assign a task to someone not already on your project team, select the Add New Member option. To unassign a member from a task, select Unassign from the pull-down list. Occasionally a team may want to assign a job title resource (e.g., IS programmer or financial analyst) to a task when a specific individual has not yet been selected for the task. To assign a job resource, your site administrator must first set up the resource in the Account Manager. Once this is done, you can select the resource by selecting the Add New Member option from the pull-down list, then clicking the Add Resource button at the bottom of the screen. Highlight the resource you desire and click OK. Resource can also be added directly to the project roster in the Team tab. Instructions on assigning multiple tasks at the same time are detailed in the Properties Button topic below.

Status Column – Changing a task's Actual Start and Actual Complete dates will change the value in the Status column. The status value can also be manually changed using the pull-down list in the Status column. Changing a task from *Scheduled* to *In Progress* will enter today's date in the Actual Start field. Changing a task from *In Progress* to *Complete* will enter today's date in the Actual Complete field. Changing a task from *Scheduled* to *Complete* will enter today's date in both the Actual Start and Actual Complete fields. Another way to change the status in the project plan is in the Steps tab by clicking the Begin and Complete buttons on each task's screen. If you click the Begin button for a task in the Steps tab, the status value in the project plan will change to *In Progress* and the actual start date will be recorded in the plan. If you click the Complete button for a task in the Steps tab, the status will change to *Complete* and the actual complete date will be recorded in the plan. If you have a task that you decide will

not be completed during the project—yet you want the task to remain in your project plan for audit purposes—you may choose the Inactive value from the pull-down list in the Status column. Inactive Tasks are ignored by the program and excluded from project-progress tracking. Instructions on setting the status for multiple tasks at the same time are detailed in the Properties Button topic below.

Notes Column – You may add notes to any task by clicking the blue link under the Notes column. Clicking the link will open a pop-up screen. Click the Add Note button on the pop-up screen and enter the desired text. You may copy and paste text here (or anywhere in this program) by highlighting the text in your other application, holding down the Control key and the letter C on your keyboard to copy the text, putting your cursor on the text field in Performance Logic, and then holding down the Control key and the letter V to paste the copied text. Once you have added the notes, click OK to close the pop-up screen. Notice the blue link changes from *No* to *Yes* in the Notes column, indicating that notes are now added to that task. You may view a compilation of all notes associated with your project plan tasks by clicking Project Notes on the left navigation menu of the Plan tab.

Log Events Column – The Log Events column is displayed in the plan only if the user has selected it by clicking the Custom View button at the bottom of the screen and then the Select Columns button (see instructions under Custom View Button below on adding additional columns to your project plan). The Log Events column is similar to the Notes column in that it records notes for events created within specific tasks. This column is unique, however, in that the user logging each event is recorded along with the event date and number of hours the event required in the task. Instead of entering hours, the user can allow the program to time the number of hours by clicking the Begin Timer button and then clicking the Finish link later to end the timer when the event is complete. Hours entered into work events contribute to the total Actual Hours for the task. You may view a compilation of all events associated with your project plan tasks by clicking Log Events on the left navigation menu of the Plan tab.

Files Column – The Files column is displayed in the plan only if the user has selected it by clicking the Custom View button at the bottom of the screen and then the Select Columns button (see instructions under Custom View Button below on adding additional columns to your project plan). The Files column shows the user whether specific files have been uploaded and attached to the project to aid in the completion of a particular task. Click the blue link in the Files column to view uploaded files on the Attachments pop-up screen that have been associated with the specific project task. Click the Attach Files button in the pop-up screen to open the Add Files pop-up screen and attach files to the task. In the Add Files window, a list of files is displayed that have been uploaded from your hard drive to the project's Document Repository, located in the Outputs tab (explained in the Outputs Tab section of the user guide). Highlight the desired file(s) and click OK to attach. To add new files that are not yet in the Document Repository, click the Add New File button and select the files from your hard drive to upload. When any files are attached to the task, the blue Files link changes from *No* to *Yes*.

Predecessors Column – The Predecessors column is displayed in the plan only if the user has selected it by clicking the Custom View button at the bottom of the screen and then the Select Columns button (see instructions under Custom View Button below on adding additional columns to your project plan). The concept of predecessors is where the user specifies that one task's beginning date is dependent on one or more other tasks' completion date(s). By default, most PL tasks in the project plan have predefined predecessor relationships that the user can modify, whereas all custom tasks added by the user have no predecessor by default. To add or modify a task's predecessor relationship, enter the task number of the predecessor task in the underlined text field in the Predecessors column for the desired task. For example, to make task number 6.1 a predecessor of task 6.2, enter "6.1" in the Predecessors column for task 6.2. To define multiple predecessors for a desired task, enter each task number separated with a comma (e.g., 6.1, 3.4.4, 2.3).

If you try to change the start date of a task to an earlier date and that task has a predecessor with a conflicting complete date, a message will appear on the screen: "The date entered is too early to satisfy the dependencies on this task. The earliest possible date has been substituted." When this occurs, you can either move the complete date earlier for the predecessor task or remove the conflicting predecessor task number in the Predecessors column. Then you will be able to change the task's start date as desired.

Once a predecessor has been entered in the Predecessors column, the properties of the predecessor constraint can be further defined using the Properties button at the bottom of the screen. See the Properties Button topic below.

Percent Complete Column – The Percent Complete column is displayed in the plan only if the user has selected it by clicking the Custom View button at the bottom of the screen and then the Select Columns button (see instructions under Custom View Button below on adding additional columns to your project plan). This optional feature allows the user to enter a percent in this column for tasks that have a status of *In Progress* to manually show how much of an *In Progress* task has been completed. Tasks with a status of *Scheduled* will have an automatic percent complete of zero, while tasks with a status of *Completed* will have an automatic percent complete of 100. Enter the percent completed for each *In Progress* task. Note that any parent task with sub-tasks listed under it will be bolded, which means that the percent complete number for the bolded parent task is a weighted average of the percent complete numbers of the sub-tasks under it. The weighted-average methodology is explained by the following example:

Sub-task 1: Length is 10 total days; marked 50% complete, so 5 completed days
Sub-task 2: Length is 12 total days; marked 25% complete, so 3 completed days
Sub-task 3: Length is 8 total days; marked 75% complete, so 6 completed days

Bolded parent task: (5+3+6 completed days) / (10+12+8 total days) = roughly 47% complete

Any percentages entered in the Percent Complete column for *In Progress* tasks will increase the project-progress gauge on the Project Status screen of the Status tab that shows how many of the project's days have been completed. Percentages entered in the Percent Complete column for *In Progress* tasks will also affect the Gantt chart view of the project plan by displaying the blue color for *Completed* tasks as a half-height bar that marks the entered number of completed days inside the grey bar for *In Progress* tasks.

Additional Columns – Several additional predefined and custom columns can be added to your project plan by clicking the Custom View button at the bottom of the screen and then the Select Columns button (see instructions under Custom View Button below on adding additional columns to your project plan). Predefined columns are available to track costs, hours, variances, projected start and complete, baselines, line number, log events, and descriptions for each task. Users can also create custom columns (see instructions under Custom View Button below on creating custom columns in your project plan).

Properties Button – The Properties button is the first of the buttons at the bottom of the screen. This button is not active (black) until you first highlight a task in your project plan. The Task Properties pop-up screen shows the task's current properties (e.g., the task's name, description, start and end dates, team member assignment, and predecessors). If you want to change the name of your project, highlight the first line of the plan, which is the name of the project, and click the Properties button. On the pop-up screen, click the name of the project in blue to change the name. If you wish to add a longer description of the task, click the blue Description link on the pop-up screen and add as many bullets to the description as desired.

The next option on the pop-up screen is to check a task as being a milestone task. Milestone tasks are any tasks from your project plan that you want to show alone in a summary view. For example, you have a large project plan and wish to share the plan's highlights with executives in your organization, but you don't want them to have to wade through all the details in your plan. So you arbitrarily choose those tasks that are meaningful to you as being milestone tasks; these tasks will populate a milestone report without the rest of your project plan. Highlight a desired task in your project plan, click the Properties button and then check the Milestone Task box. To mark multiple tasks at the same time as milestone tasks, hold down the Shift key (for consecutive tasks) or Control key (for nonconsecutive tasks) on the keyboard while highlighting all the desired tasks. Then click the Properties button and check the Milestone Task box. Access the report of the selected milestone tasks by clicking Milestone View on the left navigation menu of the Plan tab.

The user can anchor a task's start date on the pop-up screen. By default, the checkbox for this option is unchecked for most tasks so that start and complete dates for each task will automatically roll forward or backward when predecessor tasks' start and complete dates are changed. (Predecessor tasks are explained in the Predecessors Column topic above.) By checking the Anchor Start Date box, the task's start date will be locked to the date you select in the Estimated Start Date field, so the start date will not move when the estimated start and estimated complete dates for the other tasks in your plan are modified. Be aware, however, that if this task has a predecessor task and you move that predecessor task's start date forward, the anchor start date for this dependent task is overridden. This same help text for the Anchor Start Date box can be accessed by clicking the help question mark next to this option on the pop-up screen.

Analyses can be attached directly to a specific task in the project plan instead of having to add the entire Analyses module to the project and then create the analysis in the Steps tab. To add an analysis to a plan task, highlight the task, click the Properties button, and then click the blue Select link next to the Analysis category to define the type of analysis to add.

Once a predecessor has been entered in the Predecessors column of the project plan, the properties of the predecessor constraint can be further defined. (See the Predecessors Column topic above for instructions on entering predecessors.) Highlight a task with a predecessor that you wish to define and then click the Properties button. The predecessor(s) for the highlighted task will be listed on the pop-up screen. Choose the desired option from the pull-down list next to each predecessor. Predecessor constraints include:

Option	*Name*	*Definition*
SS	Start to Start	Highlighted task cannot start until predecessor has started.
SF	Start to Finish	Highlighted task cannot finish until predecessor has started.
FS	Finish to Start	Highlighted task cannot start until predecessor has finished.
FF	Finish to Finish	Highlighted task cannot finish until predecessor has finished.
SSFF	Start to Start & Finish to Finish	Combines SS and FF.

The same help text from the table above can be accessed by clicking the help question mark next to the Predecessors option on the Properties pop-up screen.

After defining predecessor constraints using the pull-down list in the Properties pop-up screen, the user can also specify a lag time in days to occur between the start/finish of the predecessor task and the start/finish of the constrained task. For example, you select a FS predecessor on a constrained task so that the predecessor must finish before the constrained task begins. By default the constrained task will begin the very next day after the predecessor is finished. If you want to have a lag time of 3 days between the finish of the predecessor task and the beginning of the constrained task, enter a 3 in the text field next to

the pull-down list where the constraint options are selected in the Properties pop-up screen. When the 3 is entered in the text field and the pop-up screen is closed, the Estimated Start date of the constrained task will be pushed out three days in the project plan.

To remove a task from the project plan, highlight the desired task and click the Properties button. Then click the Delete button on the pop-up screen.

To send email notification at any time for a task from the project plan, highlight the desired task and then click the Properties button. Click the E-mail button on the pop-up screen and then click the Send button. To email the agenda to selected project members, click the E-Mail button and then select the team members who will receive the email by highlighting their names from the left side of the screen and then clicking the Add button to transfer them to the right side. Any files that have been attached to the task can be sent with the email by checking the Include Attachments box. The email that each person receives will also contain an attached PDF file of the task information.

The Properties button also allows the user to perform the following actions for multiple tasks at the same time: select dates, assign tasks, select task status, choose milestone tasks, anchor start dates, send task email notifications, and delete tasks. First, select multiple tasks from the project plan by holding down the Shift key (for consecutive tasks) or Control key (for nonconsecutive tasks) on the keyboard while highlighting all the desired tasks. Then click the Properties button. The user can select desired dates, checkboxes, and pull-down list options as desired. Click OK to register all the chosen options in the selected tasks in the project plan. The user can also highlight multiple tasks, click the Properties button, and then click the Delete button to delete all highlighted tasks, or click the E-mail button to send email notifications to all people assigned to the highlighted tasks.

Add Task Button – Each phase, step, or task may have customized subtasks added to it by highlighting the parent task and then clicking the Add Task button at the bottom of the screen. If you want to add a high-level phase (e.g., 3.0 or 6.0), highlight the first line of the plan, which is the name of the project, and click the Add Task button to add a new phase at the bottom of the plan. Then highlight the new phase and click the Add Task button again to add steps directly underneath the new phase. You can add tasks indented at any level by highlighting the task above the desired level before clicking the Add Task button.

Move Button – Default PL tasks cannot be moved in the project plan, but all custom tasks added by the user may be moved anywhere in the plan. Highlight the desired custom task and then click the Move button at the bottom of the screen. A small pop-up screen will appear in the lower right corner with four directional arrows. Click the up and down arrows to move tasks up and down in your project plan (the program moves the task one line per click, so keep clicking until the task arrives at the desired location). Click the left and right arrows to move tasks in and out decimal places. When you have finished moving the desired task, click the Done button on the pop-up screen so the program will no longer be locked in the move function.

To move multiple tasks at the same time, hold down the Shift key (for consecutive tasks) or Control key (for nonconsecutive tasks) on the keyboard while highlighting all the desired tasks. Once the tasks are highlighted, click the Move button and then click either the right or left arrow on the pop-up screen to move the highlighted tasks in or out decimal places. You cannot move multiple tasks up and down at once. Moving a parent task also moves all the subtasks under the parent, so you should only highlight the parent tasks when moving multiple tasks at once.

Task Hours Button – The Task Hours button at the bottom of the screen is an optional feature that is used to allocate the number of hours assigned to a task across the multiple users assigned to the task. This

button is used for entering and allocating hours in the Assigned Hours and/or Actual Hours columns (these columns do not appear in the plan by default; they may be added by clicking the Custom View button at the bottom of the screen, then clicking the Select Columns button and checking the box next to the Assigned Hours and/or Actual Hours column names). The Task Hours button is only active (black) when a task is highlighted on the screen. Before entering assigned or actual hours for each task, assign team members to each task in the Assigned To field. Then enter the members' respective hours in the Assigned Hours and/or Actual Hours columns. If a task has been assigned to multiple team members, allocate the task's total hours to each of them by highlighting the task and clicking the Task Hours button. The Task Hours pop-up screen shows all team members assigned to the particular task, with a column to enter their respective assigned hours (before the task is completed) and a column to enter actual hours (after the task is completed). If you assigned a total number of hours in the project plan before clicking the Task Hours button, that value will appear on the pop-up screen in the Task Hours row. Click each person's name in blue text to allocate the hours to each day in the task's duration as desired. If the total of your allocated hours on the pop-up screen (the sum on the Total Allocated Hours row) does not match the total assigned hours previously entered in the project plan (the Assigned Hours row), you can click the blue Balance link to force the allocated hours to equal the assigned hours. Click the blue Balance Help link for details on how the program balances the two totals. You may use the Previous Task and Next Task buttons at the bottom of the pop-up screen to move easily through each project-plan task. To view a report of a user's assigned and actual task hours across all projects by date, see the Resource Planning topic in the Project Manager Resources Tab section at the end of this guide.

Remove Task Button – To remove a task, highlight the desired task and click the Remove Task button. To remove more than one task at once, hold down the Shift key (for consecutive tasks) or Control key (for nonconsecutive tasks) on the keyboard while highlighting all the desired tasks. Then click the Remove Task button to remove all highlighted tasks at once.

Custom View Button – You may customize the display of the plan by clicking the Custom View button at the bottom of the screen. The Custom View button allows the user to filter the project plan tasks that are displayed on this screen, using the various columns as filtering criteria. Some of the filter categories include the Estimated Start, Actual Start, Estimated Complete, Actual Complete, Assigned To, and Status columns. Choose the desired criteria on the Custom View pop-up screen and then click OK to filter your project plan by those criteria. For example, to view only the tasks that have been assigned to a particular team member, click the Assigned To field pull-down list on the pop-up screen and choose the desired team member's name. Then click OK to see only those tasks that have been assigned to that person. Note that before using Custom View filtering criteria, a message at the top left corner of the project plan reads, "Showing all tasks." After clicking OK to activate filtering criteria, the message now reads, "Showing filtered tasks. Click 'Custom View' to view or change filter settings."

The program will remember the last Custom View settings created by each team member. To clear these settings, click the Clear Filter button on the Custom View pop-up screen. To save settings for future retrieval, choose the desired settings and then click the Save/Load button to name and save the settings view. Enter a name for the view on the line and check the box to save the current settings. Saved views can be loaded by clicking the Save/Load button and highlighting the desired name from the list. Then check the box to load the filter settings and click OK. The loaded filter settings will appear on the Custom View pop-up screen. Click OK again to filter the project plan by the loaded settings.

Within the Custom View pop-up screen, the Select Columns button allows the user to display, hide, or reorder the project plan columns according to the user's preferences. Several additional columns can be added to your project plan in addition to the default columns that appear at the beginning of your project. Additional columns include the ability to track costs, hours, variances, predecessors, percent complete,

projected start and complete, baselines, line number, log events, and descriptions for each task. Click the Select Columns button and add columns by checking the boxes next to the column names listed on the screen. To hide any unwanted columns in the project plan, uncheck the box next to the column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button. Once columns are arranged in the desired layout, you can set the layout as the default by clicking the Set as Default button. This action will cause the other project team members to see your column layout as the default when they open the project. But they can still override this default by moving columns around or displaying/hiding columns. To edit the default layout, make the desired column changes and then click the Set as Default button again (the default can be set repeatedly). To return an altered column layout to the default (the default being whatever the layout was when the Set as Default button was last clicked), click the separate Default button.

To create custom columns, click the Create button on the Select Columns screen. Name the column and choose its data type. A custom column created in a user's project will not appear in the user's other projects; the custom column would need to be recreated in each project (unless the entire project is copied). Custom columns are identified by an asterisk (*) after the column name on the Select Columns screen. To map custom columns to *Microsoft Project* field names for importing and exporting between that application and Performance Logic, click the Tools button at the bottom of the project plan screen and then select the blue Edit Task Map link.

The Custom View screen also contains the Change Work Dates button. Clicking this button opens the Change Work Dates pop-up screen. On this screen, weekdays Monday through Friday are classified by default as working days; Saturday and Sunday are classified as nonworking. On the left side of the screen, you can globally change days of the week to working by checking the box next to a day or nonworking by unchecking the box. To make specific days working or nonworking, click the specific day on the calendar and then check the Working or Non-Working button on the right side of the screen. This functionality allows the user to designate special days throughout the year (such as holidays) as nonworking, and necessary weekend days as working.

The Custom View pop-up screen also contains a print scaling option that allows the user to choose whether the project plan will fit to one page or use the actual column widths on the screen when printed. Check one of the two options and close the pop-up screen. Then print the plan by clicking the Print button at the bottom left corner of the left navigation menu.

Tools Button – Tools for the Entire Project Plan:

Import – You can import into the Project Manager any project plan that you have created in *Microsoft Project* or in another *HealthCommander* project. Click the Import button at the bottom of the screen and select the file to be imported from your hard drive. Prior to importing from *Microsoft Project*, please ensure that 1) the project plan is saved in the Text (Tab Delimited .txt) format and 2) the export format, Task "Export Table" Map, is selected during the save. These importing instructions can be accessed at any time by clicking the yellow Help button on the left navigation menu in the Table View of the project plan. Additional instructions for importing the Resource Names field from *Microsoft Project* into the Assigned To field in a *HealthCommander* project can be accessed by scrolling to the bottom of the open Help text and clicking the Exporting User Names topic. When a project plan is imported into your Performance Logic project, it will be added at the end of the existing plan if no tasks are highlighted in the plan. To import your plan into a specific area of your project, highlight the task where you want the imported tasks to fall under and then complete the import steps. If you highlight a task that has no dependent (intended) tasks, the imported tasks will appear directly below the highlighted task as dependents of the highlighted task (and can then be

moved using the Move button). But if you highlight a task that has dependent tasks, then the imported tasks will appear at the bottom of the dependent tasks (and can then be moved).

Export – You can export your project plan in three different ways. First, you can export your project plan to a PDF file. Click the Tools button at the bottom of the screen and then click the blue Export to PDF link to place a PDF file on your hard drive. Second, you can export to an RTF file that will maintain the appearance of the rows and columns in your plan when opened in a word-processing program. Click the Tools button and then click the blue Export to RTF link to place an RTF file on your hard drive. Third, you can export a Performance Logic project plan into *Microsoft Project* or into another Performance Logic project. If you want to export the entire plan, highlight the first line of the plan (the project name). If you want to export only a phase of your plan, highlight the phase name that you want to export (only the phase and all its subtasks will be exported). Then click the Tools button and then click the blue Export to tab delimited text link to place a TXT file on your hard drive. If you are importing the *HealthCommander* file into *Microsoft Project,* open the saved text file in *Microsoft Project* and select the import format, Task "Export Table" Map. Exporting instructions can be accessed at any time by clicking the yellow Help button on the left navigation menu in the Table View of the project plan. Additional instructions for exporting the Assigned To field from a *HealthCommander* project into the Resource Names field in *Microsoft Project* can be accessed by scrolling to the bottom of the open Help text and clicking the Exporting User Names topic.

Send Task Reminders – Task reminders can be sent whenever desired when tasks with a status of Scheduled or In Progress are overdue or will be coming due. Reminders can be sent based on both date and task status. Click the blue Send Task Reminders link in the project tools and check the desired criteria. Click OK to generate a report of all tasks that meet the criteria and then click OK on the report screen to send the reminder emails to the team members for the tasks listed in the report.

Create a Baseline and **Edit Baselines –** Baseline dates capture the current Estimated Start and Estimated Complete columns from the project plan into separate baseline columns at any point during the project. This feature is useful for "What if" scenarios where the user desired to compare the effects of changing estimated start and complete dates in the plan. The user can create as many baselines as desired. The baselines will display at the far right side of the project plan when created; the user can turn display on or off by clicking the Custom View button in the project plan and then clicking the Select Columns button. Once one or more baselines have been created, a new topic appears in the list of tools called Edit Baselines. Click this blue text link to edit the name and description of a baseline or to remove it by highlighting a baseline and then clicking the Remove Baseline button.

Revise Estimates – This feature works with the Projected Start and Projected Complete columns that can be displayed in the project plan by clicking the Custom View button and then clicking Select Columns. Clicking the blue Revise Estimates link in the project tools will update dates in the Estimated Start and Estimated Complete columns to match the corresponding dates in the Project Start and Projected Complete columns. This feature only resets dates that have a Scheduled status where the task has predecessor relationships to tasks with a status of In Progress, Completed, or Delayed. This feature has no effect if predecessor relationships have not been established in the project plan.

Edit Task Map – This feature in the plan tools appears only when you have created custom columns in your project by clicking the Custom View button and then clicking Select Columns. This feature allows you to map your custom columns to field names in *Microsoft Project* so that the custom columns will import and export correctly between *Project* and Performance Logic.

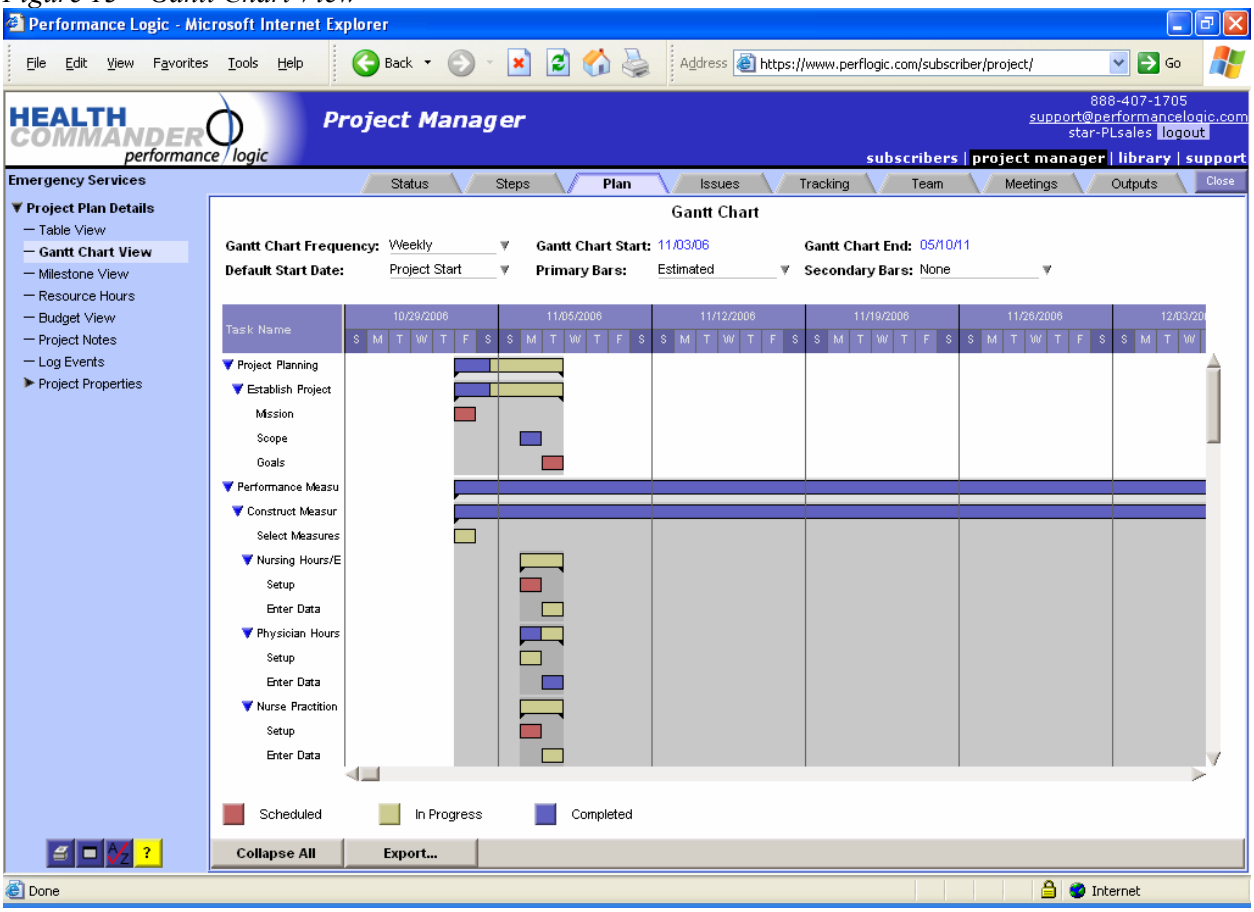
Tools Button – Tools for Selected Tasks (highlight a task before clicking the Tools button)**:**

Copy Selected Task – This feature allows tasks to be copied easily in the project plan. Highlight a task and then click the blue Copy Selected Task link in the Tools area. The program will insert of copy of the selected task directly below the highlighted task. This copy can be renamed or moved to a new location. Note that copying a parent task will copy all subordinate tasks under the parent task, allowing a group of related tasks to be copied at once.

Gantt Chart View

The project plan created in Table View can also be viewed as a timeline picture in a Gantt chart by clicking Gantt Chart View on the left navigation menu of the Plan tab (see *Figure 13*). The Gantt chart layout uses a color scheme to show the status of each phase: red for S*cheduled,* tan for *In Progress,* and blue for *Completed*. Percentages entered in the Percent Complete column for *In Progress* tasks in the project plan will affect the Gantt chart view by displaying the blue color for *Completed* tasks as a half-height bar that marks the entered number of completed days inside the tan bar for *In Progress* tasks. (See the Percent Complete Column topic above for instructions on using the Percent Complete column.)

Figure 13 – Gantt Chart View



To display the timelines of tasks and sub-tasks within a phase, click the blue triangle next to the phase's name. Click the Expand All button at the bottom of the screen to quickly display all tasks and sub-tasks within each project phase with their respective timelines. Any tasks from the project plan that have a

length of zero days in the Length column will show a triangle marker—instead of a timeline bar—on the task's start date in the Gantt chart.

Users can select which projects dates are displayed on the Gantt chart by selecting from the pull-down list next to the Primary Bars field at the top of the screen. The date choices are: Estimated, Actual, Projected, or Baseline(s). Users can also compare two sets of dates on the chart by choosing a different date feature in the Secondary Bars field than was selected in the Primary Bars field. Secondary bars are displayed as thin bars inside the thicker bars of the Primary bars.

The default frequency for the Gantt chart view is weekly. To change the frequency, click the pull-down list next to the Gantt Chart Frequency field in the upper left corner of the content screen. Selecting a monthly, quarterly, or annual frequency will redraw the Gantt chart in a smaller view. You may change the chart's viewable start and end dates by clicking the blue date links. You may also choose whether the Gantt chart picture shows a default start date using today's date or the project's start date by clicking the pull-down list next to the Default Start Date field. Changing the frequency and dates allows you to customize viewing and print the chart on fewer pages because the program will print the chart exactly as it appears on the screen. If you wish to export the chart to a picture file, click the Export button at the bottom of the screen to export the Gantt chart onto your hard drive as a JPG picture file.

Milestone View

Milestone tasks are any tasks from your project plan that you want to show alone in a summary view. For example, you have a large project plan and wish to share the plan's highlights with executives in your organization, but you don't want them to have to wade through all the details in your plan. So you arbitrarily choose those tasks that are meaningful to you as being milestone tasks; these tasks will populate a milestone report without the rest of your project plan. Highlight a desired task in your project plan, click the Properties button and then check the Milestone Task box. To mark multiple tasks at the same time as milestone tasks, hold down the Shift key (for consecutive tasks) or Control key (for nonconsecutive tasks) on the keyboard while highlighting all the desired tasks. Then click the Properties button and check the Milestone Task box. Access the report of the selected milestone tasks by clicking Milestone View on the left navigation menu of the Plan tab.

Resource Hours

The Resource Hours category on the left navigation menu allows project leaders to quickly enter assigned hours to team members without associating those hours with specific tasks in the project plan. Click the blue Date Range link at the top of the screen to display the desired date period on the screen. Team members with either the roles of Project Manager or Project Analyst may enter *assigned* hours for any team member. All team members can enter their *actual* hours in the separate column on the screen. Both assigned and actual hours are accumulated with other project hours and tracked in the Resources tab (see the Project Manager Resources Tab section of this guide). To view or edit the hours detail for a specific time period, highlight a cell and then click the Details button at the bottom of the screen. Both daily assigned and actual hours can be entered in the Details pop-up screen.

Budget View

The Budget View category on the left navigation menu allows project leaders to quickly enter budgeted and actual expenses and revenue associated with the project. To add an expense or revenue category to the budget, click the Add Item button at the bottom of the screen. The time frequency for the budget view can be monthly, quarterly, yearly, or total only. To change the time frequency, click the blue View Budget Data link at the top of the screen. The project budget can also be linked at the task level in the project plan. To link the budget, you must display expense and/or revenue columns by clicking the Custom View

button at the bottom of the screen in the project plan and then clicking the Select Columns button to check the desired budget columns.

Project Notes

To view a compilation of all notes entered in the Notes column of your project plan, click the Project Notes category from the left navigation menu of the Plan tab. Any notes you have entered for specific tasks will show in one continuous report. The report may be filtered for desired criteria by clicking the Custom View button at the bottom of the screen. For example, a user may want to view a report of only the notes that have been added to tasks assigned to a certain team member, or notes added to tasks with a certain complete-date range.

Log Events

To view a compilation of all events entered in the Log Events column of your project plan, click the Log Events category from the left navigation menu of the Plan tab. Any events you have entered for specific tasks will show in one continuous report. The report may be filtered for desired criteria by clicking the Custom View button at the bottom of the screen. For example, a user may want to view a report of only the events that have been added to tasks assigned to a certain team member, or events added to tasks with a certain complete-date range.

Project Properties

Project team members who have write access to the project can modify any of the Project Properties screens at any time.

Customize Template

Team members with the role of Project Manager or Project Analyst (see definitions in the Team Tab section of this guide) may change the project-template features for the project at any time. To do so, click Project Properties on the left navigation menu and then click Customize Template. The project's current template settings are displayed on the screen. You may edit your project's name by changing the underlined text. Check or uncheck the boxes next to the names of any modules (or elements within modules) you would like to display or hide. If you uncheck an area, any work that you already performed in that area is only hidden, rather than deleted. After customizing the template, click the Update Plan button at the bottom of the screen to generate a new project template.

Select Content Support

Team members with the role of Project Manager or Project Analyst (see definitions in the Team Tab section of this guide) may change the departmental area that was selected during the project setup at any time. This feature is useful when the user wishes to combine performance measures, analyses, and/or ideas offered by PL for one departmental area with different PL measures, analyses, and/or ideas from a different area. First select the desired PL items from the desired modules in the Steps tab for the default departmental area. Then go to the Plan tab, click Project Properties on the left navigation menu, and click Select Content Support. Change the department by checking the box next to the new desired area. Then return to the desired modules in the Steps tab and note that the available PL items on selection screens have changed to correspond with the new selected area. Add the desired PL items from the new area to your existing items from the previously selected area.

E-mail Notification Preferences

Team members with the role of Project Manager or Project Analyst (see definitions in the Team Tab section of this guide) may change the global email notification preferences for this project at any time. To do so, click Project Properties on the left navigation menu and then click E-mail Notification Preferences.

The program can automatically send emails when any one of the following actions is performed within the project:

- A task is assigned, removed, or completed
- An issue is assigned, removed, or completed
- A meeting agenda item is assigned, removed, or completed
- A team member is added to or removed from the project team
- A meeting is added to or removed from the project

All email notification preferences are disabled as the default setting when you start a new project. Check the desired boxes on the screen to enable the feature of automatically sending emails to individual team members, a team member's direct supervisor, and/or the project manager of this project. The program cannot send emails to a team member's supervisor until the relationship between employee and supervisor has been set up in the team member's user account, which can only be set up by your onsite PL administrator or your PL client manager.

Email notification preferences can be changed at any time during the project by returning to this screen and checking or unchecking the boxes. In addition to this feature of automatically generated emails, another feature of this program allows the user to generate emails manually—on demand—for tasks in the project plan in the Plan tab, issues in the Issues tab, meeting agendas and minutes in the Meetings tab, and project updates on the Project Status screen in the Status tab. See each of those areas in this guide for instructions on generating emails manually.

Issues Tab

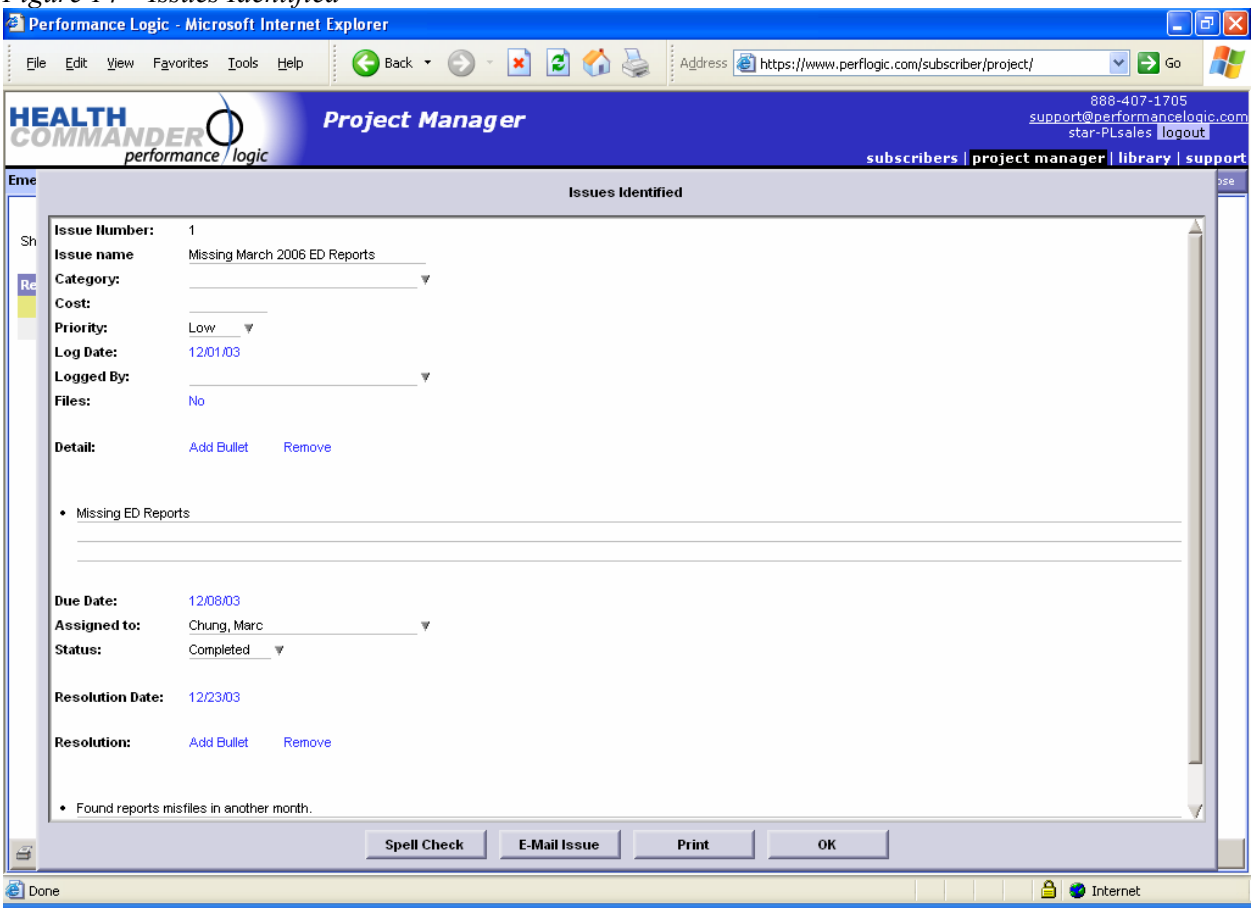
The Issues tab is a place to track issues that are encountered during the project. Click the Issues tab at the top of the content screen to view the Project Issues screen. To open an existing issue, click the issue's blue name link to open the Issues Identified pop-up screen (see *Figure 14*). To create a new issue, click the New Issue button at the bottom of the screen. To import issues from another project, click the Import Issues button and then select the file from your hard drive. Only team members with the role of Project Manager or Project Analyst (see definitions in the Team Tab section of this guide) may add or import issues to the project.

On the Issues Identified pop-up screen, the upper portion of the Issues Identified screen focuses on details about defining the issue. Rename the default issue name with a detailed name and then select or enter all the appropriate descriptive information, including issue category, cost, priority level, log date, and the name of the person who logged the issue. Click the blue date links to change dates. Click the pull-down lists after each field to select the desired value. The Category field will only appear on the pop-up screen if that feature has been added to all issues using the Custom View button on the Project Issues screen (explained below). The Category field allows the user to group issues into user-defined categories for ease of sorting them for reports. Similarly, the Cost topic will only appear on the pop-up screen if that feature has been added to all issues using the Custom View button on the Project Issues screen. To add text detailing the issue, click the blue Add Bullet link under the Detail section. To remove a bullet point, highlight it and click the Remove link in blue text.

Users can create issue categories that apply either to just this project (local) or to a folder so that the categories can be used in other projects within the folder. To add new categories, select Add New Issue Category from the pull-down list in the Category section. Check the box next to the desired location for the category (this project or a selected folder). To edit or remove local categories, select Edit Issue

Categories from the pull-down list. To edit or remove folder-level categories, open the folder that contains the categories and click the Issues tab. Then click the Edit Categories button at the bottom of the screen.

Figure 14 – Issues Identified



The Files field shows the user whether specific files have been uploaded and attached to the issue. Click the blue link in the Files field to view uploaded files on the Attachments pop-up screen that have been associated with the issue. Click the Attach Files button in the pop-up screen to open the Add Files pop-up screen and attach files to the issue. In the Add Files window, a list of files is displayed that have been uploaded from your hard drive to the project's Document Repository, located in the Outputs tab (explained in the Outputs Tab section of the user guide). Highlight the desired file(s) and click OK to attach. To add new files that are not yet in the Document Repository, click the Add New File button and select the files from your hard drive to upload. When any files are attached to the meeting, the blue Files link changes from *No* to *Yes*.

The lower portion of the Issues Identified screen focuses on details about resolving the issue. Select a due date for the issue's resolution. In the Assigned To field, you may choose an existing team member from the list or assign the issue to someone else by selecting Add New Member at the bottom of the list. You can assign the issue to multiple people by clicking the Add Multiple option. In the Status field, an issue will retain the status of *In Progress* until a user manually changes the status to *Completed*. The status can also be changed to *Deferred* if the issue will not be resolved at present time. Select a resolution date and add a resolution description using the blue Add Bullet link under the Resolution section.

When the issue details are complete, you may email the issue to project members by clicking the E-Mail Issue button at the bottom of the screen and then clicking the Send button. To email the agenda to selected project members, click the E-Mail Issue button and then select the team members who will receive the email by highlighting their names from the left side of the screen and then clicking the Add button to transfer them to the right side. Any files that have been attached to the issue can be sent with the email by checking the Include Attachments box. The email that each person receives will also contain an attached PDF file of the issue.

On the Project Issues screen, the user may perform several actions. Click any column heading to sort the rows by that column. To delete an issue, highlight it in the list and click the Remove Issue button at the bottom of the screen. To edit, add, or remove issue categories, click the Edit Categories button at the bottom of the screen. Issues may be exported to other *HealthCommander* projects by clicking the Export Issues button at the bottom of the screen and then clicking the blue Export to HealthCommander (DAT) Format link. The user can highlight the issues to export as a file to your hard drive before clicking the button. If no issues are highlighted, all issues will be exported. Then open another project and go to the Issues tab. Click the Import Issues button at the bottom of the screen and find the file that was previously exported to your hard drive. The issue(s) will import and appear in the list on the screen. Issues may also be exported to the user's hard drive as a CSV format file in order to manipulate the data in a spreadsheet. To export this file type, click the blue Export to Comma Separated Value (CSV) Format link in the Export Issues button.

Click the Custom View button at the bottom of the screen to filter the issues that will be displayed on this screen, using the various columns as filtering criteria. Choose the desired criteria on the Custom View pop-up screen and then click OK. Note that before using Custom View filtering criteria, a message at the top left corner of the screen reads, "Showing all issues." After clicking OK to activate filtering criteria, the message now reads, "Showing issues with *x*," where *x* is the filtering criteria. Click the pull-down list at the top of the screen to choose the desired criteria. The screen will then display only those issues whose features matched your filtering criteria.

Within the Custom View pop-up screen, the Select Columns button allows the user to display, hide, or reorder the issues columns according to the user's preferences. Click the Select Columns button and add columns by checking the boxes next to the column names listed on the screen. If desired, add the Category row by checking the box next to its name so that the Category feature will appear in each issue on the Issues Identified pop-up screen (see *Figure 14*). To hide any unwanted columns on the Project Issues screen, uncheck the box next to the column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button.

Issues reports may be created to view multiple issues in one continuous report. Select the desired issues by checking the appropriate boxes in the Reports column on the Project Issues screen. You may select all issues from the list by clicking the Select All button at the bottom of the screen. Then click the Issues Reports button at the bottom of the screen to view a report of all selected issues and their details. On the Issues Reports screen, the report may be printed by clicking the Print icon at the bottom of the screen. The report may also be exported to your hard drive as a Rich Text Format (RTF) or PDF file by clicking the Export button at the bottom of the report screen; this text format will preserve the look of the report on the screen when the text file is opened in a word-processing application. To return to the list of issues on the Project Issues screen, click the Issue List button at the bottom of the report screen.

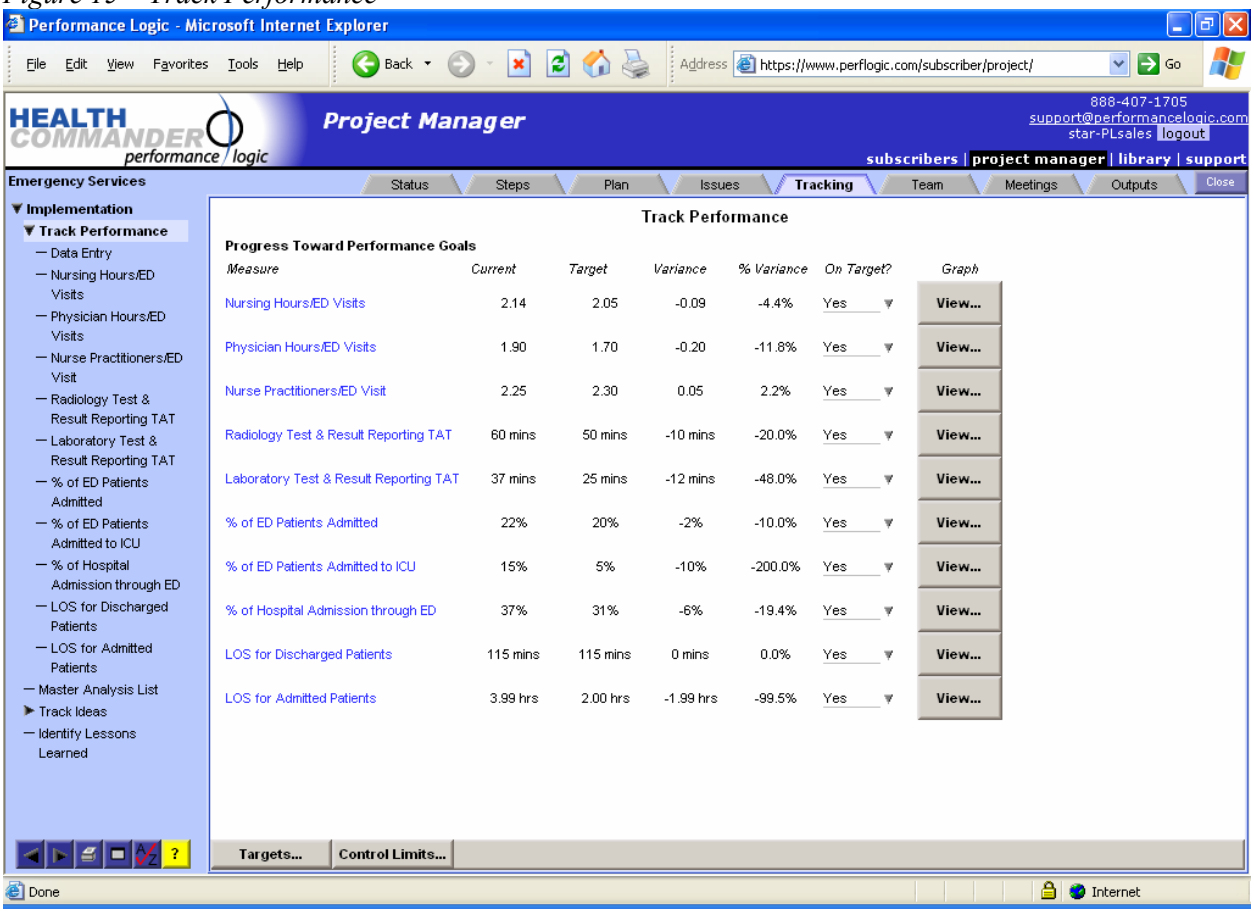
Tracking Tab

The Tracking tab allows the user quick access to project data that require regular updates. Click the Tracking tab at the top of the content screen to view and update both performance measures (created in the Performance Measures module of the Steps tab) and ideas in implementation (created in the Idea Development module of the Steps tab).

Track Performance

Click the Track Performance category on the left navigation menu of the Tracking tab to display the Track Performance screen (see *Figure 15*). The Track Performance screen shows a snapshot of progress towards performance goals for each performance measure in your project. The columns on this screen include the most current data value and target value for each measure, as well as percent change between the current and target values. Clicking the name of any measure in blue text on the screen will display a pop-up screen with the measure's definition, category, and frequency of data collection. The On Target column allows the user to arbitrarily decide whether each measure is currently on target or not by choosing an option from the pull-down list. In the final column on the screen, the user can view each measure's graph by clicking the View button. To view target graphs for all measures at once, click the Targets button at the bottom of the screen. To view control limit graphs for all measures at once, click the Control Limits button at the bottom of the screen.

Figure 15 – Track Performance



Data Entry – The Data Entry category is listed below the Track Performance category on the left navigation menu. Click this category to quickly enter the current value for all performance measures on one screen, rather than having to open each measure on the left navigation menu one at a time. Use the left, right, and down arrows in the Date column to select different dates for which you want to enter measure values. Notes can be entered with each data values on the text lines and the user can show the notes on the measure's graph by clicking the Show Graph Notes checkbox. To view target graphs for all measures at once, click the Targets button at the bottom of the screen. To view control limit graphs for all measures at once, click the Control Limits button at the bottom of the screen.

Beneath the Data Entry category on the left navigation menu lies a list of all performance measures that were created in the Performance Measures module of the Steps tab. To view the data values and notes for a specific measure, click the measure's name on the left navigation menu. The screen displayed here is the same as the Enter Data screen found in each measure in the Performance Measures module of the Steps tab; for more information on using this screen in the Tracking tab, refer to the instructions for the Enter Data screen found under the Steps Tab: Performance Measures section of this guide.

Track Ideas

Click the Track Ideas category on the left navigation menu of the Tracking tab to display the Track Ideas screen. This screen lists each idea that was selected for implementation in the Idea Development module of the Steps tab, showing each idea's current development step, as well as savings and revenue figures. Click the name of any idea in blue text on the screen to open the Idea Details screen. The topics on the left navigation menu under Track Ideas provide several critical views of your ideas in implementation.

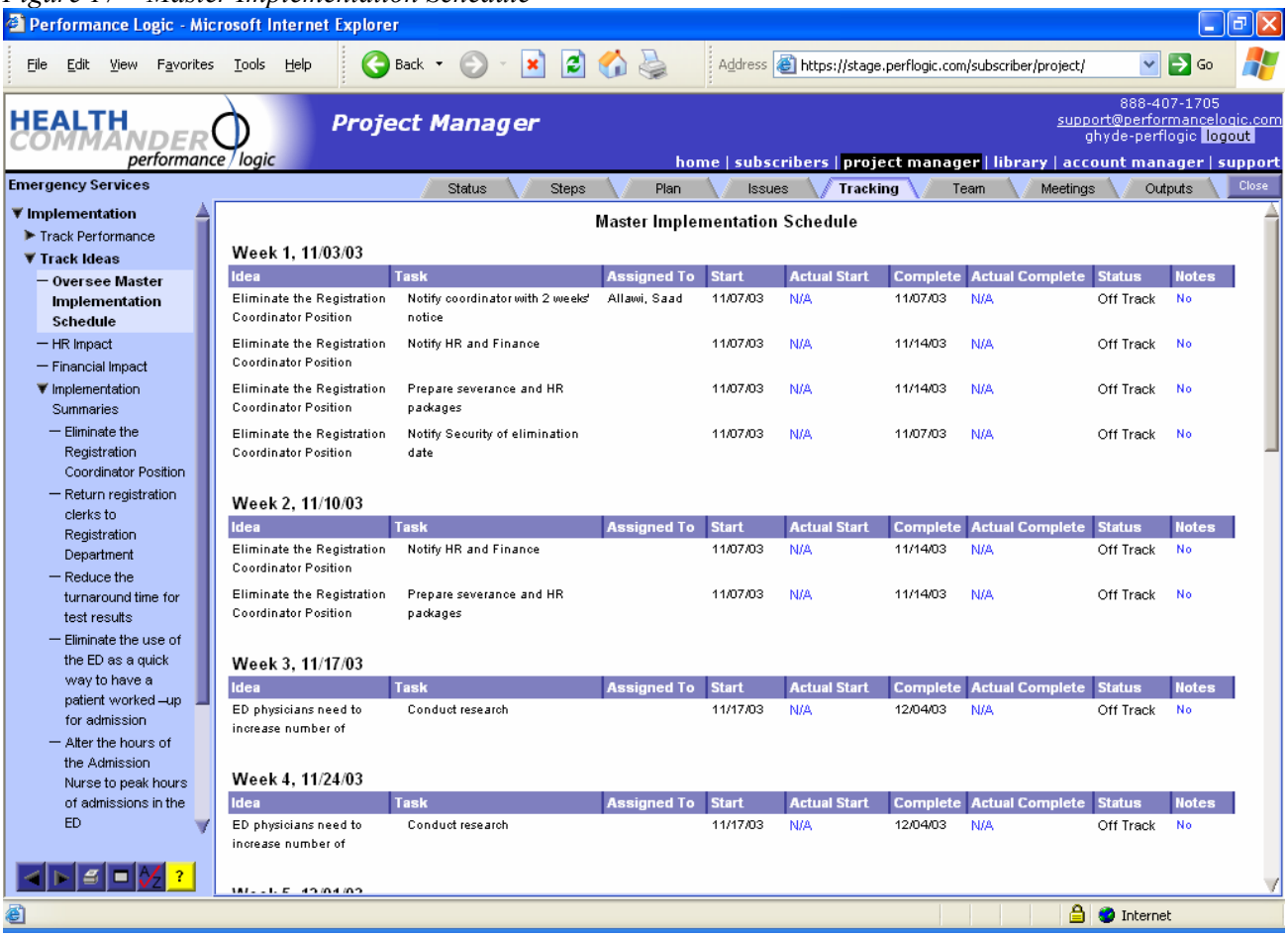
Oversee Master Implementation Schedule – Click the Oversee Master Implementation Schedule category on the left navigation menu to view the Master Implementation Schedule screen. This screen provides the user with a convenient weekly view of all combined implementation tasks for all implementation plans from all ideas (see *Figure 17*). The user can monitor this master schedule for adherence to task deadlines. The user can update Actual Start and Actual Complete dates on this screen by clicking the blue date links. If the status of a task is *Off Track*, entering a date in the Actual Complete column will change the status to *On Track*.

HR Impact – The HR Impact category on the left navigation menu contains a report of Human Resources-related information that was completed in the Idea Development module of the Steps tab. The first screen of the report, the Job Impact Summary screen, contains a summary of the information from each Job Impact tab inside specific ideas completed in Idea Development in the Steps tab. Click the Next Page button at the bottom of the screen to advance to the report's next screen. The next screen(s) will show specific job description pages from each completed Job Impact tab completed in the Steps tab. Clicking the Print Page button at the bottom of the screen will print only the current screen in the report, whereas clicking the Print icon at the bottom left corner of the left navigation menu will print all pages in the report.

Financial Impact – The Finance Impact category on the left navigation menu contains a report of finance-related information that was completed in the Idea Development module of the Steps tab. The first screen for this report, the Overall Financial Impact screen, contains a summary of the information from each Financial Impact tab inside specific ideas completed in Idea Development in the Steps tab. Click the Next Page button at the bottom of the screen to advance to the report's next screen. The next screen(s) will show specific financial description pages from each completed Financial Impact tab completed in the Steps tab. Clicking the Print Page button at the bottom of the screen will print only the

current screen in the report, whereas clicking the Print icon at the bottom left corner of the left navigation menu will print all pages in the report.

Figure 17 – Master Implementation Schedule



Implementation Summaries – The Implementation Summaries category on the left navigation menu contains a detailed report for each idea that was selected for implementation in the Idea Development module of the Steps tab. Each implementation summary contains an idea overview, an implementation plan, a job impact plan, a financial impact plan, and a feasibility plan. Choose an idea from the left navigation menu to open its implementation summary. Click the Next Page button at the bottom of the screen to advance to the report's next screen. Clicking the Print Page button at the bottom of the screen will print only the current screen in the report, whereas clicking the Print icon at the bottom left corner of the left navigation menu will print all pages in the report.

Identify Lessons Learned

Every project has a myriad of lessons learned, both positive and negative. The Identify Lessons Learned category on the left navigation menu allows the user to record all noteworthy lessons. To add a bullet point on the screen, click the Add Lesson button at the bottom of the screen. Enter the lesson on the lines provided. Add additional bullets as desired. To remove a lesson, highlight the bullet and then click the Remove Lesson button at the bottom of the screen.

Team Tab

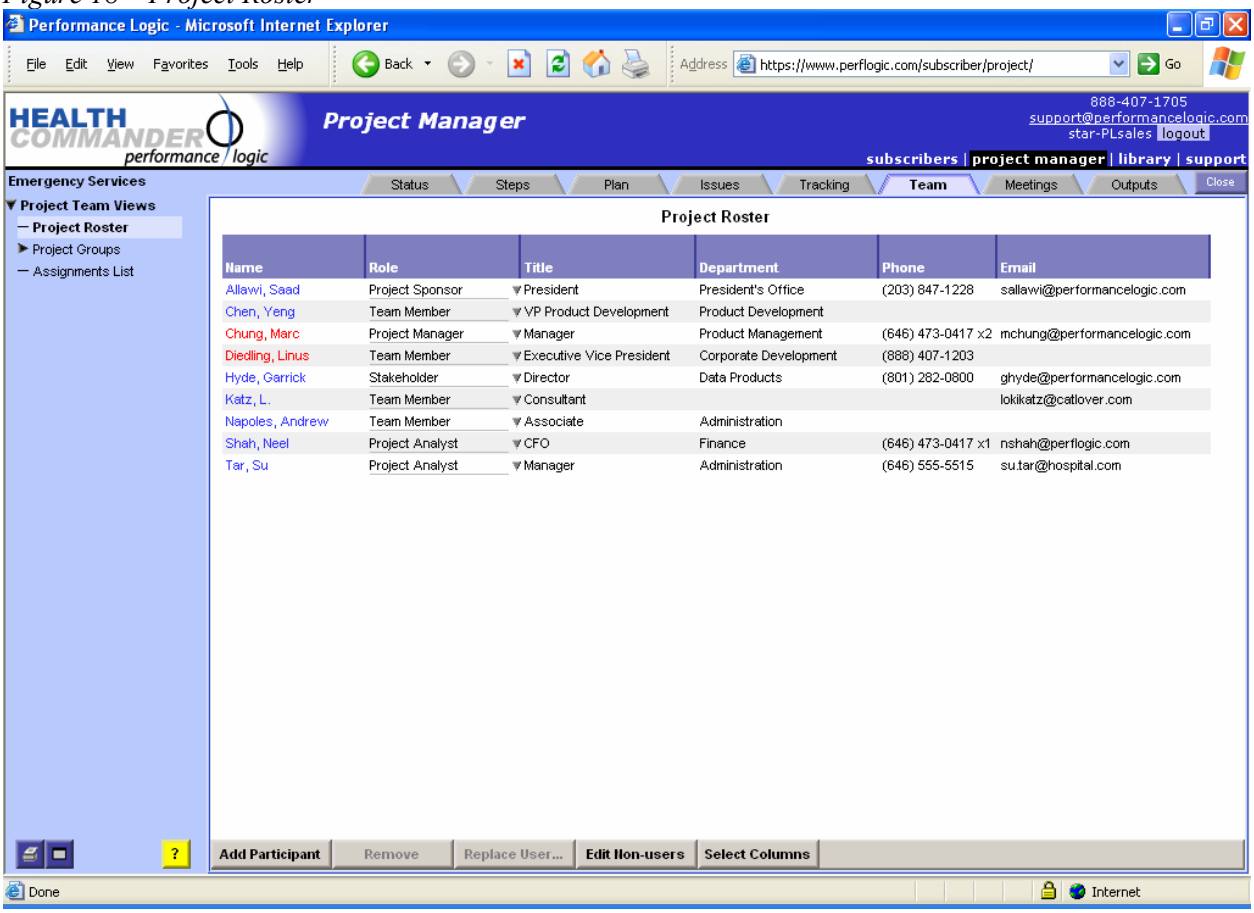
The Team tab allows the user to add team members to the project, group team members into subgroups, and view project assignments.

Project Roster

Click the Team tab at the top of the content screen to view the Project Roster screen (see *Figure 18*) by default. The Project Roster screen shows a list of every person assigned to this project. This screen allows the user to add or remove team members from the project, and to assign each member a role that will allow certain users to have read-only access—while others have read and write access—within the project. The user may click many of the blue column headings on the Project Roster screen to sort all rows by that column.

If a team member's name appears in red on the Project Roster screen (see *Figure 18*), the red color means that the user's account has been disabled, probably because the user has left your organization. Disabling an account prevents the user from accessing Performance Logic but preserves the user's preexisting project assignments. Disabled users cannot be assigned new project work once their account has been disabled. Only your onsite administrator can disable accounts.

Figure 18 – Project Roster



Add Participant Button – To add team members, click the Add Participant button at the bottom of the screen to open the Select From All Users pop-up screen. On this screen, all users in your organization

who have access to Performance Logic are grouped by last name and by department. Choose the desired grouping option by clicking the pull-down list next to the Group By row. Click the blue plus sign (+) next to a grouping category to view the users in that category. To view all users, click the blue Expand All link at the top of the screen. Highlight the name of the person you want to add to your team and click OK. The user now appears on the Project Roster screen. Note that each user's title, department, phone number, etc., appear with the user's name; if any information is missing for a user, that person must add it to their user profile when they log into the *HealthCommander* program, and then all project rosters where that person is a team member will automatically be updated with the additional information. To add multiple team members at the same time, hold down the Shift key (for consecutive names) or the Control key (for nonconsecutive names) before highlighting users' names. There is no limit to the number of team members you may add to your project.

If you wish to add team members to your project who do not have login access to Performance Logic (i.e., their names do not appear in the Select From All Users pop-up screen), you may add them manually. Click the Add Participant button at the bottom of the screen to open the Select From All Users pop-up screen. Then click the Add Non-user button at the bottom of the pop-up screen. Enter the person's name and other information on the rows provided and then click OK. The person now appears on the Project Roster screen with the letters "nu" after his/her name. These letters indicate that the person has been added manually as a non-user (someone who does not have PL access). While non-users cannot access the *HealthCommander* program, they can receive all the automatic email notifications that regular users receive as long as their email address appears next to their name in the Email column on the Project Roster screen. (For instructions on setting up email notification preferences, see the Project Properties category under the Plan Tab section of this guide.)

If you wish to assign a job-title resource to your project before a specific person has been assigned to the project, you may add resources (any job title like a programmer or nurse manager) to your team by clicking the Add Participant button and then the Add Resource button. Resources must first be set up by your site administrator before you can add them to your project team; thus, the Add Resource button will not display on the pop-up screen until at least one resource has been created by the site administrator.

Remove Participant Button – To remove a team member from the project roster, highlight the person's name on the Project Roster screen and click the Remove Participant button at the bottom of the screen.

Replace User Button – You can globally replace a team member's or a resource's assignments with a different team member or resource by highlighting the member/resource from the team roster and clicking the Replace User button at the bottom of the screen. Highlight the replacement member/resource from the pop-up list and click OK. This global replacement applies to all assignments within this project, but not to any other projects.

Role Button – Each team member listed on the Project Roster screen has a role in the Role column. Roles determine whether members have read-only access—or read and write access—to the project (see the Role Column section below for an explanation of this functionality). Roles also define the responsibilities of each team member on the project. Click the Role Descriptions button at the bottom of the screen to view detailed sample role descriptions for each of the five team roles.

Edit Non-users Button – If you have added non-users to your project team, you may edit their personal information by clicking the Edit Non-users button at the bottom of the screen. (Non-users are first added by clicking the Add Participant button and then clicking the Add Non-user button on the pop-up screen.)

Select Columns Button – The Select Columns button at the bottom of the screen allows the user to display, hide, or reorder the project roster columns according to the user's preferences. Three additional columns can be added to your project roster in addition to the default columns that appear at the beginning of your project. Additional columns include showing the total assigned and actual hours assigned to each team member; the Assigned Hours and Actual Hours fields show the sum of all hours assigned to each team member from all tasks in the project plan, located in the Plan tab. Add columns by checking the boxes next to the column names listed on the screen. To hide any unwanted columns in the project roster, uncheck the box next to the column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button.

Role Column – Each team member listed on the Project Roster screen has a role in the Role column. Roles are assigned project by project to determine the type of access a team member has within that project. The default role is Team Member, but other roles may be chosen from the pull-down list in this column. The five choices are: Project Manager, Project Analyst, Team Member, Project Sponsor, and Stakeholder. Each role is defined below:

1. **Project Manager** – A Project Manager has full read/write access to an entire project. Only one person may be assigned the Project Manager role.

2. **Project Analyst** – A Project Analyst has full read/write access to an entire project, just like the Project Manager. A project may have unlimited Project Analysts.

3. **Team Member, Project Sponsor,** or **Stakeholder –** These team roles all have the same limited rights. They may view any project where they have been assigned as a team member, but they may only write on tasks to which they have been assigned within the project, using the Steps tab. They may only modify the Actual Start, Actual Complete, and Status fields for tasks assigned to them in a project's plan (Plan tab).

Project Groups

Click the Project Groups category on the left navigation menu of the Team tab to display the Project Groups screen. This feature allows the formation of team groups within your project so that you can quickly assign tasks, issues, emails, etc., to all people within a group. Click the Add Group button at the bottom of the screen to add a new group onto the screen, and then click the group's default name in blue text to rename it. Open the group from the left navigation menu to add members to it. Within the group, click the Add Member button at the bottom of the screen to access a list of all team members from your project roster. Highlight the members to be added to this group and click OK. You may create as many groups as you desire. Once these groups are created, they will appear at the beginning of all assignment pull-down lists and email notification windows so you can select everyone in a group using just the group's name, without having to select each member individually.

Assignments List

The Assignments List category on the left navigation menu allows the user to view all plan tasks, issues assignments, meeting assignments, and idea ownership by team member in one report. You may click any of the blue column headings on the screen to sort all rows by that column. The task/assignment topics in the report are listed as links; clicking a blue link will take the user directly to the appropriate screen in the program where the assignment originated. See the Project Manager Resources Tab section at the end of this guide for instructions on generating a user's report of all assignments across all projects.

This report can be filtered by column criteria using the Custom View button at the bottom of the screen. The Custom View button allows the user to filter the assignments that are displayed on this screen, using

the various columns as filtering criteria. Choose the desired criteria on the Custom View pop-up screen and then click OK to filter your report by those criteria. For example, to view only the assignments that have been assigned to a particular team member, click the Team Member field pull-down list on the pop-up screen and choose the desired team member's name. Then click OK to see only those tasks that have been assigned to that person. Note that before using Custom View filtering criteria, a message at the top left corner of the report reads, "Showing all tasks." After clicking OK to activate filtering criteria, the message now reads, "Showing filtered tasks. Click 'Custom View' to view or change filter settings."

The program will remember the last Custom View settings created by each team member. To clear these settings, click the Clear Filter button on the Custom View pop-up screen. To save settings for future retrieval, choose the desired settings and then click the Save/Load button to name and save the settings view. Enter a name for the view on the line and check the box to save the current settings. Saved views can be loaded by clicking the Save/Load button and highlighting the desired name from the list. Then check the box to load the filter settings and click OK. The loaded filter settings will appear on the Custom View pop-up screen. Click OK again to filter the report by the loaded settings.

Within the Custom View pop-up screen, the Select Columns button allows the user to display, hide, or reorder the report columns according to the user's preferences. Three hours columns, showing the hours and actual hours assigned to each task from the project plan, can be added to your report in addition to the default columns. Click the Select Columns button and add columns by checking the boxes next to the column names listed on the screen. To hide any unwanted columns in the report, uncheck the box next to the column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button.

The Assignments List report can either be printed using the icon at the bottom left corner of the screen or exported to your hard drive as a Rich Text Format (RTF) or PDF file. The RTF text format will preserve the look of the report on the screen when the text file is opened in a word-processing application.

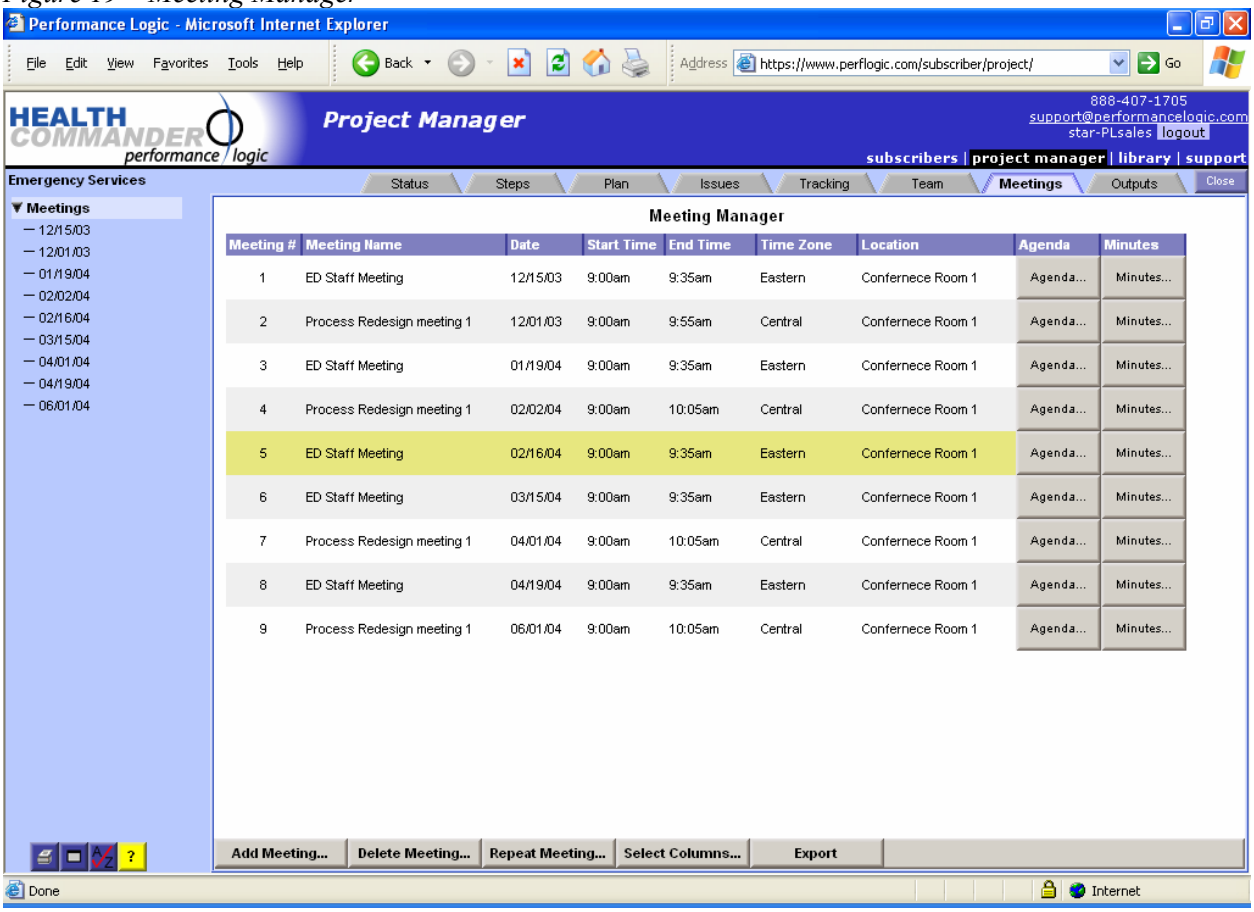
Meetings Tab

The Meetings tab houses all meeting agendas and minutes for the meetings that are held during the project. Click the Meetings tab at the top of the screen to view the Meeting Manager screen (see *Figure 19*). On this screen, the user can add, delete, or repeat meetings. The user may click many of the blue column headings on the Meeting Manager screen to sort all meetings by that column. Once meetings are added, they can be accessed by clicking the meeting's date on the left navigation menu. The list of all meetings on the Meeting Manager screen can be accessed at any time by clicking the Meetings category on the left navigation menu.

Add Meeting Button – To add a new meeting, access the Meeting Manager screen by clicking the Meetings category on the left navigation menu. Click the Add Meeting button at the bottom of the screen. Choose the meeting's date, start and end times, name, and location on the pop-up screen. If you want everyone in the project team roster (listed in the Team tab) to receive an immediate email with the information that this meeting has been scheduled, check the Send E-mail notification box and then click OK to send the email and to save the new meeting. If you want to customize the list of recipients who will receive the email notification, check the Send E-mail notification box and then click the blue Customize link to select the team members who will receive the email. Meeting notification emails include an attachment for *Microsoft Outlook* calendar information if your PL client manager has enabled this feature for your site. For organizations using *Outlook*, this attachment allows meeting information to download

directly into users' *Outlook* calendars. Once a meeting has been created, it will appear on the Meeting Manager screen.

Figure 19 – Meeting Manager



Delete Meeting Button – To delete a meeting, highlight the desired meeting on the Meeting Manager screen and then click the Delete Meeting button at the bottom of the screen. The pop-up screen confirming the meeting's deletion allows the user to send email notification, if desired, to all or selected team members, alerting them to the meeting's removal. See the previous paragraph for the functionality of the Send e-mail notification box.

Repeat Meeting Button – To repeat a meeting for a specified frequency throughout the project, highlight the desired meeting and then click the Repeat Meeting button at the bottom of the screen. The meeting can be repeated on a daily, weekly, monthly, or annual frequency, up to a chosen end date. If you choose to repeat the meeting multiple times, the email notification feature will only alert the team members to the first meeting that was created—without additional emails for the repeated meetings. Once a meeting has been repeated, the new meeting(s) will appear on the Meeting Manager screen with all meeting agenda and minutes information copied from the original meeting, so it is advantageous to detail in the original meeting all information that needs to be repeated in future meetings (like ongoing agenda items) before clicking the Repeat Meeting button. The information in a repeated meeting may be edited as desired.

Select Columns Button – The Select Columns button at the bottom of the screen allows the user to display, hide, or reorder the columns on the Meeting Manager screen according to the user's preferences.

Add columns by checking the boxes next to the column names listed on the screen. To hide any unwanted columns, uncheck the box next to the column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button.

Export Button – The Export button at the bottom of the screen allows the user to export the minutes for selected meetings to a Rich Text Format (RTF) or PDF format file. The minutes for all selected meetings will appear in one report file. Highlight the desired meetings on the screen and then click the Export button at the bottom of the screen. Choose the desired file type for export.

Meeting Agenda

To access a meeting's agenda, click either the meeting's date from the left navigation menu or the Agenda button next to the meeting shown on the Meeting Manager screen (see *Figure 19*). On the Meeting Agenda screen, select the meeting chair and the person completing the agenda from the pull-down lists at the top of the screen. The meeting date, start time, and location that were selected when the meeting was created can be edited at the top of the screen.

The Files field shows the user whether specific files have been uploaded and attached to the meeting agenda. Click the blue link in the Files field to view uploaded files on the Attachments pop-up screen that have been associated with the meeting. Click the Attach Files button in the pop-up screen to open the Add Files pop-up screen and attach files to the meeting. In the Add Files window, a list of files is displayed that have been uploaded from your hard drive to the project's Document Repository, located in the Outputs tab (explained in the Outputs Tab section of the user guide). Highlight the desired file(s) and click OK to attach. To add new files that are not yet in the Document Repository, click the Add New File button and select the files from your hard drive to upload. When any files are attached to the meeting, the blue Files link changes from *No* to *Yes*.

Add agenda topics by clicking the Add Topic button at the bottom of the screen. Subtopics may be added for any topic by highlighting a topic and clicking the Add Sub-topic button at the bottom of the screen. To nest subtopics below other subtopics, highlight the desired subtopic and click the Add Sub-topic button to insert a subtopic indented below it. Enter the name of each agenda topic on the line provided and then assign the topic to a team member using the pull-down list in the Assigned To column. Enter the length for each topic by highlighting the underlined number in the Length column and typing over it (the default time for each topic is 5 minutes). If the field is not underlined, it is because you have subtopics under the main topic. In this case you have to change the length of the subtopics and then the parent topic's time will change automatically. The end time for your meeting at the top of the screen is simply the start time plus the sum of the length of all agenda topics.

Using the button at the bottom of the screen, remove a topic or subtopic by highlighting the desired line and clicking the Remove Topic button. Topics may be moved up, down, left, or right by highlighting the desired line and then clicking the Move button. In the Move pop-up screen, click one of the directional arrows to move the highlighted topic. Click the Done button when finished to close the pop-up screen complete the move process. When the agenda is complete, you may email it to all project members by clicking the E-Mail Agenda button and then clicking the Send button. To email the agenda to selected project members, click the E-Mail Agenda button and then select the team members who will receive the email by highlighting their names from the left side of the screen and then clicking the Add button to transfer them to the right side. Any files that have been attached to the meeting agenda can be sent with the email by checking the Include Attachments box. The email that each person receives will also contain an attached PDF file of the agenda. To export the agenda to your hard drive as a Rich Text Format (RTF)

or PDF file, click the Export button at the bottom of the screen. Any assignments made in the meeting agenda will appear in the Assignments List category on the left navigation menu in the Team tab.

Meeting Minutes

To access the Meeting Minutes screen for your meeting, click either the Minutes button at the bottom of the Meeting Agenda screen or the Minutes button next to the meeting shown on the Meeting Manager screen (see *Figure 19*). The Meeting Minutes screen carries over all the topics from the meeting agenda (if the feature has been turned on by your Administrator for your organization's site), so that notes and follow-up items can be entered during or after a meeting. If the agenda items do not copy automatically into the Minutes view, you can import them by clicking the Tools button in the Minutes view and then clicking the blue Copy Agenda link. Click the Attendees button at the top of the screen to select the team members who attended the meeting. Click the Absentees button to select team members who were absent from the meeting. Attach any other files to the minutes that were not previously attached to the agenda by clicking the blue link in the Files field. Add desired notes to each meeting topic by clicking the blue link in the Notes column. Add desired follow-up to each meeting topic by clicking the blue link in the Follow-Up column. If desired, modify the team member assigned to each topic using the pull-down list in the Assigned To column. Establish a target due date for each topic by choosing a date from the Target column and then choose a status for each topic's completion using the pull-down list in the Status column.

Using the buttons at the bottom of the screen, add meeting topics and subtopics that were not established in your agenda by clicking the Add Topic or Add Sub-topic button. Remove a topic or subtopic that was not addressed in your meeting by highlighting the desired line and clicking the Remove Topic button.

Several features for meeting minutes are located in the Tools button. The blue Select Columns link allows the user to display, hide, or reorder the meeting minutes columns according to the user's preferences. Add columns by checking the boxes next to the column names listed on the screen. To hide any unwanted columns on the Project Issues screen, uncheck the box next to the column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button.

Also inside the Tools button, copy the agenda items into the Minutes view if desired by clicking the Tools button in and then clicking the blue Copy Agenda link. You may view and print in one report a compilation of all topic notes from the Notes column by clicking the Tools button and then clicking the blue Notes Summary link. When the minutes are complete, you may email them to all project members by clicking the Tools button and then clicking the blue E-Mail Minutes link. To email the agenda to selected project members, select the team members who will receive the email by highlighting their names from the left side of the screen and then clicking the Add button to transfer them to the right side. Any files that have been attached to the meeting meetings can be sent with the email by checking the Include Attachments box. The email that each person receives will also contain an attached PDF file of the minutes. To export the minutes to your hard drive as a Rich Text Format (RTF) or PDF file, click the Tools button at the bottom of the screen and then the blue Export Minutes link.

When the meeting minutes are complete, click OK to close the screen and return to the meeting agenda. Any assignments that appear on the Meeting Minutes screen will appear in the Assignments List on the left navigation menu in the Team tab.

Outputs Tab

The Outputs tab contains three different types of output reports: project reports that the user can customize, phase outputs for each PL module in the Steps tab, and predefined project presentations. The Outputs tab also contains a document repository where files from your hard drive can be uploaded and attached to the project. Click the Outputs tab at the top of the content screen to access this area of the program.

Project Reports

The Project Reports category on the left navigation menu contains a list of reports that focus on specific aspects of the project. The Overall report contains every report feature that is available. To generate the Overall report, check the box next to the report name and then click the Generate Report button at the bottom of the screen. To customize which features will display in the Overall report, check the box next to the report name and then click the Customize button at the bottom of the screen. On the Select Report Elements pop-up screen, choose the desired elements to be included in the report. To expand the menu categories, click the blue plus sign (+) next to a category name. To save your report features, click the Save Report button on the pop-up screen, give the custom report a name, and check either the box to save the settings to only your own preferences (available in any project or folder you can open) or the box to save to a folder so that the custom settings are available to other users who can access the folder. Click OK to generate the report. When the report is generated on the screen, the report can either be printed using the icon at the bottom left corner of the screen or exported to your hard drive as a Rich Text Format (RTF) file, a PDF file, or a compressed image graphic (JPG) file. The RTF text format will preserve the look of the report on the screen when the text file is opened in a word-processing application. To export reports, click the Export button at the bottom of the screen. Click the Back button at the bottom of the screen to return to the main list of reports.

The other project reports (Status, Performance Measures, Analyses, Idea Development, and Implementation) are all subsets of the Overall report that focus on specific aspects of the project. Even though the subset reports are predefined, they can still be customized the same way the Overall report can be. When customized settings are saved with a unique name by clicking the Save Report button, the unique report name will appear below the other report names in the main list of reports. You can save as many unique report names as desired. To edit the elements of a saved report, click its name in blue text and then click the Edit Elements button. To remove a saved report, click its name in blue text and then click the Delete button.

Phase Outputs

The Phase Outputs category on the left navigation menu contains snapshot views of important project components from each of the PL modules available in the Steps tab. These views are automatically updated anytime you modify your project. Click the desired category on the left navigation menu to access the screen for that topic. Phase outputs can either be printed using the icon at the bottom left corner of the screen or exported to your hard drive as a Rich Text Format (RTF) file, a PDF file, or a compressed image graphic (JPG) file. The RTF text format will preserve the look of the report on the screen when the text file is opened in a word-processing application. To export outputs, click the Export button at the bottom of the screen. Graphs from the Performance Measures and Analyses categories can also be exported as a picture without accompanying text fields by clicking the Export Graph Only button.

Presentations

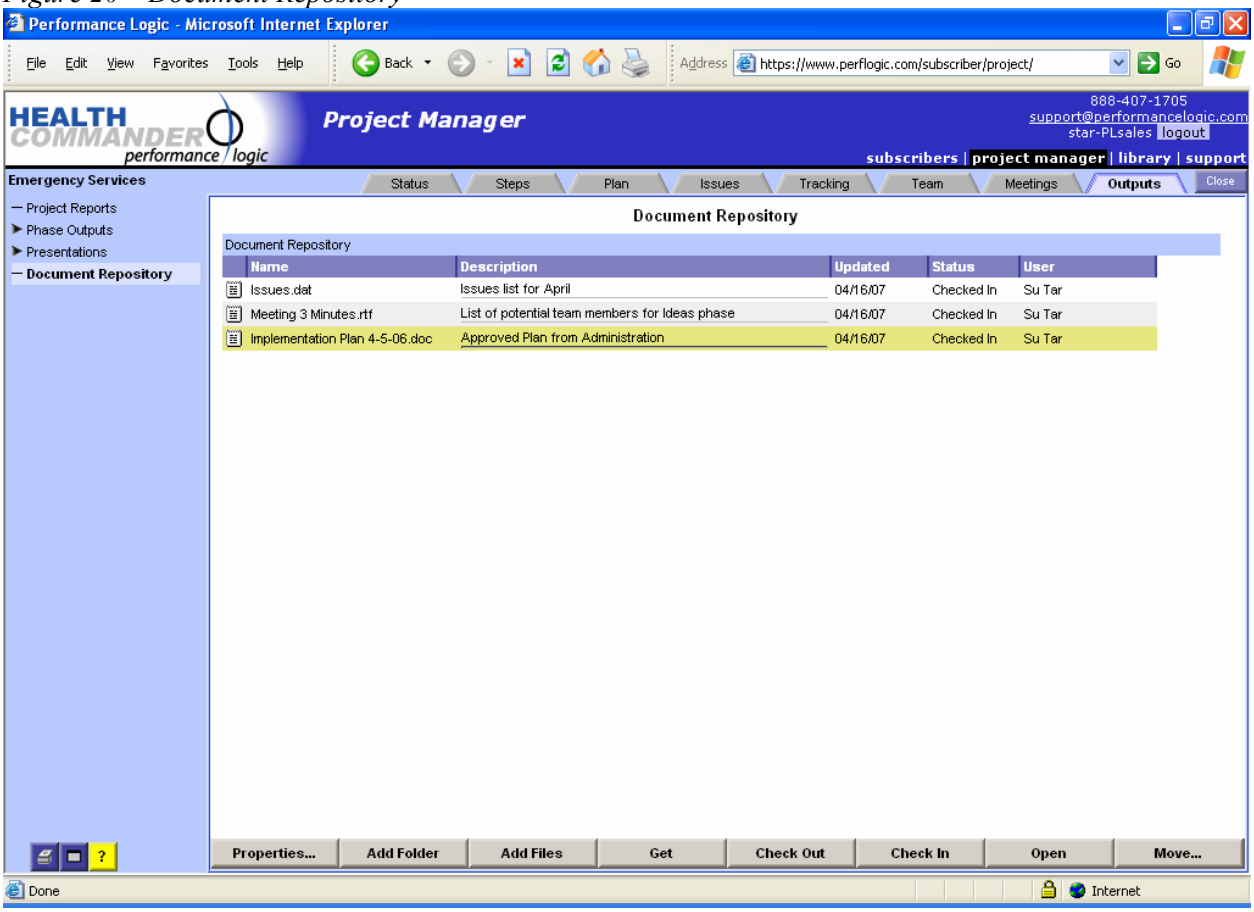
The Presentation category on the left navigation menu contains three reports that are formatted in a page-by-page presentation layout. The reports combine predefined content from various modules of the Steps

tab, as well as the team roster from the Team tab. Click the desired report name on the left navigation menu to view the report. View each page of the presentation by clicking the Previous Page and Next Page buttons at the bottom of the screen. To customize which pages will be displayed in the presentation, click the Customize button at the bottom of the screen. On the pop-up screen, highlighted pages on the right side of the screen and click the Remove button to take them out of the presentation. Reorder pages as desired by highlighting a desired page and clicking the Move Up or Move Down buttons. Click OK to close the customization pop-up screen. Print the entire presentation using the icon at the bottom left corner of the screen or print only the page displayed on the screen by clicking the Print Page button. The presentation can be exported to your hard drive as a Rich Text Format (RTF) or PDF file. The RTF text format will preserve the look of the report on the screen when the text file is opened in a word-processing application. To export presentations, click the Export button at the bottom of the screen.

Document Repository

The Document Repository is a storage area where files from your hard drive can be uploaded and attached to the project (see *Figure 20*). Uploaded files can be viewed and/or modified by selected team members. Once a file has been added to the Document Repository, it can be attached to specific tasks in the project plan by going to the Table View category in the Plan tab and then clicking the link for the appropriate task in the plan's Files column (see the documentation for this feature under the Files Column section of the Plan Tab area of this guide).

Figure 20 – Document Repository



Properties Button – The Properties button at the bottom of the screen has three unique functions. First, users can rename files and folders in the Document Repository by highlighting the desired item on the white content screen, clicking the Properties button, and then clicking the old name in blue text on the pop-up screen to rename the item. Second, users can remove files and folders by highlighting the desired item on the screen, clicking the Properties button, and then clicking the Remove button on the pop-up screen. Third, users can control the read and write access of other team members to each file in the Document Repository. Highlight a file on the screen and click the Properties button to view the read and write access of each team member. Uncheck boxes to restrict read and/or write access for specific team members. A user who has read access to a file but not write access can use the Get button to download a read-only version of the file, but cannot use the Check Out and Check In buttons. In contrast, a user who does not have read or write access cannot access the file at all. A team member who has a project team role of Project Manager or Project Analyst (see definitions in the Team Tab section of this guide) will always have read and write access to all files, and can also change the read and/or write access to a file of any other team members who do not have a Project Manager or Project Analyst team role.

Add Folder Button – Click the Add Folder button at the bottom of the screen to create a folder. Enter a name for the folder on the pop-up screen and click OK. The folder will appear on the screen and also on the left navigation menu. To open a folder, click the folder's name on the left navigation menu. If a folder is already open, you may return to the main Document Repository page by clicking the Document Repository category on the left navigation menu.

Add Files Button – To upload a document to the project from your hard drive, click the Add Files button at the bottom of the screen. Using the Windows pop-up screen, locate the document on your hard drive that you wish to add, highlight it, and then click the Open button. This action will upload your file to the project and make your original file read-only on your hard drive. A file can be uploaded directly to a specific folder, if desired, by first opening the folder on the left navigation menu into which you would like the document to be inserted and then clicking the Add Files button to upload the file to the open folder. Files can also be moved to folders using the Move button. When a file is uploaded, you can add a description of the file by entering text in the Description field on the screen.. The Updated column on the screen indicates the date the file was either uploaded or checked back into the Document Repository. The Status column on the screen indicates whether the document is checked in or checked out (see the following paragraphs for a description of this feature). The User column indicates who has checked the file in or out.

Get Button – To download to your hard drive a read-only version of a file in the Document Repository, highlight the desired file on the screen and click the Get button. The Windows Save As pop-up screen will open. Choose the location on your hard drive where you want to place this file, and then click the Save button. Using the Get button instead of the Check Out button leaves the file checked in on the screen, so you will not have to check the file back in before someone else can check it out. Team members with any team role (see the Team tab section of this guide)

Check Out Button – If team members each wish to modify a project document, they can keep track of the latest or "active" version of the file by using the Check In and Check Out buttons. To check out a file, highlight it and click the Check Out button at the bottom of the screen. A Windows Save As pop-up screen will open. Choose the location on your hard drive where you want to place this file, and then click the Save button. After you check out a file, your name will be listed in the User column on the screen and the status will change to *Checked Out* in the Status column. Once a document has a checked-out status, it cannot be checked out by other team members until it has been checked back in by the person who checked it out. Thus, it is important to check back in a file once it has been updated by the person who checked it out.

Check In Button – If team members each wish to modify a project document, they can keep track of the latest or "active" version of the file by using the Check In and Check Out buttons. To check in a document that you have checked out, highlight the document on the screen and click the Check In button at the bottom of the screen. A Windows pop-up screen will open. Locate the document on your hard drive that you wish to check in, highlight it, and then click the Open button. The file will upload from your hard drive to the project and the fields on the screen will be updated to show that you have checked the file back in on the current date.

Move Button – To move a file into a folder, highlight the file on the screen and click the Move button at the bottom of the screen. On the pop-up screen, highlight the name of the folder on the left side of the screen that you want to move your highlighted file into and then click OK. The highlighted file moves to the specified location. A file can be moved out of a folder back to the main or root level highlighting the desired file on the screen, clicking the Move button, and then clicking the Document Repository title on the left side of the pop-up screen.

To move a folder under another folder, highlight the folder name on either the left navigation menu or the white content screen and click the Move button. On the pop-up screen, highlight the name of the folder on the left side of the screen that you want to move your highlighted folder under and then click OK. The original folder is now a subfolder of the other folder.

This concludes the documentation for all tab contents within your project. Click the Close button at the top right corner of the screen to close the project and return to the Current Projects screen. The remainder of this user guide explains the features of the Project Manager that are located outside individual projects.

Project Manager Reports Tab

The Reports tab provides summary and specific reports for each project and folder. These reports are ideal for quickly viewing project status without going into the projects themselves to view greater detail. The Reports tab cannot be accessed from inside a specific project; it can only be accessed from the Current Projects screen (see *Figure 21*). Click the Reports tab at the top of the screen to view both summary and specific reports.

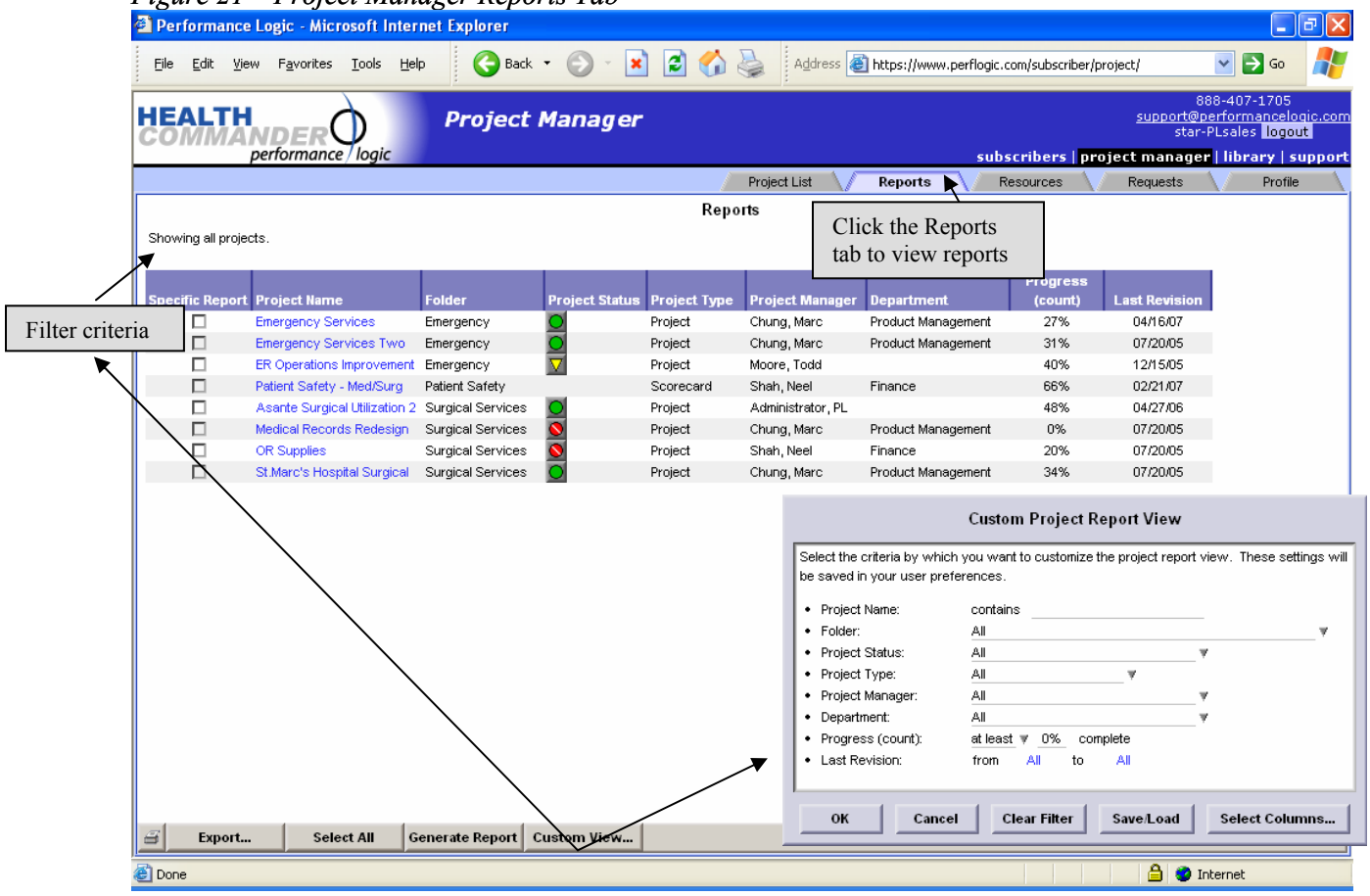
Summary Report

The Reports screen is viewed automatically when the user clicks the Reports tab (see *Figure 21*). This screen provides a summary view of status information for each project and folder.

The user sees each project and folder name that he/she has permission to view in the Project Name column; clicking a name in blue text will open the project or folder. Following the Project Name column, each folder's or project's folder, status, type, manager, manager's department, progress (number of completed tasks), and last revision date are displayed in separate columns. Many other columns can also be displayed on this report screen, including project area, project start date, project completion date, number of open issues, number of performance measures, number of analyses, number of developed ideas, number of ideas for implementation, number of scheduled tasks, number of in-progress tasks, number of completed tasks, number of inactive tasks, number of total budgeted hours, number of total actual hours, hours variance, total budgeted cost, and total actual cost. To display any of these other columns on the summary screen, see the instructions under the Custom View section below.

The Project Status column displays a green, yellow, or red light for each project or folder. This light was chosen inside the project or folder in its most-recent update. The light was chosen arbitrarily to visually show status information at that point in time. A green light indicates the project is on-track; a yellow light indicates caution; a red light indicates trouble. Click a light in the Project Status column to quickly view its update—complete with detailed notes—that was created inside the project or folder.

Figure 21 – Project Manager Reports Tab



The projects and folders listed on the screen can be sorted by any of the columns on the screen by clicking the blue column headings to sort all rows by that column. Columns may be resized by placing the mouse cursor over the border between column headings so that the cursor turns into a double-pointed arrow, holding down the left mouse button, dragging the border to the desired position, and then releasing the mouse button.

Custom View Button – You may customize the display of the report by clicking the Custom View button at the bottom of the screen. The Custom View button allows the user to filter the projects that are displayed on this screen, using the various columns as filtering criteria. Choose the desired criteria on the Custom View pop-up screen and then click OK to filter the report by those criteria. For example, to view only the projects located in a particular folder, click the Folder field pull-down list on the pop-up screen and choose the desired folder's name. Then click OK and the report will show only the projects that are located in the selected folder. Note that before using Custom View filtering criteria, a message at the top

left corner of the report reads, "Showing all projects." After clicking OK to activate filtering criteria, the message now reads, "Showing filtered projects. Click 'Custom View' to view or change filter."

The program will remember the last Custom View settings created by each team member. To clear these settings, click the Clear Filter button on the Custom View pop-up screen. To save settings for future retrieval, choose the desired settings and then click the Save/Load button to name and save the settings view. Enter a name for the view on the line and check the box to save the current settings. Saved views can be loaded by clicking the Save/Load button and highlighting the desired name from the list. Then check the box to load the filter settings and click OK. The loaded filter settings will appear on the Custom View pop-up screen. Click OK again to filter the report by the loaded settings.

Within the Custom View pop-up screen, the Select Columns button allows the user to display, hide, or reorder the report columns according to the user's preferences. As mentioned above, several additional columns can be added to your report in addition to the default columns that appear on the screen. Click the Select Columns button and add columns by checking the boxes next to the column names listed on the screen. To hide any unwanted columns in the report, uncheck the box next to the column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button. Caution: If you uncheck (hide) the Specific Report column, you will not be able to create specific reports until the column is redisplayed.

Print and **Export Buttons** – Once the Reports screen displays all the user's desired columns—sorted by clicking the blue column headings—the user may print the summary information on the Reports screen by clicking the Print icon in the lower left corner. The report can also be exported to the user's hard drive as a Rich Text Format (RTF) file, a PDF file, or a comma-separated value (CSV) file by clicking the Export button at the bottom of the report screen.

Select All and **Generate Reports Buttons** – Both the Select All and Generate Reports buttons at the bottom of the screen are used to generate detailed reports from the Reports screen. Both buttons are explained in the next section about generating specific reports.

Specific Report

To obtain a detailed report on specific projects and folders, check the boxes in the Specific Report column for all desired projects and folders listed on the Reports screen. To quickly select all projects, click the Select All button at the bottom of the screen. Then click the Generate Reports button at the bottom of the screen. A pop-up screen will appear with a list of reports that focus on specific aspects of the project. The Key Milestones and Performance Goals summary reports compare tasks and performance measures across all projects selected for the report. The specific reports allow the user to choose which features will display in a report from a menu of options. The Overall report contains (by default) every report feature that is available. To generate the Overall report, check the box next to the report name and then click OK. To customize which features will display in the Overall report, check the box next to the report name and then click the Customize button. On the Select Report Elements pop-up screen, choose the desired elements to be included in the report. To expand the menu categories, click the blue plus sign (+) next to a category name. You can save your features by clicking the Save Report button on the pop-up screen. Click OK to generate the report. When the report is generated on the screen, the report can either be printed using the icon at the bottom left corner of the screen or exported to your hard drive as a Rich Text Format (RTF) or PDF file. To export reports, click the Export button at the bottom of the screen. To return to the summary-level Reports screen, click the Summary Report button at the bottom of the screen

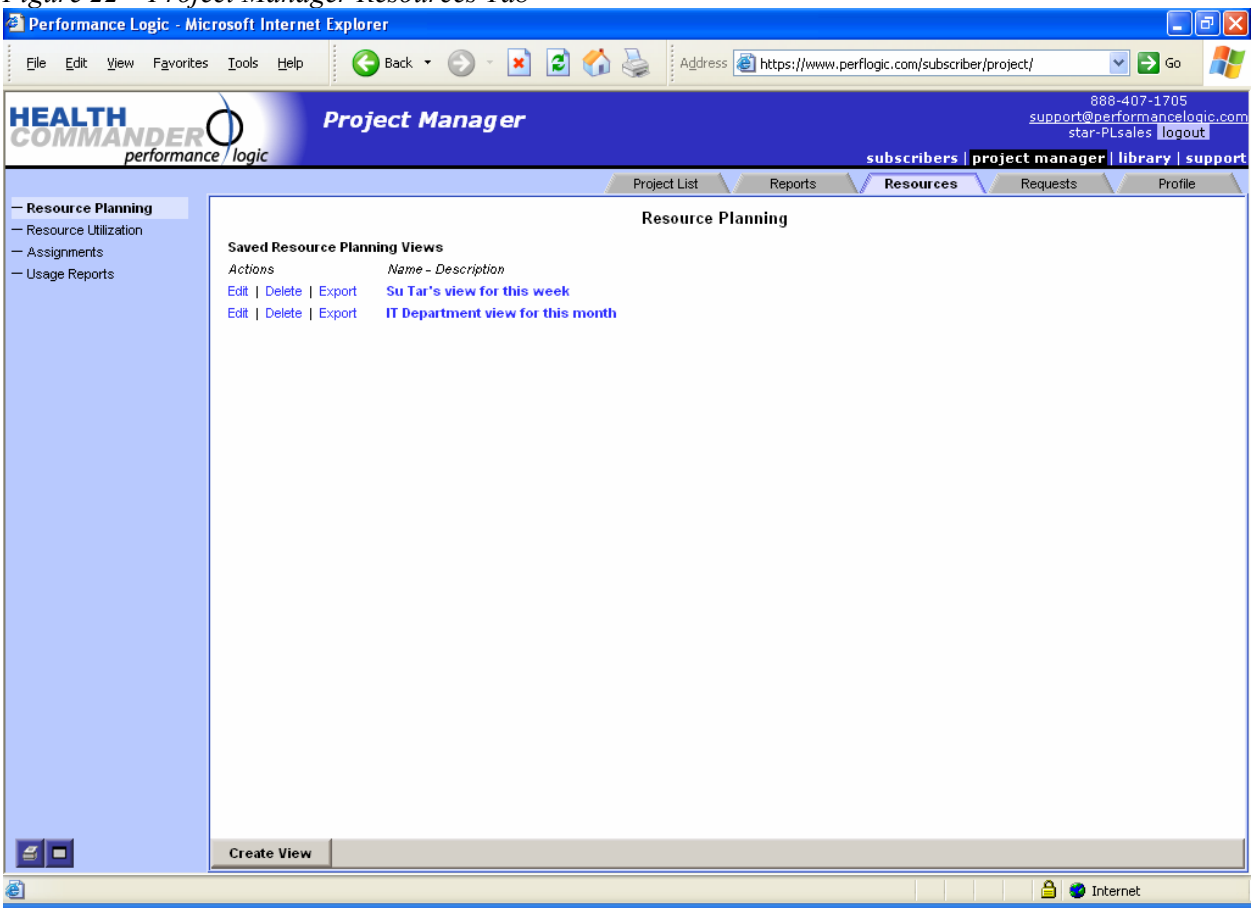
The other specific reports (Status, Performance Measures, Analyses, Idea Development, and Implementation) are all subsets of the Overall report that focus on specific aspects of the project. Even though the reports are predefined, they can still be customized the same way the Overall report can be. When customized settings are saved with a unique name by clicking the Save Report button, the unique report name will appear below the other report names in the list of specific reports. You can save as many unique report names as desired.

If you choose to generate a specific report for multiple projects and folders, the report will show all details for the first project, followed by all details for the second project listed immediately after the first, etc. This format of combining multiple projects and folders into one long report allows for easier viewing and printing.

Project Manager Resources Tab

The Resources tab contains views of users' assignments with their assigned, actual, and scheduled hours from all projects in the Project Manager. This area is helpful for resource planning as well as graphing resource utilization for selected users, projects, or departments. The Resources tab cannot be accessed from inside a specific project; it can only be accessed from the Current Projects screen (see *Figure 22*). Click the Resources tab at the top of the screen to reports on resource planning, resource utilization, and assignments.

Figure 22 – Project Manager Resources Tab



Resource Planning

The Resource Planning view allows users and their supervisors to view selected users' project assignments for specified date ranges in order to plan which future tasks can be assigned to a user's schedule. Access this view by choosing the Resource Planning category on the left navigation menu.

Create a view by clicking the Create View button at the bottom of the screen. On the pop-up screen, select a time period from the pull-down list and then click the Next button at the bottom of the pop-up screen. On the next screen, select the user(s) you wish to include in the view. Most users will only be able to generate the view for themselves, but supervisors may view the assignments given to each user under their supervision—in addition to their own assignments—as long as the onsite PL administrator has established the relationship between the supervisor and employee in each employee's user account. Once you have selected the desired user(s) for the view, click the Next button at the bottom of the pop-up screen. On the third screen, enter a name for your view over the underlined default name in the Name field. You can also enter a longer description for the view if desired. Click the Finish button to create the view. A user can generate as many views as desired. Each view name will appear on the Resource Planning screen. To open a view, click its name in bolded blue text. To edit the view's settings, click the blue Edit link next to the view's name. To delete a view's name, click the blue Delete link next to the view's name. The view can also be exported to the user's hard drive as a Rich Text Format (RTF) or PDF file by clicking the blue Export link next to the view's name; this text format will preserve the look of the report on the screen when the text file is opened in a word-processing application.

The generated view displays by default each selected user's daily assigned hours for the selected time period. Colored icons (green, yellow, and red) appear in each column. These icons represent the percentage of a user's scheduled hours per available hours for the selected time period. By default, a user whose scheduled hours are less than 50% of available hours will show a green icon, while hours between 50% and 100% will show a yellow icon and scheduled hours over 100% of available hours will show a red icon (instructions for changing the percentage thresholds associated with each icon color are found in the next paragraph). Click a colored icon to view a breakdown of hours in the column. On the Hours Breakdown screen, each project name and assignment topics are displayed as links in blue text. Click a blue link in the Project column to open the screen in the actual project where the assignment originated. When you have completed your work on the assignment within the open project, close the project using the Close button at the top right corner to return to the Resource Planning screen in the Resources tab. Click a link in the Task column to view and modify the assigned and actual hours for the selected task. Click OK to close the Hours Breakdown screen.

To change the frequency or the data shown in the Resource Planning view, click the title of the view in blue text at the top of the screen. On the Change Options pop-up screen, use the pull-down list to change the frequency (daily, weekly, monthly, or totals). Using the View By pull-down list, the user can choose to view options by user, department, or project. Select whether the view shows assigned, actual, and/or scheduled hours using the Hours pull-down list. On the ride side of the screen, enter in the underlined field the desired percentage threshold for the green and yellow icons.

The user may print the Resource Planning screen by clicking the Print icon in the lower left corner. To hide the blue left navigation menu for more screen area, click the Full Screen button next to the Print icon in the lower left corner.

Resource Utilization

The Resource Utilization view allows users and their supervisors to view graphs of selected users' or departments' assigned, actual, and scheduled hours for specified date ranges. Graphs can be viewed over time or by project. Access this view by choosing the Resource Utilization category on the left navigation menu.

Create a view by clicking the Create View button at the bottom of the screen. On the pop-up screen, select a time period from the pull-down list and then click the Next button at the bottom of the pop-up screen. On the next screen, select the user(s) you wish to include in the view. Most users will only be able to generate the view for themselves, but supervisors may view the assignments given to each user under their supervision—in addition to their own assignments—as long as the onsite PL administrator has established the relationship between the supervisor and employee in each employee's user account. Once you have selected the desired user(s) for the view, click the Next button at the bottom of the pop-up screen. On the third screen, enter a name for your view over the underlined default name in the Name field. You can also enter a longer description for the view if desired. Click the Finish button to create the view. A user can generate as many views as desired. Each view name will appear on the Resource Utilization screen. To open a view, click its name in bolded blue text. To edit the view's settings, click the blue Edit link next to the view's name. To delete a view's name, click the blue Delete link next to the view's name. The view can also be exported to the user's hard drive as a Rich Text Format (RTF) or PDF file by clicking the blue Export link next to the view's name; this text format will preserve the look of the report on the screen when the text file is opened in a word-processing application.

The generated view displays by default a graph of each selected user's assigned and actual hours for the selected time period. To change the graph settings shown in the Resource Utilization view, click the title of the view in blue text at the top of the screen. On the Change Options pop-up screen, use the first pull-down list to change the graph type from a line chart (showing hours over time) to a pie chart (showing hours by project or event category). Using the Utilization By pull-down list, the user can choose to view options by user or department. Using the Frequency pull-down list, the user can choose the graph's frequency (daily, weekly, or monthly). At the bottom of the screen, check the desired boxes to show assigned, actual, and/or scheduled hours. Actual hours and assigned hours are summed from hours entered into the Assigned Hours and Actual Hours columns for tasks assigned to the selected user in each project's plan (located in the Plan tab of each project). Available hours are taken from the selected user's calendar schedule, which is located in the Profile tab (explained in the next section).

The user may print the Resource Utilization screen by clicking the Print icon in the lower left corner. To hide the blue left navigation menu for more screen area, click the Full Screen button next to the Print icon in the lower left corner.

Assignments

The Assignments report allows a user to view a list of her/his assignments across all projects in the Project Manager. Access this report by choosing the Assignments category on the left navigation menu.

Create a report by clicking the Create Report button at the bottom of the screen. On the pop-up screen, select the user(s) you wish to include in the report. Most users will only be able to generate the report for themselves, but supervisors may view the assignments given to each user under their supervision—in addition to their own assignments—as long as the onsite PL administrator has established the relationship between the supervisor and employee in each employee's user account. Once you have selected the desired user(s) for the report, click the Next button at the bottom of the pop-up screen. On the next screen, enter a name for your report over the underlined default name in the Name field. You can also enter a

longer description for the report if desired. Click the Finish button to create the report. A user can generate as many assignments reports as desired. Each report name will appear on the Assignments screen. To open a report, click its name in bolded blue text. To edit the report settings, click the blue Edit link next to the report name. To delete a report name, click the blue Delete link next to the report name. The report can also be exported to the user's hard drive as a Rich Text Format (RTF) or PDF file by clicking the blue Export link next to the report name; this text format will preserve the look of the report on the screen when the text file is opened in a word-processing application.

When an assignments report is being generated, the report may require several seconds to appear because the program is searching through each project in the Project Manager to find assignments for the selected users. Once generated, the report displays each selected user's project plan tasks, issues assignments, meeting assignments, and idea assignments across all projects. The assignment topics are displayed as links in blue text. Click a link in the Task/Topic/Issue column to open the screen in the actual project where the assignment originated. When you have completed your work on the assignment within the open project, close the project using the Close button at the top right corner to return to the Assignment Report screen in the Resources tab. By default, the Assignment Report screen shows each assignment's estimated start and complete date and status in separate columns. Many other columns can also be displayed on this screen; see the instructions under the Custom View section below.

The assignments listed on the screen can be sorted by any of the columns on the screen by clicking the blue column headings to sort all rows by that column. Columns may be resized by placing the mouse cursor over the border between column headings so that the cursor turns into a double-pointed arrow, holding down the left mouse button, dragging the border to the desired position, and then releasing the mouse button.

Custom View Button – You may customize the display of the Assignment Report screen by clicking the Custom View button at the bottom of the screen. The Custom View button allows the user to filter the assignments that are displayed on this screen, using the various columns as filtering criteria. Choose the desired criteria on the Custom View pop-up screen and then click OK to filter the report by those criteria. For example, to view only the assignments with a particular status, click the Status field pull-down list on the pop-up screen and choose the desired status from the list. Then click OK and the report will show only the assignments that have the selected status. Note that before using Custom View filtering criteria, a message at the top left corner of the report reads, "Showing all assignments." After clicking OK to activate filtering criteria, the message now reads, "Showing filtered assignments. Click 'Custom View' to view or change filter."

The program will remember the last Custom View settings created by each team member. To clear these settings, click the Clear Filter button on the Custom View pop-up screen. To save settings for future retrieval, choose the desired settings and then click the Save/Load button to name and save the settings view. Enter a name for the view on the line and check the box to save the current settings. Saved views can be loaded by clicking the Save/Load button and highlighting the desired name from the list. Then check the box to load the filter settings and click OK. The loaded filter settings will appear on the Custom View pop-up screen. Click OK again to filter the report by the loaded settings.

Within the Custom View pop-up screen, the Select Columns button allows the user to display, hide, or reorder the report columns according to the user's preferences. As mentioned above, several additional columns can be added to the Assignment Report screen in addition to the default columns that appear on the screen. Click the Select Columns button and add columns by checking the boxes next to the column names listed on the screen. To hide any unwanted columns in the report, uncheck the box next to the

column name. To reorder columns into a customized view, highlight a column name and click the Move Up or Move Down button.

The user may print the Assignment Report screen by clicking the Print icon in the lower left corner. To hide the blue left navigation menu for more screen area, click the Full Screen button next to the Print icon in the lower left corner. To return to the main Assignments screen from the Assignment Report screen, click the Back button at the bottom of the screen.

Usage Reports

The Usage Report allows a user to view her/his historical usage of the Performance Logic application. The report displays total login counts and total duration in minutes by month for the current month and previous four calendar months.

Create a report by clicking the Create Report button at the bottom of the screen. On the pop-up screen, select the user(s) you wish to include in the report. Most users will only be able to generate the report for themselves, but supervisors may view usage for each user under their supervision—in addition to their own usage—as long as the onsite PL administrator has established the relationship between the supervisor and employee in each employee's user account. Once you have selected the desired user(s) for the report, click the Next button at the bottom of the pop-up screen. On the next screen, enter a name for your report over the underlined default name in the Name field. You can also enter a longer description for the report if desired. Click the Finish button to create the report. A user can generate as many usage reports as desired. Each report name will appear on the Usage Reports screen. To open a report, click its name in bolded blue text. To edit the report settings, click the blue Edit link next to the report name. To delete a report name, click the blue Delete link next to the report name. Click the blue Export link next to the report name to export the report to the user's hard drive as a CSV format file in order to manipulate the data in a spreadsheet. The file can also be exported in Rich Text Format (RTF) or PDF file format.

Project Manager Profile Tab

The Profile tab contains the user's account profile information, the user's schedule of daily available hours, and the user's time sheet of hours assigned to project tasks. Each user has access to his/her profile information in the Profile tab, but no one has access to profile information for other users. The Profile tab cannot be accessed from inside a specific project; it can only be accessed from the Project Manager's Current Projects screen (see *Figure 23*). Click the Profile tab at the top of the screen to view your profile, schedule, time sheet, and nonproject events.

User Profile

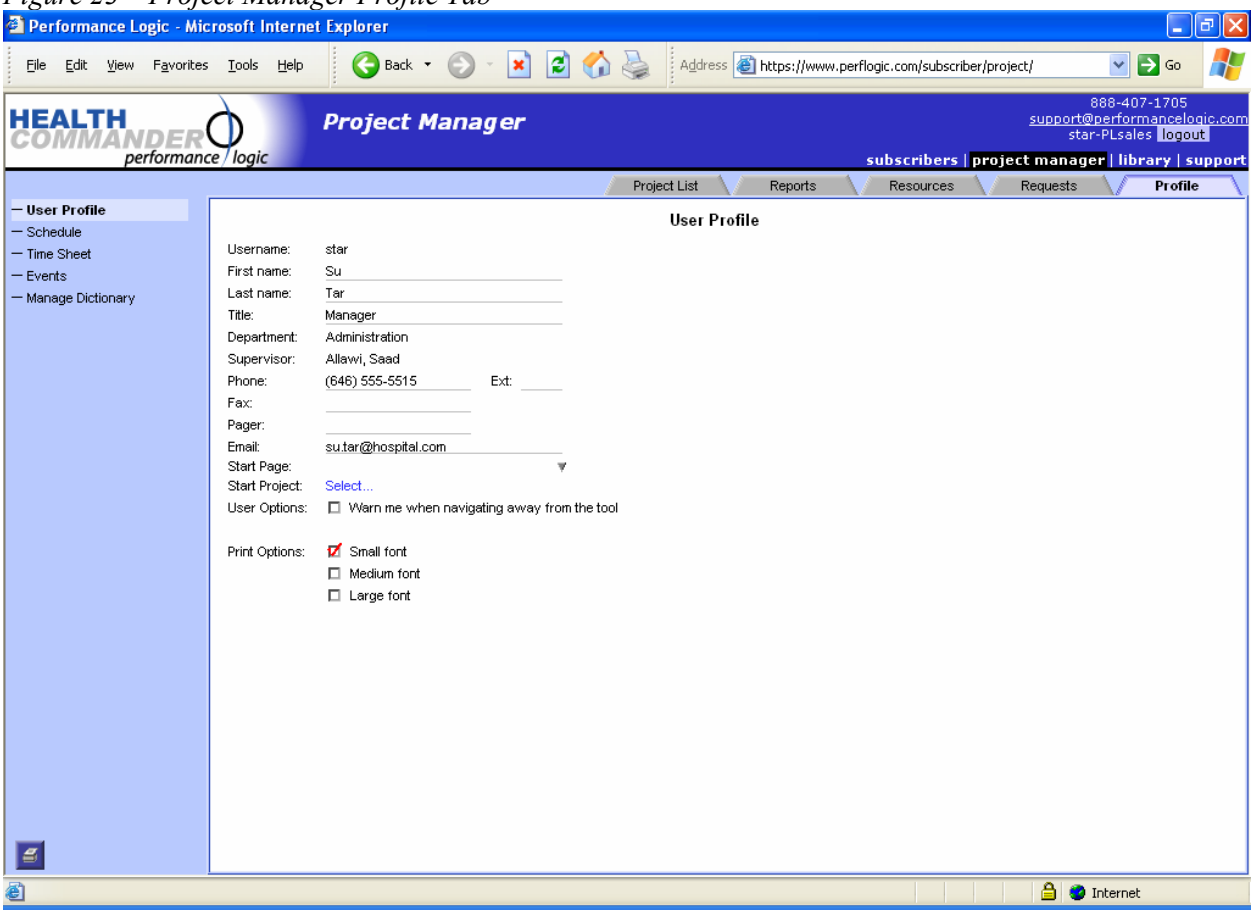
Access your user profile by choosing the User Profile category on the left navigation menu. On this screen, the user's information can be updated by typing over existing text in the underlined fields. Using the pull-down list in the Start Page field, the user can choose whether the program takes the user to the Subscribers screen after logging into Performance Logic or directly into the Project Manager. The user can also select a project or folder to load automatically in the Project Manager by clicking the blue Select link in the Start Project field. The user can select from three printing options when printing any content in *HealthCommander*: small, medium, or large font. All changes in the User Profile are automatically saved.

Schedule

To update your calendar of daily scheduled work hours, choose the Schedule category on the left navigation menu. This screen shows a calendar with scheduled hours listed in each date box. Scheduled

hours default to eight hours per day, Monday through Friday, as shown in the top row of the default weekly schedule. To change the default schedule, enter new values over the existing values in the top row. For example, if you work four ten-hour days instead of five eight-hour days, then enter "10" for each of the four weekdays you work and "0" for the three days you do not work. The calendar below the weekly schedule will update when the default-schedule hours are changed on the top row. You may also change your scheduled hours on specific days in the calendar below by entering new values over the default ones (e.g., for a holiday or sick day). The daily scheduled hours on this screen in the Profile tab are used in the Resource Planning and Resource Utilization reports found in the Resources tab (see the previous section in this guide).

Figure 23 – Project Manager Profile Tab



Time Sheet

The third category on the left navigation menu is the user's time sheet. This screen shows all tasks assigned to the user for a specified time period with assigned and actual hours listed for each task. Here the user can verify that enough tasks have been assigned to him/her so that the number of assigned hours for the time period roughly equals the number of scheduled hours the user works in that time period. Enter assigned or actual hours by clicking a task name in blue text. Users who only have read-access to a project will not be able to change their assigned hours for tasks from that project, but they will be able to change their actual hours. Any task hours entered in the time sheet will update within the hours columns of the project plan inside the respective projects. To change the time period view of your time sheet, click the Time Period link in blue text at the top of the screen. You may also group the tasks on the screen by either date or project by clicking the Group By link in blue text at the top of the screen. Since each user

will probably spend a portion of each day doing work tasks that are not tracked in Performance Logic projects, the user can add these nonproject events to his/her time sheet by clicking the Add Event button at the bottom of the screen. Events can be modified or removed by clicking the Events category on the left navigation menu.

Events

The Events category on the left navigation menu allows the user to add, modify, or remove nonproject events that the user wants to add to his/her time sheet. On the Events screen, click the Add Event button at the bottom of the screen to add events. Once the event line appears on the screen, enter a name for the event and choose a category from the Category column pull-down list. Any categories created will be available to all users in your site. Categories are an important grouping feature of the Resource Utilization reports in the Reports tab (see the previous section of this guide). The start and complete dates for the event can be modified by clicking the blue date links. Both assigned and actual hours can be entered in their respective columns. If you wish to include notes with an event, click the blue link in the Notes column.

To repeat an event over a specified time period, highlight the event and then click the Repeat Event button at the bottom of the screen. To remove an event, highlight the event and then click the Remove Event button. To view or modify the hours allocated by each day of an event, highlight the event and click the Detailed Hours button. To filter the events shown on the screen using the columns as filtering criteria, click the Custom View button. Columns can also be sorted by clicking the dark blue column headings.

Manage Dictionary

The Manage Dictionary category on the left navigation menu allows the user to add or remove entries to the user's personal dictionary. Personal words are commonly added when the user chooses to add them while performing the Spell Check feature throughout the program.

Performance Logic Client Support can be reached at
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(888) 324-8304 West Coast Office
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