`

# User Manual

03/02/2012

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# I. OVERVIEW

## *Project Reporter Connects Project Teams*

♦ **Organize & Manage** ♦ **Communicate** ♦ **Document & Store** ♦ **Report**

---

Project Reporter is a multi-pronged tool that helps teams organize, communicate, document and report on projects. This on-line tool provides instant access to key project information and status updates, as well as providing a centralized repository to store project documents.

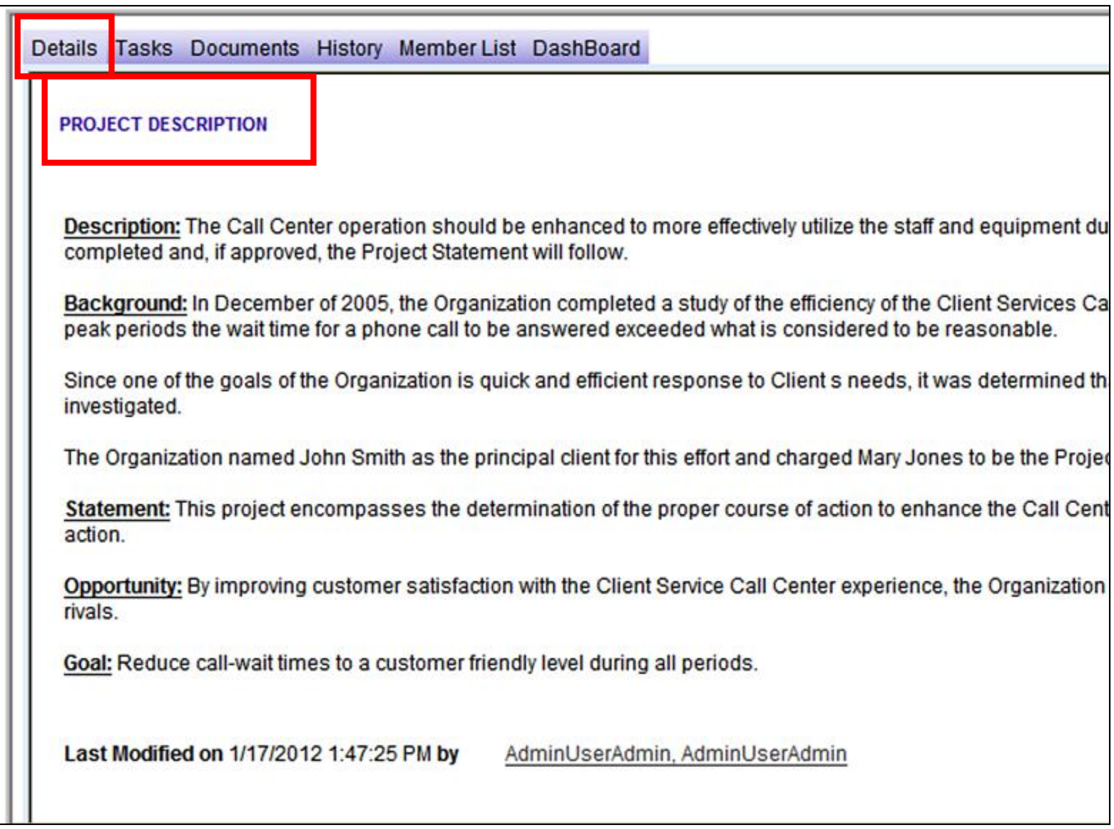
**Project Reporter is organized into 5 functional tabs. Each header tab displays key project information.**

## Project Details

**The Details tab contains a high level Project Description and displays the current project status.**

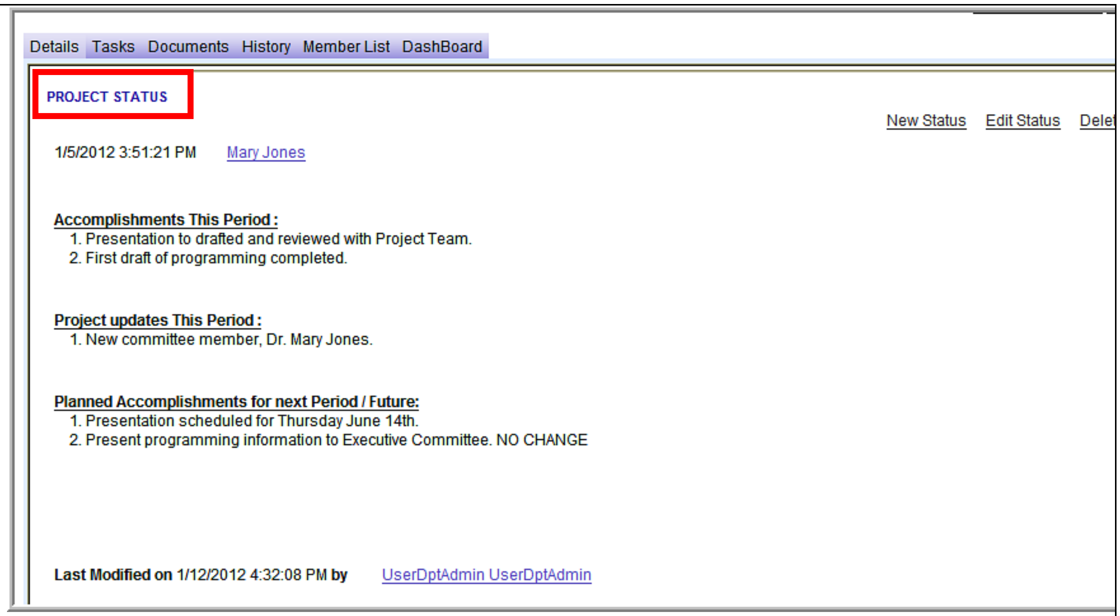
1. Documents issues and opportunities.
2. Defines goals and objectives and success criteria.
3. Identifies risks, considerations and assumptions.

The detailed **Project Description** is typically contained within the Project Statement and/or Charter documents. These documents can be stored within the project using the **Documents tab**.



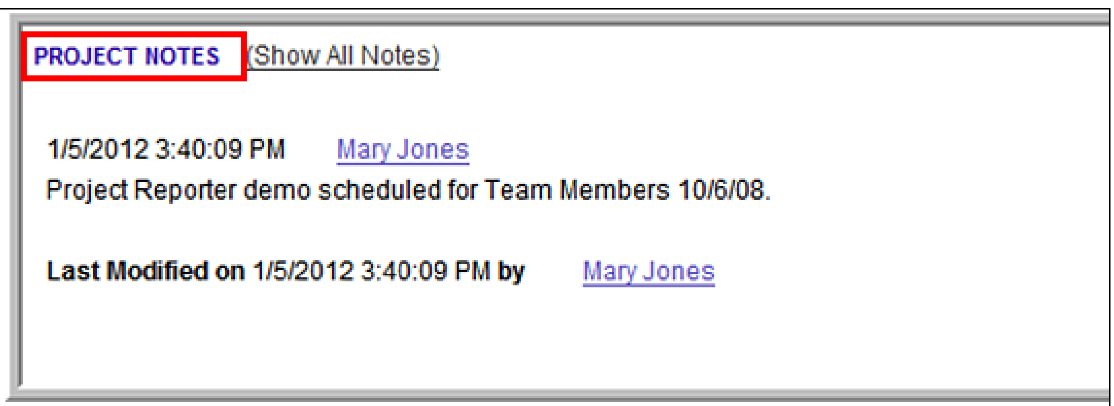
## Current Project Status

Communicates **Project Status** information including schedule and cost updates, issues, and risks, and their effect on the project.




## Current Project Notes

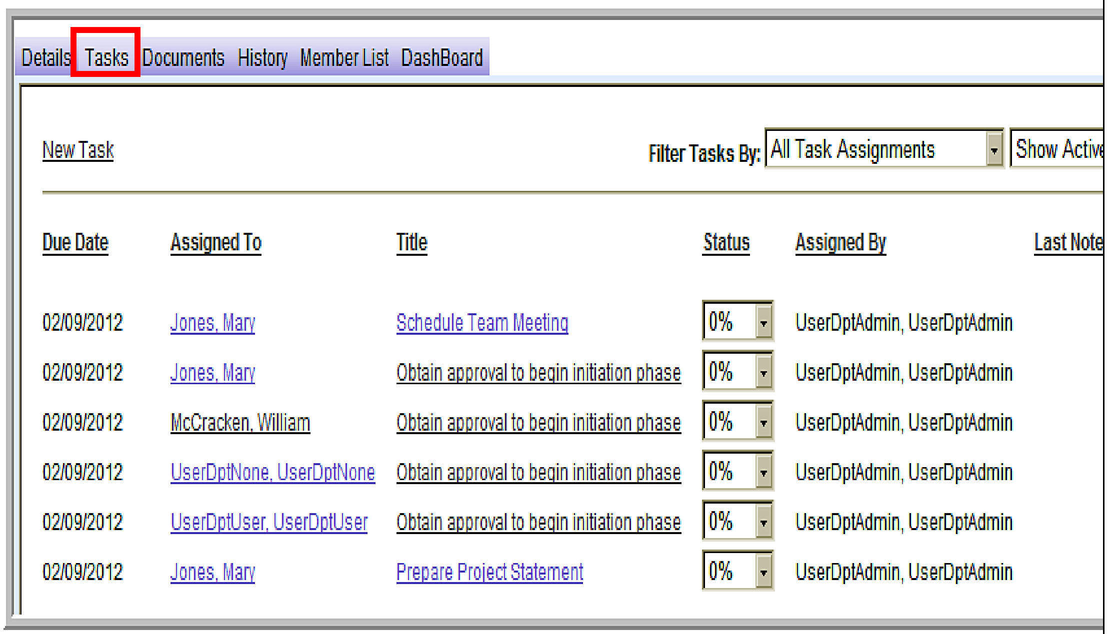
Communicates **Project Notes** Information including Upcoming Events.



# Tasks Tab

**Document, assign and communicate progress using the <u>Tasks tab</u>**

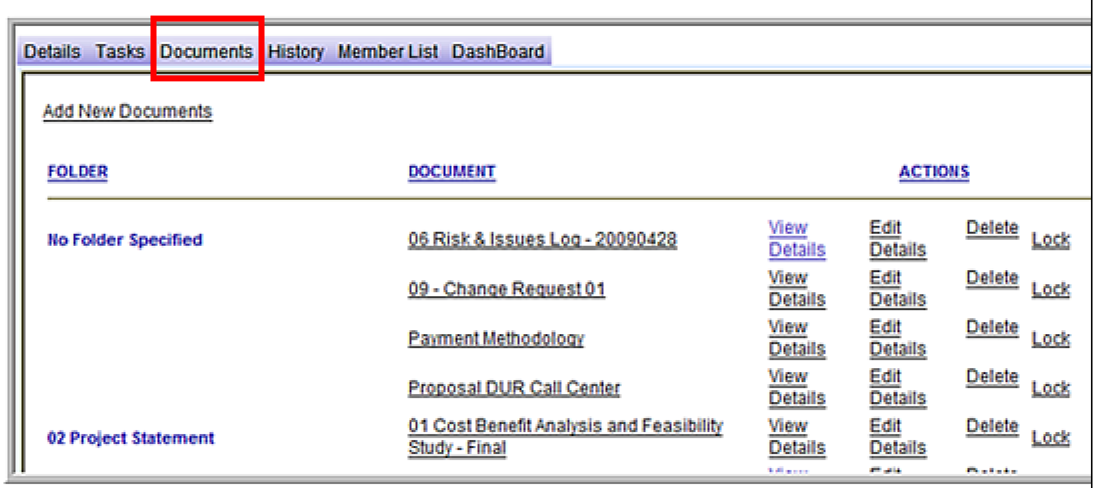
1. Organize and assign **<u>Tasks</u>** to project team members with the option of sending notification of the assignment via e-mail.
2. Team members update their tasks and **status** and add **notes** to document progress.




# Documents Tab

**Attach, access & share any project documents using the <u>Documents tab</u>**

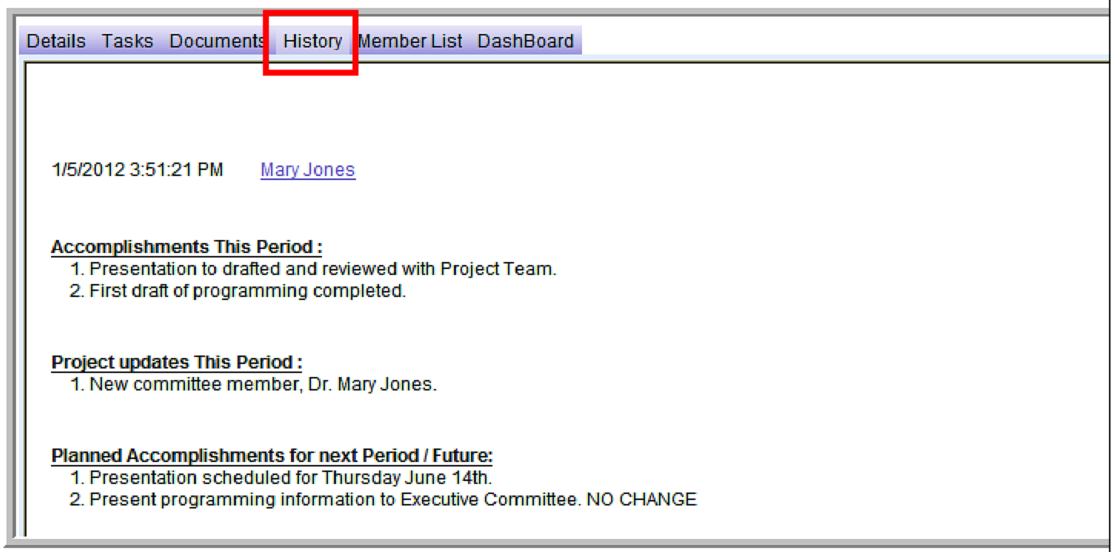
This tab serves as the library for **Project Documents**



## History Tab

**Track overall project progress using the <u>History tab</u>.**

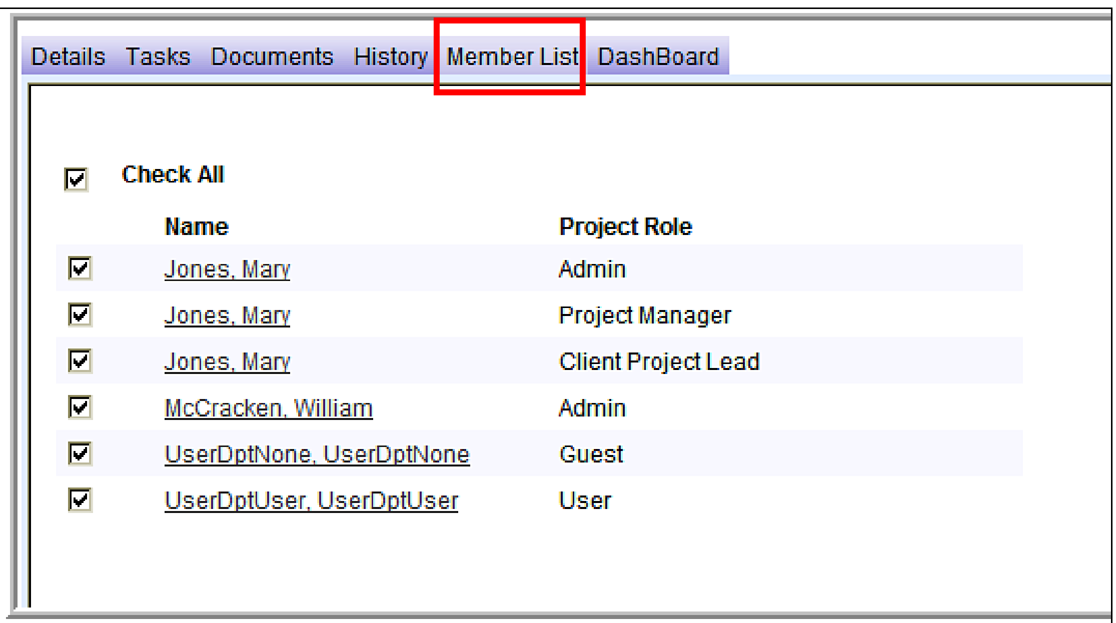
Review the **Project History** via **status** updates.



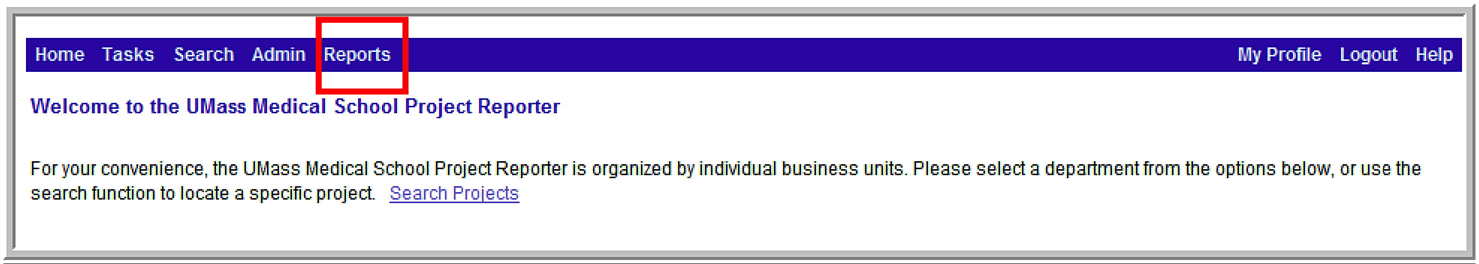

## Member List Tab

**Track project members and their access to project information using the <u>Member List tab</u>.**

1. View a list of team member **names** and their **roles**.
2. Send **emails** to project members from this tab.



# Reports




The reporting function provides point and click standard reports with instant access to project information. User's access to information in reports replicates their access in the Project Reporter application.

`

# II. ROLES & SECURITY

Access to projects in the Project Reporter tool is managed using a tiered security model: **Department Role, Project View and Project Team Members.** By combining these functions, with the Project View explained below, the Project Manager (Admin Role) can limit or grant access to project team members.

## a. Department Role Assignments

Each department has an assigned Department Coordinator. The Department Coordinator will process requests to add new users and maintain all department user access. **Only** the Department Coordinator has access to add, inactivate, or reactivate users for the department. Please contact your Department Coordinator if you would like to add, inactivate, or reactivate a user. Users outside the department must contact the Department Coordinator for access.

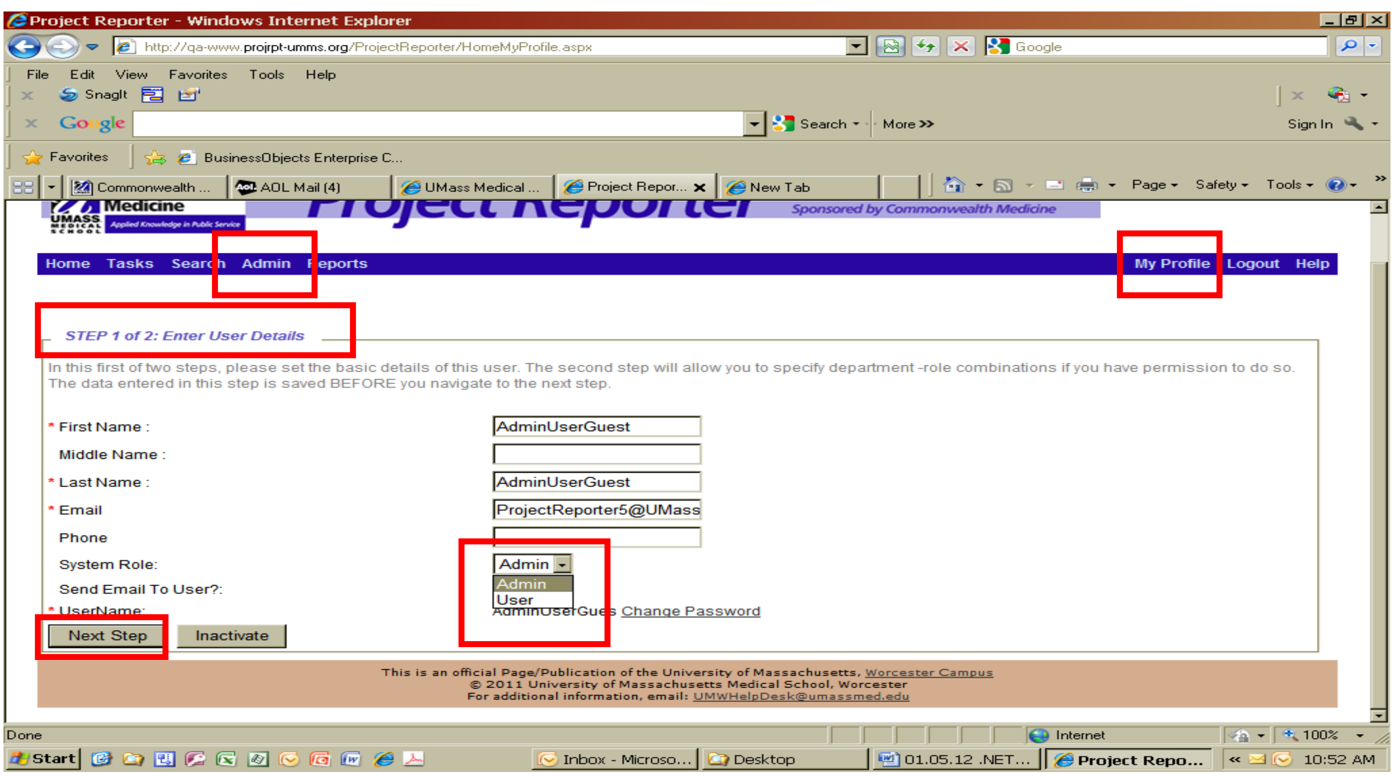
Department Roles are assigned in the **Enter User Profile** screen, accessed by clicking **My Profile** or **Admin** button from the navigation bar (see screen shot below).

Roles assigned in this screen determine the user access to the department level projects:

- **Team Administrators** enter and edit project details & information, statuses, and adds clients. There must be at least one Team Administrator assigned to the project.

- **Project Users** have the ability to add and maintain documents and see assigned projects. The *Project User* cannot edit project details.

- **Project Guests** only have access to view projects in a department. Users assigned this role are not able to make any changes to the project.



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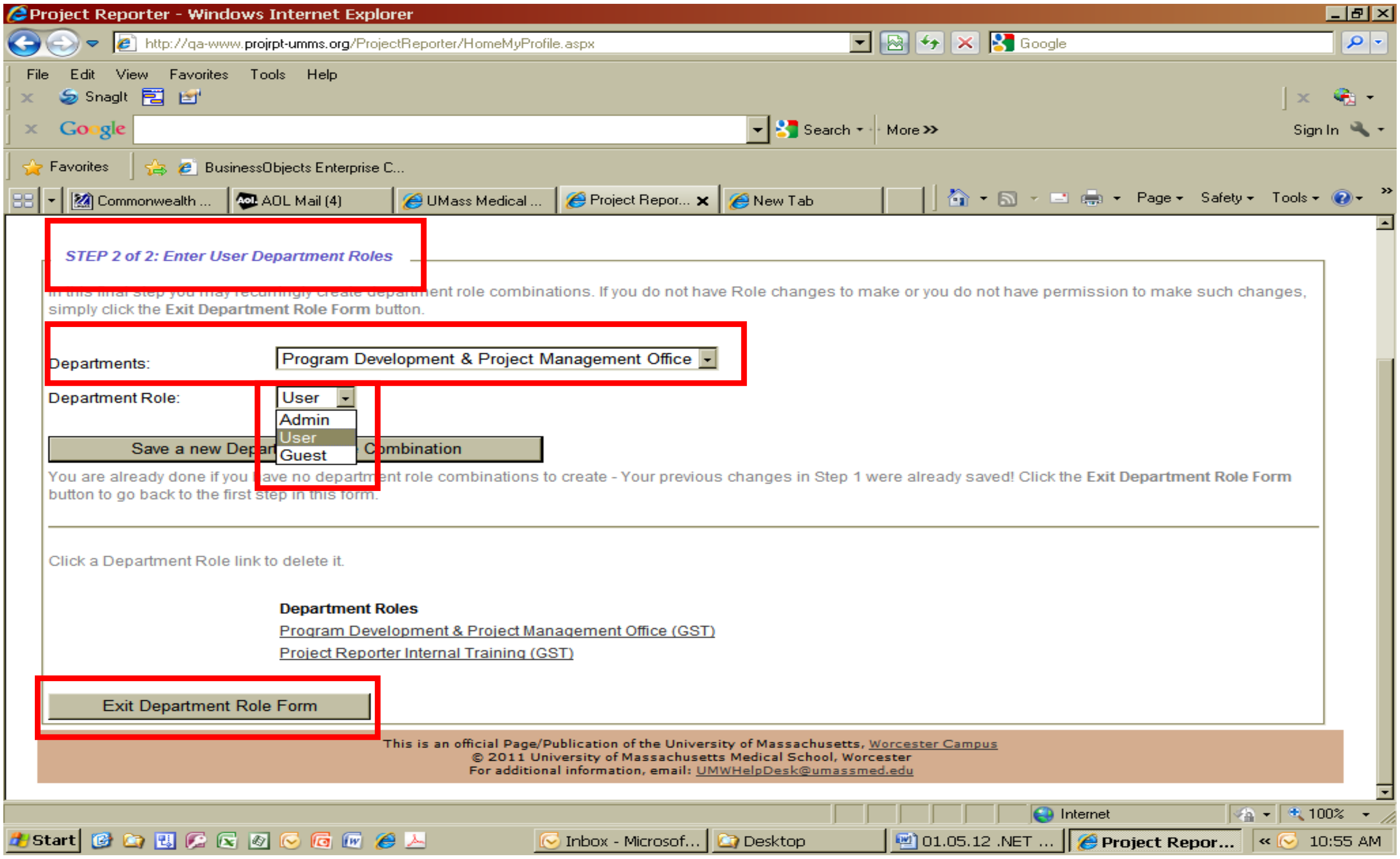
Project Reporter - Windows Internet Explorer
http://qa-www.projrpt-umms.org/ProjectReporter/HomeMyProfile.aspx
STEP 2 of 2: Enter User Department Roles
In this final step you may recurringly create department role combinations. If you do not have Role changes to make or you do not have permission to make such changes, simply click the Exit Department Role Form button.
Departments:
Program Development & Project Management Office
Department Role:
User
Admin
User
Guest
Save a new Department Role Combination
You are already done if you have no department role combinations to create - Your previous changes in Step 1 were already saved! Click the Exit Department Role Form button to go back to the first step in this form.
Click a Department Role link to delete it.
Department Roles
Program Development & Project Management Office (GST)
Project Reporter Internal Training (GST)
Exit Department Role Form
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For additional information, email: UMWHelpDesk@umassmed.edu

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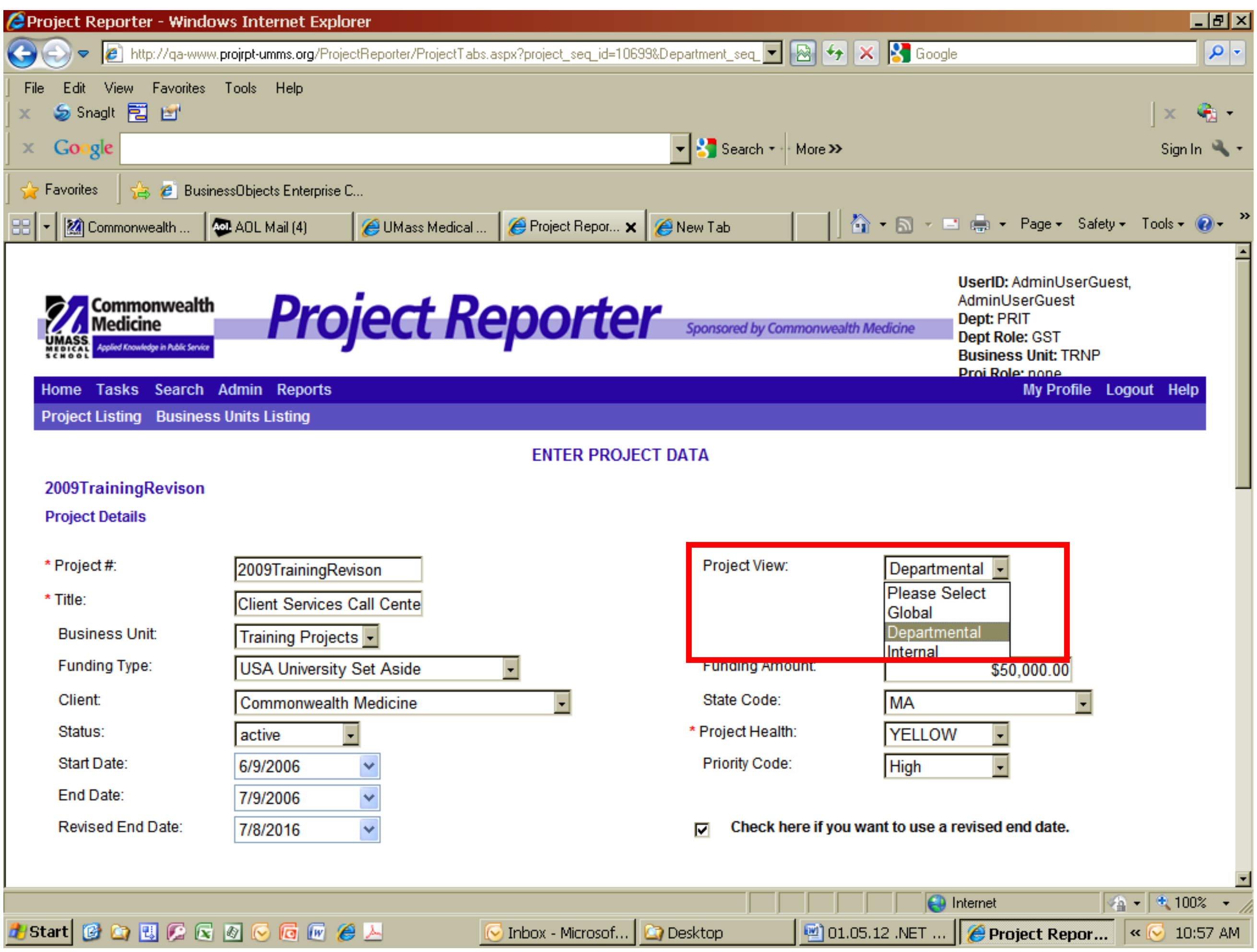
## b. Project View

Located on the **Enter Project** screen, the **Project View** limits or allows access to the project. The **Project View** will always default to Departmental, and can be changed by selecting the drop down arrow to the right**.** The **Project View** selection is made by the Project Manager (Admin Role or Team Admin Role) and defines who will have access to the project:

- **Departmental:** all users assigned to the department are able to see and access this project.
- **Global:** all users that have a log on to Project Reporter are able to see and access this project.
- **Internal**: users specifically assigned to the project are able to see and access this project. This project will appear ONLY on the project listing for team members. (Assignment of user to view your **INTERNAL** project is defined in the Project Team Members Add New Projects section of this guide).



## c. Project Team Member

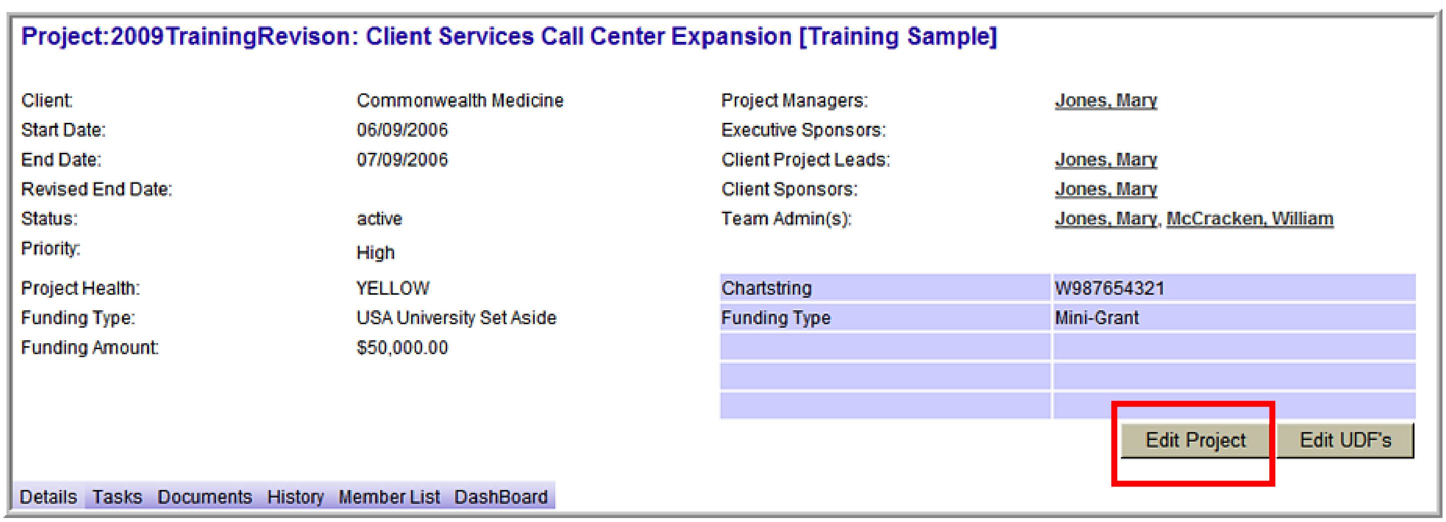
The Project Team Member Access is granted and maintained by the Project Manager (Admin Role) and the Department Coordinator.

- **Team Administrators** enter and edit project details & information, statuses, and adds clients. There must be at least one Team Administrator assigned to the project.
- **Team Users** have the ability to add and maintain documents and see assigned projects. The *Project User* cannot edit project details.
- **Team Guests** only have access to view projects in a department. Users assigned this role are not able to make any changes to the project.

Assignment of Project Team Members is made during the initial set up of the project, and can be changed at any time by clicking the **Edit Project** button in the header of any tab.

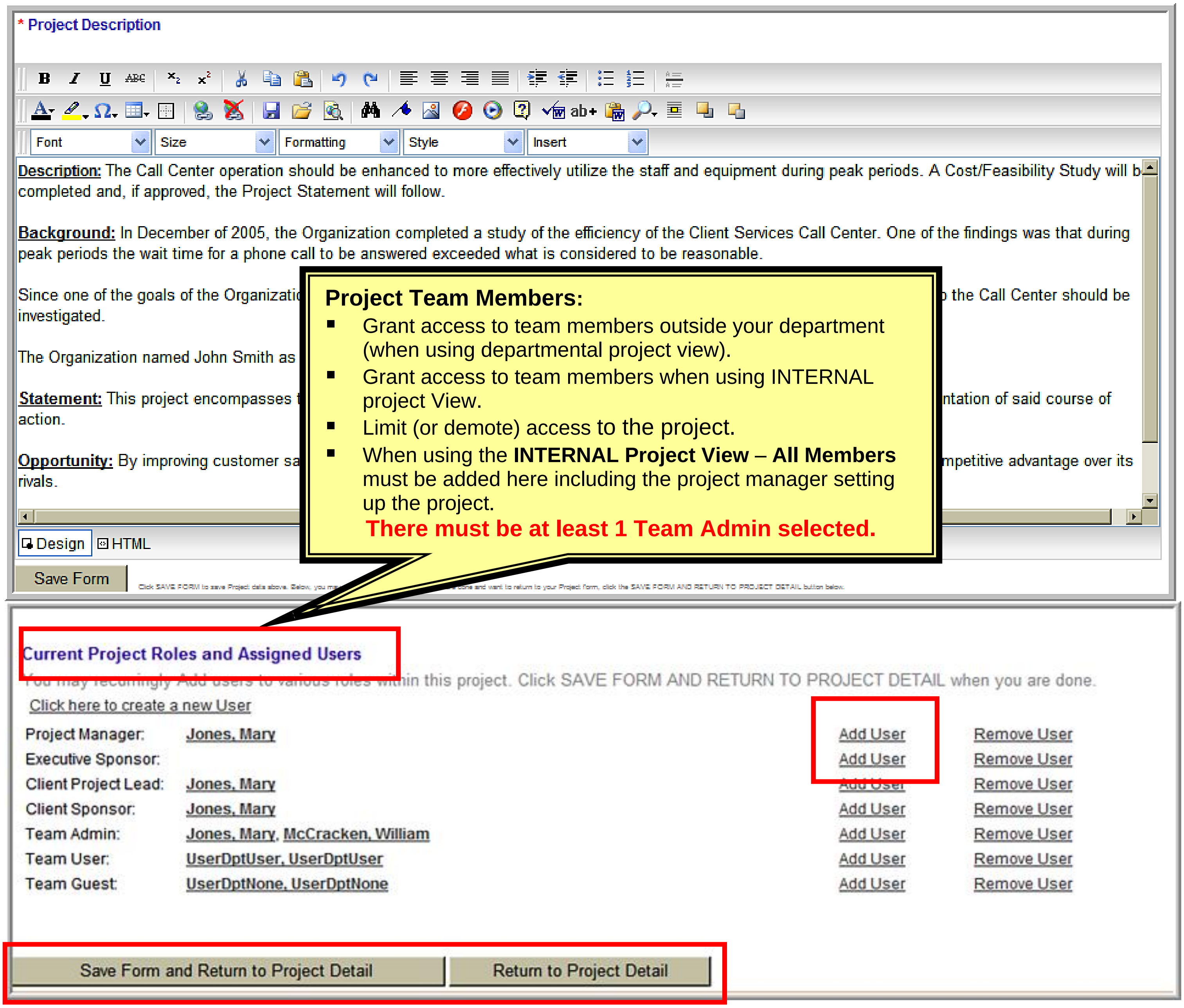
**This function is designed to:**

1. Grant access to users from outside your department when the ***DEPARTMENTAL*** project View is selected.
2. Grant access to users when the Project View is ***INTERNAL***. Internal Project views ***require*** the assignment of Project Team Members. Only the users assigned in the Project Team Member section will have the ability to view and access the project, including the Project Manager setting up the project.
3. Limit or demote access to users within the department. If a user has department ADMIN privileges, but need only have guest access in this project, you can limit access in the Project Team Member section below.

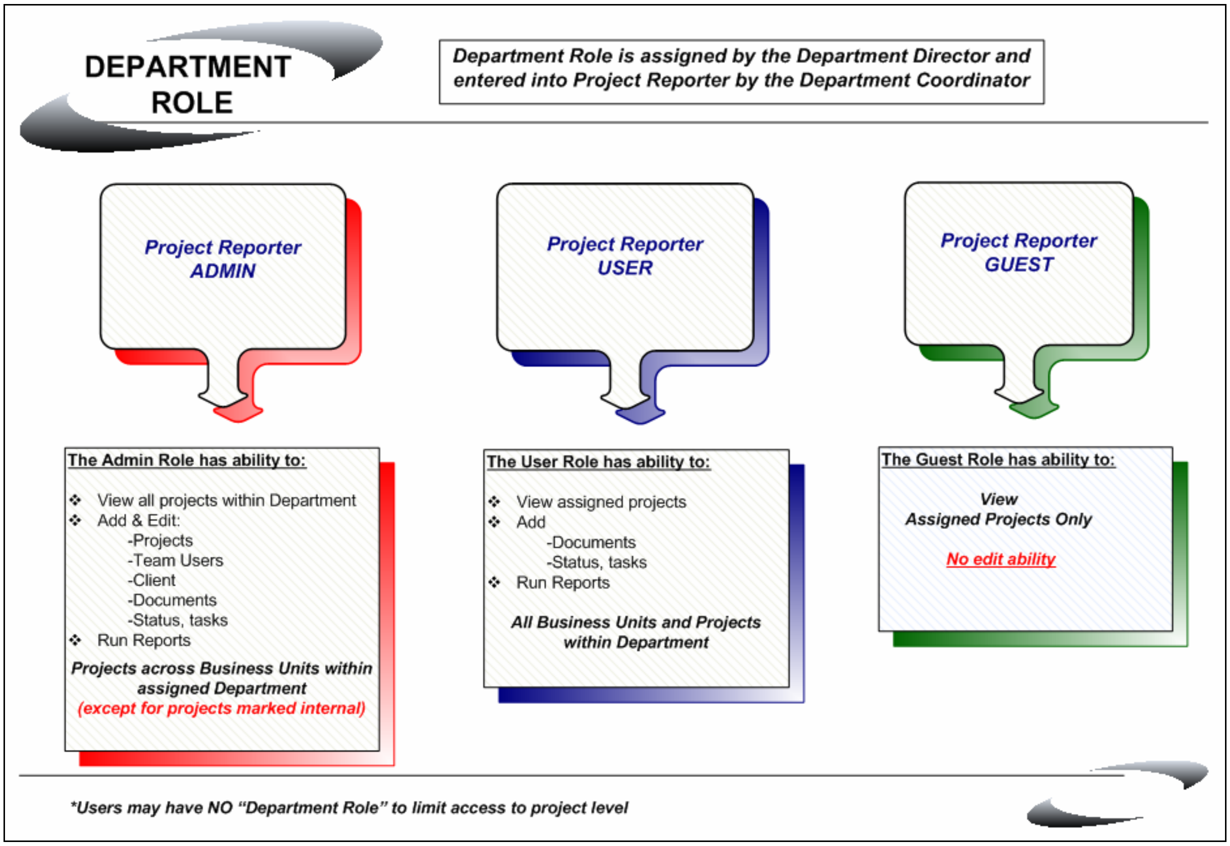


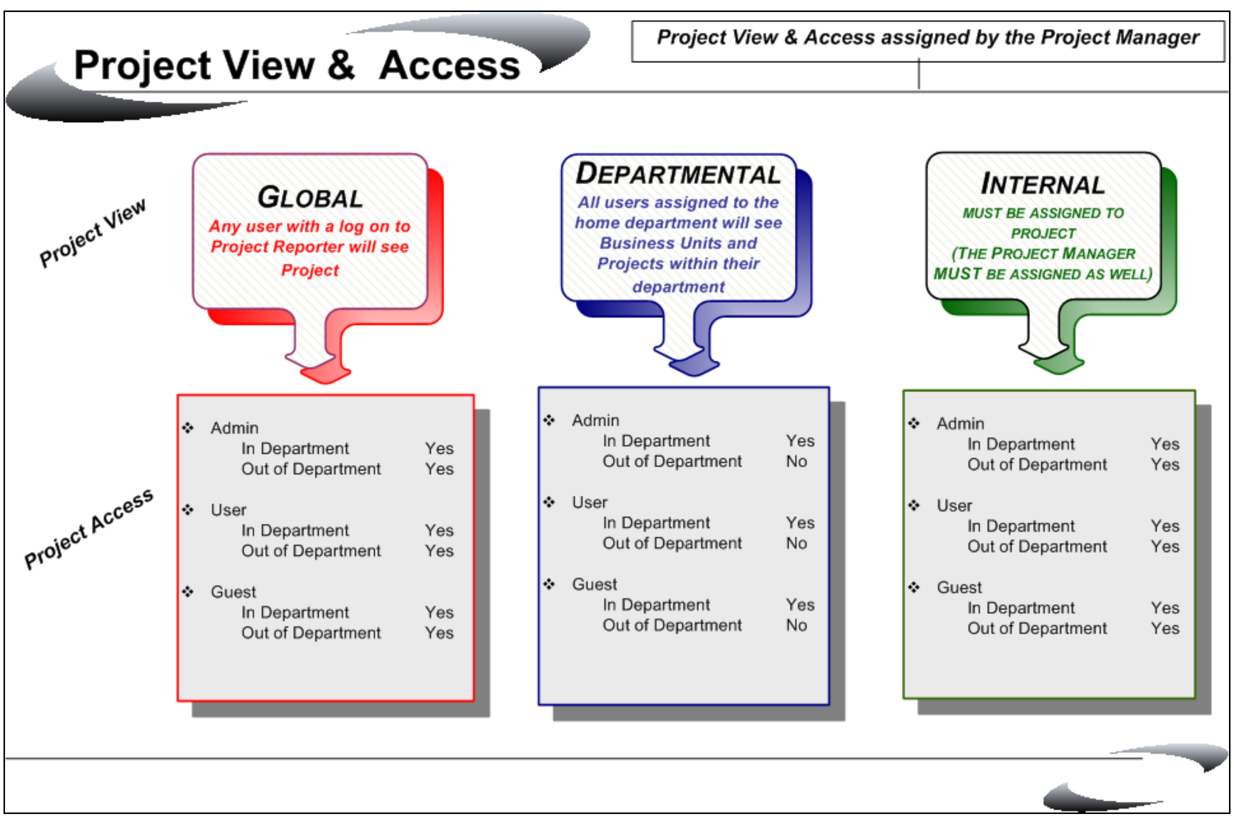
`

**Project Team Members' added can be edited at the bottom of the page** (see below) –



## d. Definitions

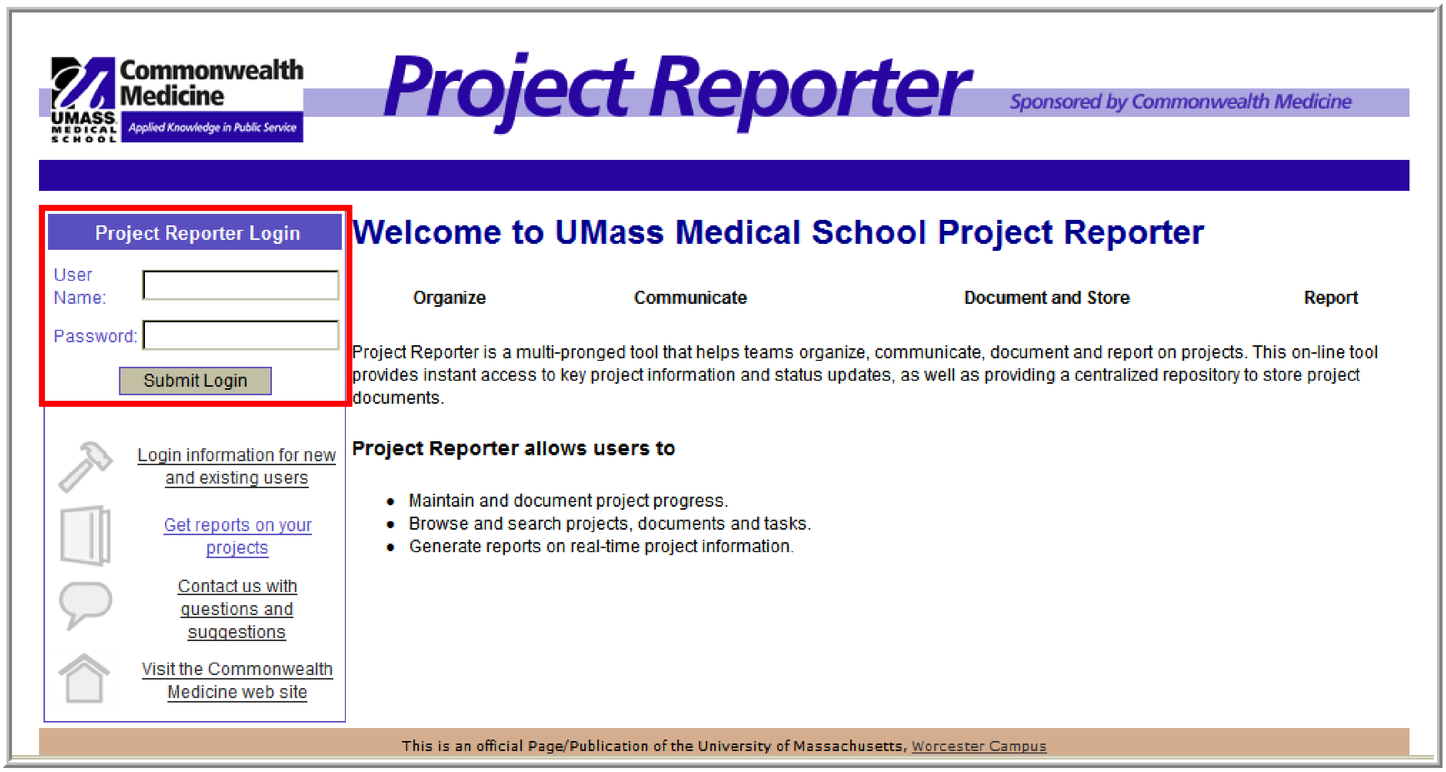


# III. ADDING AND MAINTAINING A PROJECT

## a. Login

Login to Project Reporter at **http:www.projrpt-umms.org**



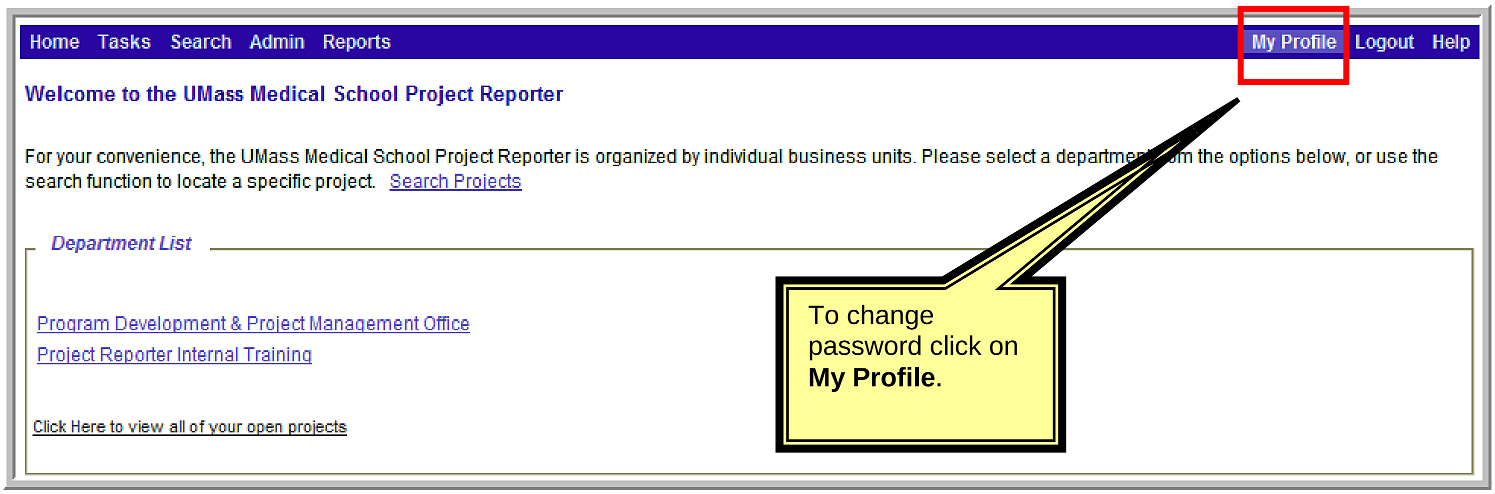

## Initial password/change

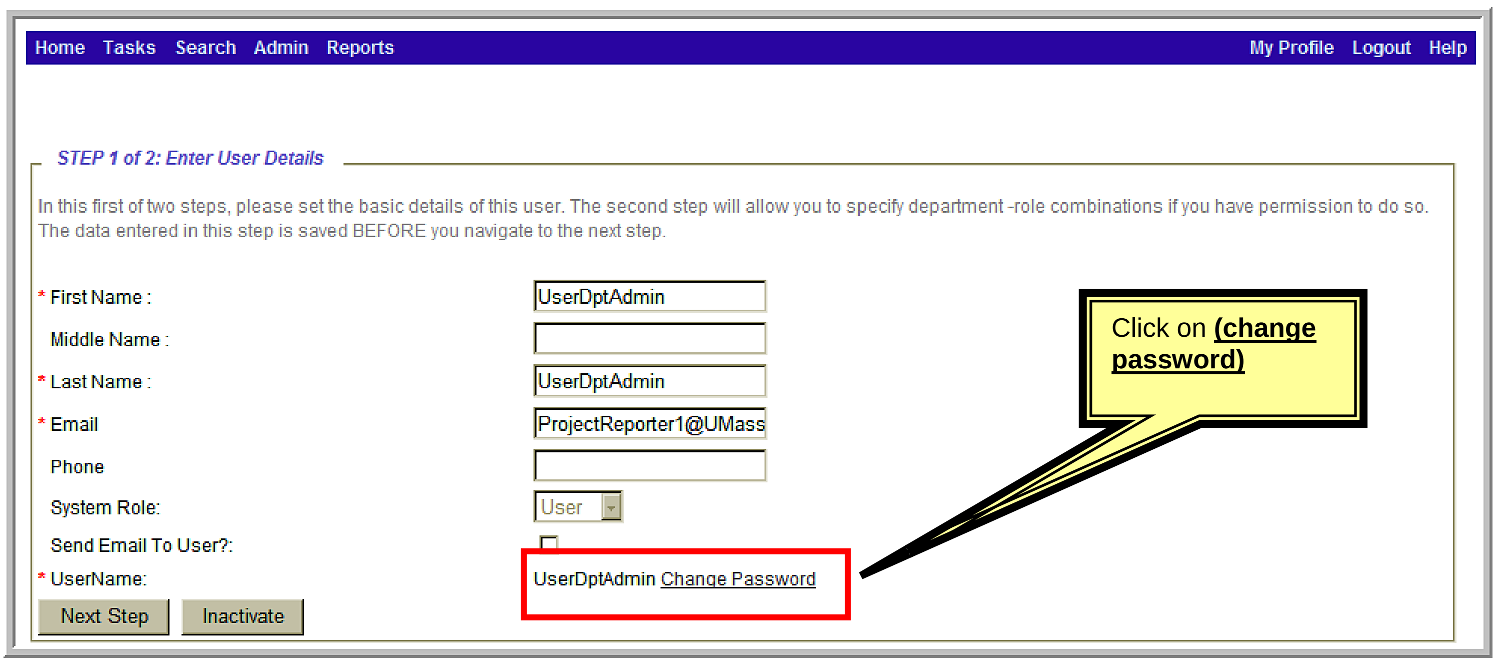
The user is asked to change their password when logging into Project Reporter for the first time. In order to avoid unauthorized logon, security *'Best Practices'* dictates that the initial password ('password') be changed.

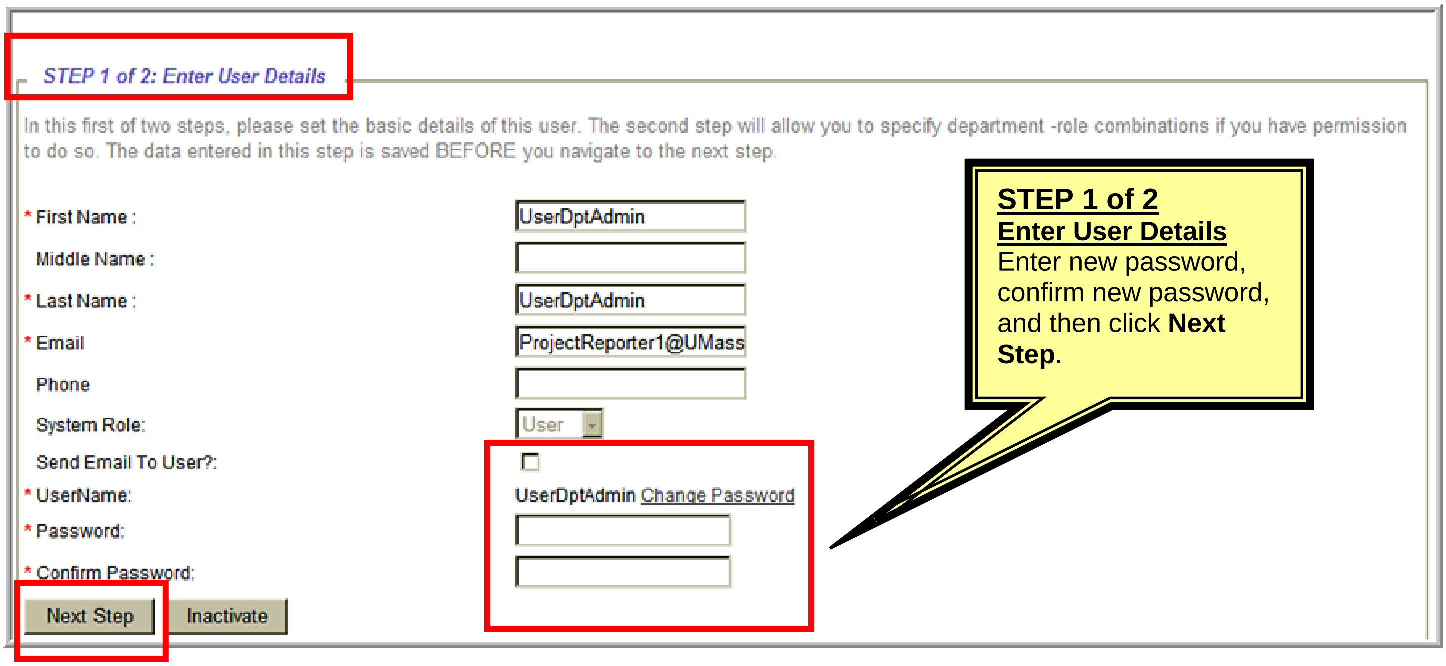
A confirmation text box prevents mistakenly entering an incorrect password that might not be remembered.

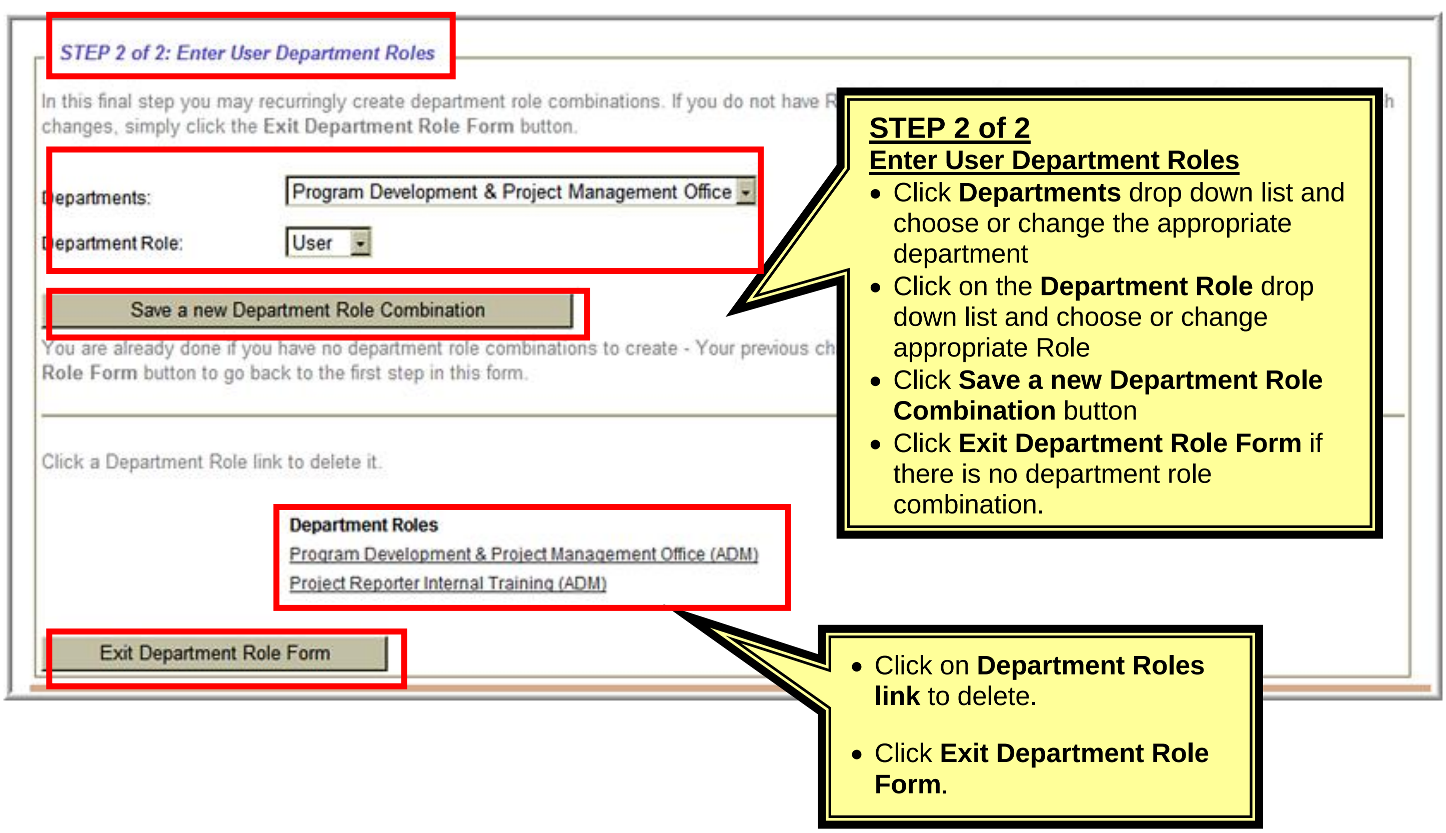
**The initial login password is: password (lower case)**

## b. Changing Project Reporter Password



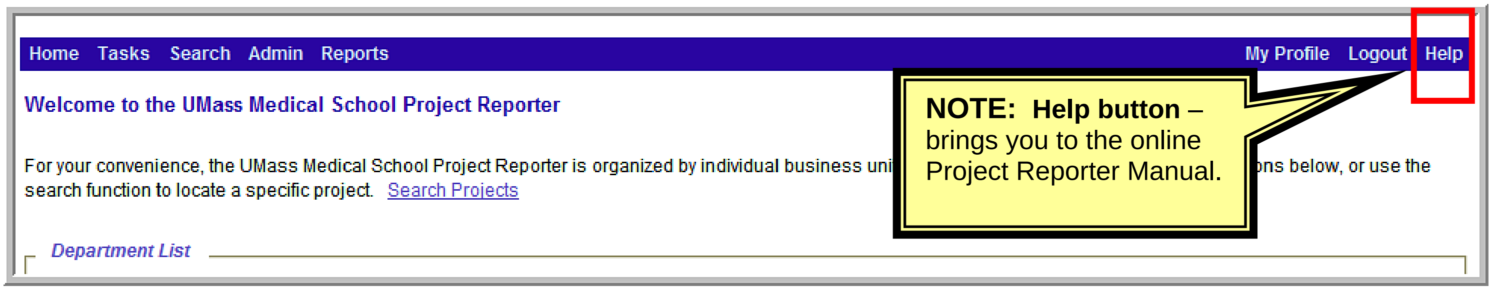



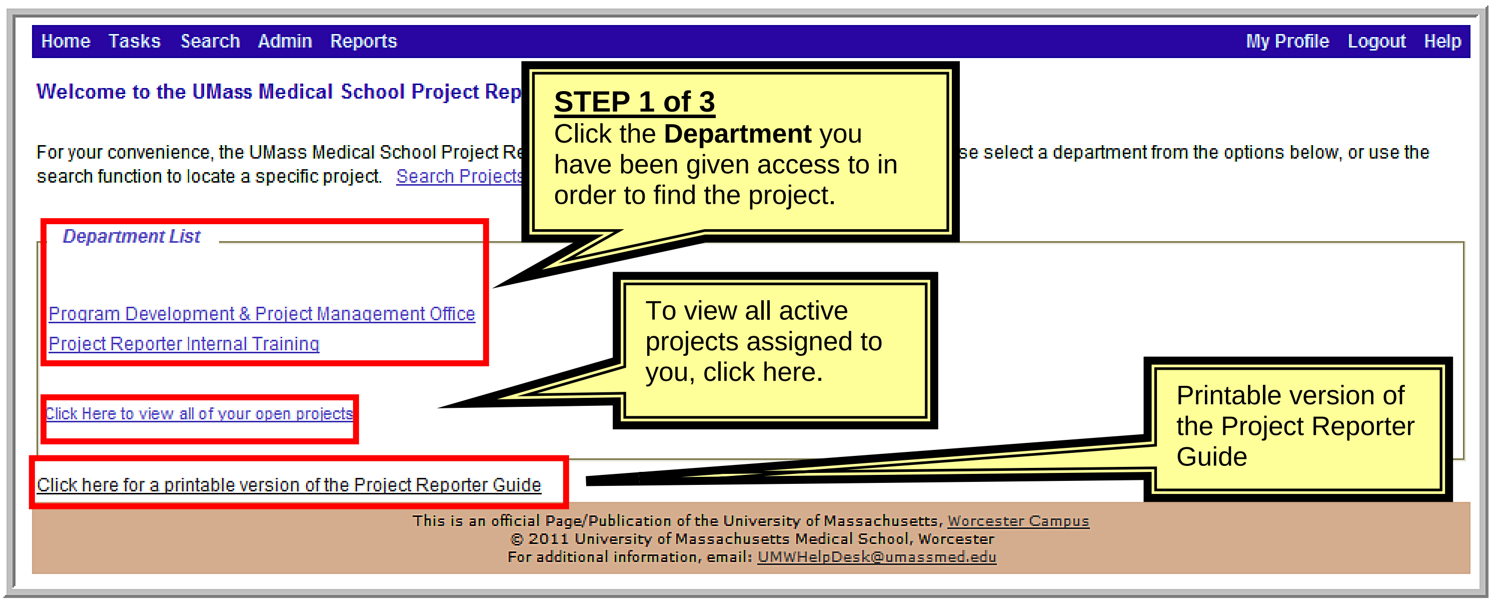

STEP 1 of 2: Enter User Details
In this first of two steps, please set the basic details of this user. The second step will allow you to specify department -role combinations if you have permission to do so. The data entered in this step is saved BEFORE you navigate to the next step.
* First Name : UserDptAdmin
Middle Name :
* Last Name : UserDptAdmin
* Email ProjectReporter1@UMass
Phone
System Role: User
Send Email To User?:
* UserName: UserDptAdmin Change Password
* Password:
* Confirm Password:
Next Step
Inactivate
STEP 1 of 2
Enter User Details
Enter new password, confirm new password, and then click Next Step.

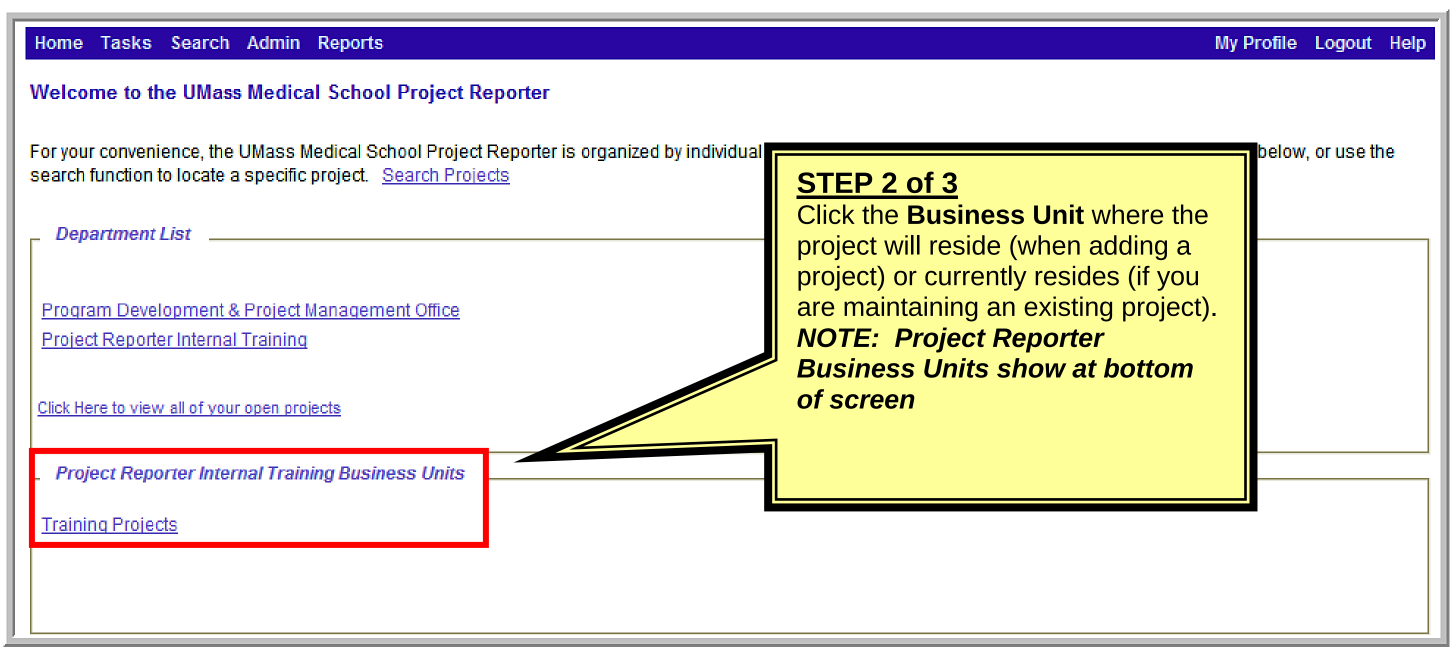

STEP 2 of 2: Enter User Department Roles
In this final step you may recurringly create department role combinations. If you do not have R
changes, simply click the Exit Department Role Form button.
Departments: Program Development & Project Management Office
Department Role: User
Save a new Department Role Combination
You are already done if you have no department role combinations to create - Your previous ch
Role Form button to go back to the first step in this form.
Click a Department Role link to delete it.
Department Roles
Program Development & Project Management Office (ADM)
Project Reporter Internal Training (ADM)
Exit Department Role Form
STEP 2 of 2
Enter User Department Roles
• Click Departments drop down list and choose or change the appropriate department
• Click on the Department Role drop down list and choose or change appropriate Role
• Click Save a new Department Role Combination button
• Click Exit Department Role Form if there is no department role combination.
• Click on Department Roles link to delete.
• Click Exit Department Role Form.

`

### After logging in to Project Reporter:



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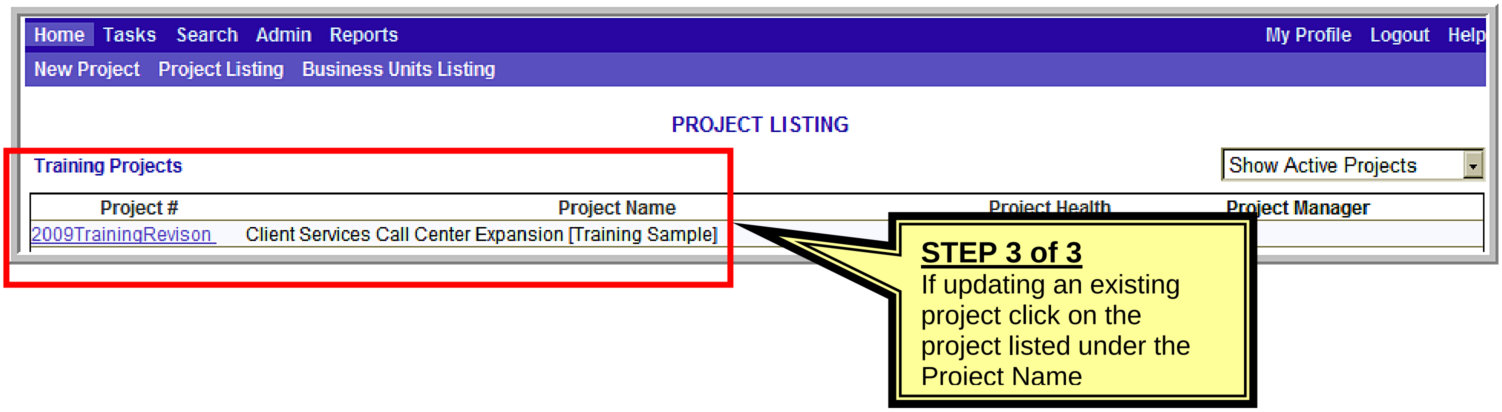
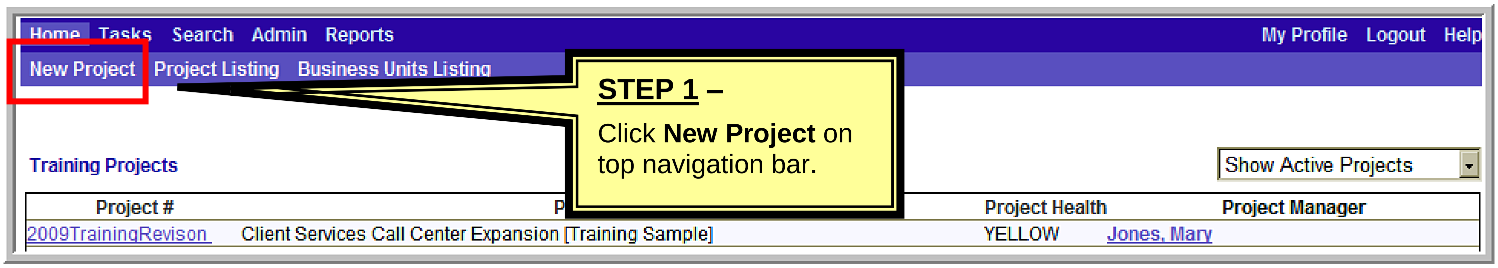
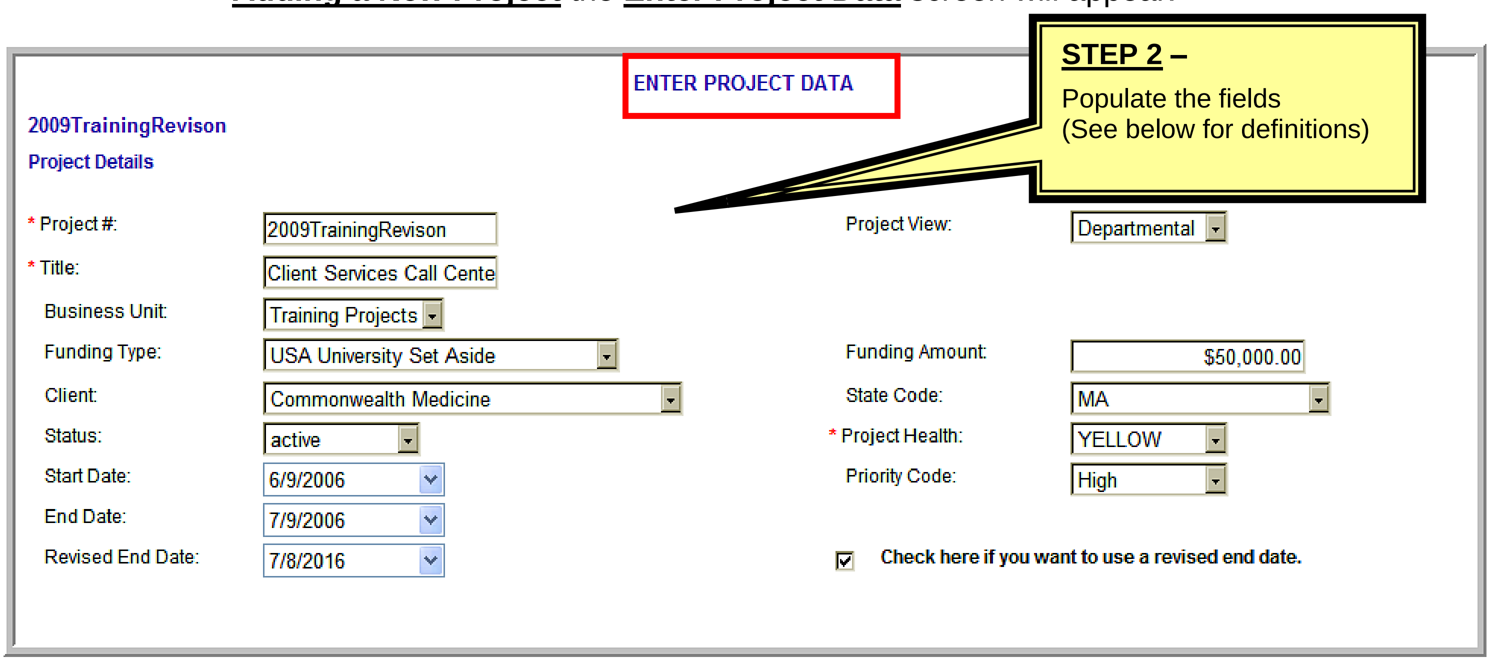

Home
Tasks
Search
Admin
Reports
My Profile
Logout
Help
New Project
Project Listing
Business Units Listing
PROJECT LISTING
Training Projects
Show Active Projects
Project #
Project Name
Project Health
Project Manager
2009TrainingRevison
Client Services Call Center Expansion [Training Sample]
STEP 3 of 3
If updating an existing project click on the project listed under the Project Name

## c. Adding a New Project




**Special Note**: *Access to the Enter a Project screen is limited to users assigned the Admin role within a department. If the New Project selection does not appear on the navigation bar the user cannot enter a project. Check with the Department Coordinator to add users or update user access.*

**Adding a New Project** the **Enter Project Data** screen will appear.




a. The **Project Number** will be auto assigned *(you may edit the Project # by clicking in the box). Project #'s cannot be duplicated.*

b. **Project View** – Departmental, Global or Internal *(see Roles & Security Defined in the Overview).*

c. Enter **Title**: Project titles can be duplicated across departments but not in same Business Unit.

d. Select **Business Unit** (BU) from drop down (*common to see more than one BU).*

`

e. Select **Funding type** from drop down (USA funding, SSA funding, immigrant, grants, ISA, Fee for Service)

f. Enter **Funding Amount**

g. Select **Client** from drop down *(if the client you require does not appear check with your Department Coordinator to add).*

h. Select **State**

i. Select **Status**
   i. **Active** – Current project
   ii. **Archive**
   iii. **Cancelled** – Project cancelled prior to completion
   iv. **Completed** – Completed/success and including project closure
   v. **Deleted** – Project entered in error i.e. duplicate
   vi. **On Hold**
   vii. **Pending** – Project awaiting approval of feasibility cost benefit analysis

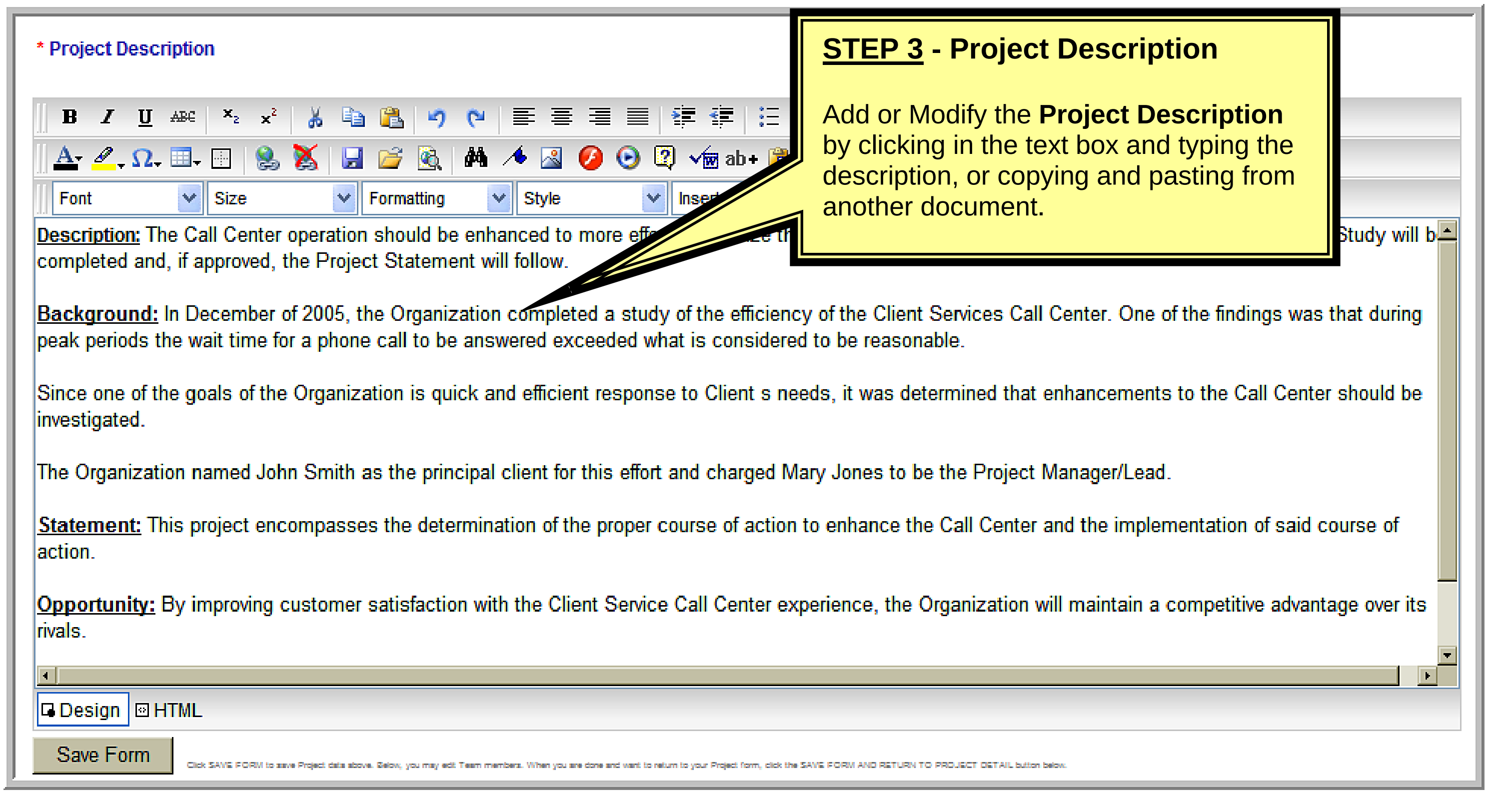
j. Select **Project Health -** Overall Project status field allows for reporting/sorting by current project status.

| | | |
|---|---|---|
| **Red** | = | Serious Risk |
| **Yellow** | **=** | Manageable Risk |
| **Green** | = | On Target |

k. Select **Priority Code:**
   i. **High** – Critical needs, mandated (cost, legal, etc.);
   ii. **Medium** – Important but not mandated
   iii. **Low** – Requested but not mandated

l. Enter **Start Date & End Date** *(Revised End Date used if the end date of project needs to be changed later).*
   i. **Start date** – Date project officially began
   ii. **End date** – Projected date of completion
   iii. **Revised End Date** – Change projected date of completion

m. Enter **Project Description**




*The project description details the project issues and opportunities, goals and objectives, success criteria, identifies risks, considerations and assumptions.*

## d. Project Description Example

### 1. Problem/Opportunity:

Our client has requested our assistance in developing and implementing the sample systems to coordinate the benefits of their members eligible for coverage.

### 2. Project Goal:

To establish and coordinate required business functions with client on sample project.

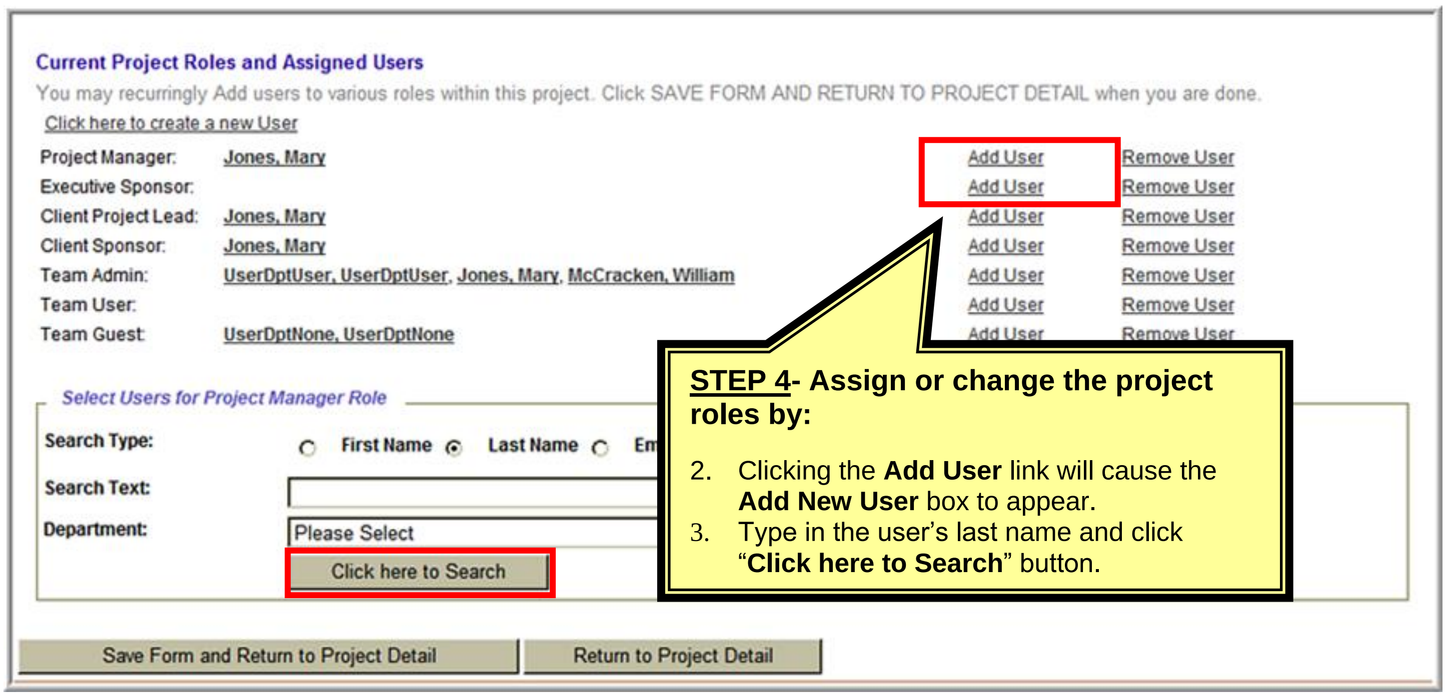
### 3. Objectives:

**a.** participate with client in the development of contract agreement for sample project.
**b.** Communicate with client to establish mutually agreeable policies and business processes including, but not limited to:
- Data sharing format and frequency
- Billing and payment process
- Enrollment/dis-enrollment procedures
- Reporting and reconciliation of enrollment & eligibility, member utilization and claims and member appeals process
- Interface with project teams for claims processing planning and implementation

## e. Assign Lead Roles

Adding **Project Role and Assigned User** section the **Enter Project Data** screen can be used to grant or limit access to the project.

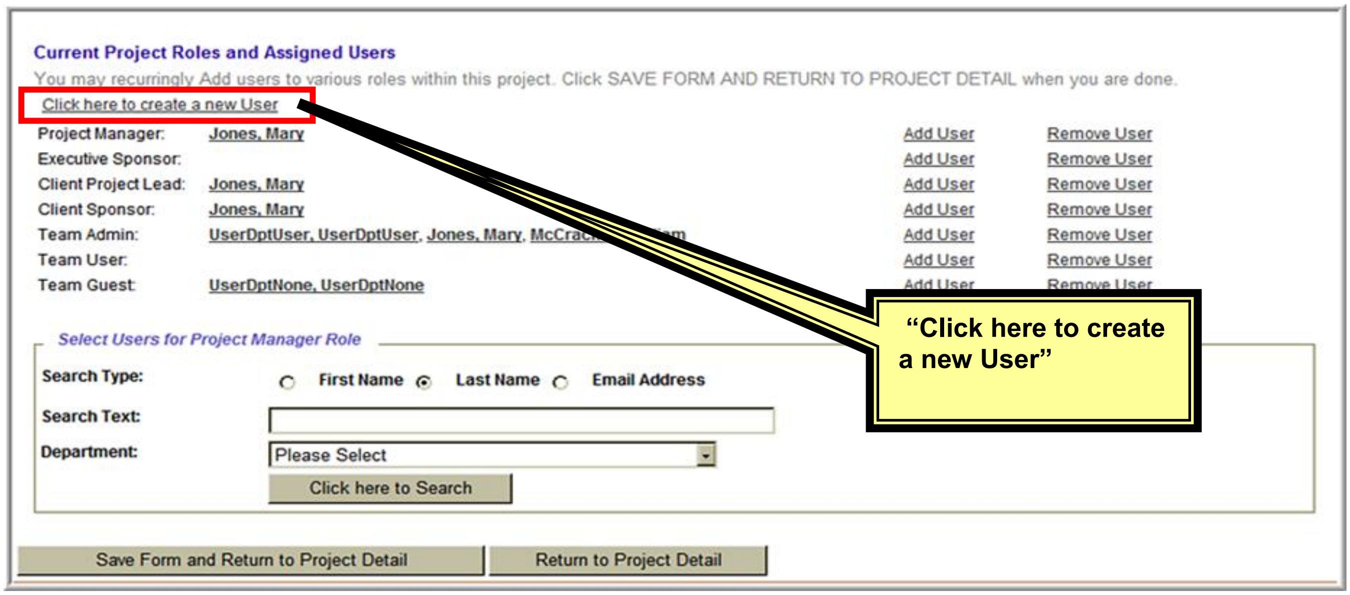
See **Roles & Security** - Project Team Members, describes the security function of this section.

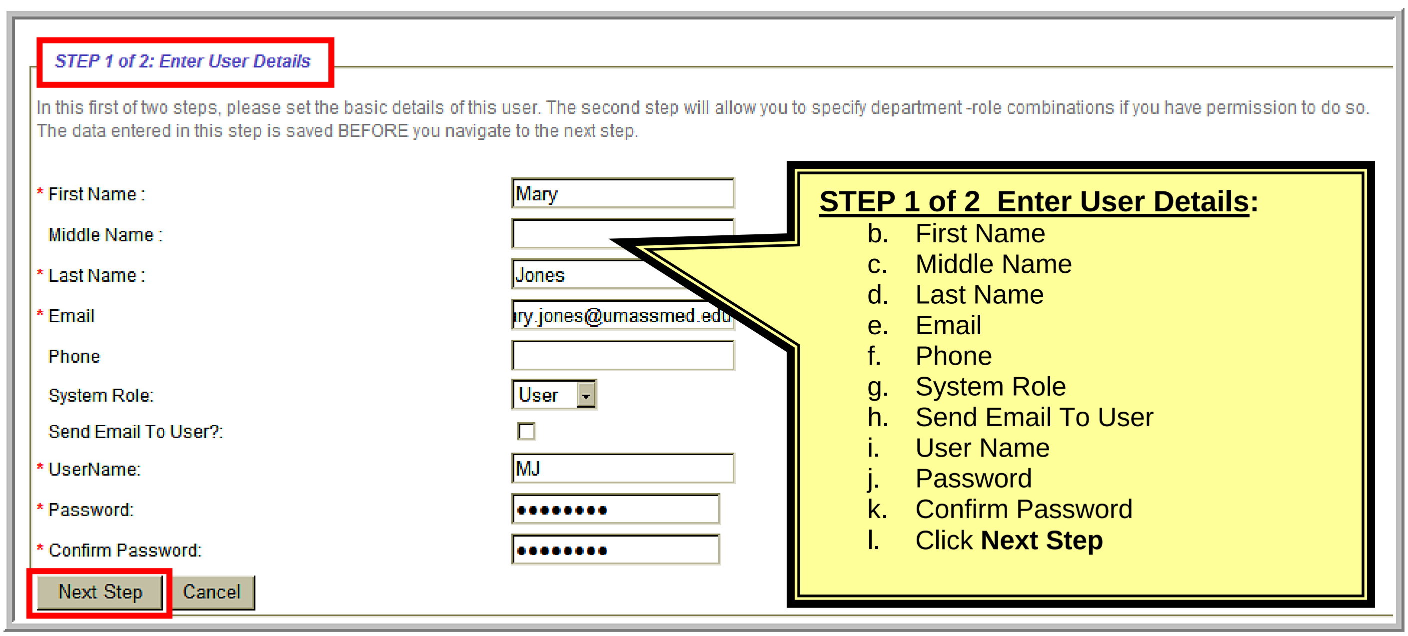


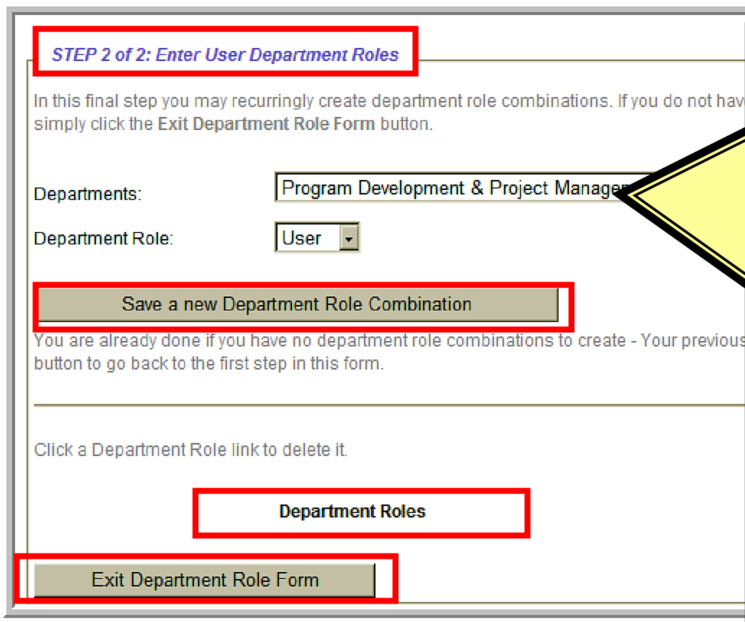

| | |
|---|---|
| **Project Manager:** | Internal Project Leader |
| **Executive Sponsor:** | Internal High Level Decision Maker |
| **Client Project Lead:** | External Client Project Lead |
| **Client Sponsor:** | External High Level Decision Maker |

- Some projects may not have each role and more than one person can be assigned to a role, however, each person should only be assigned one role.

- Please note that within Project Reporter, an assigned project role will override a person's department role. For example, a person who is a department administrator will not have editing capabilities for a project if they have been added to the project as a Guest.

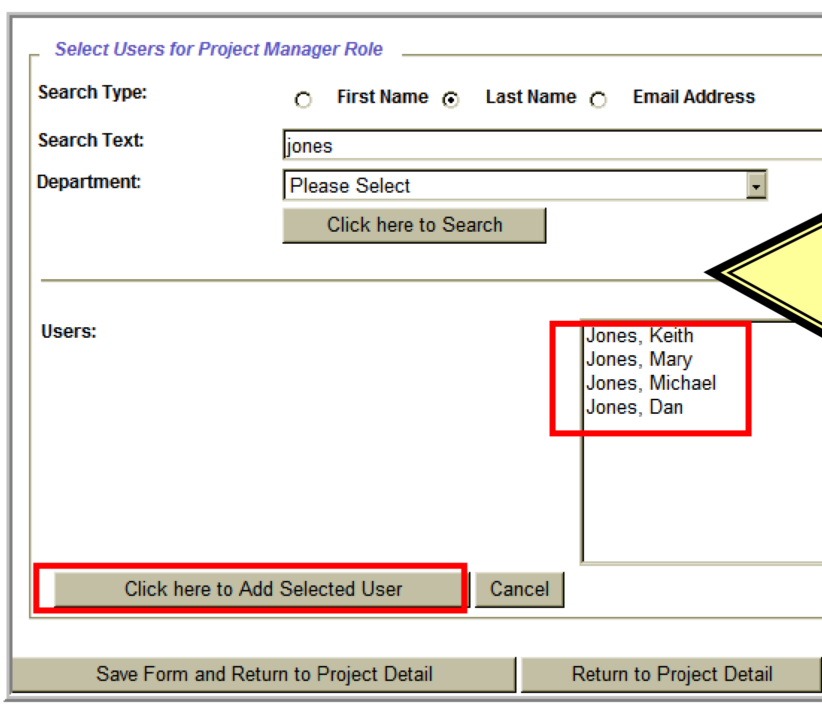

Current Project Roles and Assigned Users
You may recurringly Add users to various roles within this project. Click SAVE FORM AND RETURN TO PROJECT DETAIL when you are done.
Click here to create a new User
Project Manager: Jones, Mary
Executive Sponsor:
Client Project Lead: Jones, Mary
Client Sponsor: Jones, Mary
Team Admin: UserDptUser, UserDptUser, Jones, Mary, McCra
Team User:
Team Guest: UserDptNone, UserDptNone
Add User
Remove User
"Click here to create a new User"
Select Users for Project Manager Role
Search Type:
First Name
Last Name
Email Address
Search Text:
Department:
Please Select
Click here to Search
Save Form and Return to Project Detail
Return to Project Detail


STEP 1 of 2: Enter User Details
In this first of two steps, please set the basic details of this user. The second step will allow you to specify department -role combinations if you have permission to do so. The data entered in this step is saved BEFORE you navigate to the next step.
* First Name : Mary
Middle Name :
* Last Name : Jones
* Email ry.jones@umassmed.edu
Phone
System Role: User
Send Email To User?:
* UserName: MJ
* Password: ••••••••
* Confirm Password: ••••••••
Next Step
Cancel
STEP 1 of 2 Enter User Details:
b. First Name
c. Middle Name
d. Last Name
e. Email
f. Phone
g. System Role
h. Send Email To User
i. User Name
j. Password
k. Confirm Password
l. Click Next Step




## STEP 2 of 2  Enter User Department Roles

1. Departmental Project View: Use this section to ***grant access to users outside the department*** where this project resides.
2. Internal Project View: If the Project View is **INTERNAL, users MUST BE granted access** in the Project Team Member list to be able to view or have access to this project.
3. Promote or Demote User access
4. Click "**Save a new Department Role Combination**" button
5. Click a **Department Role** link to delete it.
6. Click **Exit Department Role Form** button



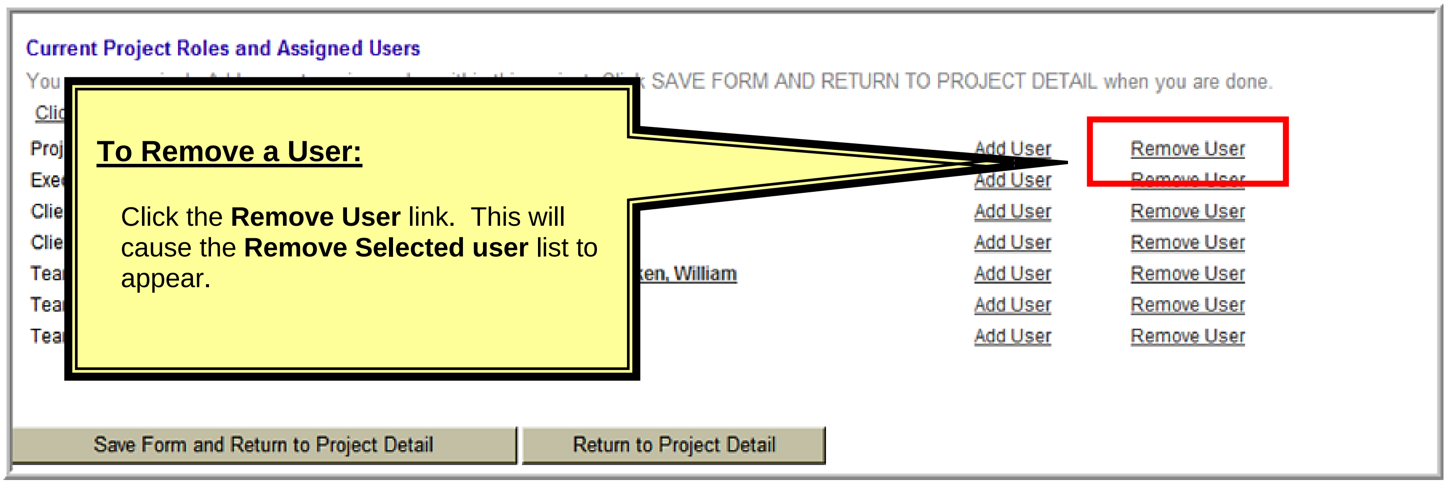

## Search Users for Project Roles By:

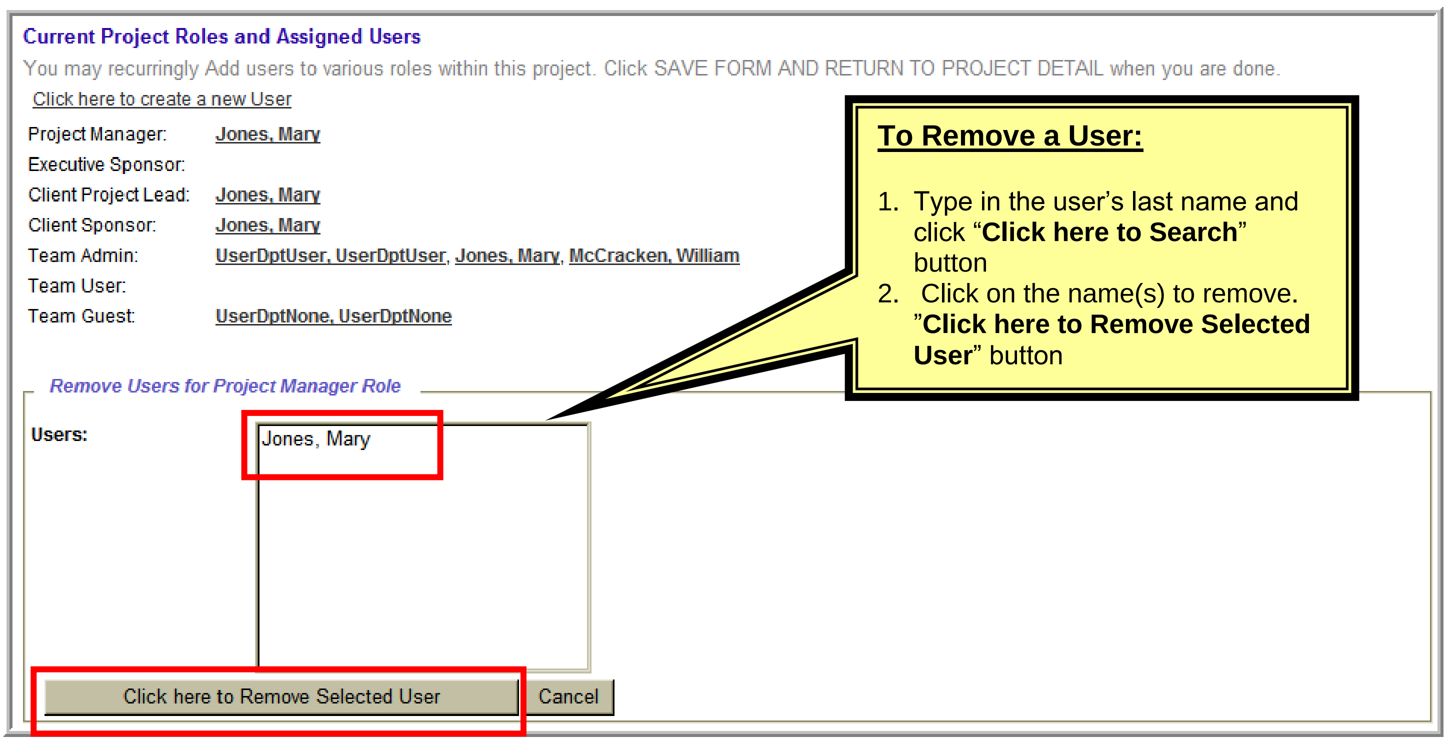
- First Name
- Last Name
- Email Address
- Search Text
- Department

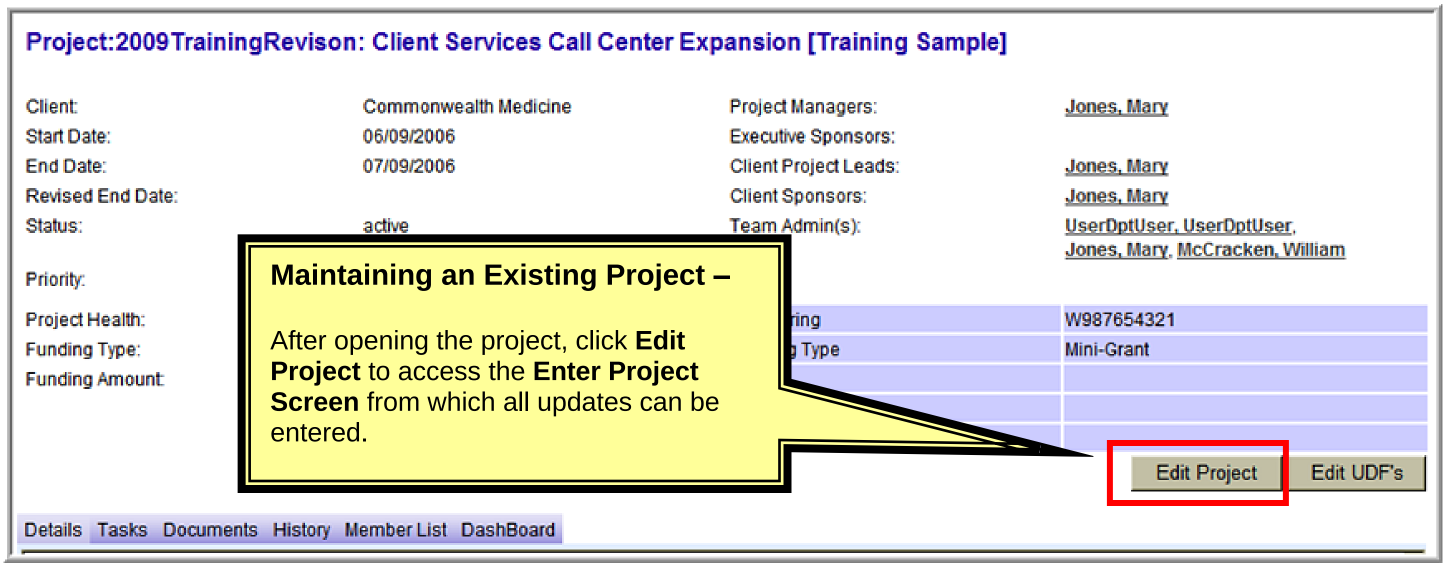
Click **Click here to Search** button

1. **Choose member(s)** from Users drop down list.
2. Click **Click here to Add Selected User**

`

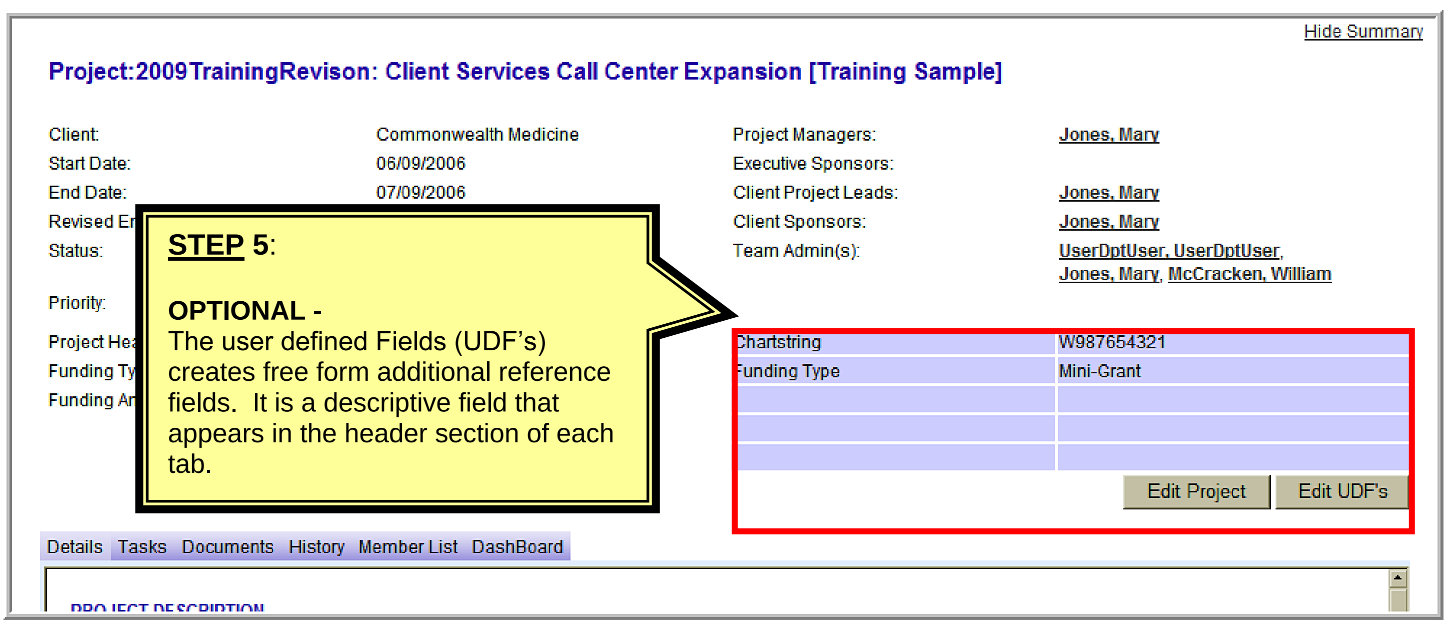

Current Project Roles and Assigned Users
SAVE FORM AND RETURN TO PROJECT DETAIL when you are done.
To Remove a User:
Click the **Remove User** link. This will cause the **Remove Selected user** list to appear.
en, William
Add User
Remove User
Save Form and Return to Project Detail
Return to Project Detail


Current Project Roles and Assigned Users
You may recurringly Add users to various roles within this project. Click SAVE FORM AND RETURN TO PROJECT DETAIL when you are done.
Click here to create a new User
Project Manager: Jones, Mary
Executive Sponsor:
Client Project Lead: Jones, Mary
Client Sponsor: Jones, Mary
Team Admin: UserDptUser, UserDptUser, Jones, Mary, McCracken, William
Team User:
Team Guest: UserDptNone, UserDptNone
Remove Users for Project Manager Role
Users:
Jones, Mary
Click here to Remove Selected User
Cancel
To Remove a User:
1. Type in the user's last name and click "**Click here to Search**" button
2. Click on the name(s) to remove. "**Click here to Remove Selected User**" button




The information on the Header Section, as well as the Project Description and user information, can be edited by clicking the Edit Project button and making any necessary changes.

## f. Entering User Defined Fields




To edit any of the Project or UDF information click the **Edit Project** or **Edit UDF's** buttons located on the header section of each tab.

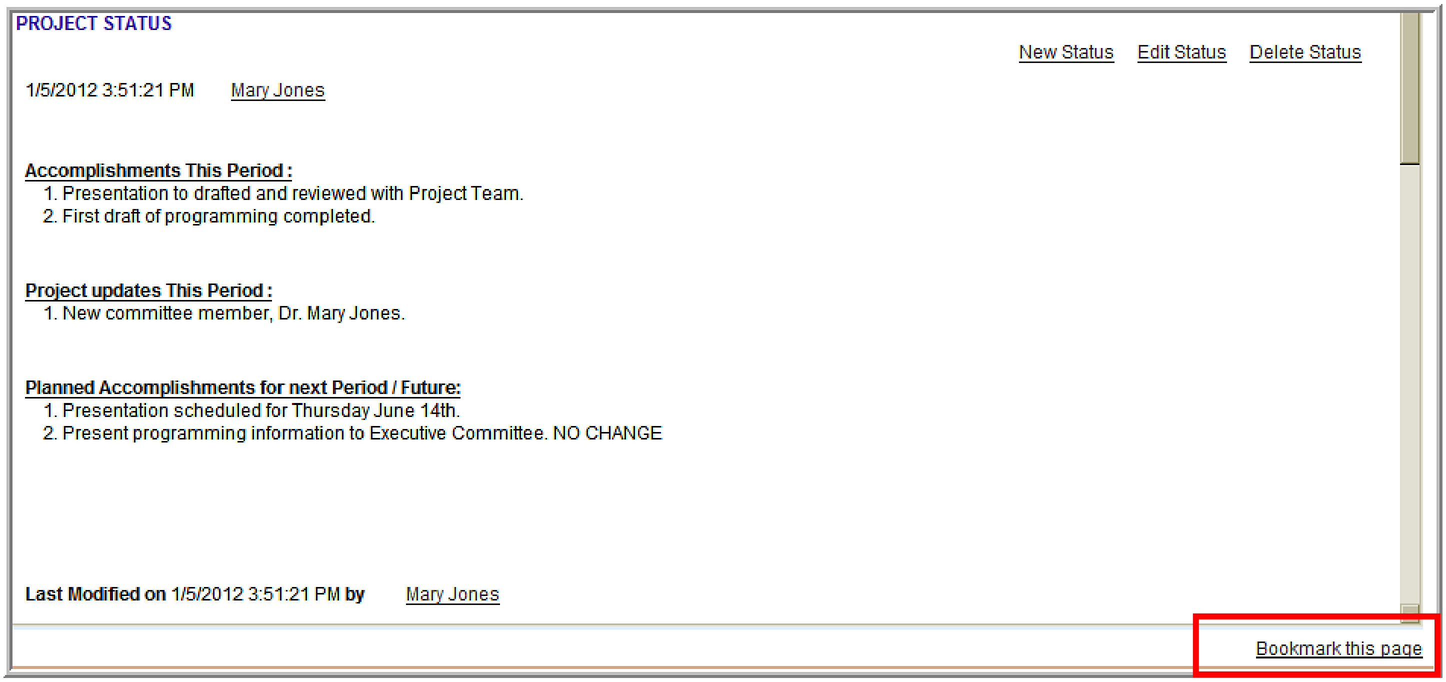
Fields and values are searchable *(see search function for details)*.

UDF's appear on the Project Detail by Business Unit Report & Project Status Detail Report.

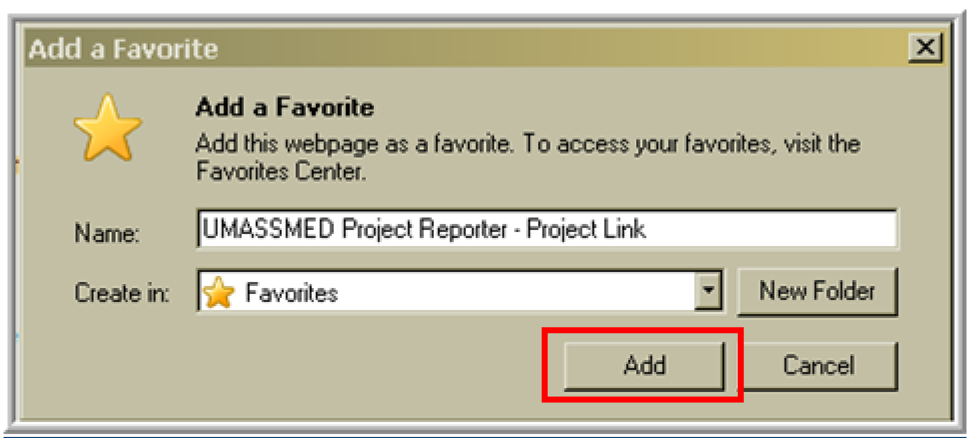
**NOTE**: You are not required to enter any UDF's for a Project

## g. Bookmarking a Project

You can add this project to your “Favorites” by clicking the **Bookmark This Page** Hyperlink at the bottom of the Project Detail Screen.




You can leave the default name or replace the Name, which will be pre-filled with “UMASSMED Project Reporter – Project Link”; with a name that describes the actual project and click **Add.**

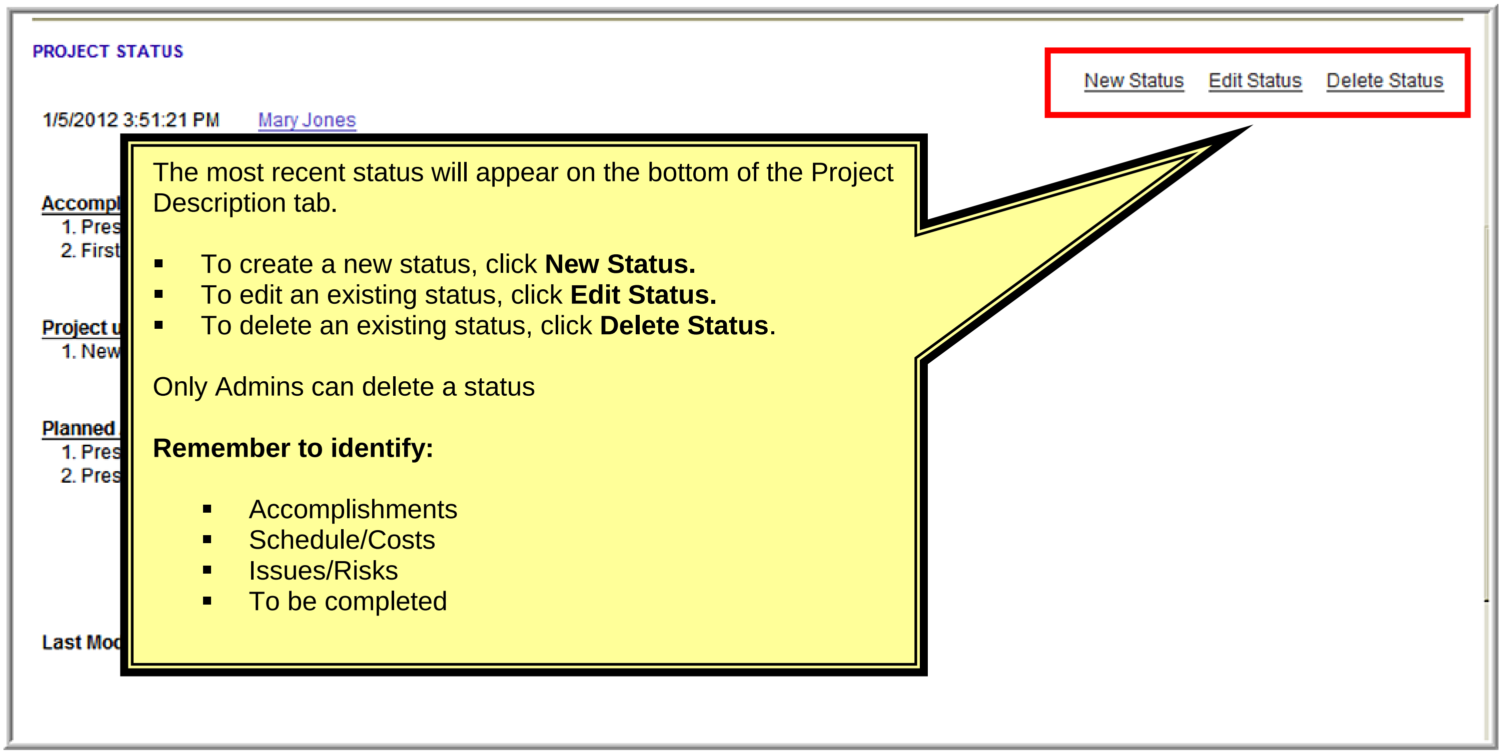


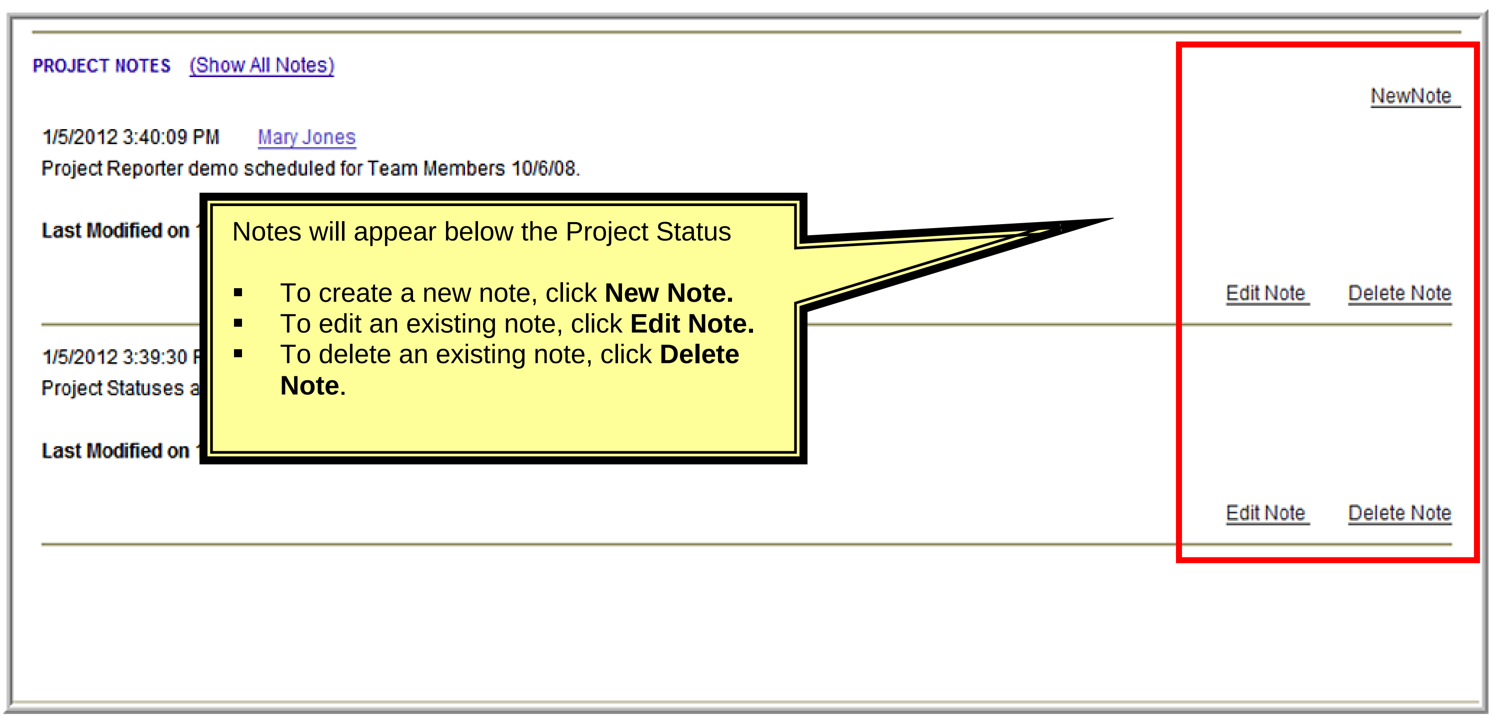

Upon first accessing the web and selecting the new favorite, if you are already logged into Project Reporter you will not have to login. If you are not logged into Project Reporter you will be asked for your Project Reporter login information. A successful login will bring you directly to this project.

# IV. STATUS UPDATES

## a. Entering and Maintaining Project Status & Project Notes

*Project Status is designed to communicate an overall project update to the project team.*



`

## b. Latest Project Status Update

The **Latest Project Status**, appearing on the Details Tab, under Project Description is designed to communicate an overall project update to the project team. The Project Manager will work with the Executive Sponsor, Client Project Lead and Client Sponsor to determine the schedule of project status updates (weekly, monthly).

Each Status Update will begin with the color indicated below that allows for team members a quick reference

**Green:** Project is on track, hitting all major and minor milestones. Interdependencies being well managed.

**Yellow:** There is some risk in the project. Minor milestones have been missed. Some issues with interdependencies. Major milestones will still be met.

**Red:** The project is at risk. Minor and major milestones will be missed. Interdependencies not cooperating or not aligned.

Be sure and include pertinent info:

1. What has been accomplished?
2. Is the project on schedule and meeting cost projections?
3. Are there potential issues that affect the project schedule or cost, and what are the risks if the issues are not resolved?

**SAMPLE Project Status Update:**

**Green:** Draft of the Communication plan submitted to Senior Leadership for review and approval on 12/15/05. Schedule for distribution to the management staff for presentation is 1/5/06, upon approval from Senior Leadership. If revisions are needed, the schedule to present to the department staff may be extended and the projected cost will increase due to additional resource time.

1. **Accomplishments:** Draft of the Communication plan submitted to Senior Leadership for review and approval on 12/15/05.
2. **Schedule/Costs:** Schedule for distribution to the management staff for presentation is 1/5/06, upon approval from Senior Leadership.
3. **Issues/Risks:** If revisions are needed, the schedule to present to the department staff may be extended and the projected cost will increase due to additional resource time.
4. **To be completed:** Identify work the team will work on between now and the next status update.

**NOTE: The history of the Project Status updates can be found by clicking the History tab.**

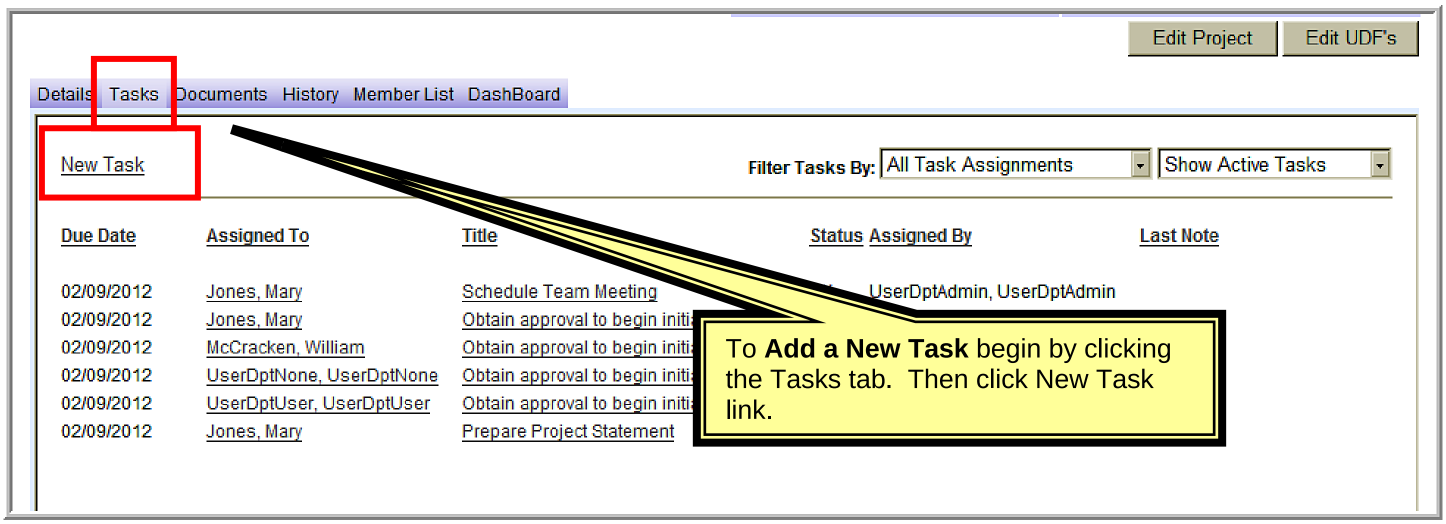
# V. TASK TAB

The Tasks tab is designed to document, assign and communicate progress.

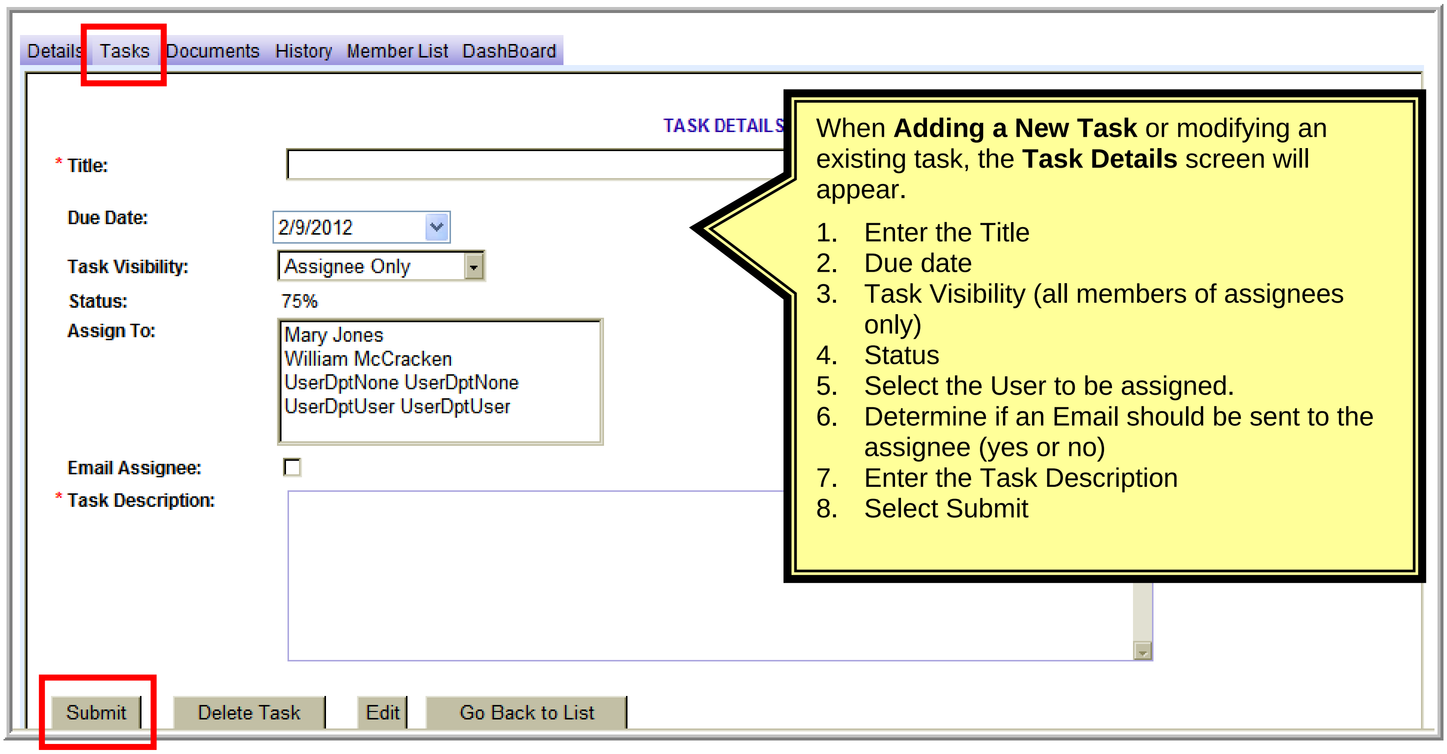
1. Organize and assign tasks to project team members, with an option of sending notification of the assignment via email.

2. Track progress by having team members update task status and add notes to document progress.

## a. Adding and Maintaining a Task



`


Details
Tasks
Documents
History
Member List
DashBoard
TASK DETAILS
* Title:
Due Date:
2/9/2012
Task Visibility:
Assignee Only
Status:
75%
Assign To:
Mary Jones
William McCracken
UserDptNone UserDptNone
UserDptUser UserDptUser
Email Assignee:
* Task Description:
Submit
Delete Task
Edit
Go Back to List
When **Adding a New Task** or modifying an existing task, the **Task Details** screen will appear.
1. Enter the Title
2. Due date
3. Task Visibility (all members of assignees only)
4. Status
5. Select the User to be assigned.
6. Determine if an Email should be sent to the assignee (yes or no)
7. Enter the Task Description
8. Select Submit

`

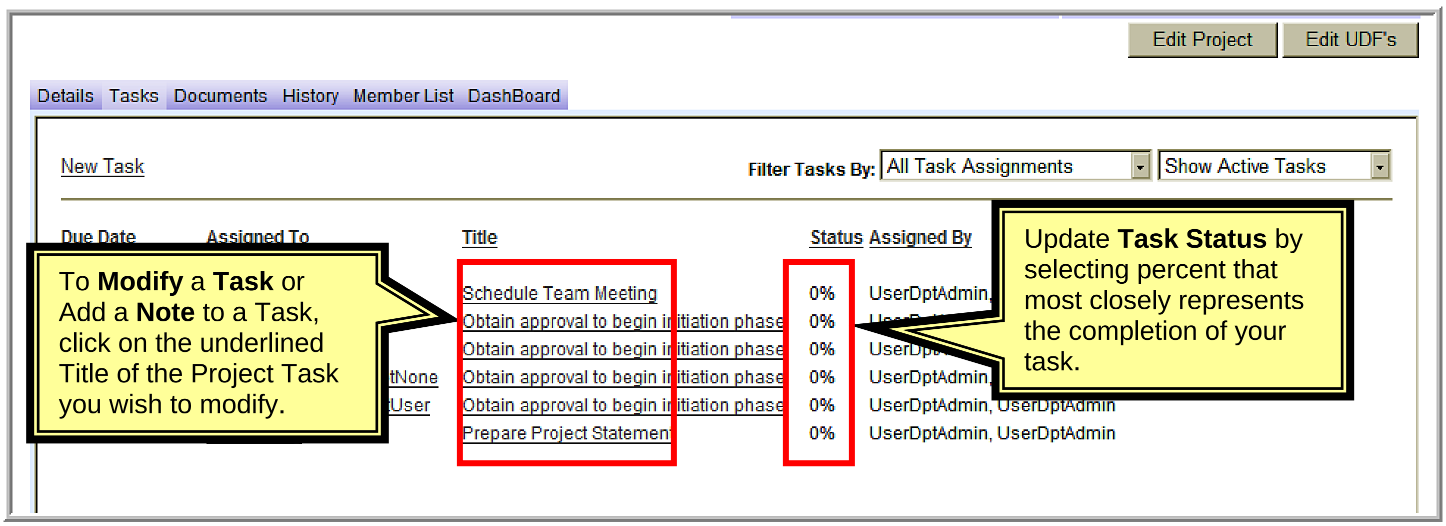
Task assignee will receive an e-mail in the following format:

***NOTE:*** *The body of the E-mail includes a link that brings the recipient directly to the task.*

> Hello
>
> Your Task List has been updated with the following task for project "Client Services Call Center Expansion [Training Sample]"
>
> Project Statement Revisions
>
> To access this application click here

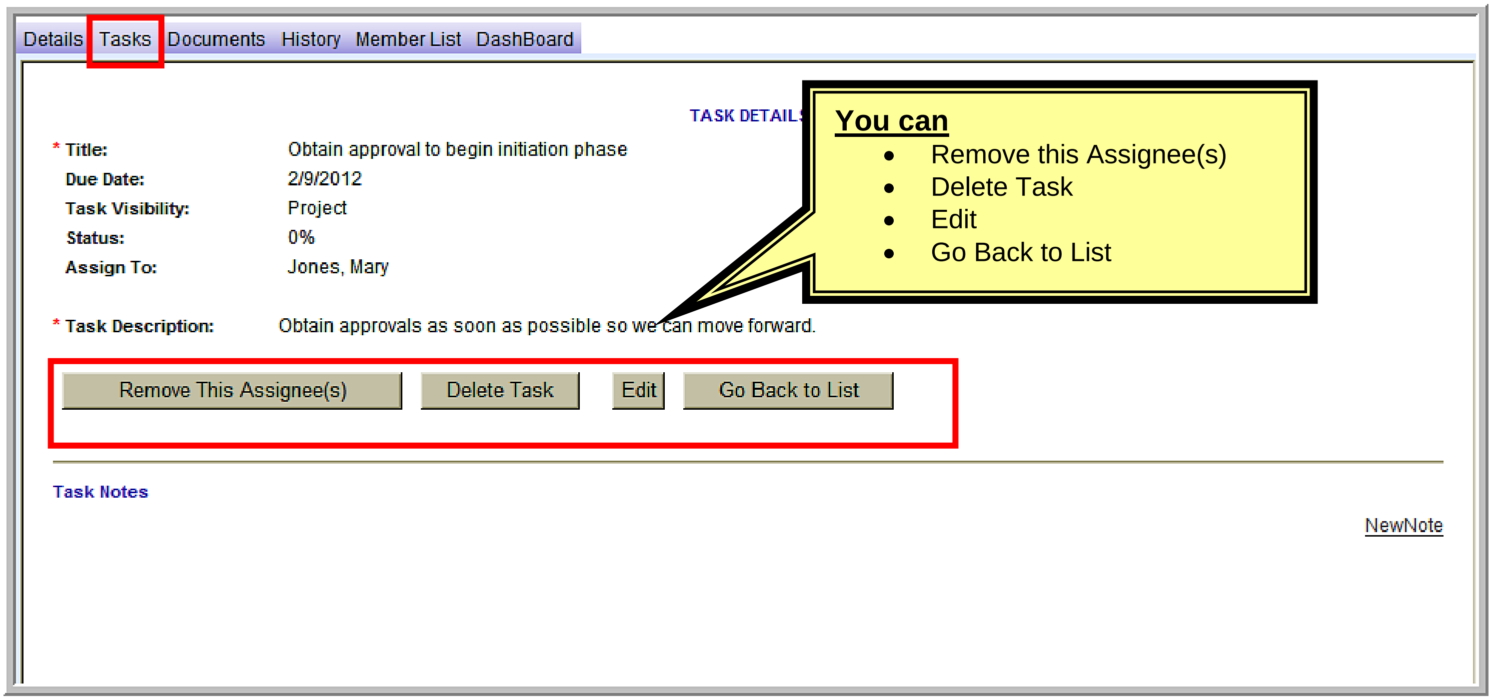
***Note: You can assign a task to multiple team members***

### b. Updating Task Status

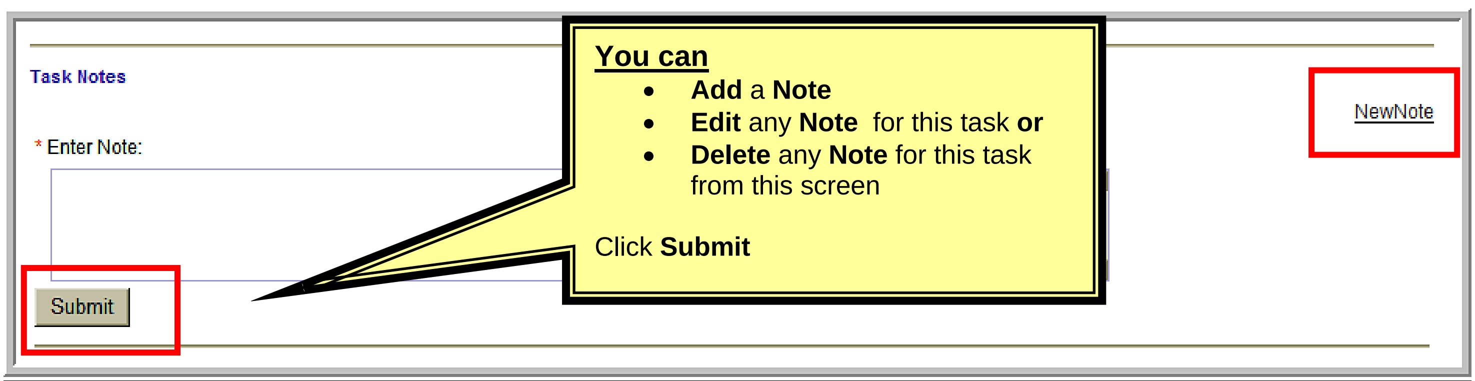



The assignor will receive an e-mail containing a link to the task when the task has been completed or reopened.

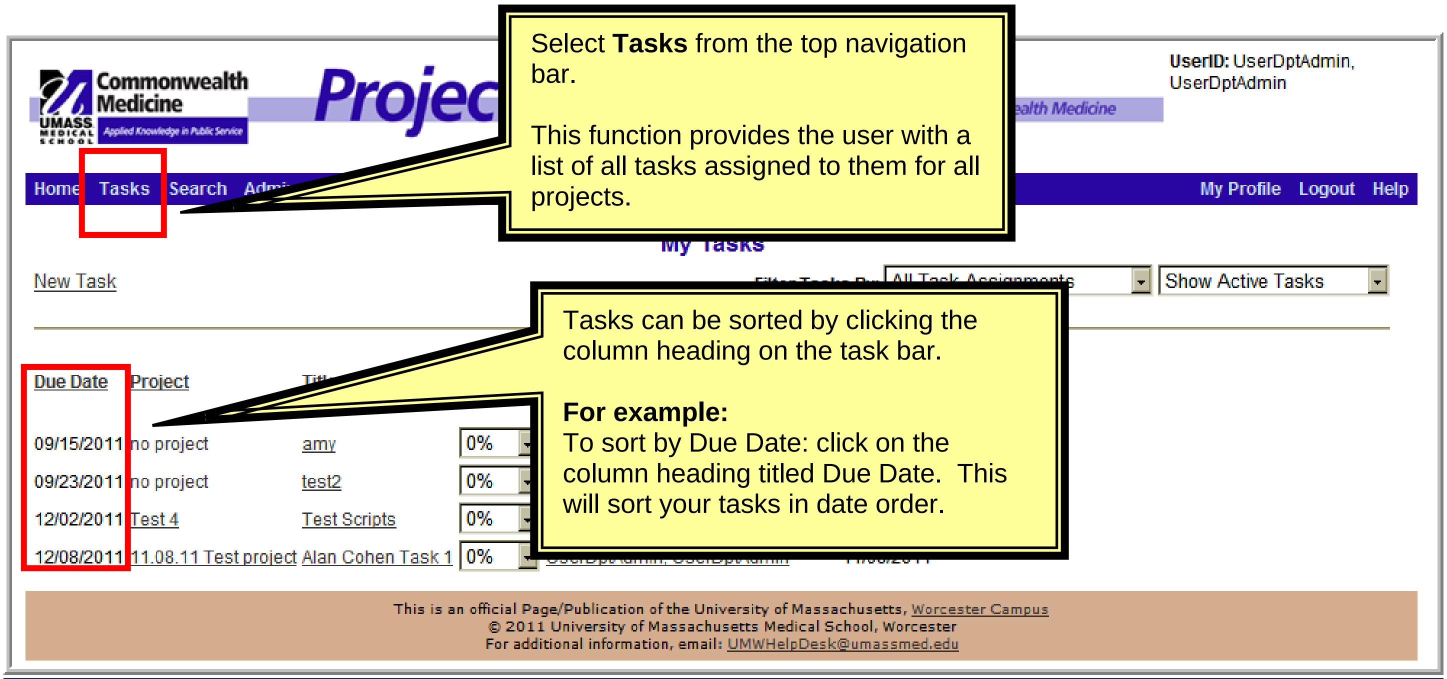
> Hello
>
> This Task ("Project Statement Revisions" in project "Client Services Call Center Expansion [Training Sample]") has been completed.
>
> To access this application click here




## c. Adding Notes to a Task



## d. Organize Assignments

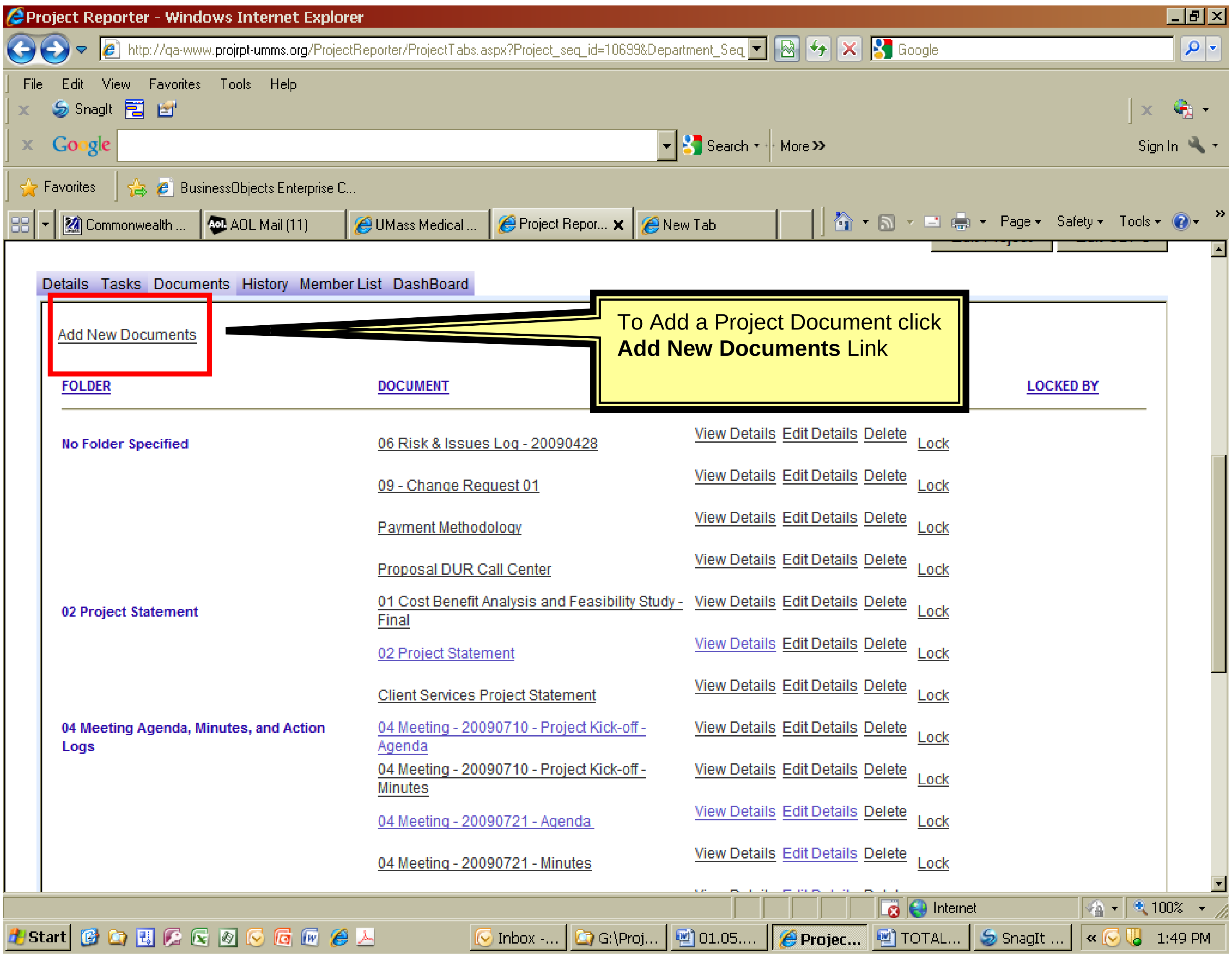


`

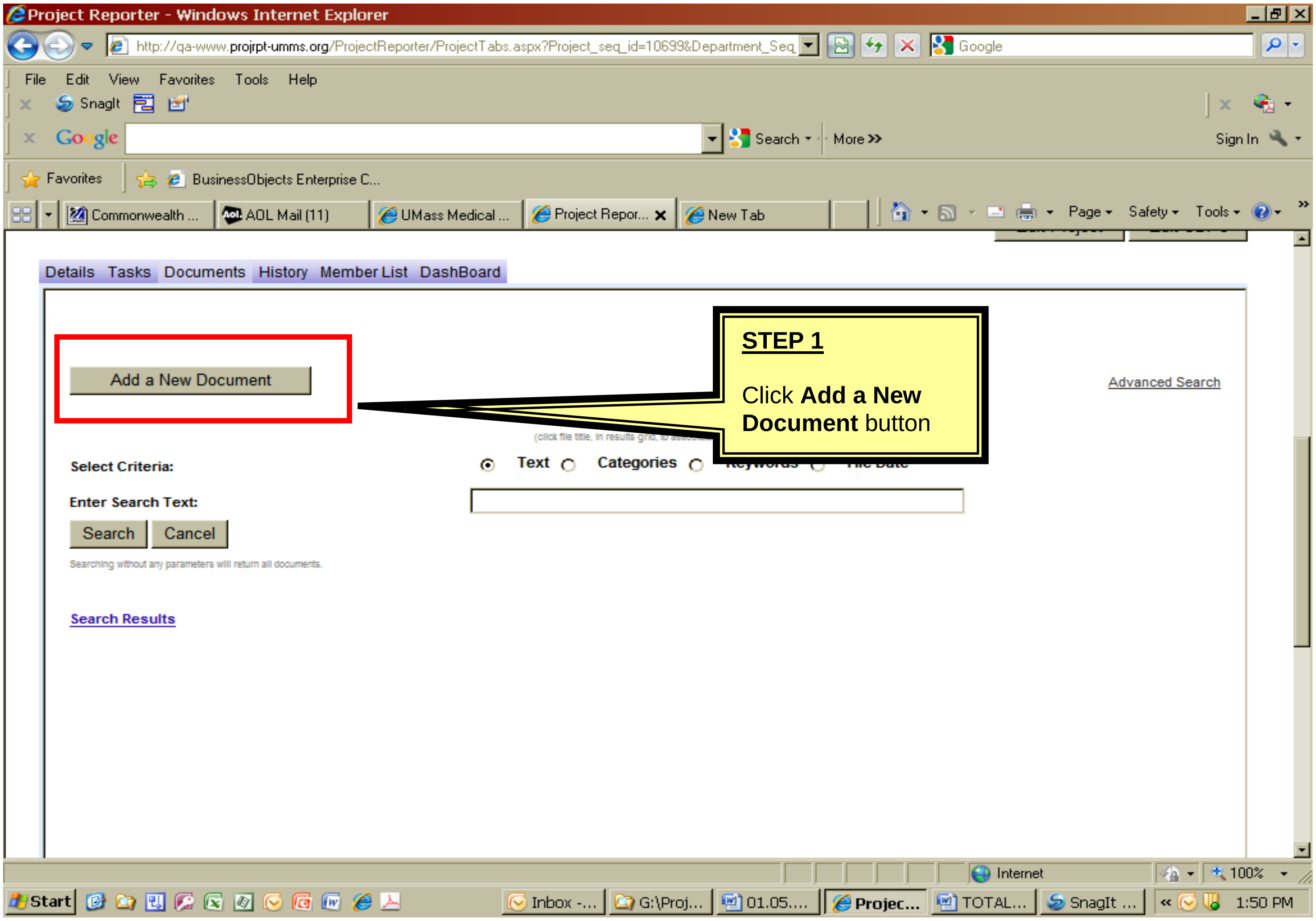
# VI. DOCUMENTS TAB

Any project document can be uploaded into a project. You can attach, access, and share any type of project documents using the **Documents** tab which serves as the library for project related documents.

## a. Add a Document

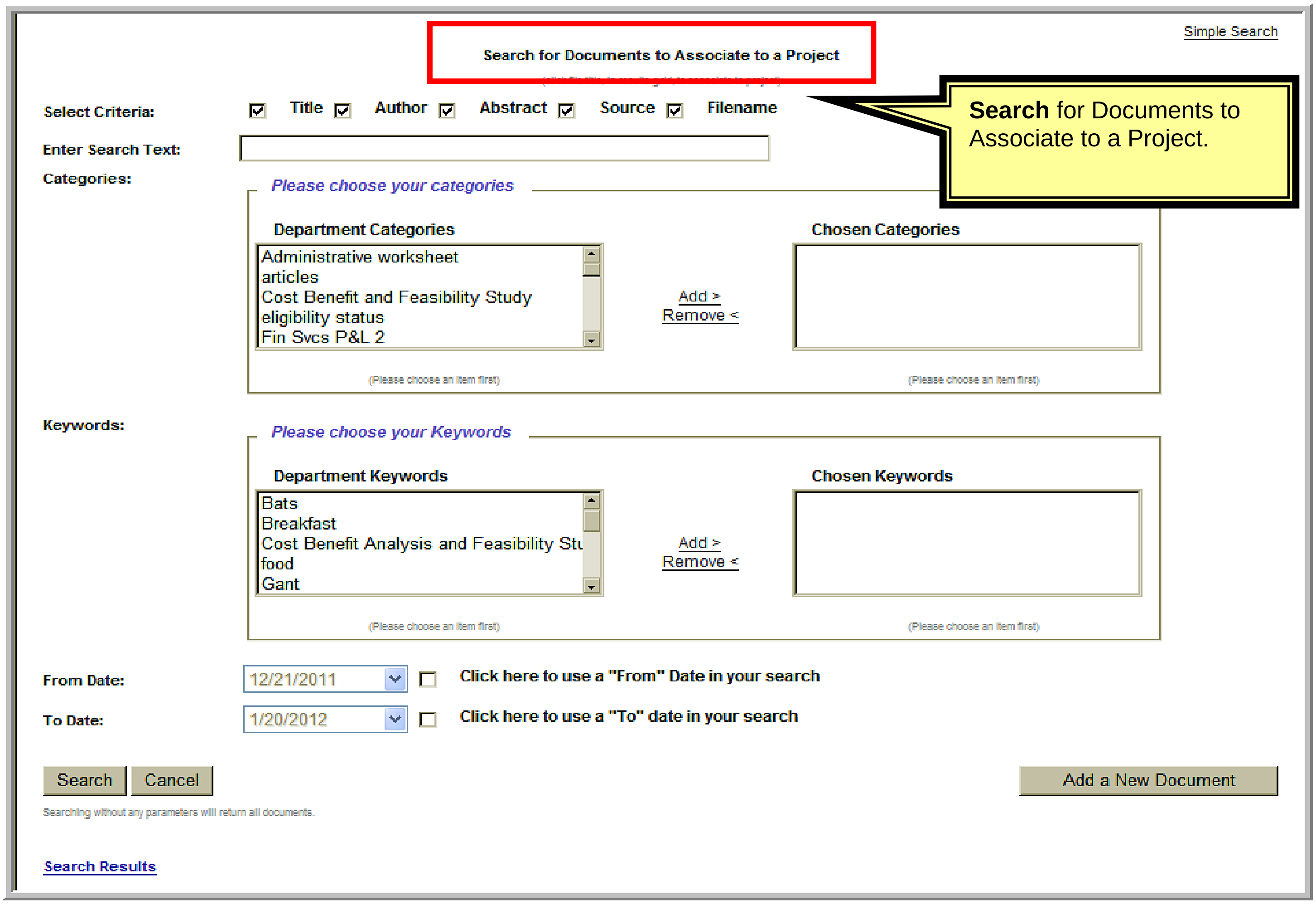


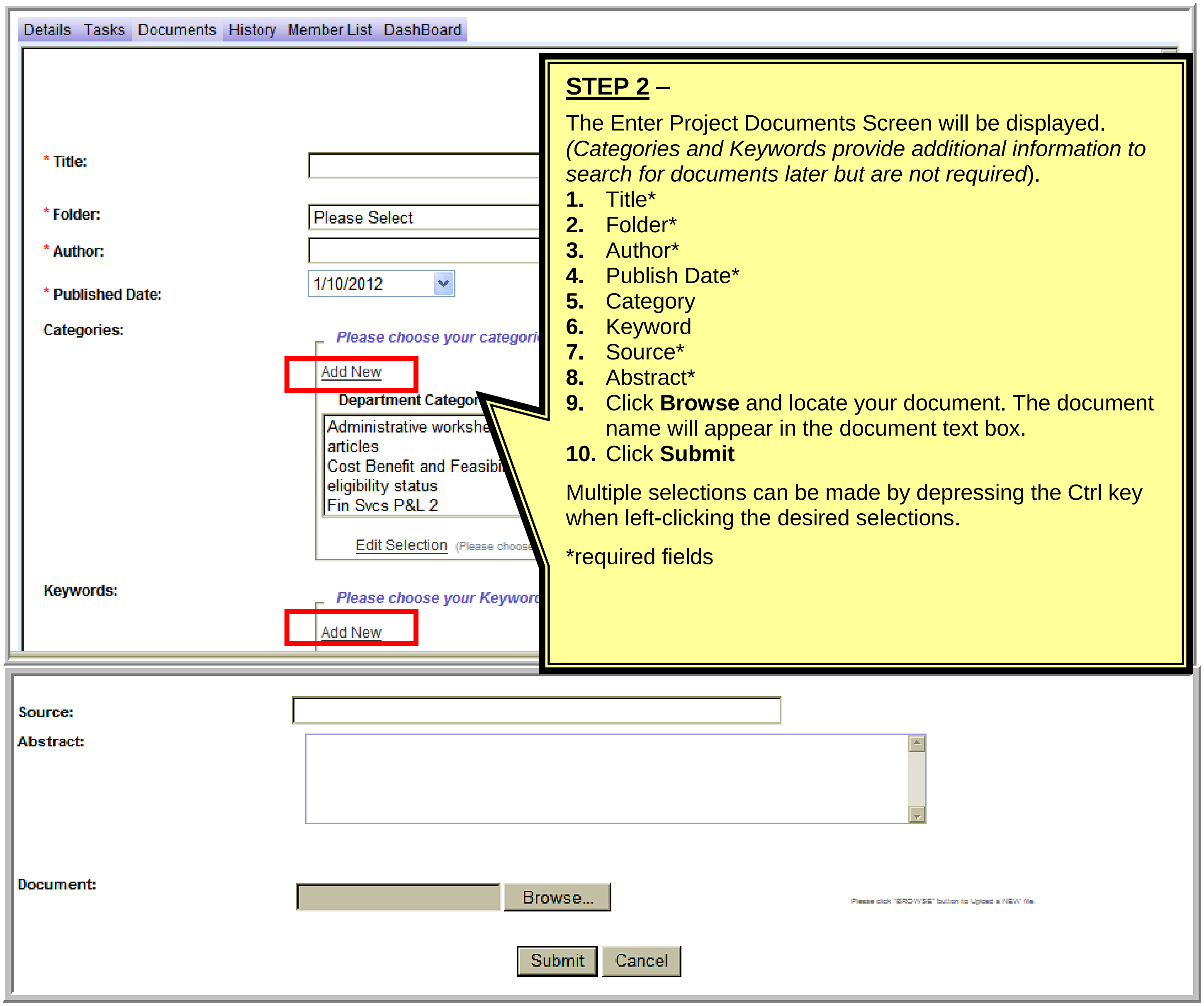
`


Project Reporter - Windows Internet Explorer
http://qa-www.projrpt-umms.org/ProjectReporter/ProjectTabs.aspx?Project_seq_id=10699&Department_Seq
File Edit View Favorites Tools Help
Details Tasks Documents History Member List DashBoard
Add a New Document
STEP 1
Click Add a New Document button
Advanced Search
Select Criteria:
Text
Categories
Enter Search Text:
Search
Cancel
Searching without any parameters will return all documents.
Search Results

Commonwealth Medicine UMASS Medical School Applied Knowledge in Public Service

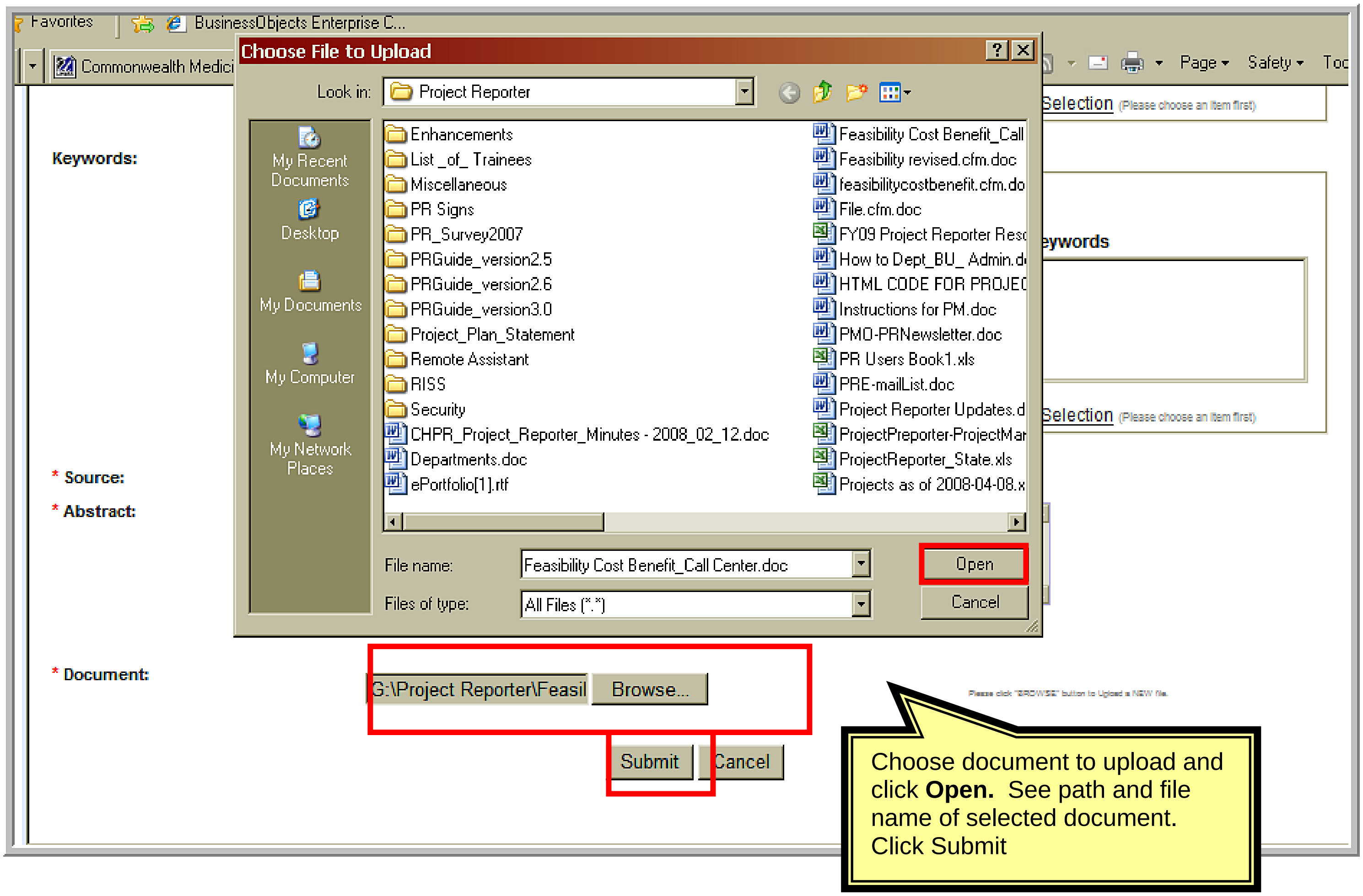
Project Reporter Sponsored by Commonwealth Medicine



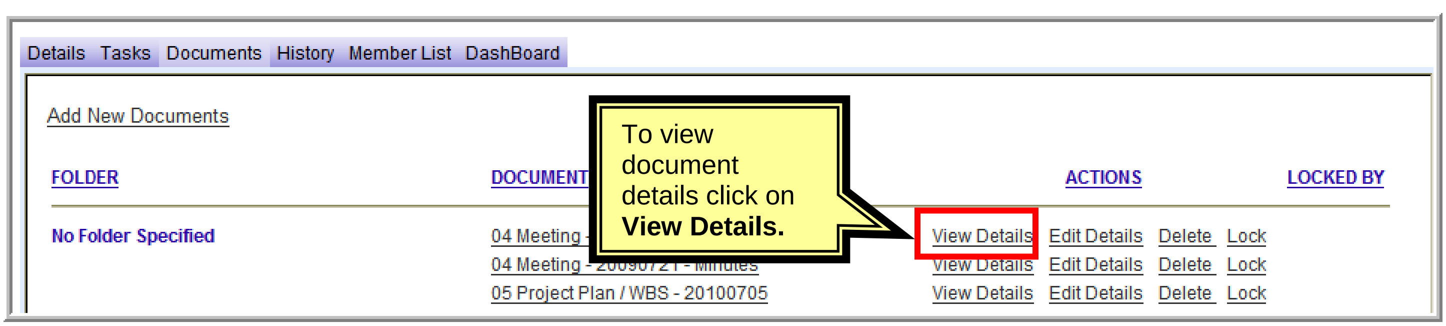


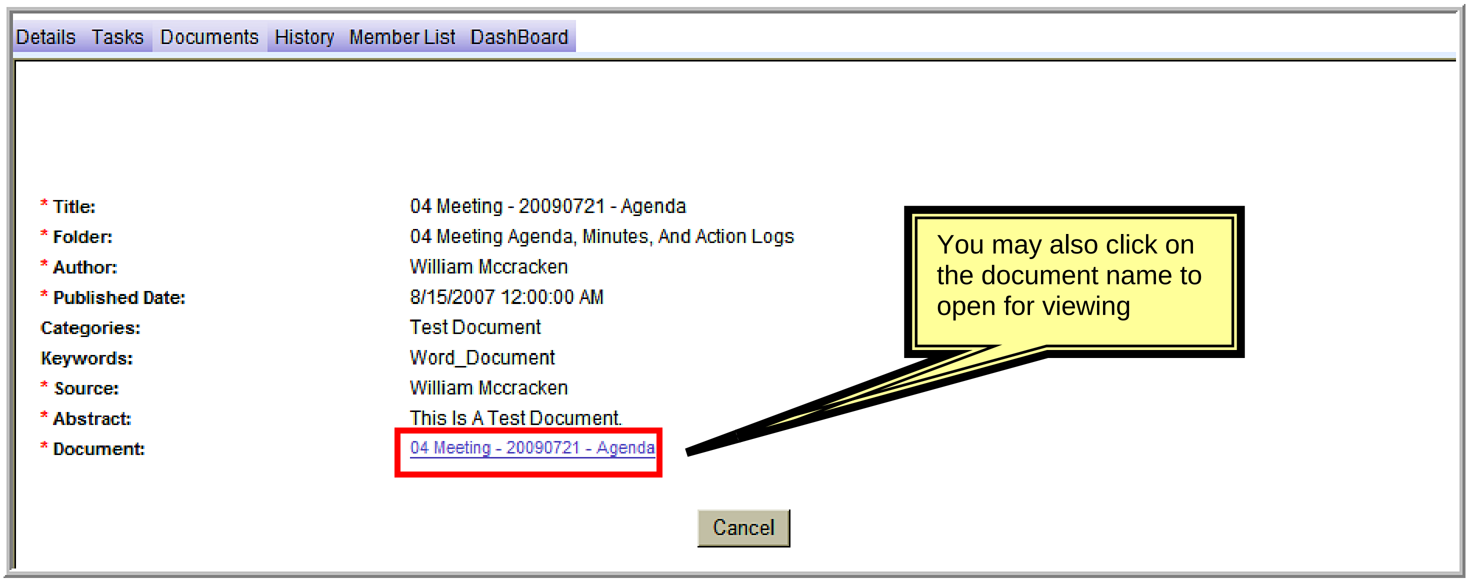

## FOLDER BLURB

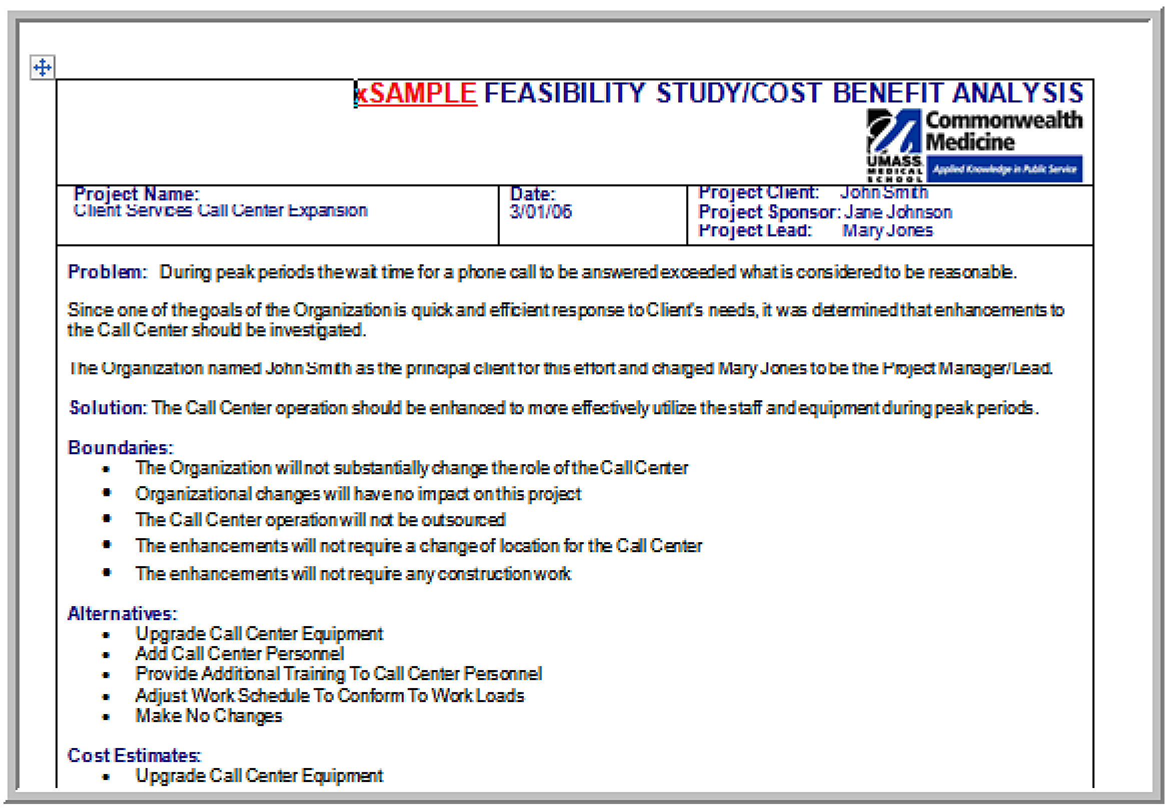
`




## b. View Details





SAMPLE FEASIBILITY STUDY/COST BENEFIT ANALYSIS

Commonwealth Medicine UMASS Medical School Applied Knowledge in Public Service

| Project Name: | Date: | |
|---|---|---|
| Client Services Call Center Expansion | 3/01/06 | Project Client: John Smith<br>Project Sponsor: Jane Johnson<br>Project Lead: Mary Jones |

**Problem:** During peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is quick and efficient response to Client's needs, it was determined that enhancements to the Call Center should be investigated.

The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

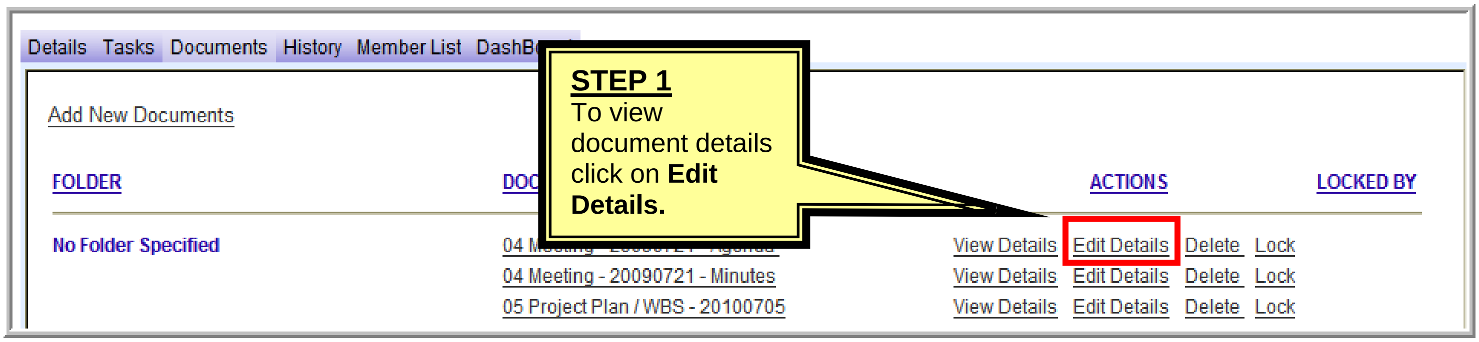
**Solution:** The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods.

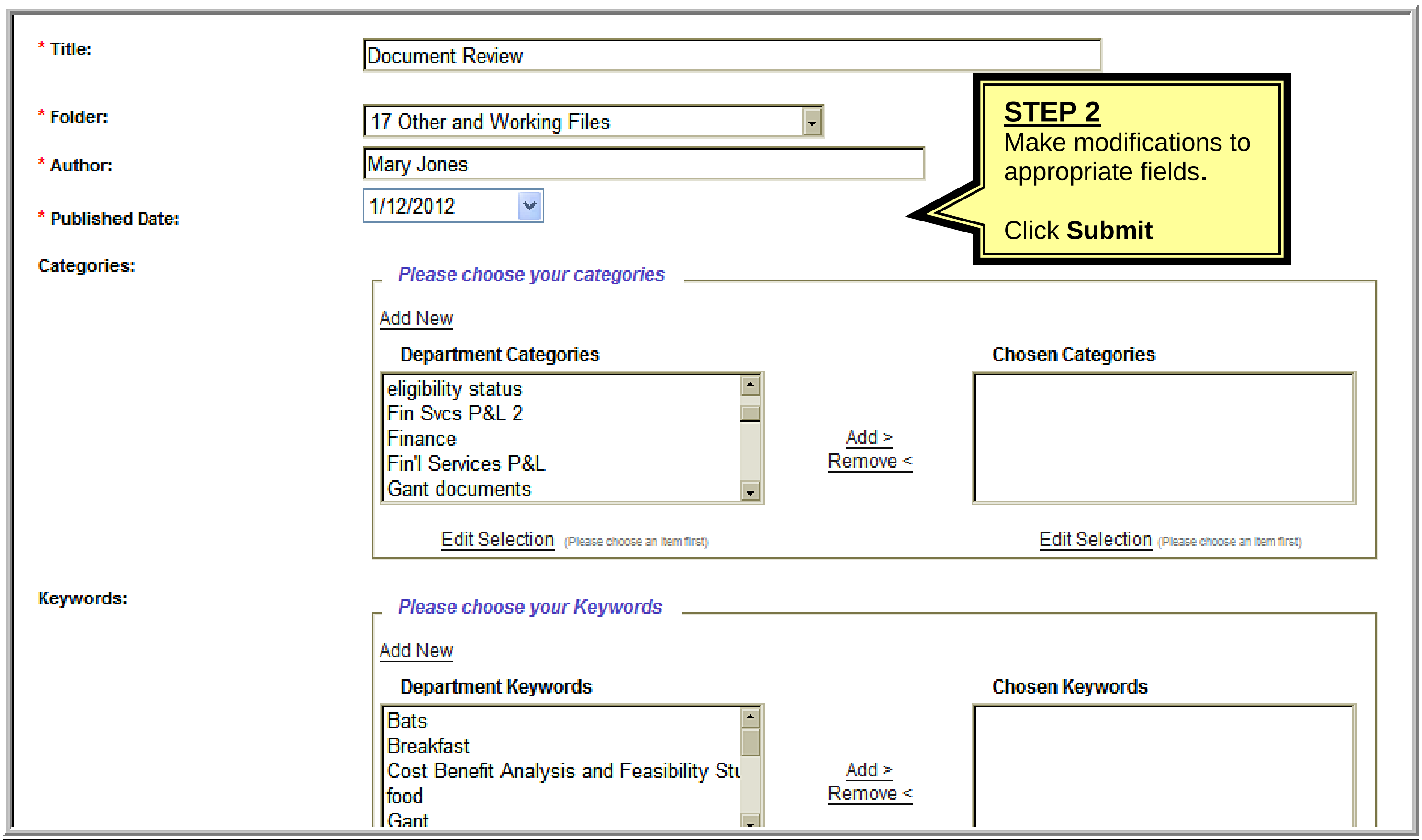
**Boundaries:**
- The Organization will not substantially change the role of the Call Center
- Organizational changes will have no impact on this project
- The Call Center operation will not be outsourced
- The enhancements will not require a change of location for the Call Center
- The enhancements will not require any construction work

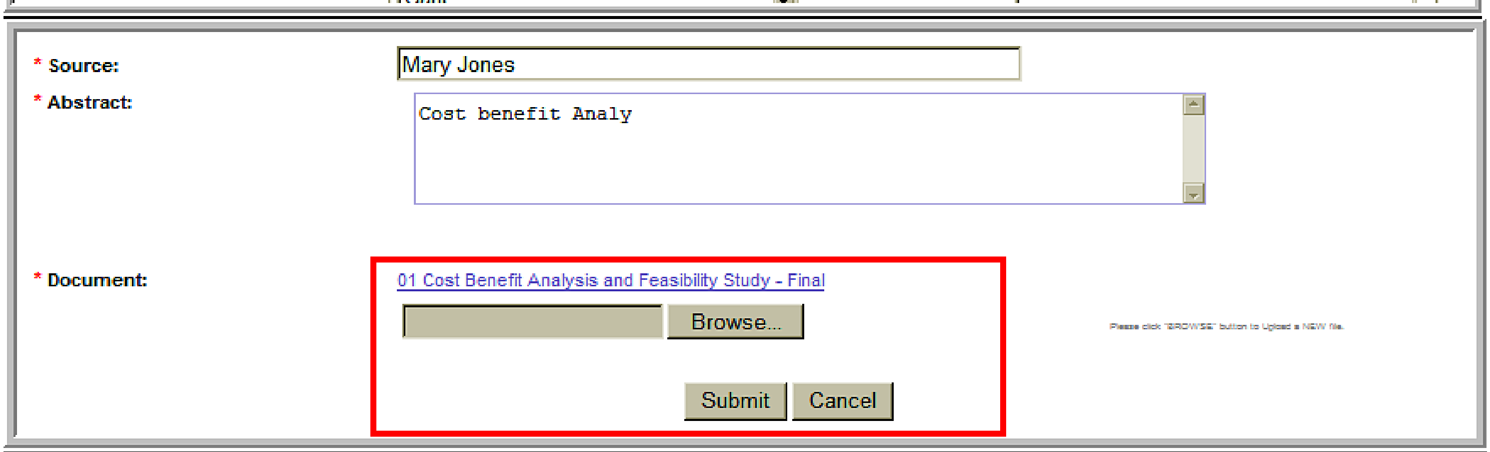
**Alternatives:**
- Upgrade Call Center Equipment
- Add Call Center Personnel
- Provide Additional Training To Call Center Personnel
- Adjust Work Schedule To Conform To Work Loads
- Make No Changes

**Cost Estimates:**
- Upgrade Call Center Equipment

## c. Edit Details

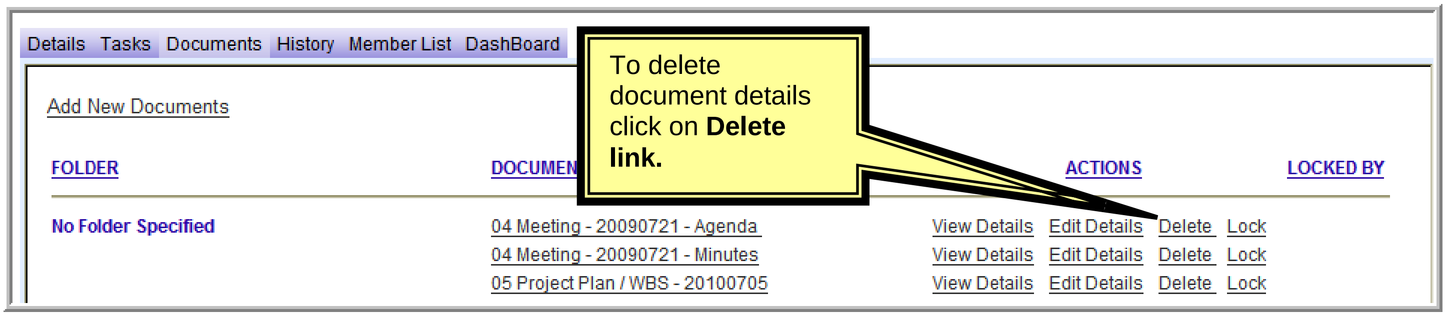


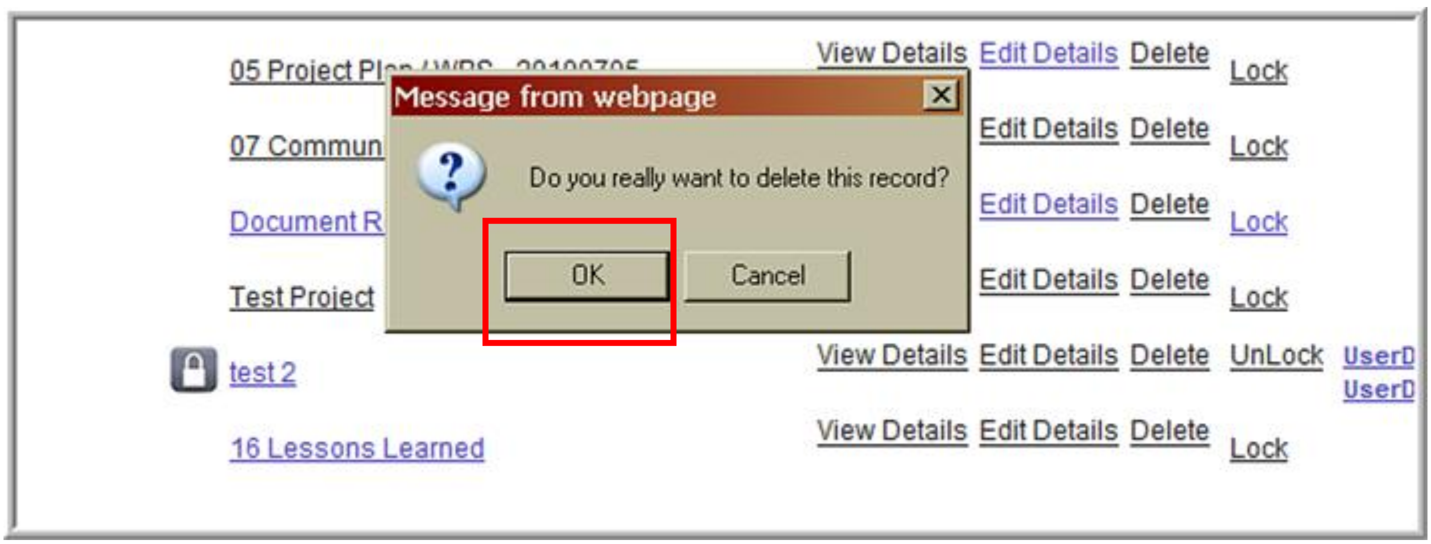



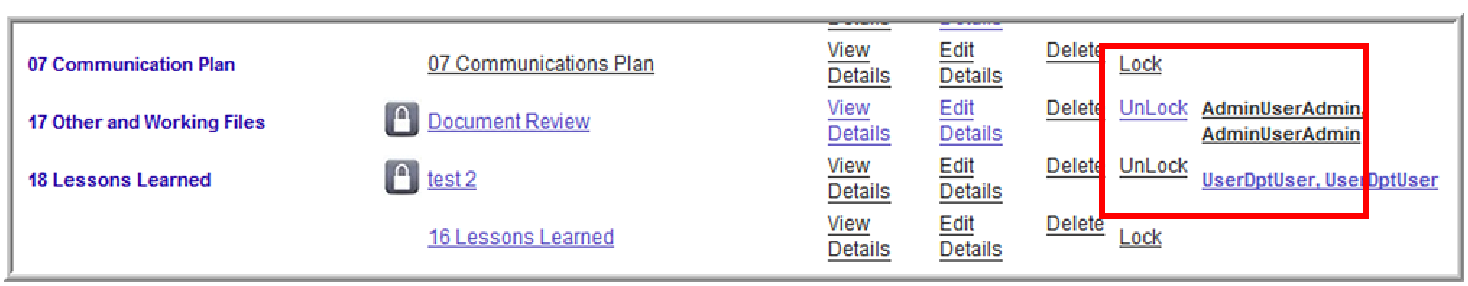
`

## d. Delete a Document




## e. Lock a Document



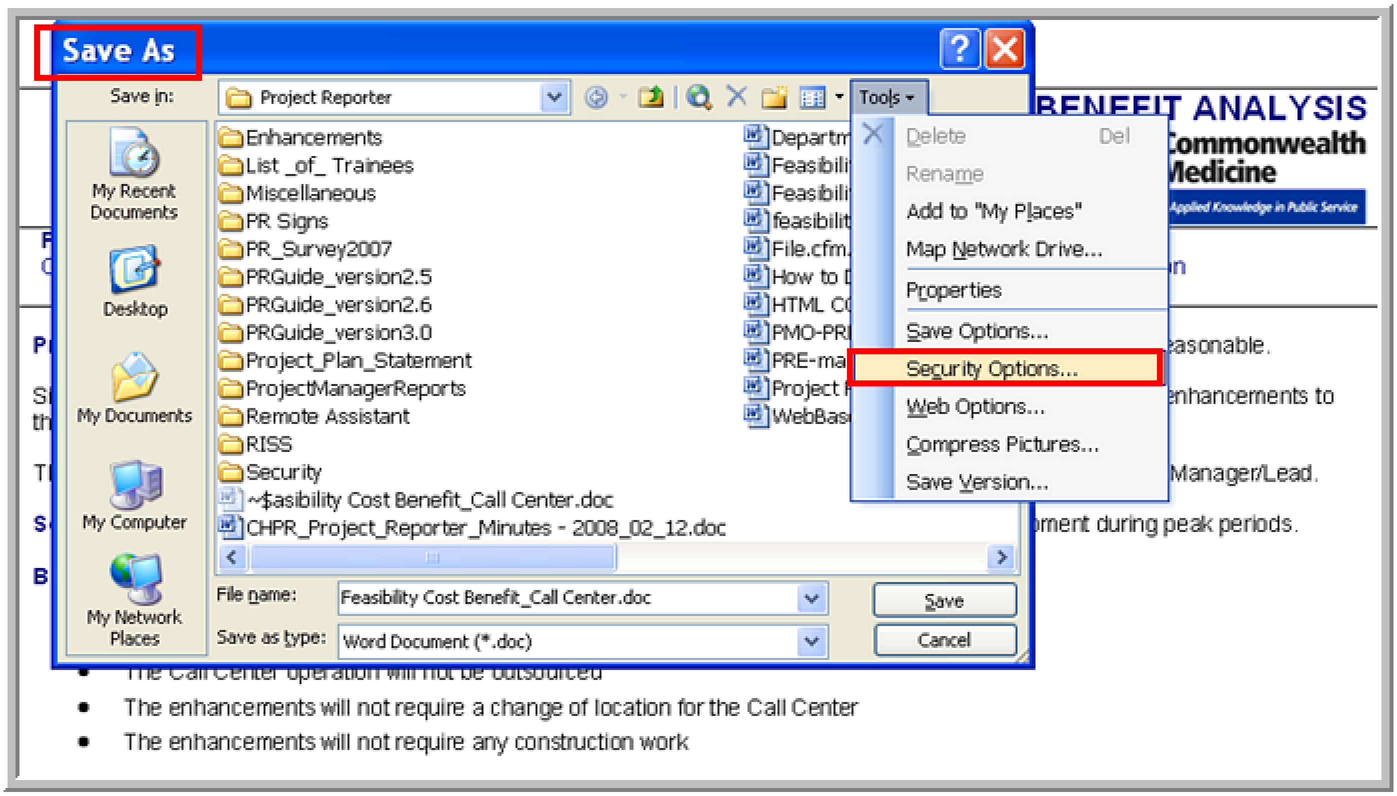

**Locking the document prevents anyone from making changes to your document.**

`

***IMPORTANT FILE ACCESS NOTE:***

Access to any file can be limited by using the Microsoft File ***PASSWORD PROTECTION***:

- When saving a **<u>WORD</u>** <u>document</u> go to **File > Save as** then click on **tools**. Click on **SECURITY OPTIONS.**



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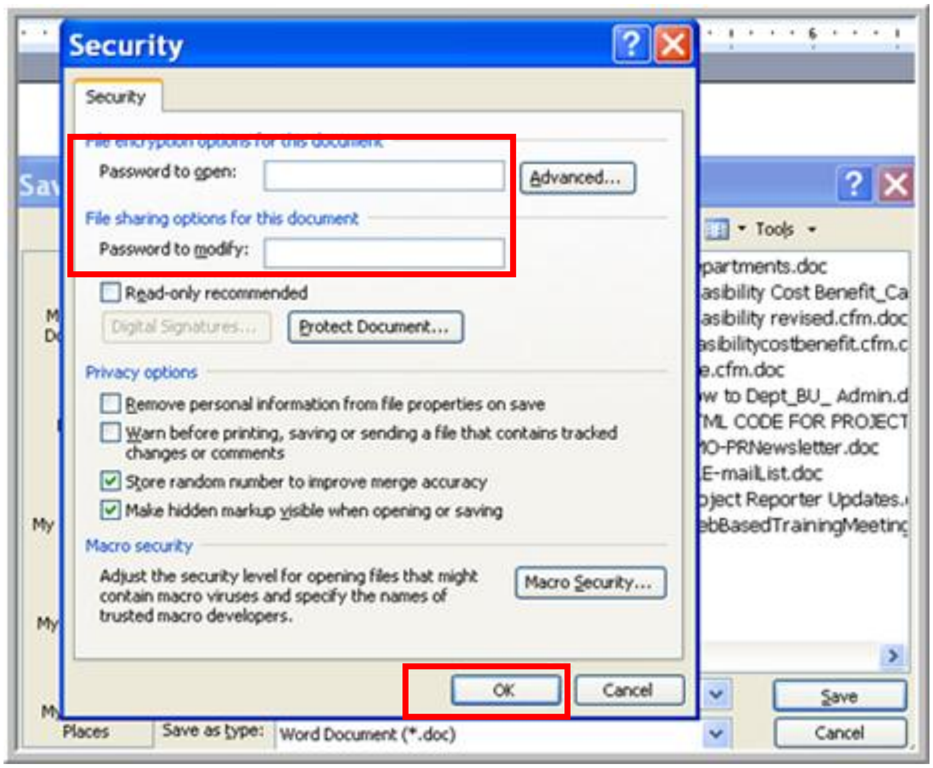
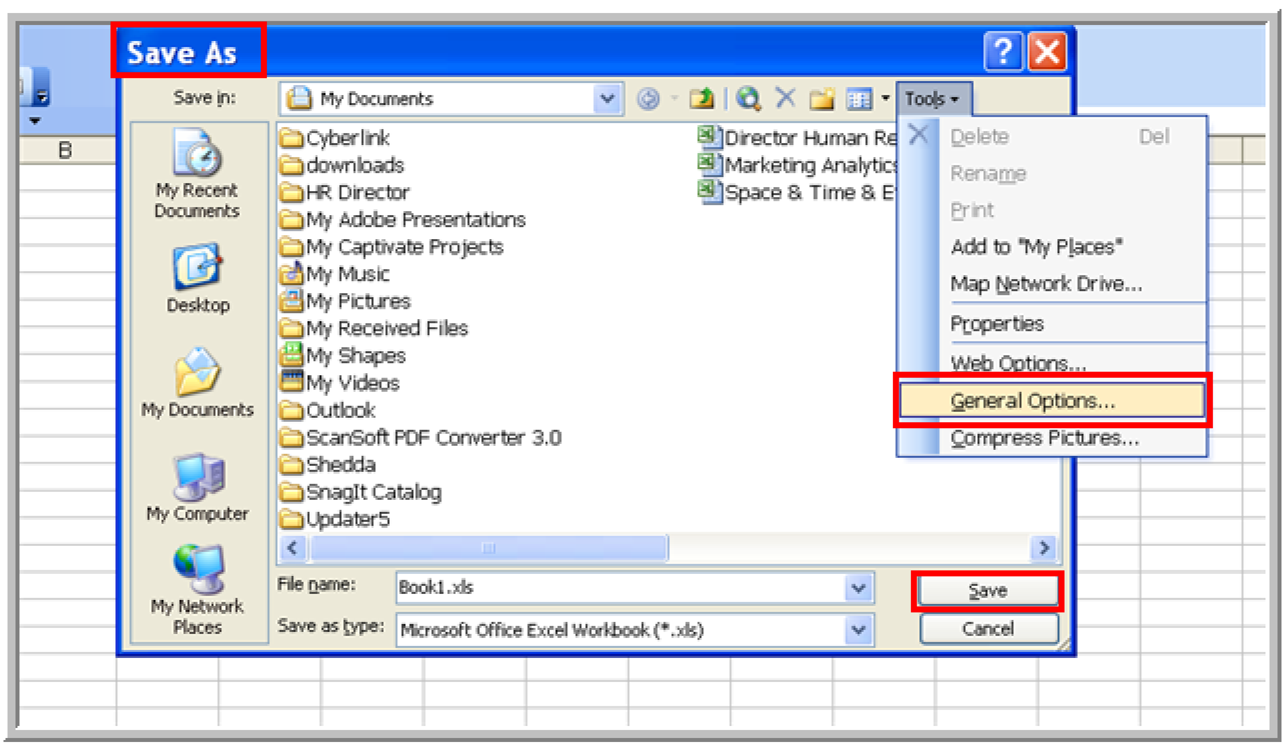
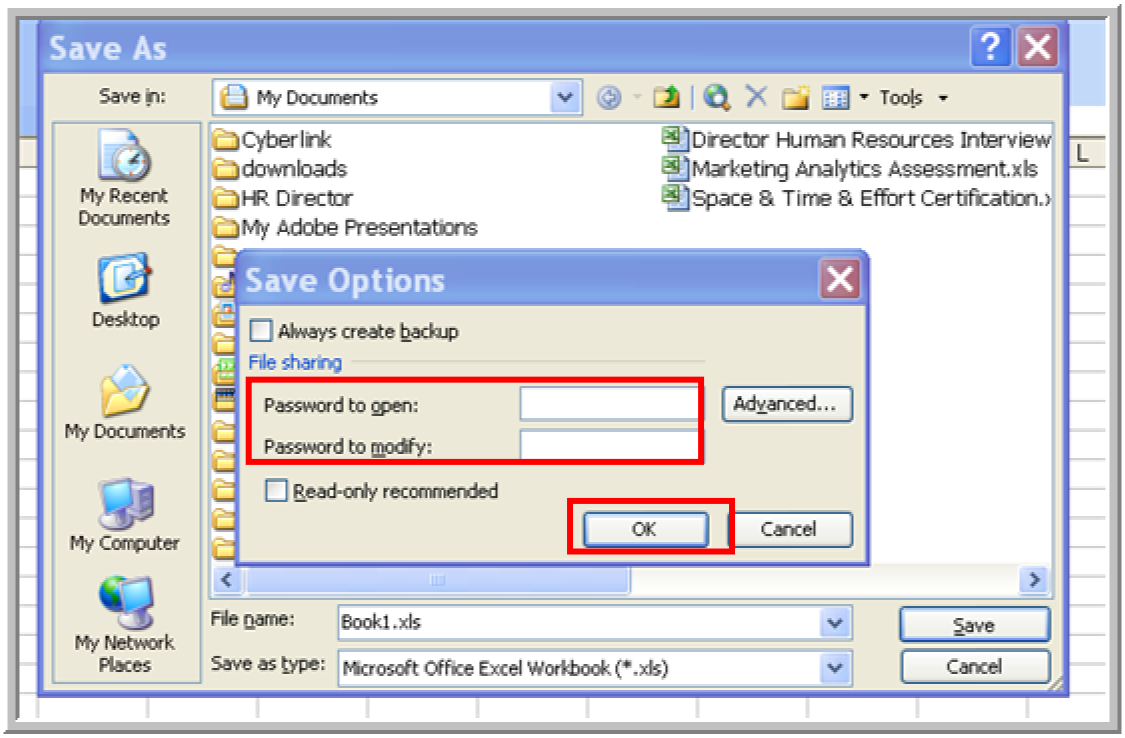



**Then enter your password and click OK.**

When saving an **EXCEL** document go to **File > Save** as then click on **tools**.  Click on **GENERAL OPTIONS.**

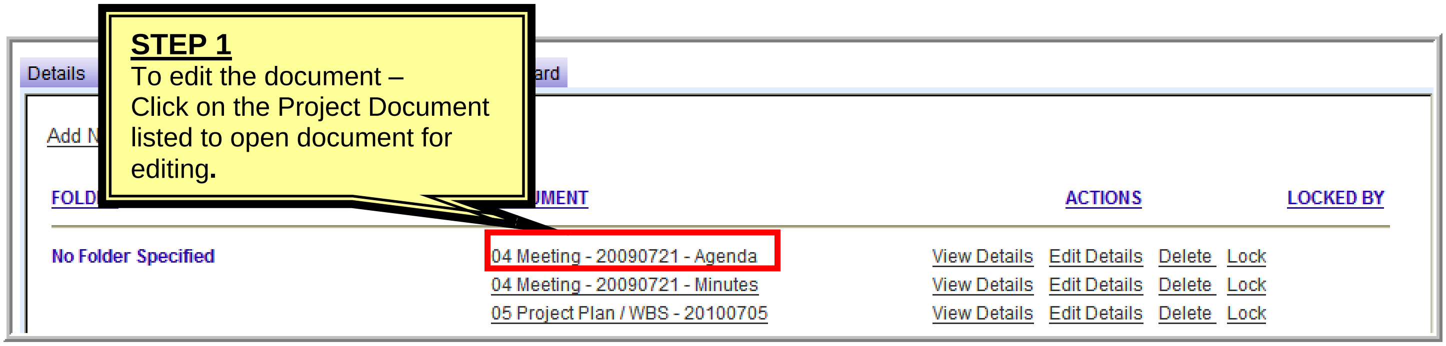


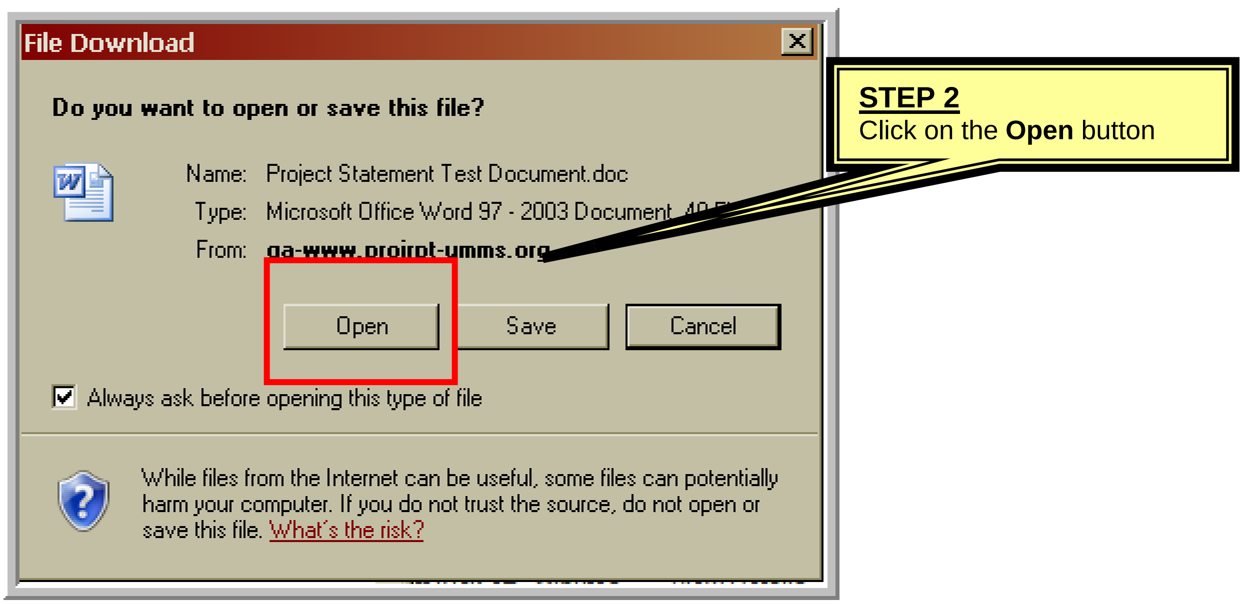



**Then enter your password and click OK.**

When the file is loaded into Project Reporter the password protection remains, and this function works the same as if the file was in the share drive; upon opening the user will be prompted to enter a password to allow the file to open.

## f. Edit Documents



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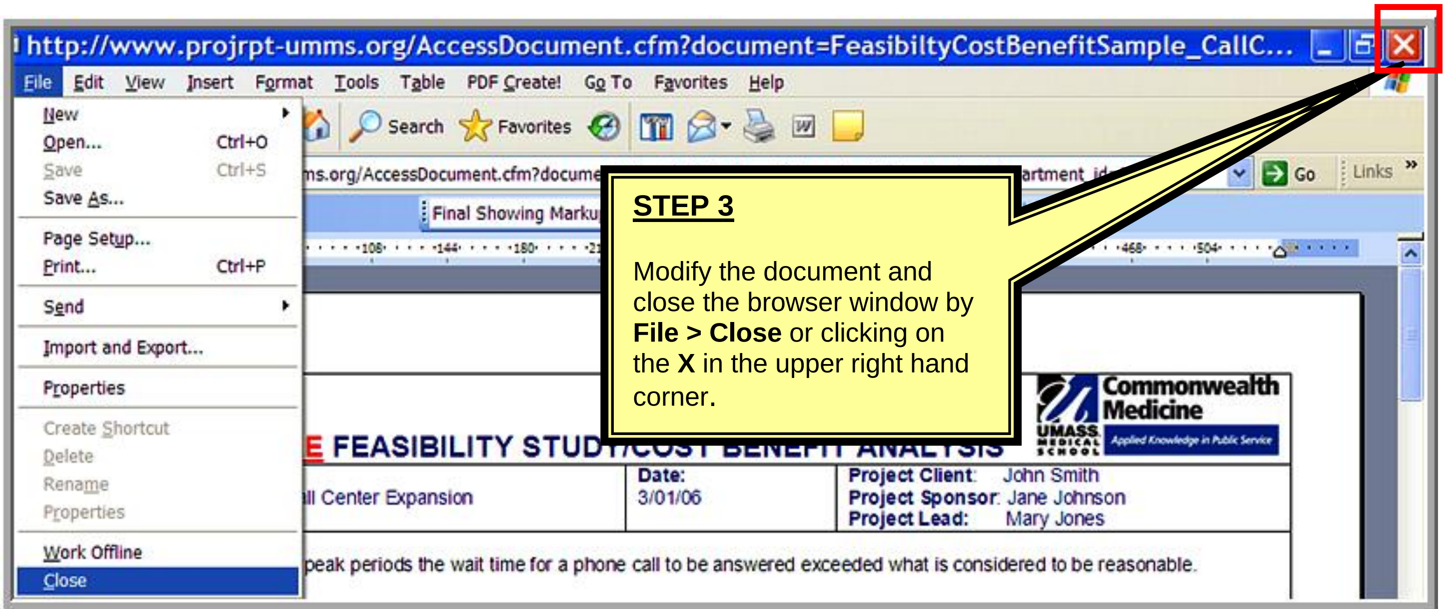
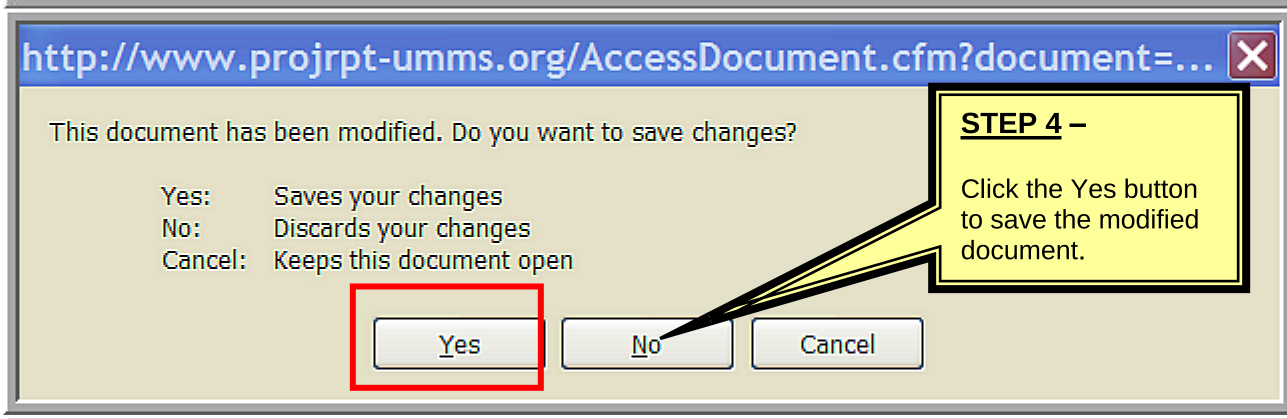
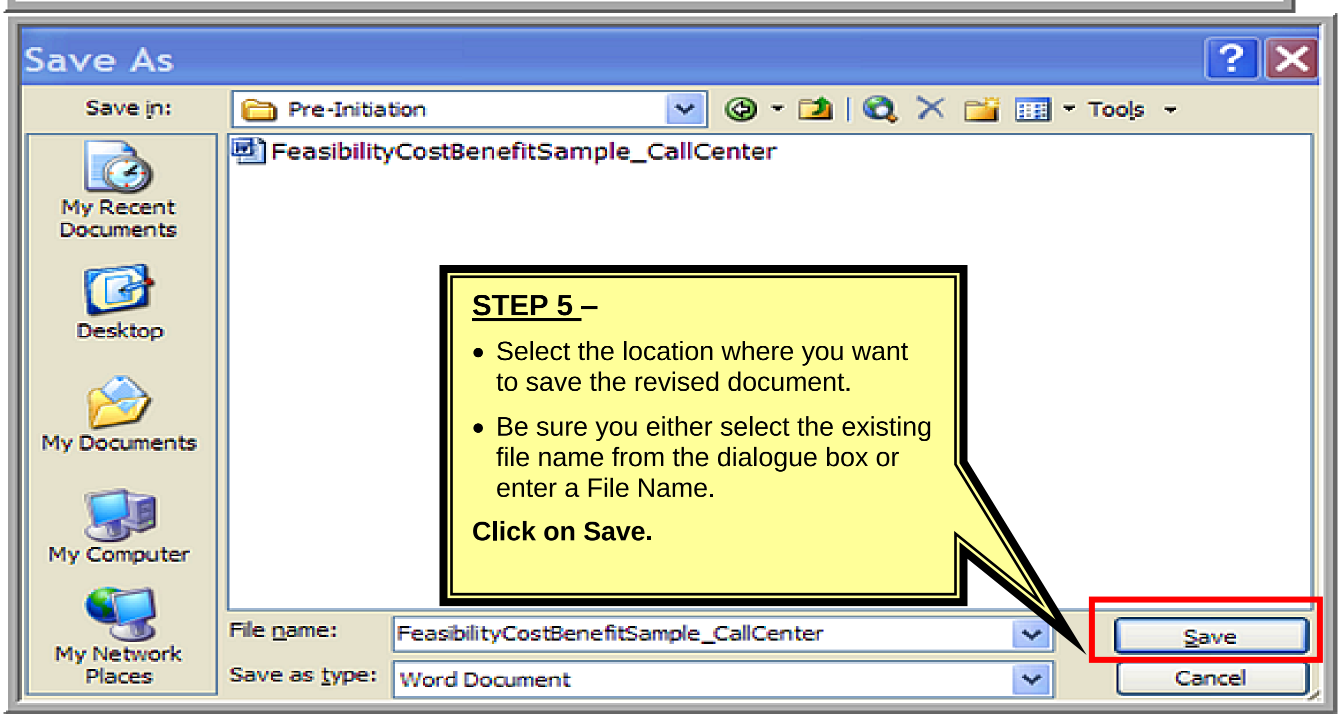
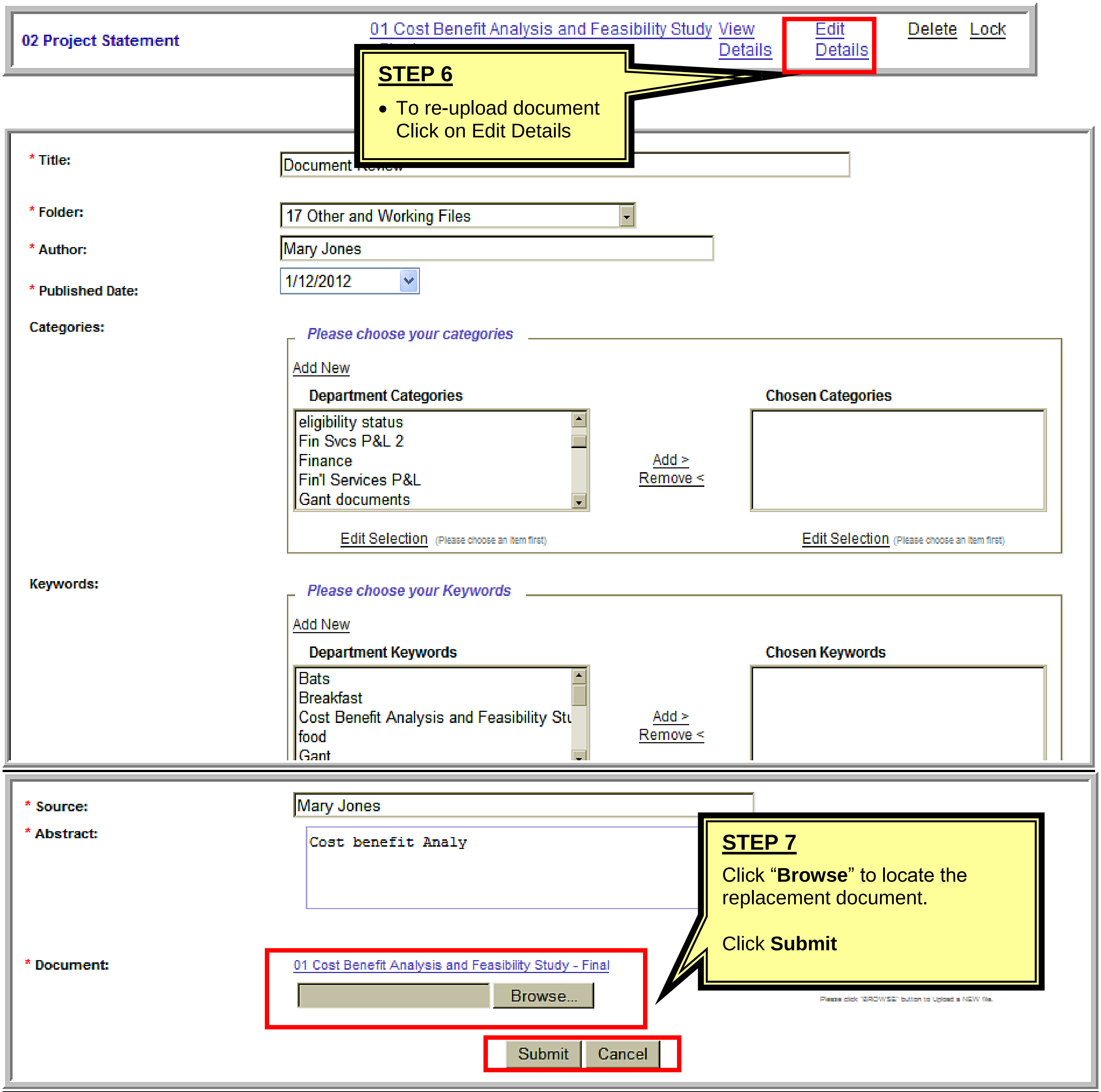
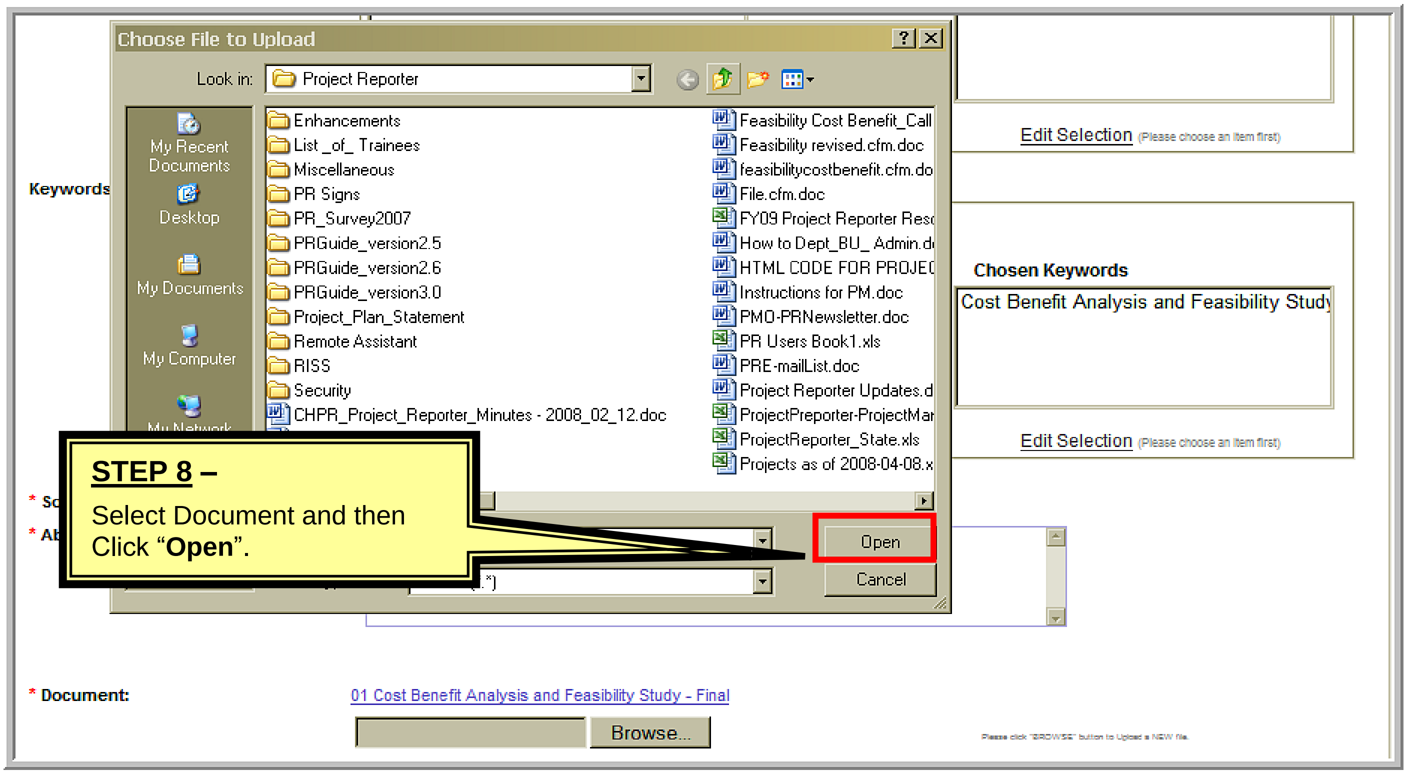

http://www.projrpt-umms.org/AccessDocument.cfm?document=FeasibiltyCostBenefitSample_CallC...
File Edit View Insert Format Tools Table PDF Create! Go To Favorites Help
New
Open... Ctrl+O
Save Ctrl+S
Save As...
Page Setup...
Print... Ctrl+P
Send
Import and Export...
Properties
Create Shortcut
Delete
Rename
Properties
Work Offline
Close
STEP 3
Modify the document and close the browser window by File > Close or clicking on the X in the upper right hand corner.
E FEASIBILITY STUDY/COST BENEFIT ANALYSIS
ll Center Expansion
Date: 3/01/06
Project Client: John Smith
Project Sponsor: Jane Johnson
Project Lead: Mary Jones
peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

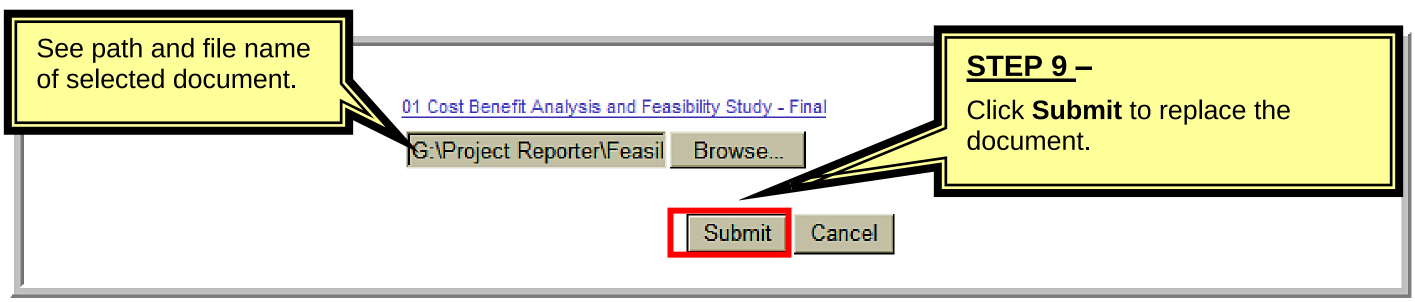

http://www.projrpt-umms.org/AccessDocument.cfm?document=...
This document has been modified. Do you want to save changes?
Yes: Saves your changes
No: Discards your changes
Cancel: Keeps this document open
STEP 4 –
Click the Yes button to save the modified document.
Yes
No
Cancel


Save As
Save in: Pre-Initiation
Tools
FeasibilityCostBenefitSample_CallCenter
My Recent Documents
Desktop
My Documents
My Computer
My Network Places
STEP 5 –
• Select the location where you want to save the revised document.
• Be sure you either select the existing file name from the dialogue box or enter a File Name.
Click on Save.
File name: FeasibilityCostBenefitSample_CallCenter
Save as type: Word Document
Save
Cancel

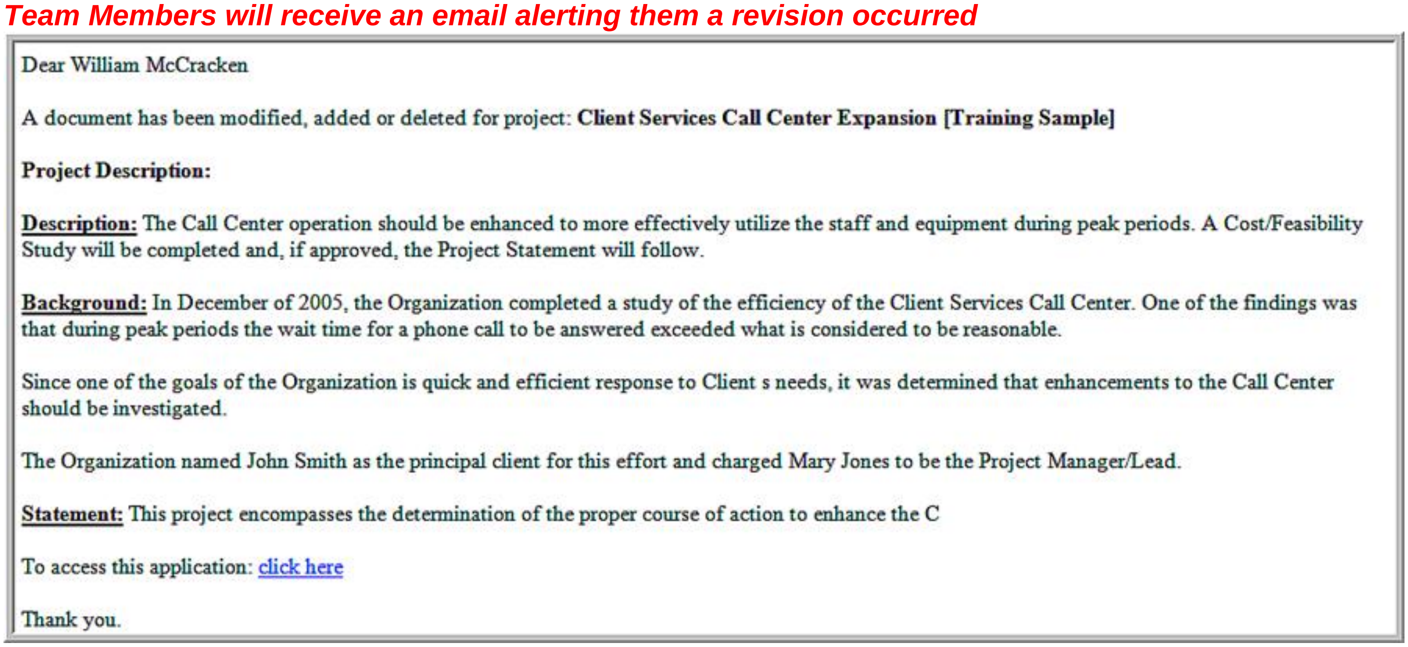
**NOTE: The document must then be re-uploaded into the project.**






***Team Members will receive an email alerting them a revision occurred***



Dear William McCracken

A document has been modified, added or deleted for project: **Client Services Call Center Expansion [Training Sample]**

**Project Description:**

**Description:** The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods. A Cost/Feasibility Study will be completed and, if approved, the Project Statement will follow.

**Background:** In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. One of the findings was that during peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is quick and efficient response to Client s needs, it was determined that enhancements to the Call Center should be investigated.

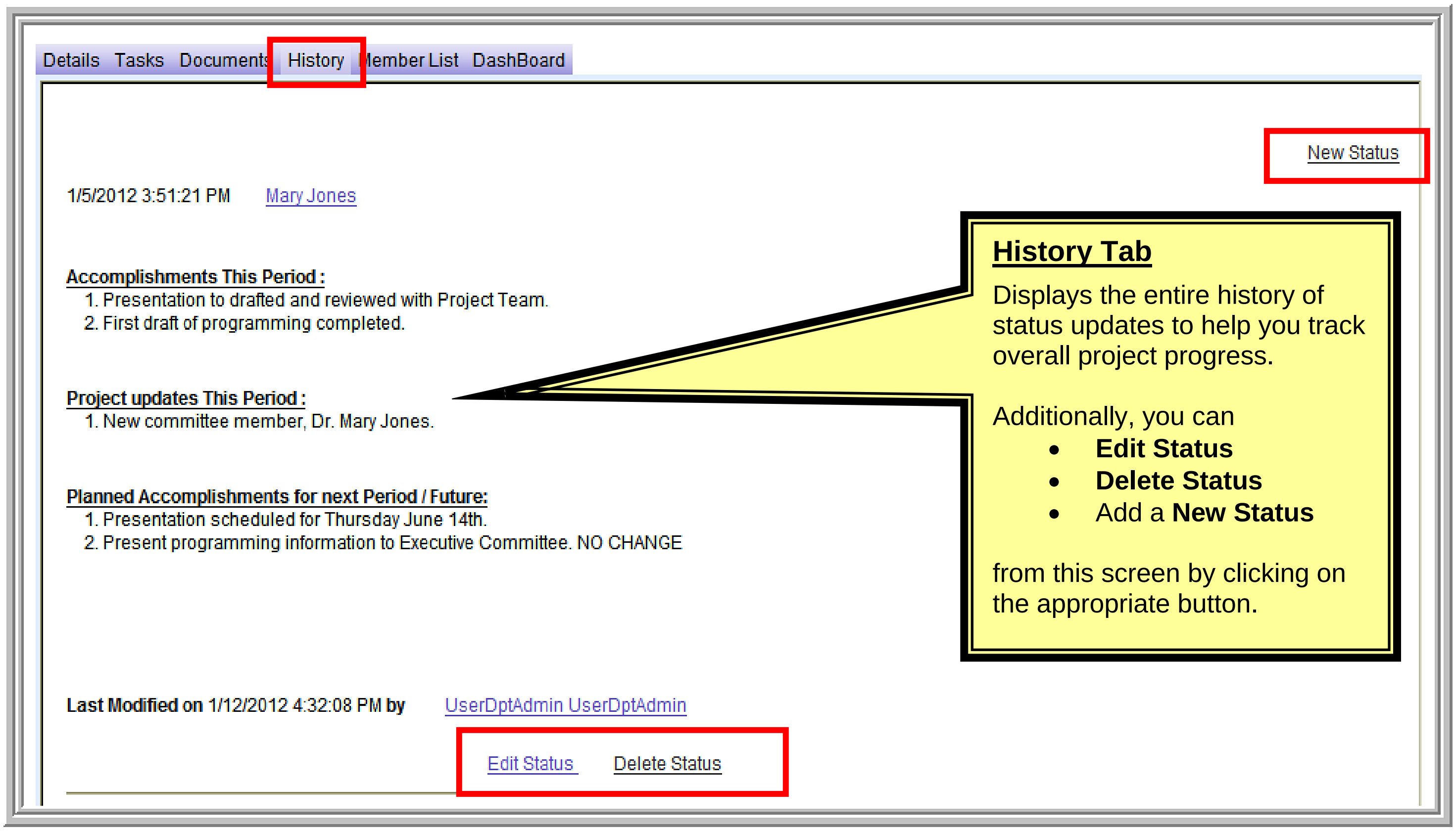
The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

**Statement:** This project encompasses the determination of the proper course of action to enhance the C

To access this application: click here

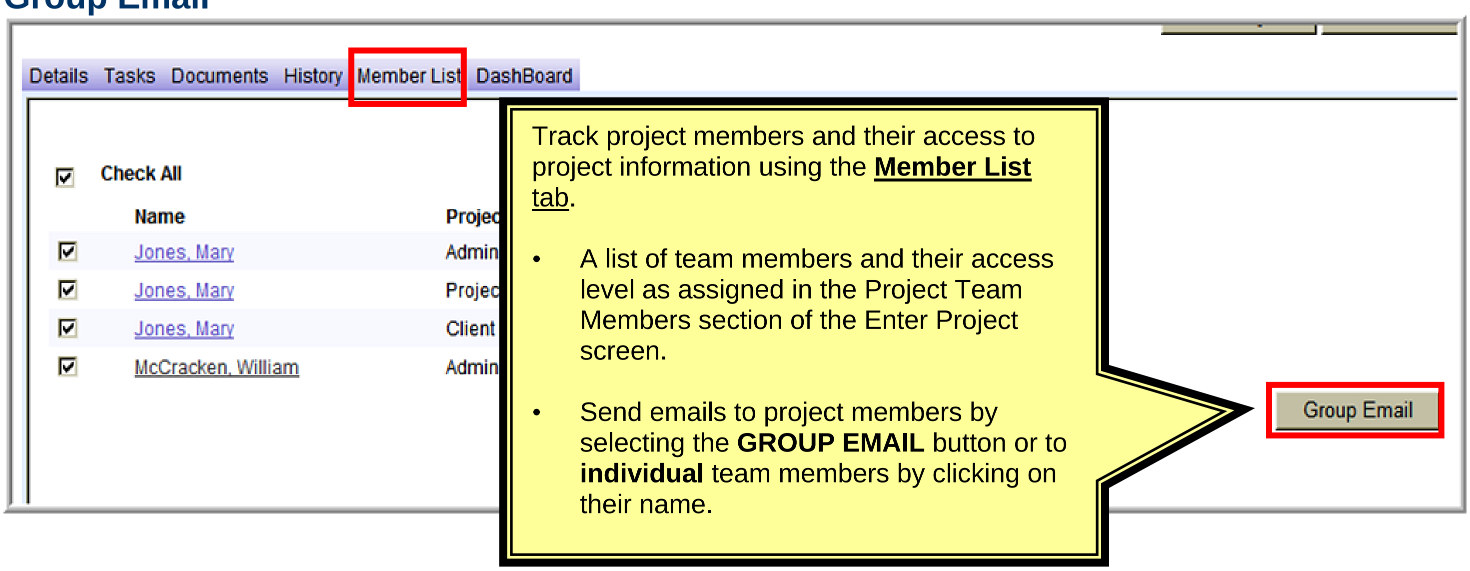
Thank you.

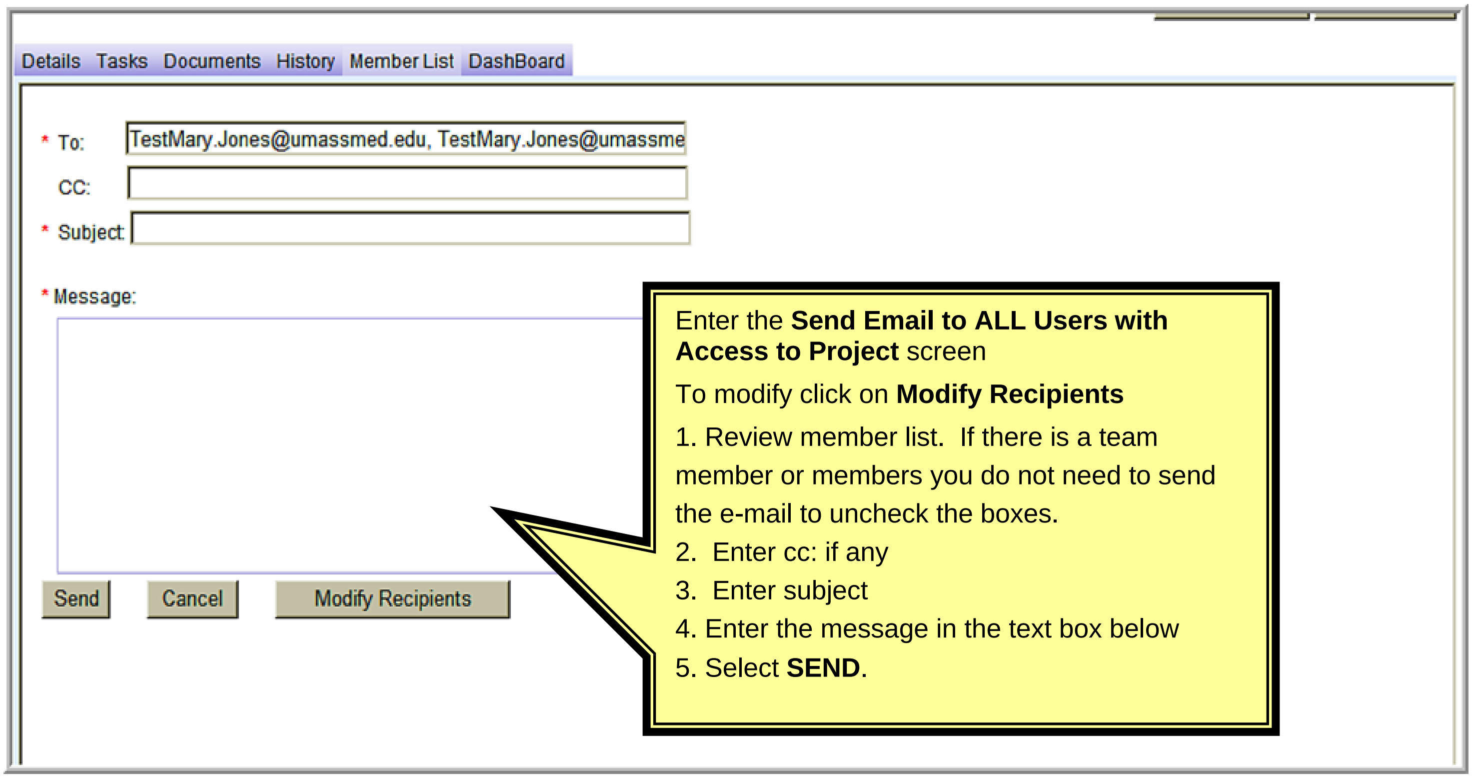
## VII. HISTORY TAB




## VIII. MEMBER LIST TAB

### Group Email






- **Although a team member's name may appear multiple times, they will receive only one e-mail.**

***WARNING:* If you wish to exclude some individuals be sure you uncheck all occurrences.**

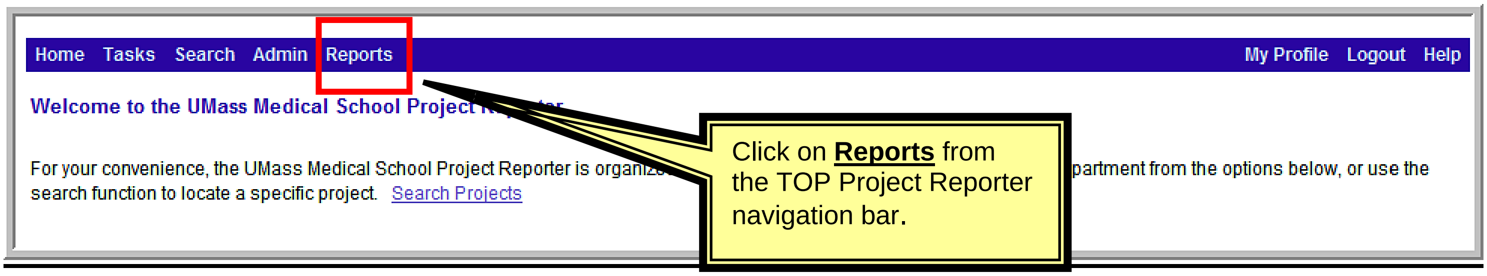
# IX. PROJECT REPORTER / BUSINESS OBJECTS REPORTS

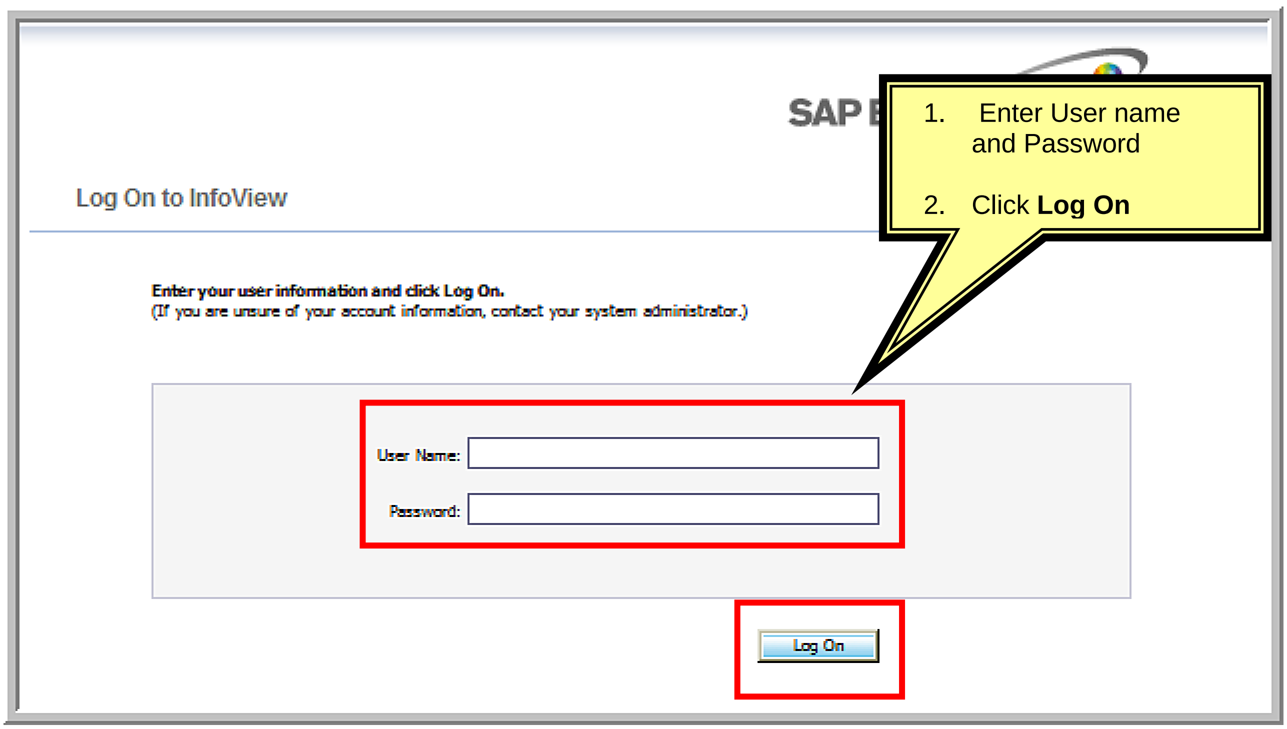
Standard Report Set

1. **Business Unit**
2. **Client Lead**
3. **Client Report**
4. **End Date**
5. **Internal Projects**
6. **Project Detail by Business Unit**
7. **Project Detail**
8. **Project Manager**
9. **Project Status by Business Unit**
10. **Sponsor**
11. **Task Report By Person**
12. **Task Report By Project**

***Note:*** ***All reports are exportable by clicking the file button at the top left hand corner.***

## a. Producing Reports



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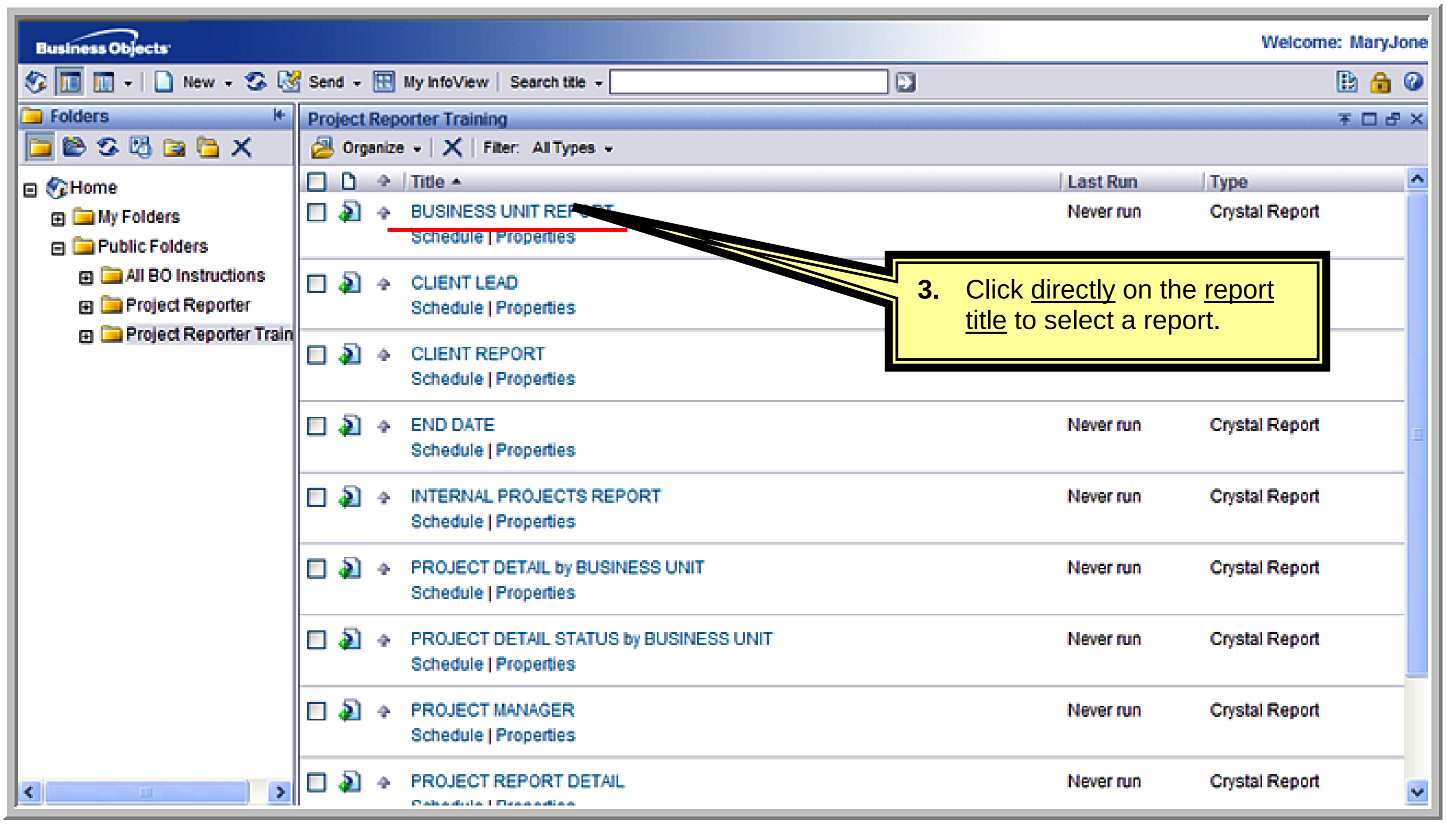
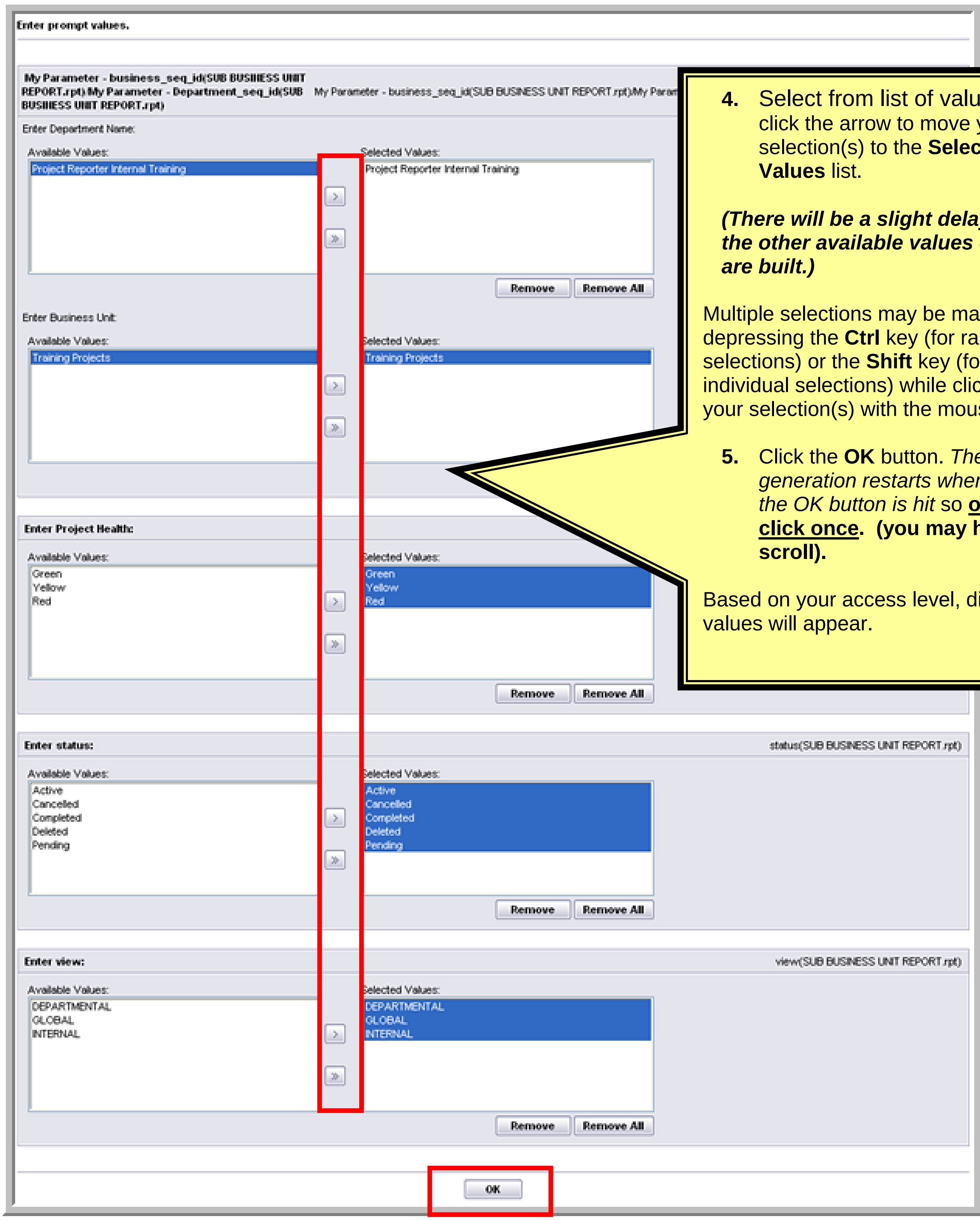



**There will be a slight delay while the selection criteria screen is built.**




4. Select from list of values and click the arrow to move your selection(s) to the **Selected Values** list.

***(There will be a slight delay while the other available values criteria are built.)***

Multiple selections may be made by depressing the **Ctrl** key (for range selections) or the **Shift** key (for individual selections) while clicking on your selection(s) with the mouse.

5. Click the **OK** button. *The report generation restarts whenever the OK button is hit* so **only click once**. **(you may have to scroll).**

Based on your access level, different values will appear.

`

## b. Sample Reports

**Business Unit** - ***View a snapshot of all projects within one or multiple business units.***

UMASS MEDICAL SCHOOL

**UMass Medical School**

**Project Reporter: *BUSINESS UNIT REPORT***

**Department: Project Reporter Internal Training**

| Project Name | Project View | Client | Project Number | Priority | Project Team | Project Manager | Sponsor | Start Date | End Date | Revised End Date | Status |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Training Projects** | | | | | | | | | | | |
| **Client Services Call Center Expansion [Training Sample]** | Departmental | Commonwealt h Medicine | 2006PRJ M10698 | High | Crane Johnson Jones McCracken Miller Smith Wayne Williams | Mary Jones | Dennis Crane Jane Johnson Mary Jones Brady Wayne | 06/09/06 | 07/09/06 | 07/08/06 | Active |

Project Health: **YELLOW**

08/13/2007 Mary Jones

On Target

**Client Lead** – ***View projects for an individual or group of project Client Leads.***

UMASS MEDICAL SCHOOL

**UMass Medical School**
**Project Reporter: *CLIENT LEAD***

**Client Lead: *Mary Jones***

| Project Name | Project View | Priority | Status | Project Manager | Client | Start Date | End Date | Revised End Date |
|---|---|---|---|---|---|---|---|---|
| **Training Projects** | | | | | | | | |
| **Client Services Call Center Expansion [Training Sample]** | Departmental | High | Active | Mary Jones | Commonwealt h Medicine | 06/09/06 | 07/09/06 | 7/8/200 |

Project Health: YELLOW

08/13/2007 Mary Jones

On Target

**Client Report** - ***View projects for an individual or group of Clients.***

UMASS MEDICAL SCHOOL

**UMass Medical School**
**Project Reporter: *CLIENT REPORT***

**Client: Commonwealth Medicine**

| Project Name | Project Number | Project View | Priority | Status | Project Manager | Start Date | End Date | Revised End Date |
|---|---|---|---|---|---|---|---|---|
| **Training Projects** | | | | | | | | |
| **Client Services Call Center Expansion [Training Sample]** | 2006PRJM10698 | Departmental | High | Active | Mary Jones | 06/09/06 | 07/09/06 | 07/08/06 |

Project Health: YELLOW

08/13/2007 Mary Jones

On Target

`

**<u>End Date</u> – *View projects by project End Date.***

UMass Medical School
Project Reporter: *End Date*
Project Reporter Internal Training: Project End Date From: 07/08/2006 To: 07/09/2006

| Project Name | Project View | Client | Project Number | Priority | Project Team | Project Manager | Sponsor | Start Date | End Date | Revised End Date | Status |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Training Projects** | | | | | | | | | | | |
| **Client Services Call Center Expansion [Training Sample]** | Departmental | Commonwealth Medicine | 2006PRJM10698 | High | Crane Johnson Jones McCracken Miller Smith Wayne Williams | Mary Jones | Dennis Crane Jane Johnson Mary Jones Brady Wayne | 06/09/2006 | 07/09/2006 | 07/08/2006 | Active |

Project Health: YELLOW

08/13/2007 Mary Jones

On Target

**<u>Internal Projects</u> – *View internal projects in which you are a member with appropriate security access.***

UMass Medical School
Project Reporter: *INTERNAL PROJECTS REPORT*

| Project Name | Client | Project Number | Priority | Project Team | Project Manager | Sponsor | Start Date | End Date | Revised End Date | Status |
|---|---|---|---|---|---|---|---|---|---|---|
| Training Projects | | | | | | | | | | |
| **Client Services Call Center Expansion [Training Sample]** | AHRQ | 2006PRJM10698 | High | Bailey Barnes Block Brown Crane Grey Johnson Jones Smith Wayne | Mary Jones | Johnson Jones | 06/09/06 | 07/09/06 | | Active |

07/18/2006 Mary Jones

GREEN - Project Statement Approved....

**<u>Project Detail by Business Unit</u>** - ***View a snapshot of an individual project, including project description, current status update and list of outstanding tasks by Business Unit.***

UMASS MEDICAL SCHOOL

**UMass Medical School**
**Project Reporter: *PROJECT DETAIL by BUSINESS UNIT***

**Department: PRIT**
**Business Unit: Training Projects**
**Project: Client Services Call Center Expansion [Training Sample]**

| | | | |
|---|---|---|---|
| **Project Number:** | 2006PRJM10698 | **Project Manager:** | Mary Jones |
| **Project View:** | Departmental | **Client Sponsor:** | Mary Jones, Brady Wayne |
| **Project Start Date:** | 06/09/2006 | **Executive Sponsor:** | Dennis Crane, Jane Johnson |
| **Project End Date:** | 07/09/2006 | **Team Admins:** | Mary Jones, Betty Miller, John Williams |
| **Revised End Date:** | 07/08/2006 | | |
| **Project Health:** | YELLOW | | |
| **Status:** | Active | **Team Users:** | Dennis Crane, Jane Johnson, William McCracken, Julie Smith, Brady Wayne |
| **Priority:** | High | **Team Guests:** | |

**Chartstring:** W987654321

**Project Description:**

**<u>Description:</u>** The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods. A Cost/Feasibility Study will be completed and, if approved, the Project Statement will follow.

**<u>Background:</u>** In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. One of the findings was that during peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is quick and efficient response to Client s needs, it was determined that enhancements to the Call Center should be investigated.

The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

**<u>Statement:</u>** This project encompasses the determination of the proper course of action to enhance the Call Center and the implementation of said course of action.

**<u>Opportunity:</u>** By improving customer satisfaction with the Client Service Call Center experience, the Organization will maintain a competitive advantage over its rivals.

**Project Report Detail** – ***View a snapshot of an individual project, including project description, current status update and list of outstanding tasks.***

UMass Medical School
Project Reporter: ***PROJECT REPORT DETAIL***

**Training Projects**
**Project: Client Services Call Center Expansion [Training Sample]**

| | | | |
|---|---|---|---|
| **Project Number:** | 2006PRJM10698 | **Project Manager:** | Mary Jones |
| **Project View:** | Departmental | **Client Sponsor:** | Mary Jones, Brady Wayne |
| **Project Start Date:** | 06/09/2006 | **Executive Sponsor:** | Dennis Crane, Jane Johnson |
| **Project End Date:** | 07/09/2006 | **Team Admins:** | Mary Jones, Betty Miller, John Williams |
| **Revised End Date:** | 07/08/2006 | | |
| **Project Health:** | YELLOW | | |
| **Status:** | Active | **Team Users:** | Dennis Crane, Jane Johnson, William McCracken, Julie Smith, Brady Wayne |
| **Priority:** | High | **Team Guests:** | |

**Chartstring:** W987654321

**Project Description:**

**Description:** The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods. A Cost/Feasibility Study will be completed and, if approved, the Project Statement will follow.

**Background:** In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. One of the findings was that during peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is quick and efficient response to Client s needs, it was determined that enhancements to the Call Center should be investigated.

The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

**Statement:** This project encompasses the determination of the proper course of action to enhance the Call Center and the implementation of said course of action.

**Opportunity:** By improving customer satisfaction with the Client Service Call Center experience, the Organization will maintain a competitive advantage over its rivals.

**Project Status by Business Unit** – ***View a snapshot of an individual project with current status update***

UMass Medical School
Project Reporter: ***PROJECT STATUS by BUSINESS UNIT***
Department:Project Reporter Internal Training
Business Unit:Training Projects

**Project: Duplicate Project Names** **Project view: Departmental**
**Project Manager: Mary Jones**
**Start Date: 06/25/2007** **End Date: 07/25/2007** **Revised End Date:**

**Project Health:** YELLOW
**Project Description:**

testing duplicate project names and numbers

**Current Project Status:**

Not Entered

`

**Project Manager** – ***View projects for an individual or group of Project Managers.***

**UMass Medical School**
**Project Reporter: *PROJECT MANAGER REPORT***

Project Manager: *Mary Jones*

| Project Name | Project View | Priority | Status | Sponsor | Client | Start Date | End Date | Revised End Date |
|---|---|---|---|---|---|---|---|---|
| **Training Projects** | | | | | | | | |
| **Client Services Call Center Expansion [Training Sample]**<br>Project Health YELLOW<br>08/13/2007 Mary Jones<br>On Target | Departmental | High | Active | Dennis Crane<br>Jane Johnson<br>Mary Jones<br>Brady Wayne | Commonwealth Medicine | 06/09/06 | 07/09/06 | 07/08/06 |

**Client Sponsor** - ***View projects for Client Sponsors.***

**UMass Medical School**
**Project Reporter: *SPONSOR***

Sponsor: Mary Jones

| Project Name | Project | Priority | Status | Project Manager | Client | Start Date | End Date |
|---|---|---|---|---|---|---|---|
| **Training Projects** | | | | | | | |
| **Client Services Call Center Expansion [Training Sample]** | Departmental | High | Active | Mary Jones | Commonwealth Medicine | 06/09/06 | 07/09/06 |

**Sponsors: Dennis Crane, Jane Johnson, Mary Jones, Brady Wayne**
Project Health: YELLOW

04/04/2008 Alan Cohen

**Accomplishments This Period:**
1. Presentation drafted and reviewed with Project Team.
2. First draft of programming completed.

**Project updates This Period:**
1. New committee member, Dr. Mary Jones.

**Planned Accomplishments for next Period / Future:**
1. Presentation scheduled for Thursday June 14th.
2. Present programming information to Executive Committee.

Commonwealth Medicine — UMASS Medical School — Applied Knowledge in Public Service

# Project Reporter

Sponsored by Commonwealth Medicine

`

**Executive Sponsor** - ***View projects for Executive Sponsors.***

UMass Medical School

Project Reporter: *SPONSOR*

Sponsor: Jane Johnson

| Project Name | Project | Priority | Status | Project Manager | Client | Start Date | End Date | Revise End Da |
|---|---|---|---|---|---|---|---|---|
| **Training Projects** | | | | | | | | |
| **IFC Project**<br>**Sponsors: Jane Johnson**<br>Project Health: GREEN<br>Status good - moving forward | Departmental | High | Active | Mary Jones | EOHHS | 06/04/07 | 07/04/07 | 06/29/( |
| **Client Services Call Center Expansion [Training Sample]**<br>**Sponsors: Dennis Crane, Jane Johnson, Mary Jones, Brady Wayne**<br>Project Health: YELLOW<br>04/04/2008 Alan Cohen<br>Accomplishments This Period :<br>1. Presentation drafted and reviewed with Project Team.<br>2. First draft of programming completed. | Departmental | High | Active | Mary Jones | Commonwealth Medicine | 06/09/06 | 07/09/06 | 07/08/( |

**Task Report by Person** – ***View project tasks by person.***

UMass Medical School

Project Reporter: *TASK REPORT BY PERSON*

Project Reporter Internal Training

| Due Date | Assigned To | Task | Project | Project View | Project Number | Status | Assigned By |
|---|---|---|---|---|---|---|---|
| 08/19/2007 | Mary Jones | Obtain Approval to Begin Initiation Phase | Client Services Call Center Expansion [Training Sample] | Departmental | 2006PRJM10698 | 25% | Mary Jones |
| No Notes Entered | | | | | | | |
| 08/19/2007 | Mary Jones | Create Preamble for Department and Business Unit home pages | Client Services Call Center Expansion [Training Sample] | Departmental | 2006PRJM10698 | 75% | Mary Jones |
| No Notes Entered | | | | | | | |

**Task Report by Project** – ***View project tasks by project.***

UMass Medical School

Project Reporter: *TASK REPORT BY PROJECT*

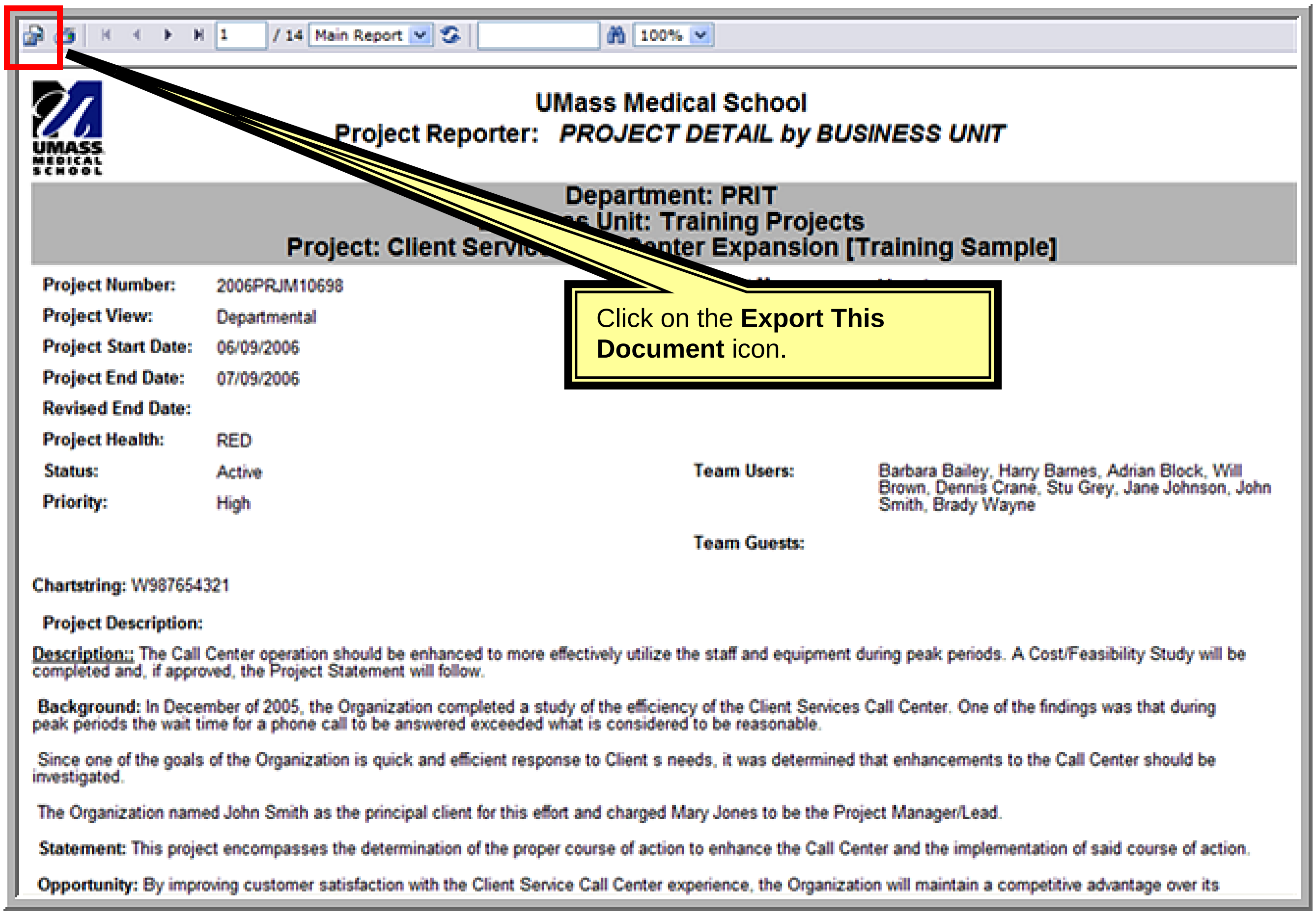
Project Reporter Internal Training

| Due Date | Assigned To | Task | Project | Project View | Project Number | Status | Assigned By |
|---|---|---|---|---|---|---|---|
| 08/23/2007 | Brady Wayne | Prepare Cost Benefit Analysis and Feasibilty Study | Client Services Call Center Expansion [Training Sample] | Departmental | 2006PRJM10698 | 50% | Mary Jones |
| Prepare the cost benefit analysis using the new CWM methodology. | | | | | | | |
| 08/19/2007 | Mary Jones | Obtain Approval to Begin Initiation Phase | Client Services Call Center Expansion [Training Sample] | Departmental | 2006PRJM10698 | 25% | Mary Jones |
| No Notes Entered | | | | | | | |

`

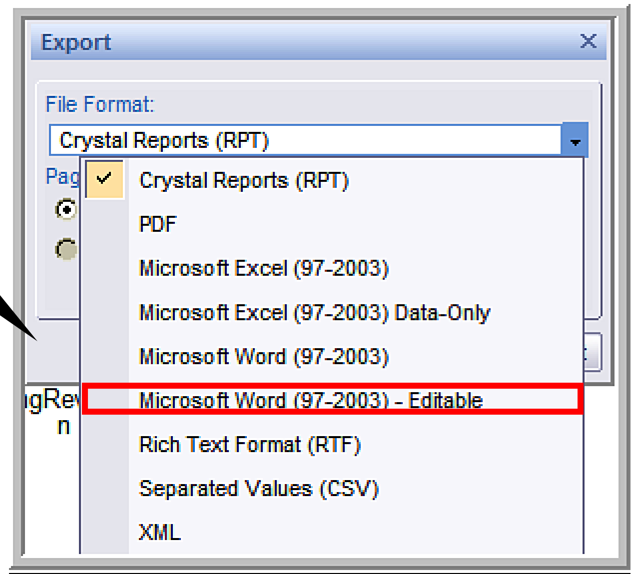
## c. Downloading Report Data

In order to save a report to disk, or to edit the contents of a report, create the report within Project Reporter as described in the section above.

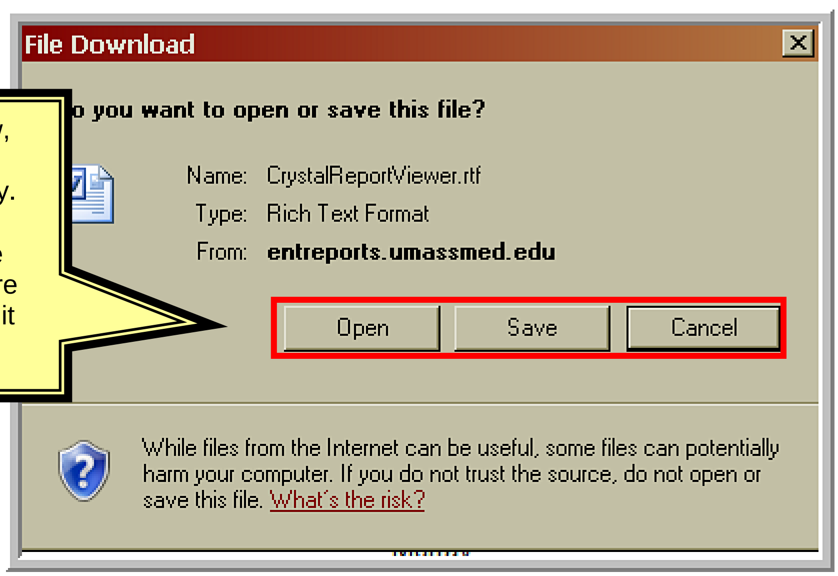


## Downloading Report Data *(continued):*

Select **Microsoft Word (97-2003) – Editable** from the **File Format** dropdown.

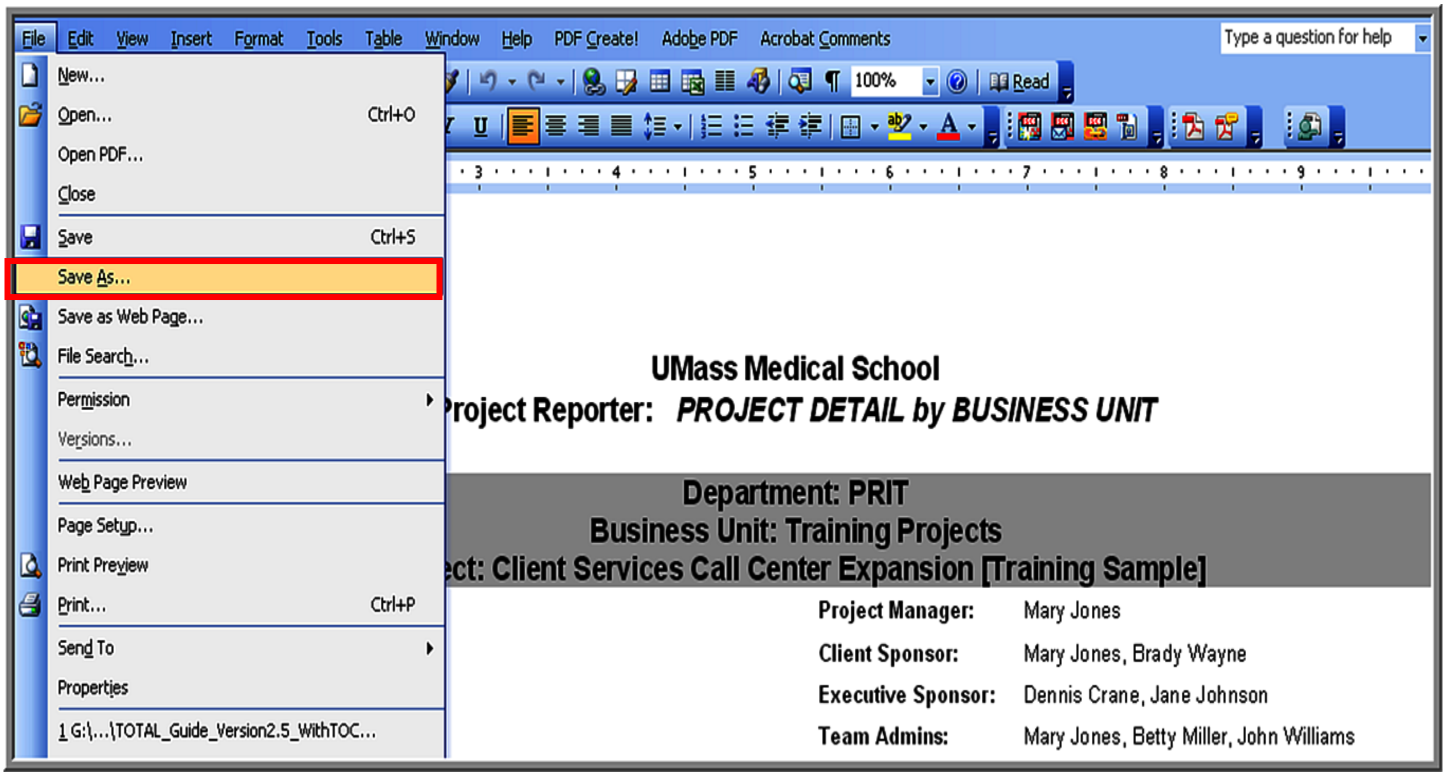



- Click on **Open** to view, edit, and/or print the document immediately.
- Click on **Save** to store the document for future retrieval in order to edit and/or print later.




**CAUTION:**
If you have opened the document for immediate viewing/editing/printing and you wish to save it from within Word, You must use **File > Save As** to store the document where you wish.

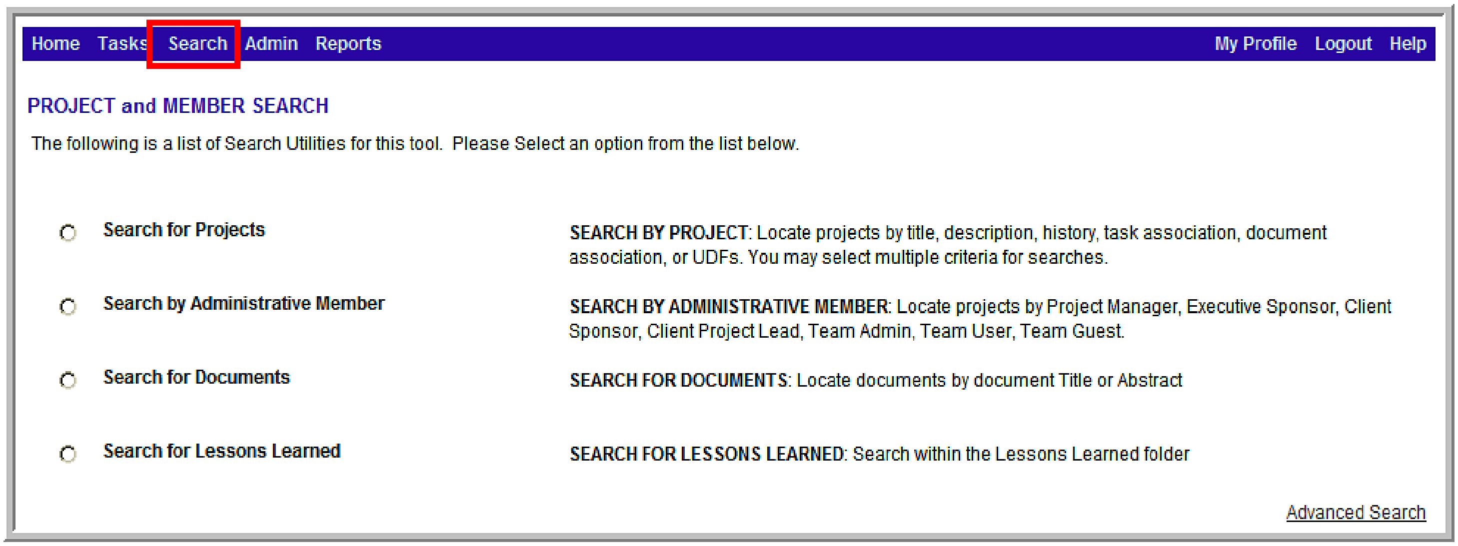
`



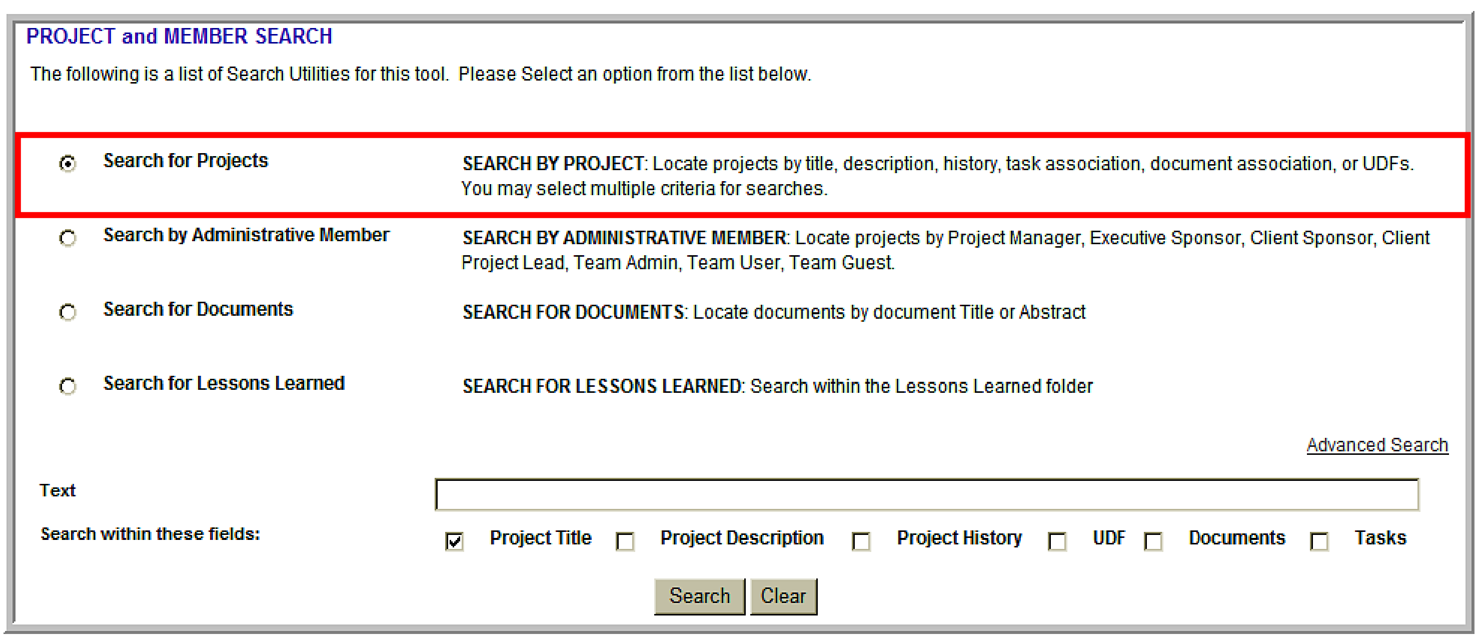

**WARNING!** **Using File > Save will store it to a location in the Temporary Internet Files folder and you may not find it again!**

# X. SEARCH FEATURE

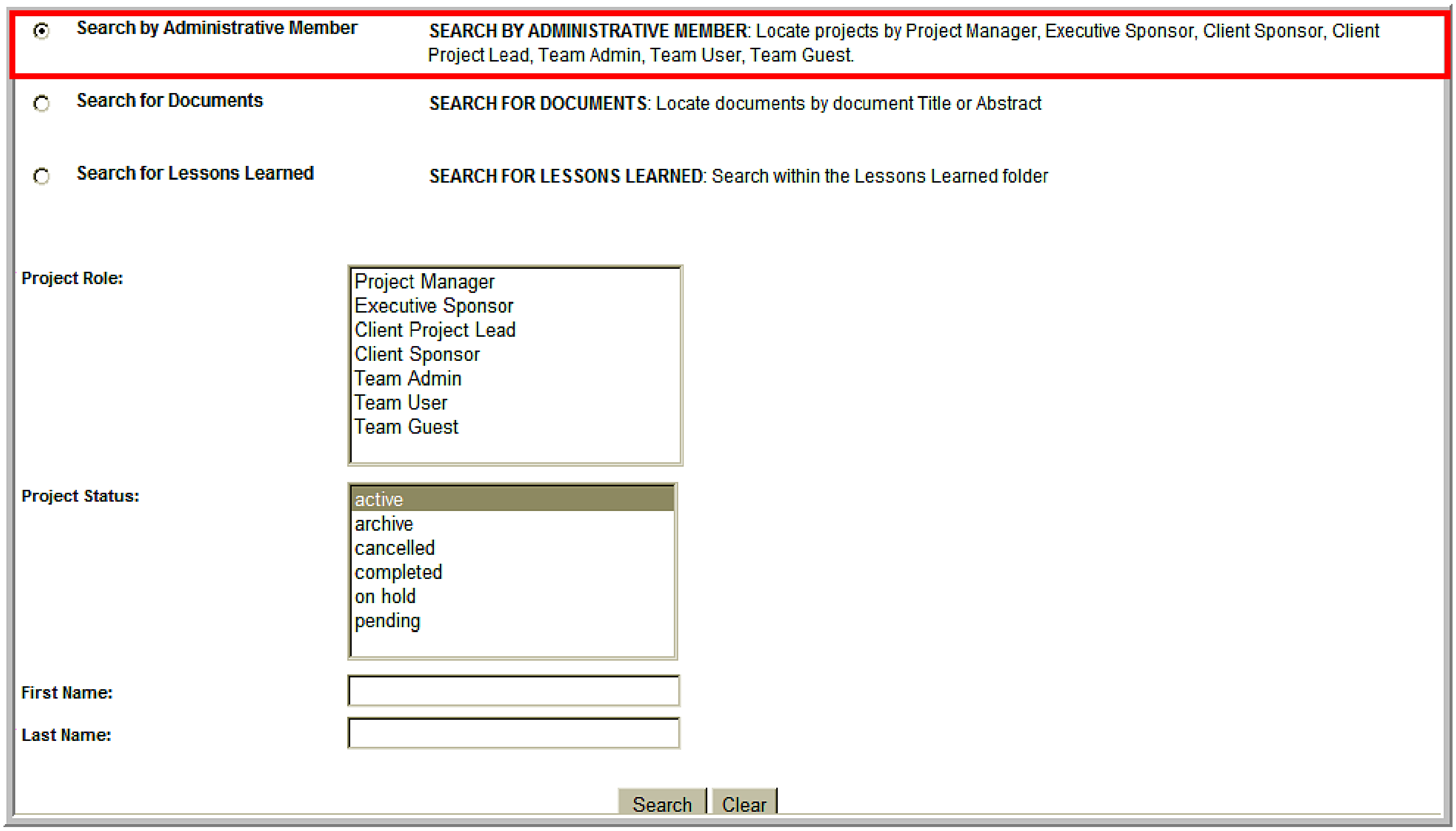
Locate projects by title, description, history, task association, documents association or UDFs. You may select multiple criteria for searches. The Search Feature provides the ability to navigate to different areas within Project Reporter.



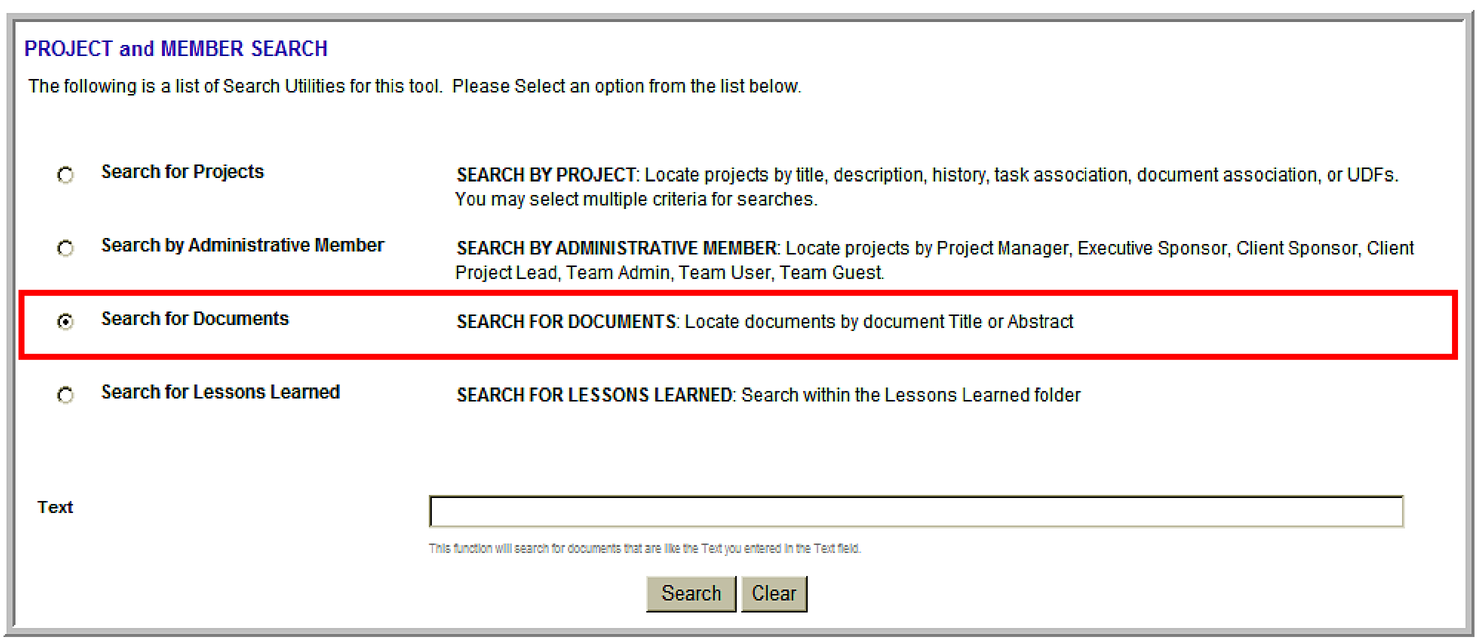

Search for Projects by Title, Description, History, Task Association or UDFs. You may select multiple criteria for searches.



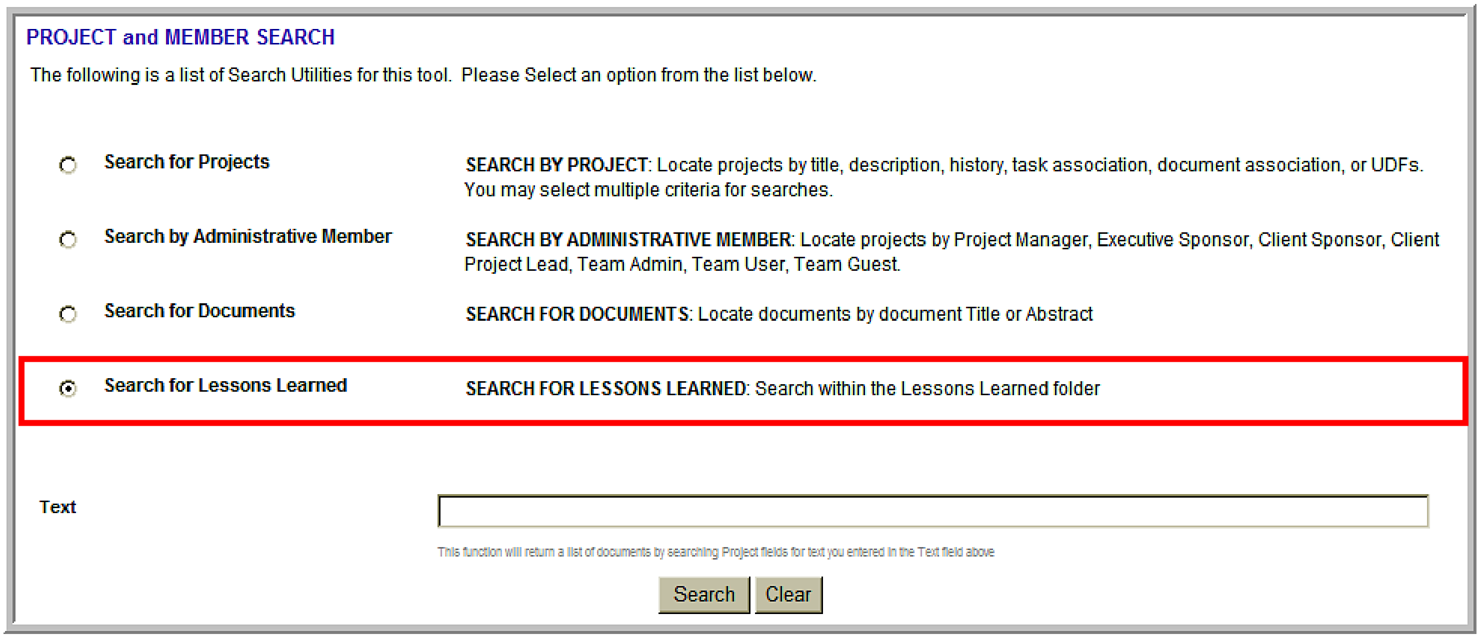
Search by Administrative Member: Project Manager, Executive Sponsor, Client Sponsor, Client Project Lead, Team Admin, Team User, Team Guest.




Search for Documents by Document Title or Abstract



Search for Lessons Learned within the Lessons Learned Folder



# XI. Department Coordinator Role

To ensure security and access control, each department will identify and assign a Department Coordinator. The Coordinator is responsible for granting and maintaining user access at the proper security level:

***Department Coordinators must participate and understand the following:***

- ✓ **Responsibilities**:
  - Creating and maintaining access for department users, including prompt inactivation of terminated employees.
  - Perform a period check of users.
  - Support resource for the department users to go to with questions, concerns, etc.
- ✓ **Security**:
  - Work with the Department Director to determine the proper level access needed by users. Admin access should be granted only after approval from Director and completion of the Project Reporter Admin Training.

**The Program Development office will provide the Security and ADMIN training, and will ensure support to answer any questions regarding security access issues.**

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# XIII. PROJECT DASHBOARDS