



Printable Version

Planner

for Version 3.5 : REV:12/15/11

► User's Manual



Process Data Control Corporation

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Document Version: 3.5.2

Document Revised: 12/15/2011

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Chapter 1 - CCIRS Overview

1.1 CCIRS Introduction

PDC's COMPASS Compliance Information Reporting System (CCIRS, pronounced "Seekers") is a web based application portal environment designed on the latest technologies like .NET Framework 4.0, AJAX, Silverlight 4.0. CCIRS runs on Internet Information Services 7.5 and is a platform to host multiple PDC web applications. The portal enables PDC web applications to share a common foundation, share common resources, and seamlessly interact with each other. The portal also hosts an advanced security layer that has to be used by all CCIRS modules and common resources.

Planner can only be accessed through the CCIRS Portal, and CCIRS users can adjust certain environment settings and preferences that will affect the look and feel of all CCIRS applications. Therefore, this chapter is crucial to one's understanding of Planner.

1.2 System Requirements

In order to operate Planner, client devices must possess the following requirements:

- Graphical display
 - Minimum Resolution: 1024 X 768
 - Recommended Resolution: 1280 X 1024
- Pointing device
 - Mouse
 - Touchscreen
- Internet connectivity
- Standard web browser (*The following have been tested and are supported*)
 - Microsoft® Internet Explorer 7.0 and 8.0
 - Mozilla® Firefox 3.0, 4.0
 - Google® Chrome
 - Opera® 9.0, 10.0, 11.0
- Microsoft® Silverlight® 4.0
- Headphones or Speakers (*for video help content*)

1.3 CCIRS Log-in Page

A Planner Manager or System Administrator will provide users the Uniform Resource Locator (URL) that will be used to access Planner. After the URL is entered by a user they will be directed to the CCIRS Log-in screen, as shown in Figure 1.3.

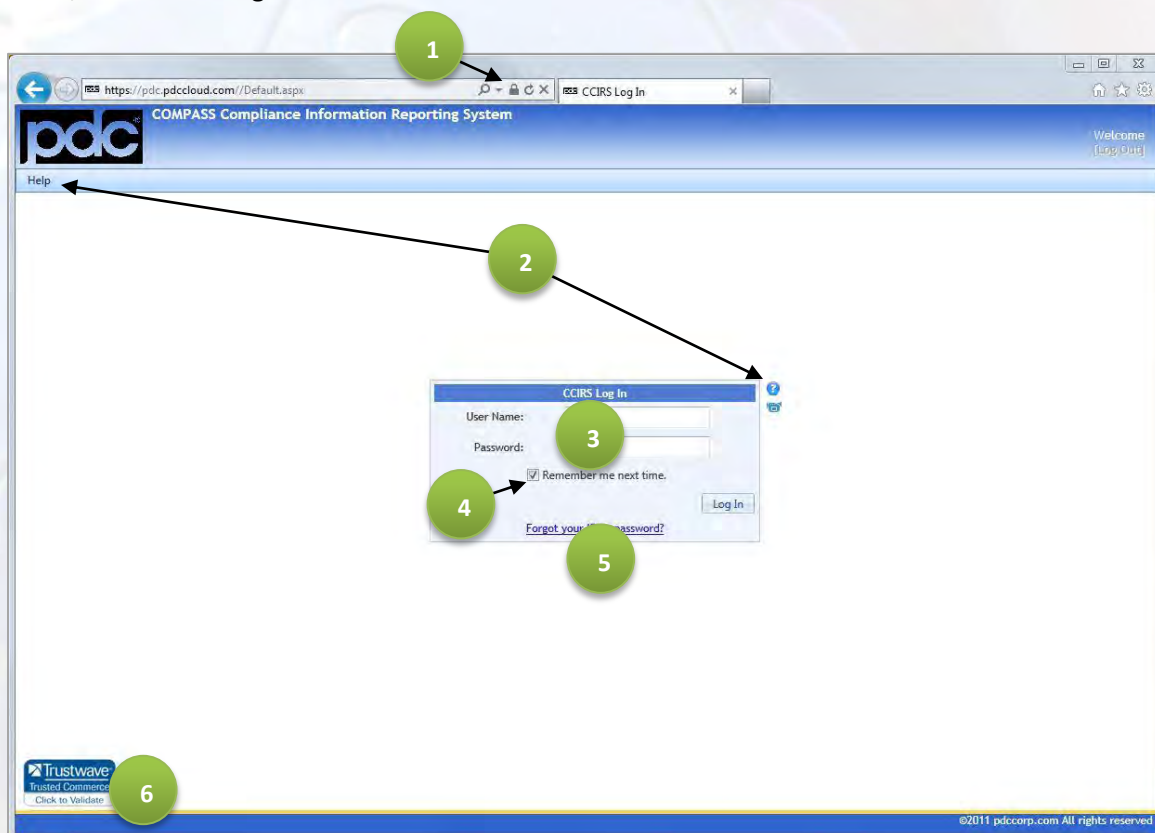


Figure 1.3

1. If users are connected to CCIRS using an SSL encrypted connection, they will see the SSL padlock.
2. Content specific help documentation can be accessed by clicking on blue question marks, and content specific help videos can be accessed by clicking on the blue camcorders. Other help information can be accessed from the help menu.
3. Users must be registered in CCIRS in order to have Log-in access. They may either use a User Name or their e-mail address designated in their user profile.
4. The **Remember me next time** function will store the User Name in a cookie located on the local machine, and will be present in the **User Name** field the next time the web page is requested.
5. If a user forgets their user ID or password, reset options can be accessed from this link.
6. If users are connected to CCIRS using PDC's SSL encrypted connection, they can check the connection at any time by clicking on this 3rd Party verification button.

1.4 CCIRS Sessions

After users log in, they are given the opportunity to enter a session note. They can use this feature to track the purpose of their CCIRS Log-In sessions. Session notes can be changed or added during a session, and old session notes can be retrieved. Session notes are not required, so **Continue** may be clicked without entering a session note. A session note entry screen is displayed below in Figure 1.4a.

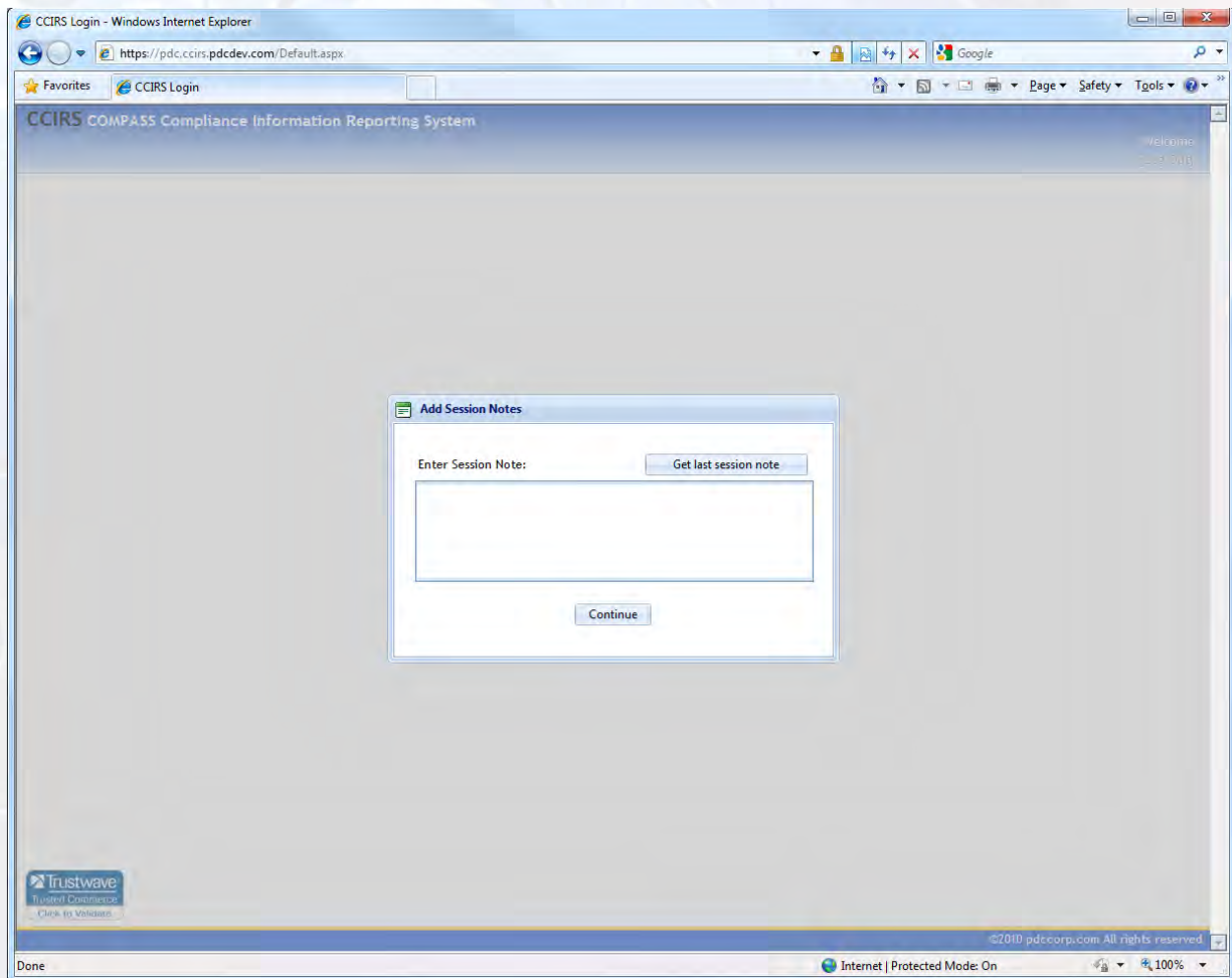


Figure 1.4a

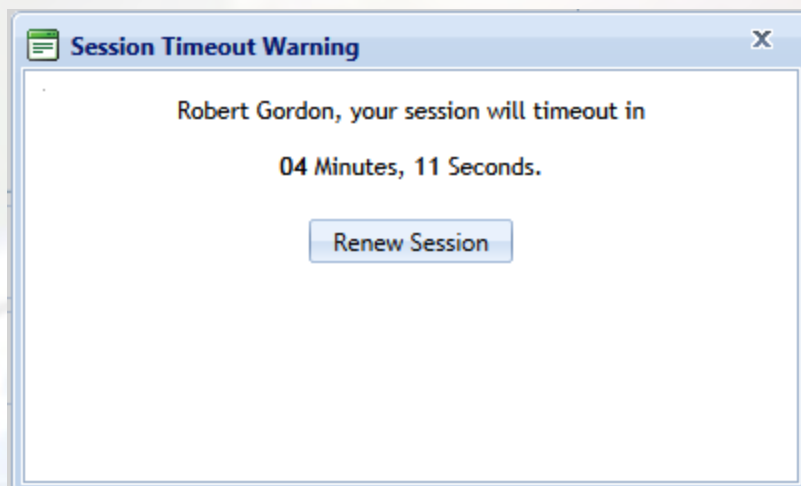


Figure 1.4b

CCIRS sessions time-out after twenty minutes of inactivity, resulting in an automated log-out. A modal window will appear five minutes before a session time-out that will allow a user to renew their session. If a user does not respond to the time-out warning, the session will be closed and re-directed to the CCIRS log-in page.

1.5 CCIRS Dashboard

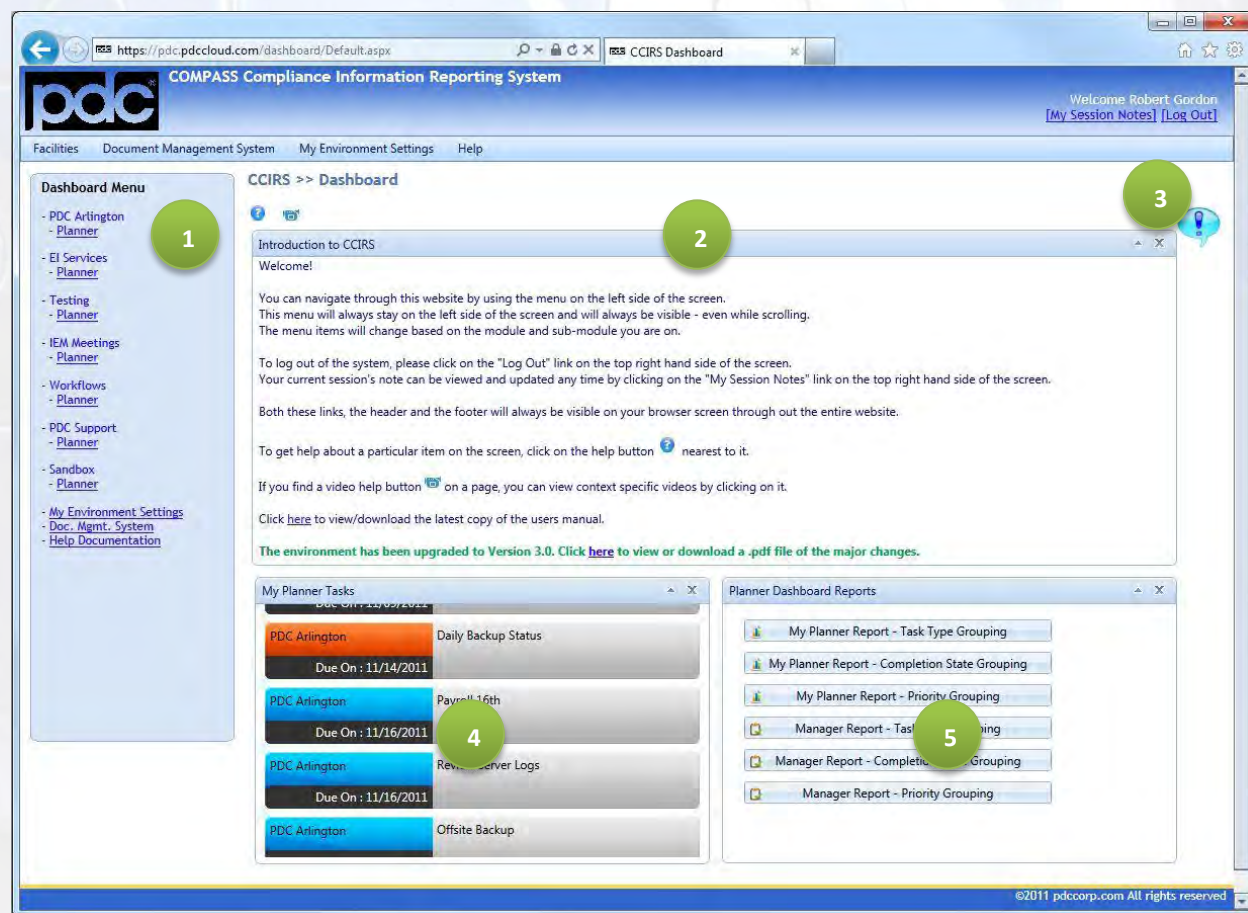



Figure 1.5a

The CCIRS dashboard elements, shown above in Figure 1.5a, are explained below:

1. From the **Dashboard** Menu, users may access any Facility to which they have access, and any modules within those facilities to which they have access. Available facilities and modules are displayed in the **Dashboard Menu** and the “one-click” **Menu System** (discussed in Section 1.6). The Document Management System and Help library can also accessed from here.
2. This Dashboard element may contain pertinent information customized by your organization.
3. Add a sticky note to the CCIRS Dashboard. By clicking on the  symbol, users can add a sticky note to their CCIRS Dashboard, and then remove it at any time. *The sticky note feature is a quick and easy way to add reminders, but should be not be used for any purpose that requires data tracking.*
4. The **Task Rotator** displays all of a user’s overdue Planner tasks for all facilities, and pending Planner tasks for all facilities. The number of days the **Task Rotator** looks into the future for pending tasks is customizable in **My Environment Settings** (discussed in Section 1.7)
5. Multi-Facility Planner reports may be generated from this **Planner Summary Reports** dashboard element. The reports aggregate data across all of a user’s accessible facilities. By default, the date range of these multi-facility summary reports is 30 days before and 30 days after the current date.

There are three default User Planner Reports:

Grouped by Type: Displays a User’s Responsible Tasks grouped by One-Time, Continuous and Recurring tasks.

Grouped by Completion State: Displays a User’s Responsible Tasks grouped by Pending, Closed or Overdue.



Figure 1.5b

Grouped by Priority: Displays a User’s Responsible Tasks grouped by High, Medium or Low.

If a user is a Manager in any facility, then the user will see options to run Manager reports.

1.6 CCIRS Navigation

CCIRS' "one-click" menu system permanently resides at the top of the page, and enables users to navigate to any CCIRS system endpoint with a single click at any time. Menu items may be "hovered over" to expand options, followed by a single click on the desired final destination. Figure 1.6 illustrates a user navigating to a Planner Manager's All Overdue Tasks page within the PDC Arlington Facility.

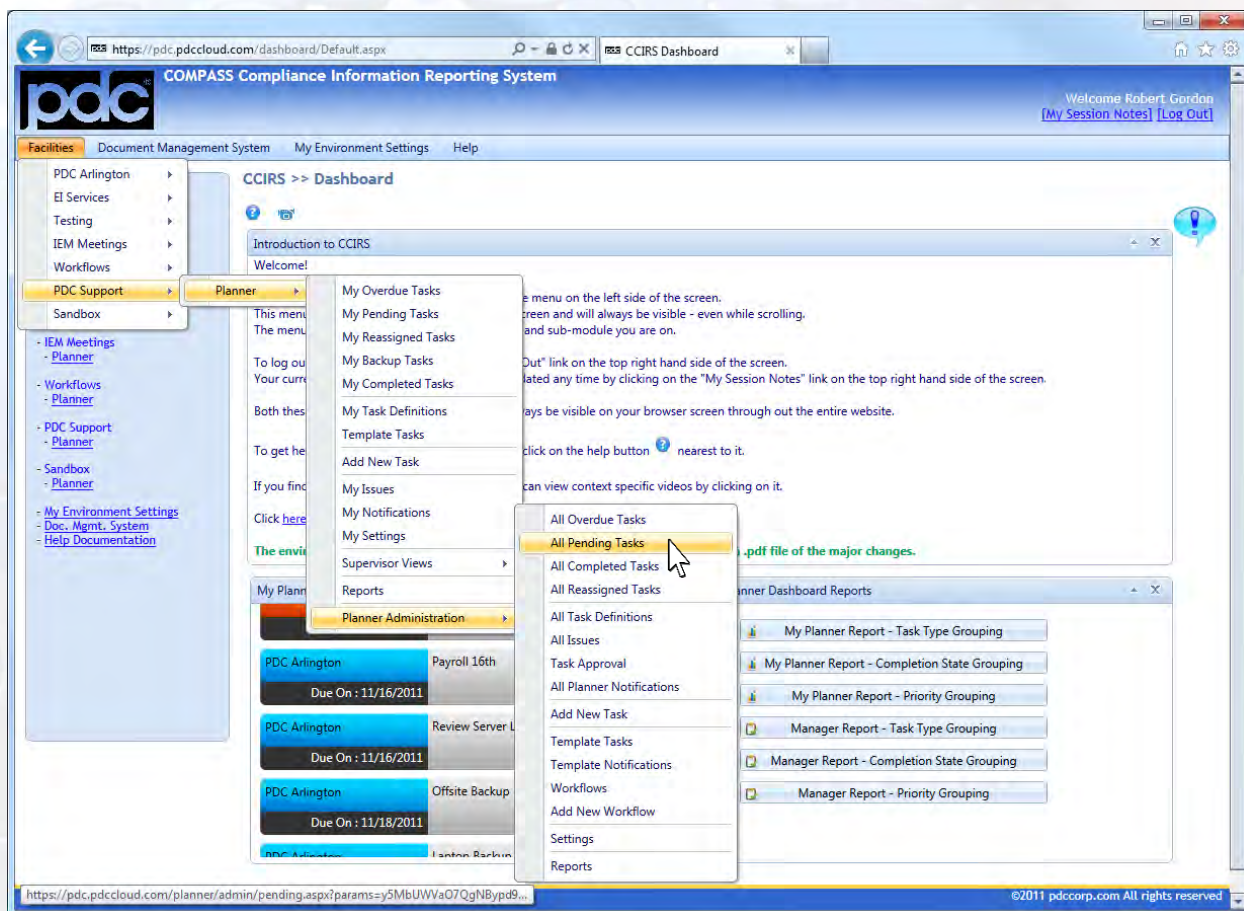


Figure 1.6

The Document Management System, help documentation and user environment settings can also be accessed from the "one-click" menu system. The "one-click" menu system may be used in conjunction with the left-hand menu options to achieve maximum flexibility.

1.7 CCIRS Environment Settings

A user's Environment Settings are accessible from the "one-click" menu system.

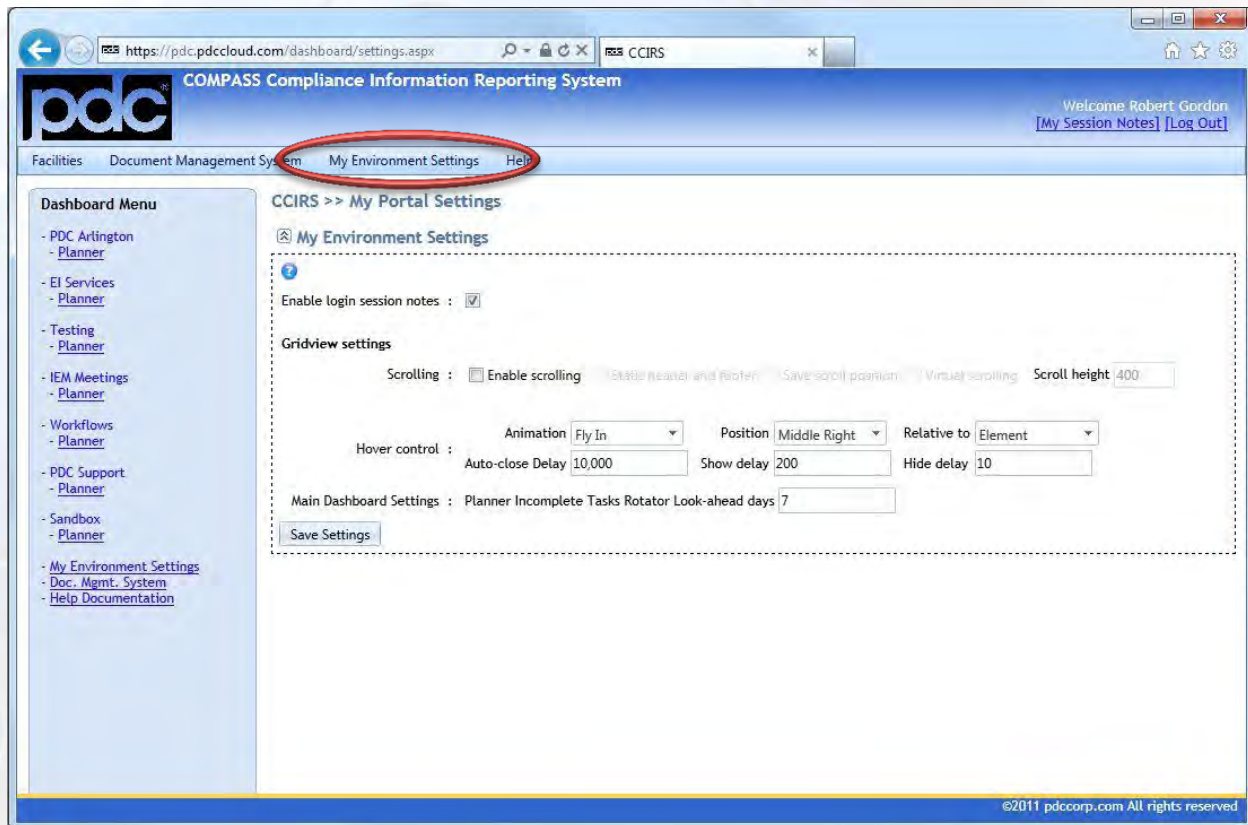


Figure 1.7

Enable Login Session Notes toggles the session notes feature on and off. **Gridview Settings** contain features that control how grids are displayed and interacted with. These features are:

- **Enable Scrolling** – will allow the tasks within grids to be scrolled independently of the browser scroll, as illustrated in Figure 1.7.1.

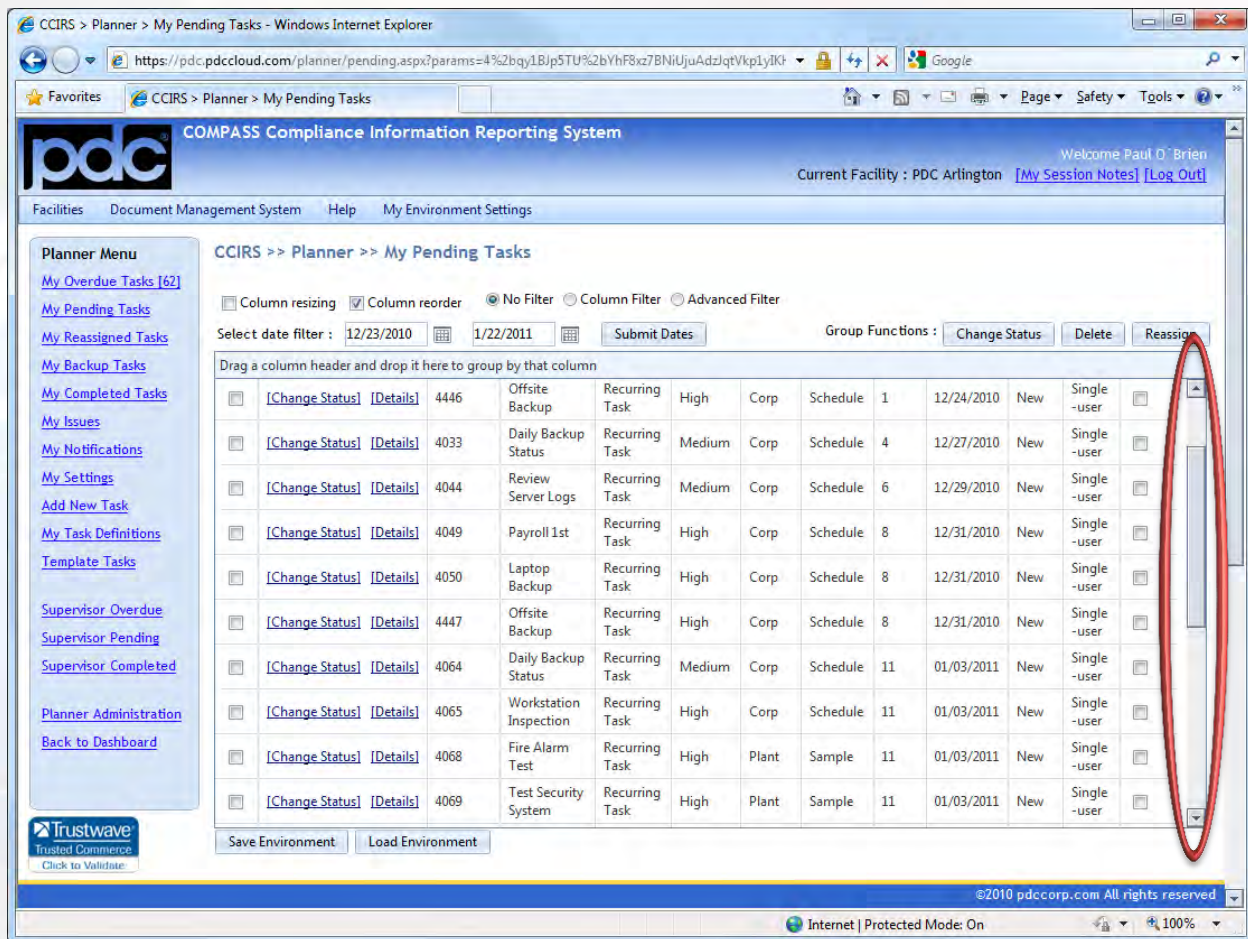


Figure 1.7.1

- **Static Header & Footer** – This option will lock the grid header and footer in place during grid scroll operation.
- **Save Scroll Position** – This option keeps the current scroll position intact when performing page functions (e.g. status changes, date range alterations, filtering, etc.)
- **Virtual Scrolling** – This option allows the scroll bar to scroll through all of the pages of tasks. For example, if a grid is set to page size of twenty and contains eighty tasks, there will be four pages of tasks. With virtual scrolling enabled, the grid will show page four if the scroll bar is pulled all the way to the bottom. Page numbers will also be displayed as the scroll bar is being dragged.

Hover Control settings allow users to customize the following attributes of mouse hover over boxes:

- **Animation** – Users can animate the initial appearance of hover over boxes by enabling a resize, fade, slide or fly in effect.
- **Position & Relative to** – Users can choose where the hover over box will appear. The combination of a position and relative to option will control where the box will appear.

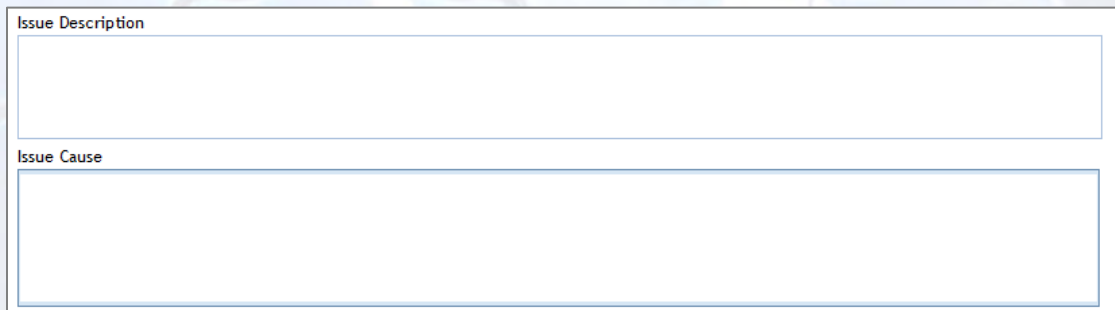
Main Dashboard Settings control dashboard element behavior:

- The **Incomplete Tasks Rotator** setting allows a user to specify the number of days into the future that the Rotator will look for Pending tasks. All overdue tasks will be displayed.

1.8 CCIRS Data Entry Features

While using CCIRS and Planner, various text fields will be utilized to enter data. Some fields will allow users to perform advanced operations, such as spell-checking, media insertion, and other rich text functions, while other fields will not allow these operations.

1.8.1 Rich Text Fields

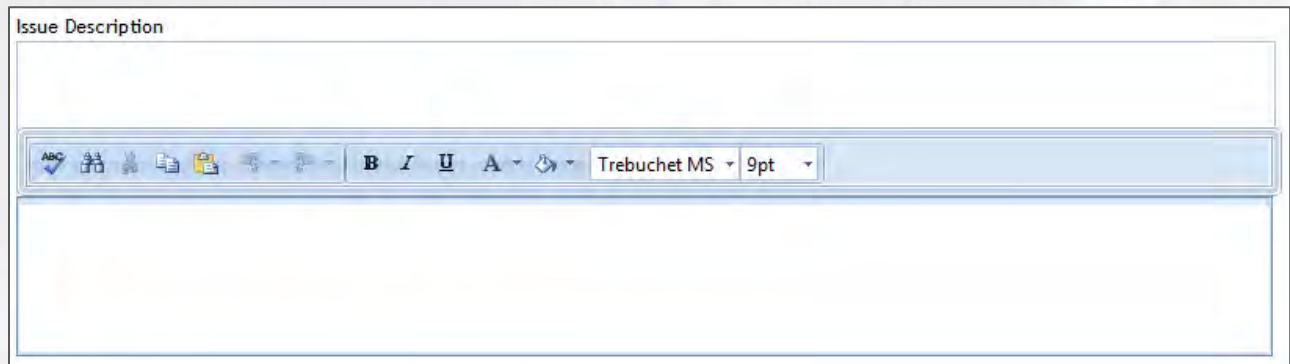


Issue Description

Issue Cause

Figure 1.8.1a

The second data field pictured in Figure 1.8.1a, titled Issue Cause, has a light blue inner border. This light blue inner border indicates that the field is a rich text field. A rich text toolbar will appear when a user clicks in the field, as illustrated in Figure 1.8.1b. The data field titled Issue Description is a standard data field, which only allows ANSI characters.



Issue Description

ABC [undo] [redo] [bold] [italic] [underline] [text color] [background color] [bulleted list] [numbered list] [link] [unlink] [font face: Trebuchet MS] [font size: 9pt]

Figure 1.8.1b

1.8.2 Feature Rich Fields

Fields that will accept feature rich material will always have toolbars above the fields. This is illustrated in Figure 1.8.2.

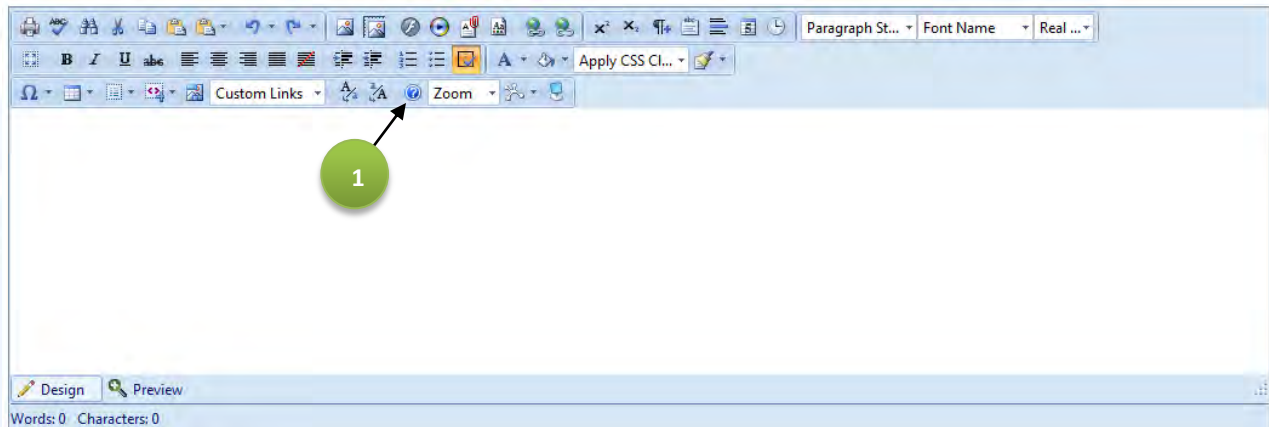


Figure 1.8.2

Many advanced operations can be performed in these fields such as inserting images, videos, hyperlinks and tables. Formatted material from other applications such as Microsoft Word® or Microsoft Excel® can be pasted in these fields, and much of the formatting will be retained. An explanation of all editor functions can be viewed by clicking on the blue question mark, shown by Green Bubble #1.

Chapter 2 - Planner Overview

2.1 Planner Introduction

Planner is one module of PDC's COMPASS Compliance Information Reporting System application portal (CCIRS, pronounced "Seekers"). Planner is a business process management tool designed to promote business effectiveness, efficiency, and continuity through its unique set of capabilities. Every user throughout an organization, ranging from basic users to executives, benefit from using Planner. Planner users receive personalized task lists that are generated from pre-configured recurring or one-time tasks, workflows, and contingent workflows. When users first navigate to the Planner dashboard, they see interactive graphical displays of their performance. Users can also leverage the power of Planner's enterprise grade document management system. After workflows are established in Planner, the system ensures that nothing "falls through the cracks," and that processes continue to flow. Planner also gathers business intelligence, using the information that passes through it, in order to assist executives in making decisions.

2.2 Planner Dashboard Overview

Users can access Planner by clicking on **Planner** under the desired Facility. The Planner dashboard can be seen below in Figure 2.2.

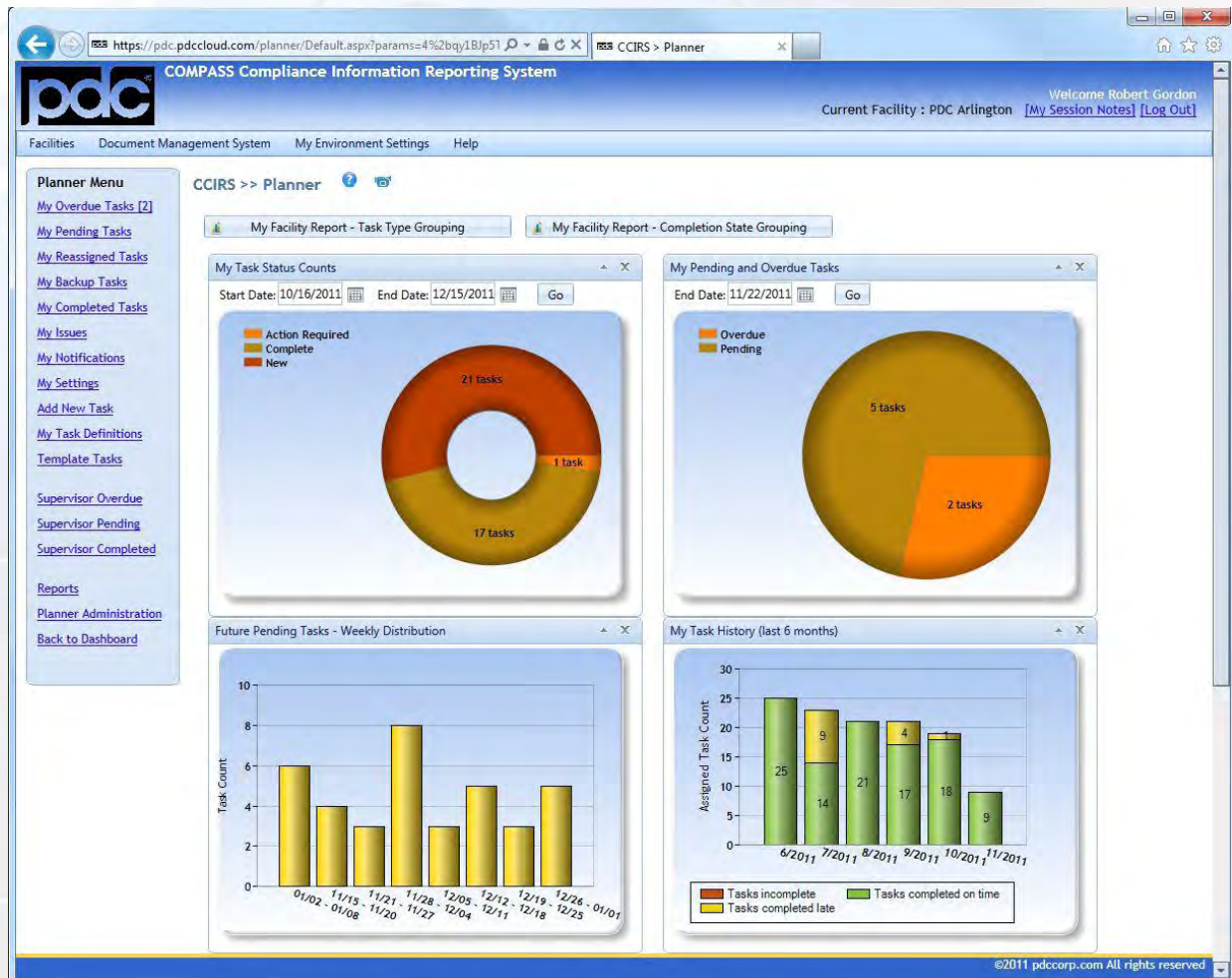


Figure 2.2

The Facility the user is currently accessing is always displayed in the top right corner of the user's browser. Bread Crumb Navigation buttons are displayed beneath the web page header, so users can easily navigate back to a certain level. Two pre-defined Facility Reports are available above the visualizations. Detailed information about Dashboard Reports can be found in [Section 10.2](#) of this Manual. The **Planner Menu** is always visible on the left-hand side of the user's web browser, and contains the following items:

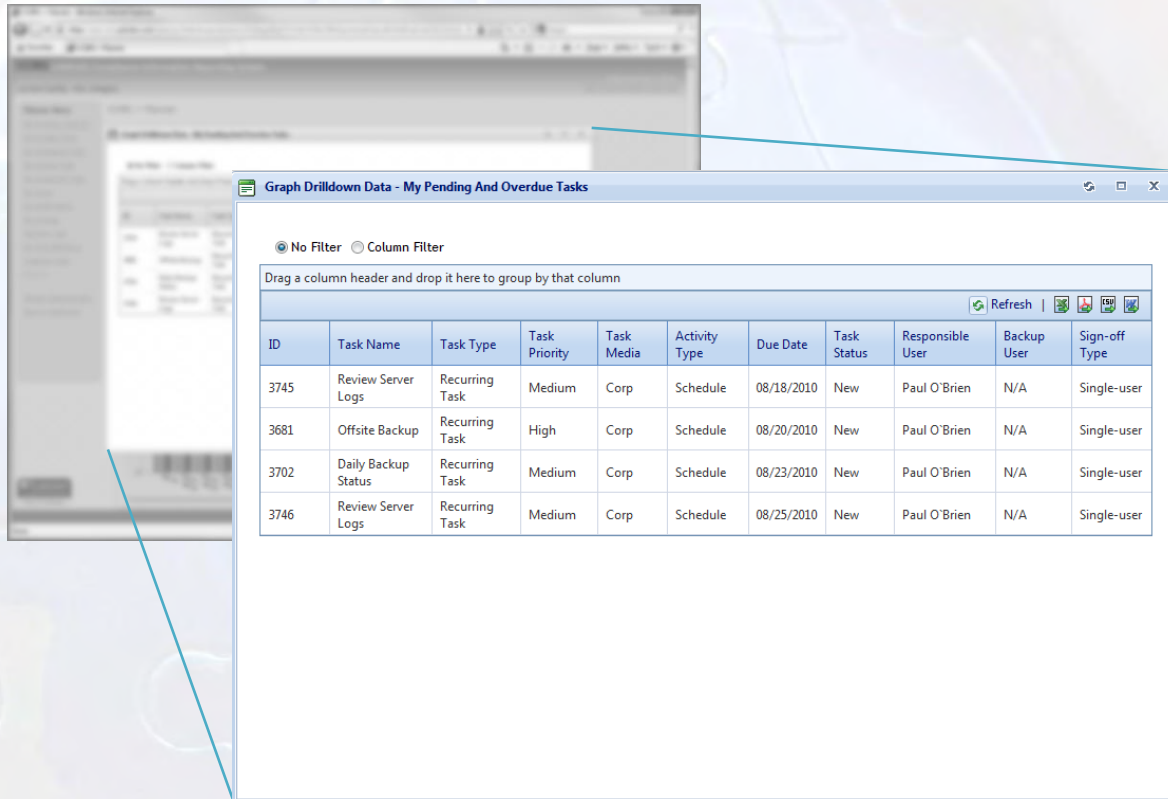
- **My Overdue Tasks** – Displays all tasks that have not been completed, and whose due dates are in the past.

- My Pending Tasks – Displays all tasks that are assigned to the logged-in user, have not been completed, and whose due dates are still in the future. *Only tasks that are due within the global “look ahead” range will be displayed: 200 days is the system default.)*
- My Reassigned Tasks – Displays tasks that were originally assigned to the logged-in user, but have been reassigned to the task’s designated Backup User.
- My Backup Tasks – Displays tasks for which the logged-in user is the designated Backup User. A Backup User is not responsible for a task unless a Planner Manager or the Responsible User reassigns the task to them. After a task has been reassigned, it is moved into the Backup User’s pending or overdue task list, depending on the due date.
- My Completed Tasks – Displays all tasks that were completed.
- My Issues – Issues can be created for tasks, and created issues can be viewed here. For more information about Issues, see [Section 4.1.2](#) of this manual.
- My Notifications – Copies of Planner notifications that were sent to the logged-in user via e-mail are viewable here. For more information about My Notifications, see [Chapter 5](#) of this manual.
- My Settings – User preferences may be set here. For example, a user’s e-mail notification preferences are specified in My Settings. For more information about My Settings, see [Chapter 6](#) of this manual.
- Add New Task – Users may create tasks for themselves or others here. For more information about adding new tasks, see [Section 4.3](#) of this manual.
- My Task Definitions – A Task Definition is the configuration information for a task. Active tasks currently configured for individual users can be viewed here. For more information about Task Definitions, see [Section 4.6](#) of this manual.
- Template Tasks – Tasks can be created as Template Tasks, and created Template Tasks can be seen here. For more information about Template Tasks, see [Section 4.7](#) of this manual.
- Supervisor Overdue/Pending/Completed – If a user is designated as one or more user’s Supervisor, these Supervisor options will be listed in the Planner Menu. More information about the Supervisor role is discussed in [Chapter 7](#) of this manual.
- Reports – Customizable reports showing various types of Planner information may be generated by clicking on Reports. More information about CCIRS Reports is discussed in [Chapter 10](#) of this manual.
- Planner Administration – If a user is a Planner Manager, then this menu item will be available. For more information about Planner Manager Operation, see [Chapter 8](#) of this manual.
- Back to Dashboard – This link will take a user back to the CCIRS dashboard.

The Planner dashboard consists of several visualizations that may be moved around the screen, closed, or collapsed if desired. Several of the graphs allow a user to alter the date range for visualization. All of the graph elements are interactive, and can be clicked on to see the task information referenced in the graphs. The graph’s interactive function is discussed in the next section of this manual.

2.2.1 Planner Dashboard Drilldown Data

To see task information that is referenced by a graph element, the **Graph Drilldown Data** window may be accessed by clicking on the desired element. A **Graph Drilldown Data** window is illustrated below in Figure 2.2.1.








The screenshot shows a window titled "Graph Drilldown Data - My Pending And Overdue Tasks". It features a "No Filter" (selected) and "Column Filter" radio button interface. Below the buttons is a text prompt: "Drag a column header and drop it here to group by that column". To the right of the prompt are icons for "Refresh", "Print", "PDF", "CSV", and "DOC". The main content is a table with 11 columns: ID, Task Name, Task Type, Task Priority, Task Media, Activity Type, Due Date, Task Status, Responsible User, Backup User, and Sign-off Type. The table contains four rows of task data.

ID	Task Name	Task Type	Task Priority	Task Media	Activity Type	Due Date	Task Status	Responsible User	Backup User	Sign-off Type
3745	Review Server Logs	Recurring Task	Medium	Corp	Schedule	08/18/2010	New	Paul O'Brien	N/A	Single-user
3681	Offsite Backup	Recurring Task	High	Corp	Schedule	08/20/2010	New	Paul O'Brien	N/A	Single-user
3702	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	08/23/2010	New	Paul O'Brien	N/A	Single-user
3746	Review Server Logs	Recurring Task	Medium	Corp	Schedule	08/25/2010	New	Paul O'Brien	N/A	Single-user

Figure 2.2.1

The **Graph Drilldown Data** window displays all of the individual tasks, referenced by a graph element in a grid format. From the **Graph Drilldown Data** window, a user can:

- Organize the data to meet their needs. *Advanced organization of the data displayed in this grid can be accomplished by performing functions discussed in [Section 3.1](#) of this manual.*
- Apply a column filter to any column in the grid. To apply a column filter, select the **Column Filter** radio button.
- Navigate to the Task Detail Screen of one particular task. This is performed by right clicking on an individual row and selecting **Details**.
- Generate reports that contain the data displayed in the grid. By clicking on one of the report options located at the grid's top right corner     , an XLS, PDF, CSV, or DOC file can be generated.

Chapter 3 - Grid Anatomy

Many Planner pages utilize common grid structures. Thus, the information provided in this chapter will apply to many pages within Planner. Figure 3 below illustrates a common Planner grid structure.

1

☐ Column resizing ☒ Column reorder ☒ No Filter ☐ Column Filter ☐ Advanced Filter

Select date filter :

Group Functions :

Drag a column header and drop it here to group by that column

Refresh |

<input type="checkbox"/>	Actions	ID	Task Name	Task Type	Task Priority	Subject	Activity Type	Days to Due Date	Due Date	Task Status	Sign-off Type	Private
<input type="checkbox"/>	[Change Status] [Details]	4454	Offsite Backup	Recurring Task	High	Corp	Schedule	1	02/18/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4347	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	4	02/21/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4353	Review Server Logs	Recurring Task	Medium	Corp	Schedule	6	02/23/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4357	Laptop Backup	Recurring Task	High	Corp	Schedule	8	02/25/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4455	Offsite Backup	Recurring Task	High	Corp	Schedule	8	02/25/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4364	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	11	02/28/2011	New	Single-user	<input type="checkbox"/>

Figure 3

Reports may be generated that contain data displayed in the grid. By clicking on one of the report options located at the grid's top right corner , an XLS, PDF, CSV, or DOC file can be generated. A user can also hover their mouse cursor over a task name to see the full task description for a task.

Some grids allow a user to alter the date range from which data is displayed in the grid. If the date range function is available, a user may alter the start date or end date.

3.1 Grid Organization


3.1.1 Column Resizing and Reordering

<input checked="" type="checkbox"/> Column resizing	<input checked="" type="checkbox"/> Column reorder	<input checked="" type="radio"/> No Filter	<input type="radio"/> Column Filter	<input type="radio"/> Advanced Filter
Select date filter :	<input type="text" value="2/17/2011"/>	<input type="text" value="3/19/2011"/>	<input type="button" value="Submit Dates"/>	
Drag a column header and drop it here to group by that column				
Width: 145 pixels				
<input type="checkbox"/>	Actions	ID	Task Name	Task Type
<input type="checkbox"/>	[Change Status] [Details]	4454	Offsite Backup	Recurring Task
<input type="checkbox"/>	[Change Status] [Details]	4347	Daily Backup Status	Recurring Task
<input type="checkbox"/>	[Change Status] [Details]	4353	Review Server Logs	Recurring Task

Figure 3.1.1a

Column resizing and reordering within the grid can be accomplished by checking the appropriate checkbox, as illustrated by Green Bubble #1 in Figure 3.

To perform Column Resizing, click and drag the boundary of a column header to the desired width as shown in Figure 3.1.1a.

To perform column reordering, click and drag a column header when the  cursor appears to the desired location within the grid as shown in Figure F3.1.1b.

☐ Column resizing

☒ Column reorder

☒ No Filter

☐ Column Filter

☐ Advanced Filter

Select date filter :

2/17/2011

3/19/2011

Submit Dates

Drag a column header and drop it here to group by that column

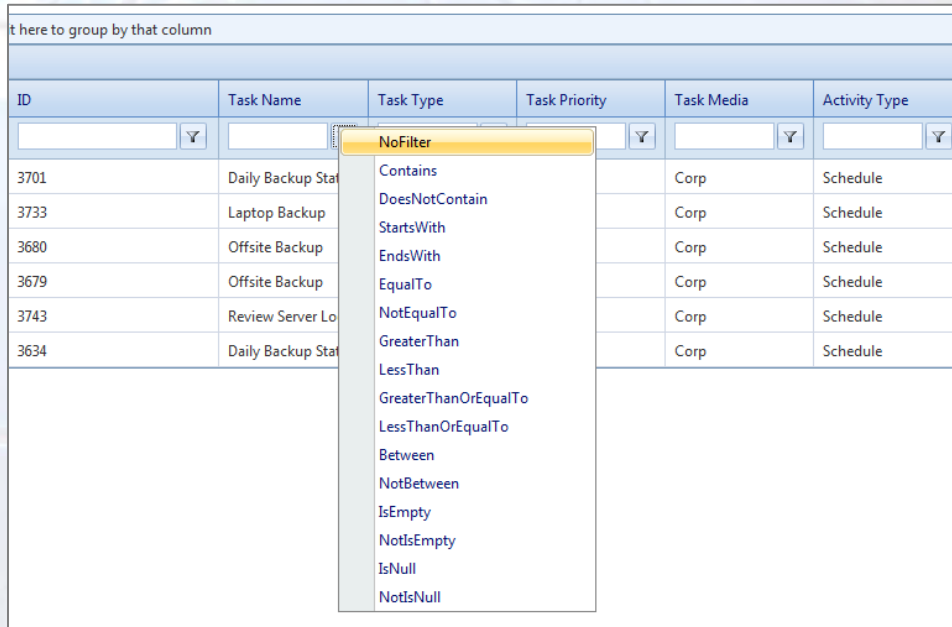
<input type="checkbox"/>	Actions		ID	Task Type	Task Priority
<input type="checkbox"/>	[Change Status] [Details]	4454	Offsite Backup	Recurring Task	High
<input type="checkbox"/>	[Change Status] [Details]	4347	Daily Backup Status	Recurring Task	Medium
<input type="checkbox"/>	[Change Status] [Details]	4353	Review Server Logs	Recurring Task	Medium

Figure 3.1.1b

3.1.2 Grid Filtering

Grid data can be filtered in two different ways; by a column filter or by an advanced filter.

To perform a column filter, the **Column Filter** radio button must be selected above the grid. After **Column Filter** is selected, filtering options appear in the grid, as illustrated by Figure 3.1.2a.



The screenshot shows a data grid with columns: ID, Task Name, Task Type, Task Priority, Task Media, and Activity Type. A filter dropdown menu is open over the Task Name column, displaying various filter conditions. The grid contains several rows of data, including tasks like 'Daily Backup Stat', 'Laptop Backup', 'Offsite Backup', and 'Review Server Lo'.

ID	Task Name	Task Type	Task Priority	Task Media	Activity Type
3701	Daily Backup Stat			Corp	Schedule
3733	Laptop Backup			Corp	Schedule
3680	Offsite Backup			Corp	Schedule
3679	Offsite Backup			Corp	Schedule
3743	Review Server Lo			Corp	Schedule
3634	Daily Backup Stat			Corp	Schedule

Filter conditions available in the dropdown:

- NoFilter
- Contains
- DoesNotContain
- StartsWith
- EndsWith
- EqualTo
- NotEqualTo
- GreaterThan
- LessThan
- GreaterThanOrEqualTo
- LessThanOrEqualTo
- Between
- NotBetween
- IsEmpty
- NotIsEmpty
- IsNull
- NotIsNull

Figure 3.1.2a

To apply a filter, a user must first supply a filter value in the filter field, and then choose a filter condition by choosing an option from the filter drop down. After a filter condition is selected, the filter will be applied. The filter condition may be changed at any time, or removed at any time by selecting **NoFilter** from the filter drop down. The grid data may be filtered by multiple columns simultaneously (*the system using an 'And' condition to perform simultaneous filtering*).

To perform advanced filtering, the **Advanced Filter** radio button must be selected above the grid. After **Advanced Filter** is selected, a first filtering group is created. A user can then build additional filtering groups and expressions, as illustrated in Figure 3.1.2b.

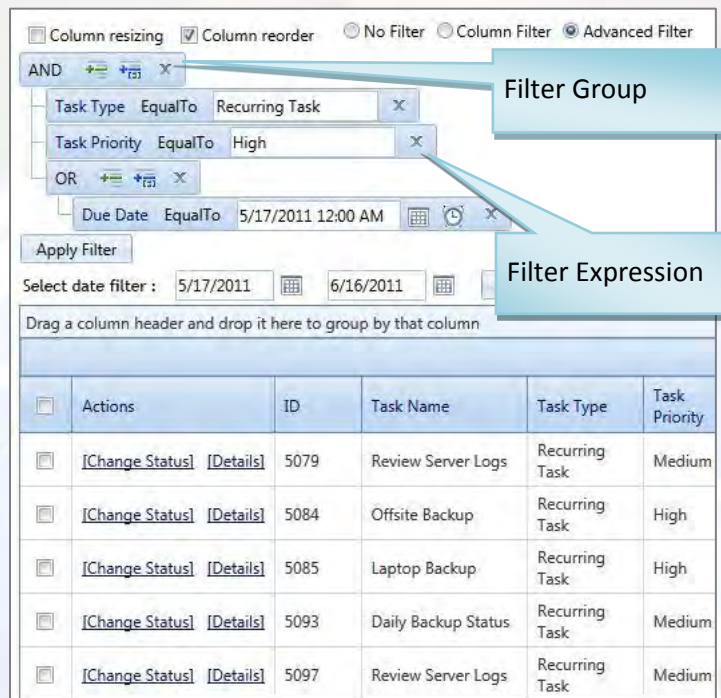






Figure 3.1.2b

When the user has constructed all desired filter groups and expressions, and is ready to apply the advanced filter, then **Apply Filter** may be clicked.

A filtering group **AND**  begins with one of the following operators:

- And
- Or
- Not And
- Not Or

New filtering groups can be added by clicking .

A filtering expression **ID**  **5,000**  begins with a column name, followed by a filter condition, concluded with a filter value. The filter value field may change depending on the column selected.

3.1.3 Grid Sorting

The grid data may be sorted on any column by clicking on the desired column header. The first time a column header is clicked; the grid will sort on that column in ascending order. The second time a column header is clicked; the grid will sort on that column in descending order. The third time a column header is clicked; the sort function will be removed from that column. Sorting can also be removed using fewer clicks by utilizing the right-click menu discussed in [Section 3.1.5](#) of this manual.

The grid data may also be sorted on multiple columns by performing a sort function on multiple columns. The sort priority is established by the order in which the column sorts are applied, and sorted columns are shaded in different colors than non-sorted columns. Figure 3.1.3 illustrates a sorted grid.

Drag a column header and drop it here to group by that column							
<input type="checkbox"/>	Actions	ID ▲	Task Priority	Task Name ▲	Task Type	Subject	Activity Type
<input type="checkbox"/>	[Change Status] [Details]	4347	Medium	Daily Backup Status	Recurring Task	Corp	Schedule
<input type="checkbox"/>	[Change Status] [Details]	4353	Medium	Review Server Logs	Recurring Task	Corp	Schedule
<input type="checkbox"/>	[Change Status] [Details]	4357	High	Laptop Backup	Recurring Task	Corp	Schedule
<input type="checkbox"/>	[Change Status] [Details]	4364	Medium	Daily Backup Status	Recurring Task	Corp	Schedule

Figure 3.1.3

A small up or down arrow will appear next to a column name that has an active sort, depending on whether it is sorted ascendingly or descendingly.

3.1.4 Grid Grouping

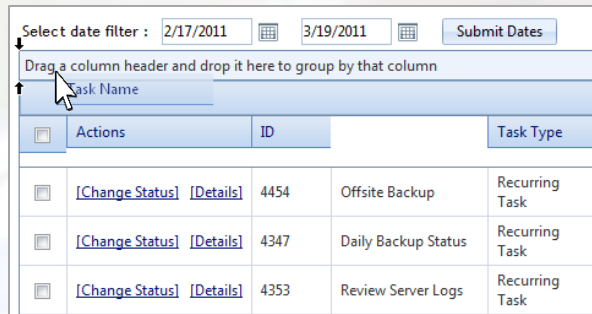


Figure 3.1.4a

Grid data may also be grouped by values residing in specified columns. In order to apply a grouping, a user must click and drag a column header to the top of the grid where “Drag a column header and drop it here...” is displayed, as illustrated in Figure 3.1.4a.

After a column header is dragged to the grouping area, the grid will create sections within the grid, one for every unique value that was found in the specified column. Multiple groupings may be created by dragging additional column headers to the grouping area. Figure 3.1.4b illustrates a grid that has a grouping applied.

Grouped grids can also be sorted by the grouped column by clicking on the column name in the grouped area.

Task Name													
Refresh													
		Actions	ID	Task Name	Task Type	Task Priority	Subject	Activity Type	Days to Due Date	Due Date	Task Status	Sign-off Type	Private
Task Name: Daily Backup Status													
	[Change Status]	[Details]	4347	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	4	02/21/2011	New	Single-user	
	[Change Status]	[Details]	4364	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	11	02/28/2011	New	Single-user	
	[Change Status]	[Details]	4388	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	18	03/07/2011	New	Single-user	
	[Change Status]	[Details]	4841	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	25	03/14/2011	New	Single-user	
Task Name: Fire Alarm Test													
	[Change Status]	[Details]	4375	Fire Alarm Test	Recurring Task	High	Plant	Sample	12	03/01/2011	New	Single-user	
Task Name: Laptop Backup													
	[Change Status]	[Details]	4357	Laptop Backup	Recurring Task	High	Corp	Schedule	8	02/25/2011	New	Single-user	
	[Change Status]	[Details]	4463	Laptop Backup	Recurring Task	High	Corp	Schedule	22	03/11/2011	New	Single-user	
Task Name: Offsite Backup													
	[Change Status]	[Details]	4454	Offsite Backup	Recurring Task	High	Corp	Schedule	1	02/18/2011	New	Single-user	
	[Change Status]	[Details]	4455	Offsite Backup	Recurring Task	High	Corp	Schedule	8	02/25/2011	New	Single-user	
	[Change Status]	[Details]	4456	Offsite Backup	Recurring Task	High	Corp	Schedule	15	03/04/2011	New	Single-user	
	[Change Status]	[Details]	4462	Offsite Backup	Recurring Task	High	Corp	Schedule	22	03/11/2011	New	Single-user	
	[Change Status]	[Details]	4862	Offsite Backup	Recurring Task	High	Corp	Schedule	29	03/18/2011	New	Single-user	

Figure F3.1.4b

To remove a grouping, a column name must be clicked and dragged away from the grouping area.

3.1.5 Right Click Organization Menu

When a user right-clicks on a column header, a menu will appear providing many options. This right-click menu is shown in Figure 3.1.5.

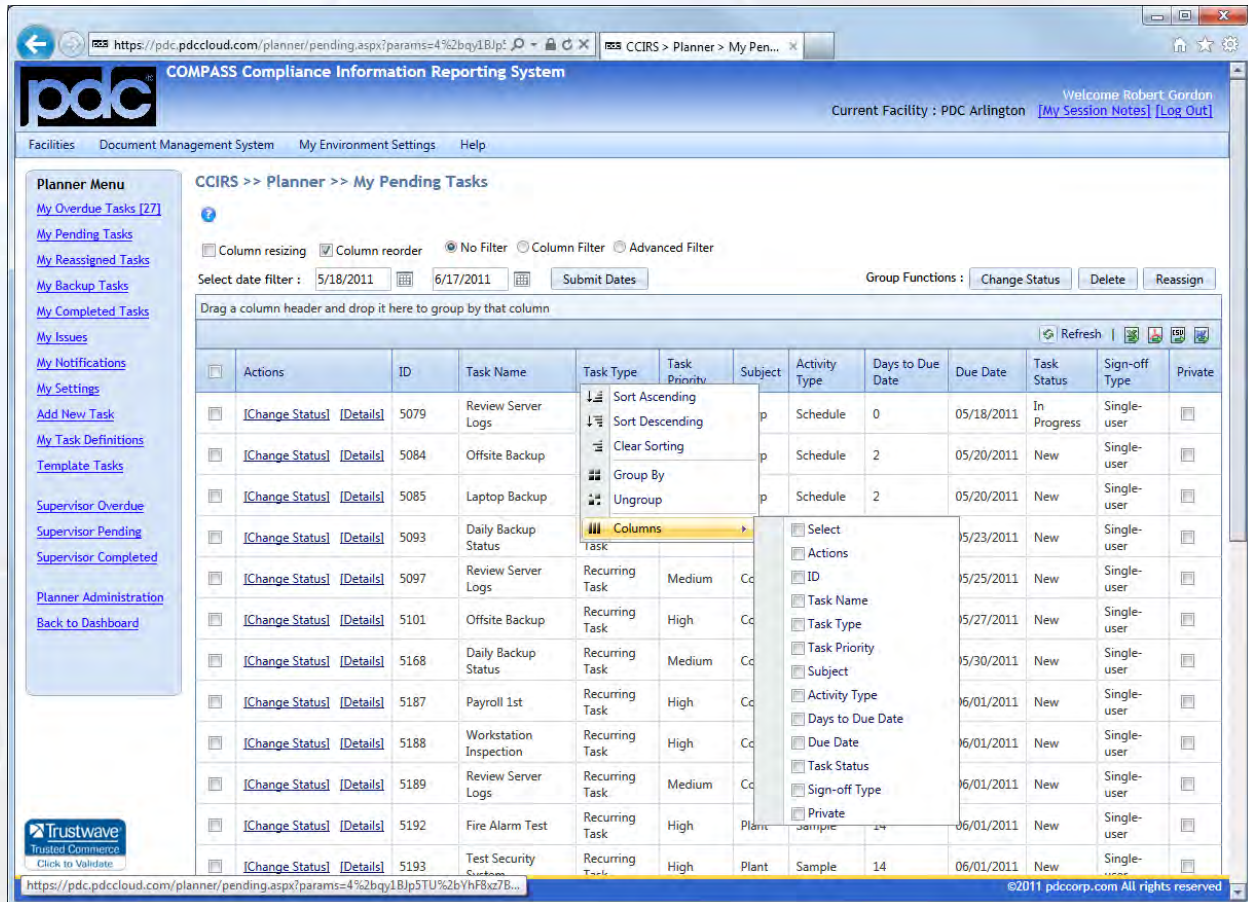


Figure 3.1.5

In addition to the sorting and grouping methods discussed in previous sections, sorting and grouping can also be performed using this menu. A user can also hide columns from view. Only columns that have their checkboxes checked will be visible, as shown in Figure 3.1.5.

3.2 Grid Actions

Each task has a **Change Status** and **Details** action option listed in the grid's Action column

[\[Change Status\]](#) [\[Details\]](#)

1. **Details** – Clicking on **Details** for a particular task will take the user to the full detail screen for that task. Further information regarding Task Detail screens can be found in [Section 4.1.1](#) of this manual.
2. **Change Status** – Clicking on **Change Status** will allow a user to change the status of a task without entering the full detail screen. After **Change Status** is selected, a modal window appears asking for the status change, and an optional comment. Users then select a status option followed by **Update**. Depending on the status option that was chosen the modal window may require further information.

More action options may be seen by right-clicking on a task row in the grid, as shown in Figure 3.2a

Drag a column header and drop it here to group by that column

Refresh												
<input type="checkbox"/>	Actions	ID	Task Name	Task Type	Task Priority	Subject	Activity Type	Days to Due Date	Due Date	Task Status	Sign-off Type	Private
<input type="checkbox"/>	[Change Status] [Details]	4454	Offsite Backup	Recurring Task	High	Corp	Schedule	1	02/18/2011	New	Single-user	<input type="checkbox"/>
<input checked="" type="checkbox"/>	[Change Status] [Details]	4347	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	4	02/21/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4353	Review Server Logs	Task	Medium	Corp	Schedule	6	02/23/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4357	Laptop Backup	Task	Medium	Corp	Schedule	8	02/25/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4455	Offsite Backup	Task	Medium	Corp	Schedule	8	02/25/2011	New	Single-user	<input type="checkbox"/>
<input type="checkbox"/>	[Change Status] [Details]	4364	Daily Backup Status	Recurring Task	Medium	Corp	Schedule	11	02/28/2011	New	Single-user	<input type="checkbox"/>

Change Status

Details

Copy

Delete

Re-assign to backup

View Definition

Figure 3.2a

In addition to the Details and Change Status actions accessible from the grid action column, the right-click menu will also allow a user to:

1. Copy – Clicking on copy will direct the user to an Add New Task screen that is pre-populated with the details of the copied task. This feature is useful when creating new tasks that are very similar to others. Further information about adding new tasks can be found in Section 4.3 of this manual.
2. Delete – A user can only delete a task if they have the rights to delete it. Users can only delete tasks that they create for themselves, and managers can delete tasks that they have created for anyone.
3. Re-assign to Backup – By clicking on **Re-assign to Backup**, a user can re-assign the selected task to the task's designated Backup User. After a task is re-assigned, the task will be removed from the re-assigning user's pending list, and will be moved to their **My Re-assigned Tasks** list. The task will also appear in the Backup User's pending list.
4. View Definition – Viewing a task definition will show a user how the Add New Task Page looked when the task was created, and will also allow changes to the task configuration. For more information about Task Definitions, see [Section 4.6](#) of this manual.

3.2.1 Group Functions

The task actions discussed in Section 3.2 of this manual can also be applied to a group of tasks. The first step in performing group functions is selecting a group of tasks. There are three ways a user can select a group of tasks:

1. A user can use the checkboxes in the far left column to select desired tasks.
2. A user can left-click on a row and use CTRL + Left-Click to select additional tasks rows.
3. A user can left-click and drag a box over a block of tasks within the grid. Releasing the mouse button will make the selection.

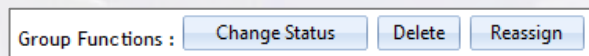


Figure 3.2.1a

After a group of tasks is selected, group functions can be performed by using the **Group Function** buttons,

located above the top right corner of the grid (*illustrated in Figure 3.2.1a*). When performing a status change to a group of tasks, the status change and optional comment will be applied to all selected tasks. The timestamp value will also be identical on every selected task.

3.3 Grid Environments

Grid properties can be saved in an environment and loaded in the future, these properties are:

- Column size
- Column order
- Visible columns
- Column filters
- Advanced filters
- Single and multi-level column grouping
- Single and multi-column sorts
- Page size (*tasks per page*)

This feature is designed for users who find themselves making the same customizations, to the properties listed above, every time they view a particular grid.

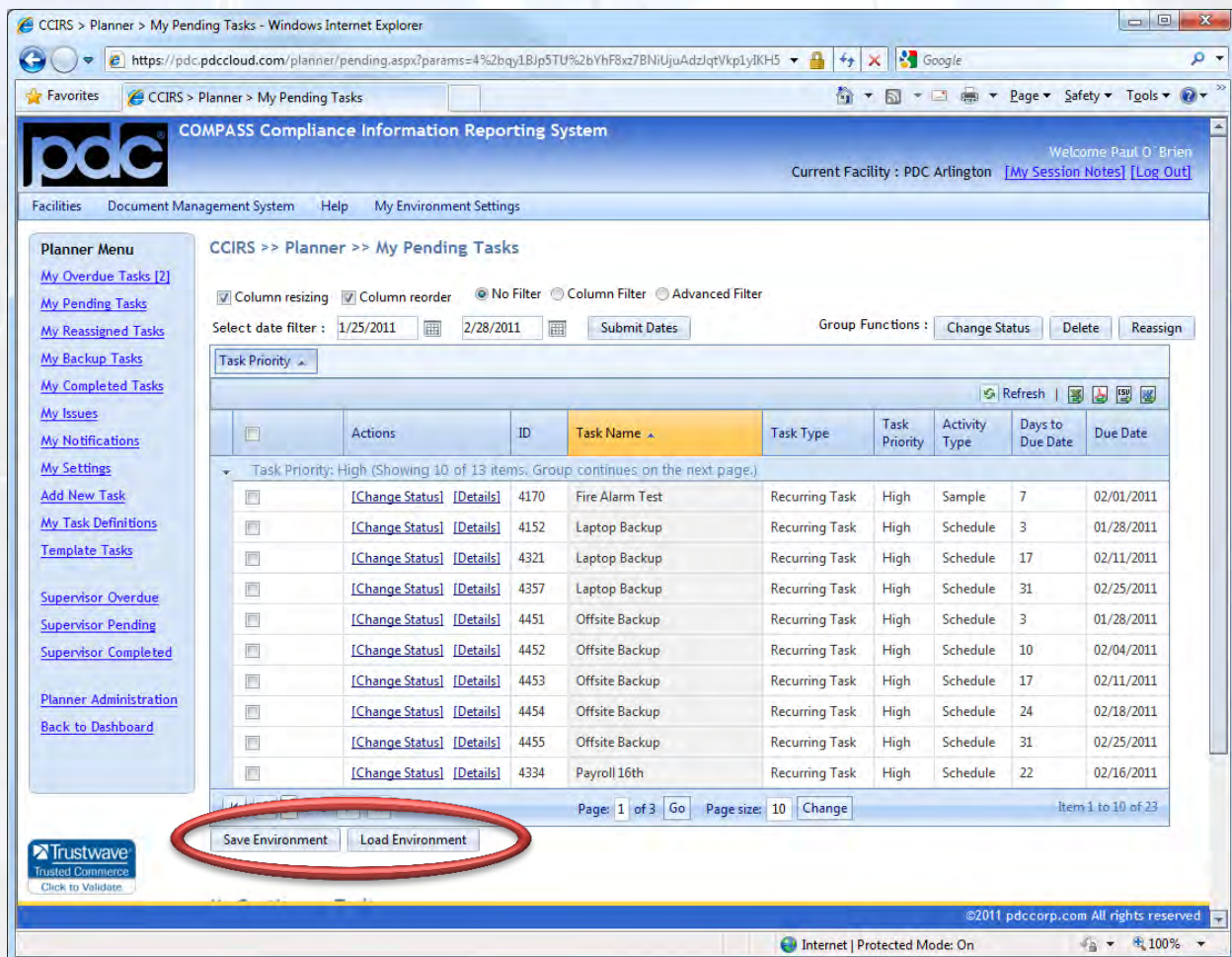


Figure 3.3

For example, the grid pictured in Figure 3.3 shows a single level grouping, a single column sort, custom column sizes and some columns hidden from view.

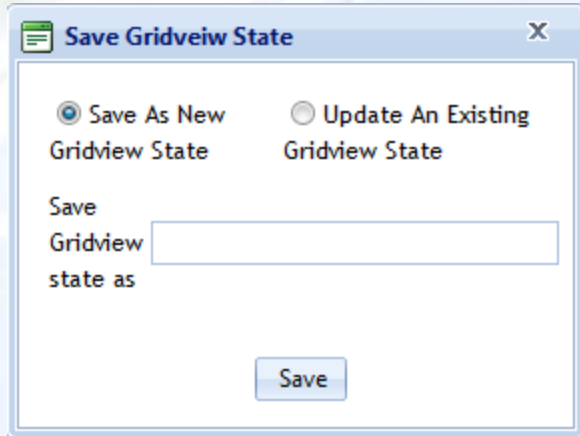


Figure 3.3.1

After making all desired changes, a user can click on **Save Environment** below the grid to save the current grid state for future use. They can then either give the gridview state a new name, or update an existing saved state.

When a user wishes to retrieve a saved Gridview State at a future time, **Load Environment** should be clicked.

The user may then choose from their list of previously saved environments. They can also choose one of their saved environments to serve as their default Gridview State.

When a default Gridview State is configured, the current grid will use the saved grid state whenever the grid is accessed in the future.

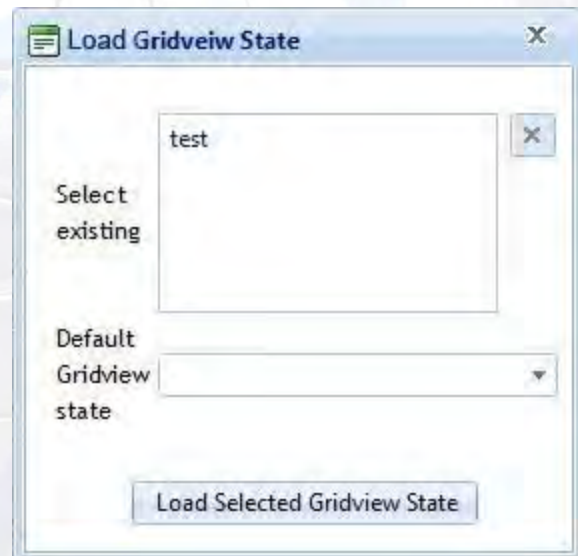


Figure 3.3.2

Chapter 4 - Task Management

The management of tasks takes place in the Planner Task Pages, and in the detail screens of individual tasks. From the Planner Menu, pages can be accessed that will show tasks in varying states. These pages are listed below, as well as the data that they will reflect:

- My Overdue Tasks – Displays all tasks that have not been completed, and whose due dates are in the past. If there are overdue tasks, the number of them will appear next to “My Overdue Tasks” in the Planner Menu (e.g. [My Overdue Tasks \[6\]](#))
- My Pending Tasks – Displays all tasks that are assigned to the logged-in user, have not been completed, and whose due dates are still in the future.
- My Reassigned Tasks – Displays tasks that were originally assigned to the logged-in user, but have been reassigned to the task’s designated Backup User.
- My Backup Tasks – Displays tasks for which the logged-in user is the designated Backup User. A Backup User is not responsible for a task unless a manager or the Responsible User reassigns the task to them. After a task has been reassigned, it is moved into the Backup User’s pending or overdue task list, depending on the due date.
- My Completed Tasks – Displays all tasks that were completed.

4.1 Task Anatomy

A task is comprised of many parts that are displayed in a task’s details page, after a task is created. Most of these parts were entered when the task was created. The **Task Details** Page is broken up into four sections.

- Task Details
- Task Actions
- Add Comments
- Comments

4.1.1 Task Details

The screenshot shows the 'Task Details' form with the following fields and sections highlighted by numbered callouts:

- 1**: Task Name (Review Server Logs)
- 2**: Task Description (Server logs for potential problems)
- 3**: Task Signoff Information table
- 4**: Task Type (Recurring Task - Weekly)
- 5**: Task Due Date (11/23/2011)
- 6**: Task Priority (Medium)
- 7**: Subject (Corp)
- 8**: Task Activity Type (Schedule)
- 9**: Private Task checkbox
- 10**: Task Definition ID (17) and View Definition link
- 11**: Task Signoff Type (Single-user)
- 12**: Responsible User(s) (Robert Gordon)
- 13**: Backup User (N/A)
- 14**: File Location (Paper and/or Electronic)
- 15**: Report is sent to
- 16**: Task ID (22198)
- 17**: Task Created On (5/7/2011 12:04:39 AM)
- 18**: Task Created By (N/A)
- 19**: Task Start Date (Not Applicable)
- 20**: Source Module (Planner)
- 21**: Notification Settings (User Defaults) and View button
- 22**: Task icon
- 23**: Task icon
- 24**: Task icon

User Id.	Name	Task Status	Completed On	Completed By	Recorded On	Recorded By
4	Robert Gordon	New		N/A		N/A


Figure 4.1.1a

- 1. Task Name** – This is a short description of the task’s main purpose, and is limited to 500 characters. Task names are used to identify tasks in Planner grid views.
- 2. Task Description** – This is a complete description containing duties associated with the task, and is limited to 4000 characters (including formatting). A task’s full description can be seen from a Planner grid view, by hovering the mouse cursor over the Task Name.
- 3. Task Signoff Information** – Responsible Users for a task and their status relative to this task is displayed in this section. If a task is a single use task, then one name will be displayed in this section. If the task is a multi-user task, then all Responsible Users will be displayed.

When a user completes a task, this section will display two different sets of data. The **Completed On** data will show the completion date and the completing user that was specified.

The **Recorded On** data will show the actual date and user making the completion entry into the system.

4. **Task Type** – There are three types of tasks supported in Planner
 - a. **Recurring Task** – A recurring task creates unique instances of itself on a specified recurring schedule (e.g. daily, weekly, annually).
 - b. **One-Time Task** – A one-time task is due on one specific date, and will not recur.
 - c. **Continuous Task** – A continuous task has a start date, and can have an optional end date. If a continuous task has only a start date, then the task will always be present on a user's pending task list until it is completed. If a continuous task has an end date, then the task will have a specific duration.
5. **Task Due Date** – If the task is not completed by the date in this field, the task will be classified as overdue. If the task is a one-time task, the date in this field will be the only due date. If the task is a recurring task, then this date will be the unique due date for this particular instance of the task.
6. **Priority** – A task can have one of three different priorities; High, Medium, or Low. Task priority affects the notifications associated with the task.
7. **Subject** – The value in the media field comes from a customizable list that is common across the current Facility. It is used to classify tasks into groups in order to aid task retrieval.
8. **Activity Type** – The value in the activity type field comes from a customizable list that is common across the current Facility. It is used to classify tasks into groups in order to aid task retrieval.
9. **Private Task** – If a task is set to private, the task will only be visible to the logged-in user. The task will not be visible to supervisors or managers, and will not be included in managerial reports.
10. **Task Definition & Related Instances** – Clicking on **Task Definition** will navigate a user to current task's Task Definition page. Clicking on **Related Instances** will show a user other task instances that were generated for the current task's Task Definition.
11. **Signoff Type** – This field shows whether the task is a single user or multi-user task
12. **Responsible User(s)** – This field will display the Responsible Users for the task. If the task is a single-user task, only one name will be present. If the task is a multi-user task, all Responsible Users will be listed.
13. **Backup User** – This field displays the designated Backup User for the task. A Backup User is not responsible for a task unless a manager or the Responsible User reassigns the task to them.
14. **File Location** – This field is optional, and can be used to specify either an external physical or electronic file location. This field is limited to 1000 characters.
15. **Report Sent to** – This field is optional, and can be used to specify an external entity to which a report must be sent.
16. **Task ID** – The unique Task ID is displayed here. In regard to recurring tasks, every unique instance of a recurring task will have a unique task ID. The task ID can be used in the future to locate a task.
17. **Task Created on** – This field will display the date on which Planner generated the task for a user.

18. Task Created By – This field will display the user that created the task. If the task was loaded into the system through other some other means and was not manually entered into the system, then N/A will be displayed.
19. Task Start Date – A start date will only be displayed if the task’s type is continuous.
20. Source Module – Since tasks can be created from modules other than Planner, this field will display the module that created the task.
21. Notification Settings – This field will display the notification settings that apply to the task. If a user wishes to see what the specific notification settings are, **View** may be clicked.
22. Outlook Export – The  icon allows this task to be exported to a user’s Microsoft® Outlook® calendar, or any other calendar system that supports “.ics” files. When the icon is clicked, a

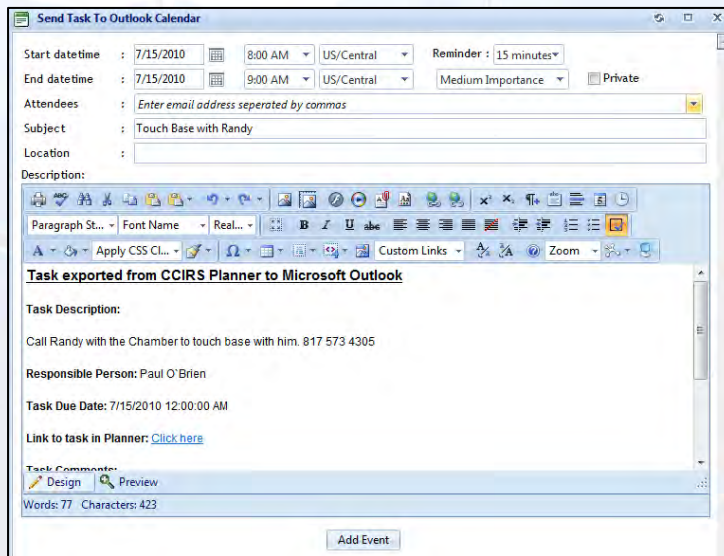




Figure 4.1.1b

modal window will appear, shown in Figure 4.1.1b, in which the Outlook® Appointment fields have been populated with appropriate task information. A user can change any of these attributes before clicking on **Add Event**. When **Add Event** is clicked, an “.ics” file is created, which will create the calendar event when opened.

23. The  icon enables users to send the details of a task to any e-mail address.
24. The  icon indicates that the current task is involved in a workflow. This workflow symbol, and its subsequent modal window, is available to all Planner Users. More information about Workflow Tasks can be found in [Section 4.2](#) of this Manual.

4.1.2 Task Actions

The screenshot shows a web interface for task management. On the left, there are two dropdown menus: 'Task Assignment' (showing 'silas russel') and 'Task Status' (showing 'New'). Below these is a 'Save Changes' button. In the center is a large box labeled 'Documents attached to this task' with an 'Add New' and 'Delete' button at the bottom. On the right, there are two sections: 'Follow-up Tasks' and 'Issues'. Each section has a table with columns 'Task Id', 'Task', 'Status', and 'Due Date'. Below each table are 'Add New', 'Add Existing', and 'Delete' buttons. Numbered callouts are placed over the interface: 1 points to the Task Assignment dropdown, 2 to the Task Status dropdown, 3 to the Save Changes button, 4 to the Documents box, 5 to the Follow-up Tasks table, and 6 to the Issues table.

Figure 4.1.2a

1. Task Assignment –

Single User Tasks - The user who is responsible for a task is specified here. A user can reassign a task to a designated backup person by selecting the backup person from the drop-down list, and then clicking **Save Changes**.

Multi-User Tasks – The list of assigned users will appear in the drop-down list, however, this field may be editable or read-only depending on permissions. Managers may use this field to perform a sign-off on behalf of someone else.

2. Task Status – The current task status is displayed here. The different status values will differ across Planner installations, as they are customizable. A user can change the status of a task by selecting a desired status, and then clicking **Save Changes**.

3. Save Changes – **Save Changes** must be clicked whenever a task assignment or status change is made, in order to confirm the changes. The **Save Changes** button does not need to be clicked when adding documents, follow-up tasks, or issues.

4. Documents – Documents can be added to tasks throughout the task lifecycle (i.e. upon creation, while in progress, while overdue, or after completion). By clicking **Add New**, a user can select available documents from the Document Management System, as illustrated in Figure 4.1.2b. A user can select one or more documents, and then click **Return Selected**.

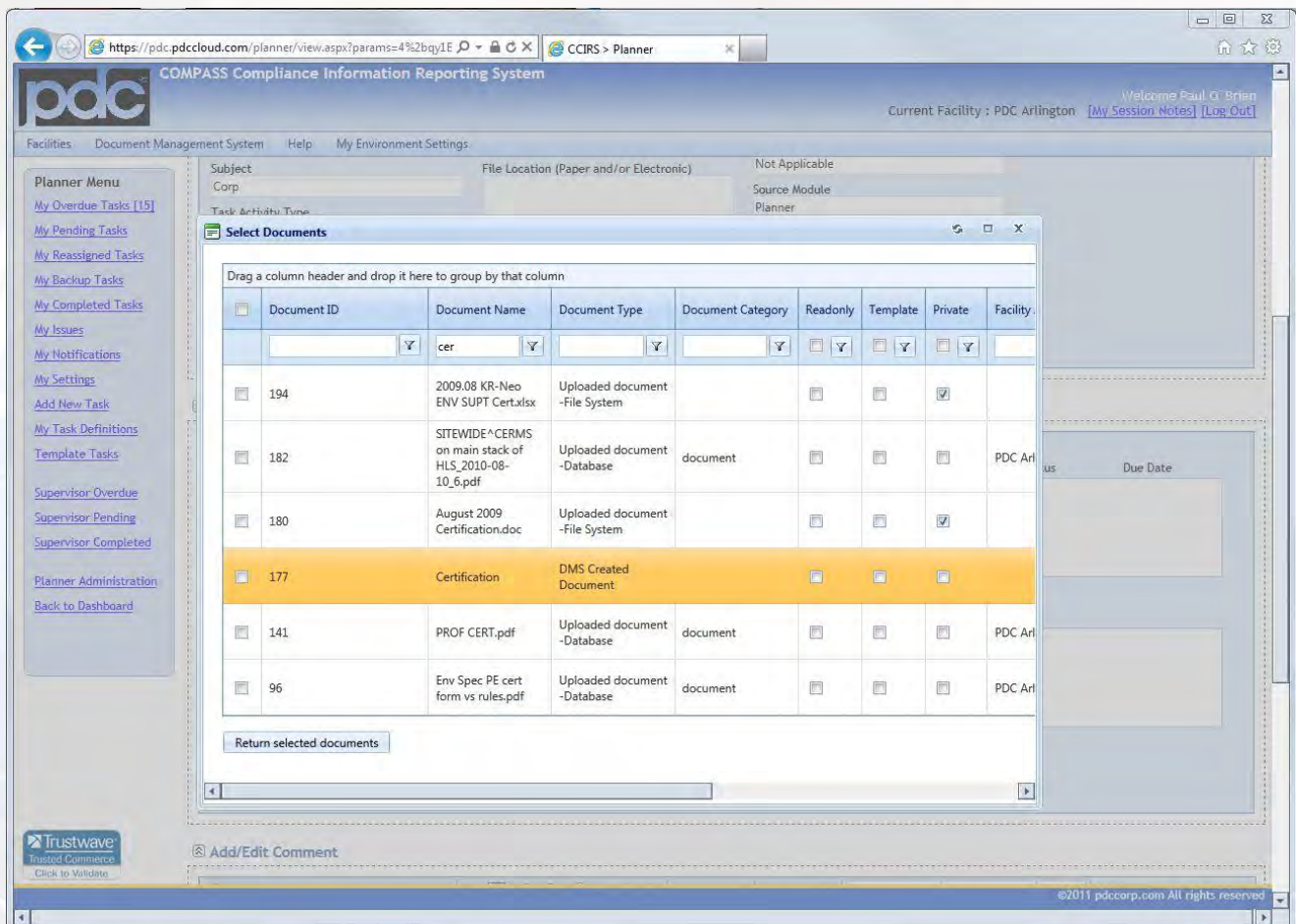


Figure 4.1.2b



Figure 4.1.2c

All attached documents will be listed in the documents section, as illustrated in Figure 4.1.2c. A user can double click on a document to view the document, or delete the link to the document by highlighting the document, and then clicking **delete** (*does not delete document*).

5. **Follow-Up Tasks** – A Follow up task is a one-time “child” task in a parent-child relationship with one or more tasks.

Example: A task instructs a user to check the air pressure in their automotive tires using their tire pressure gauge. However, the user’s tire pressure gauge is broken, and the user cannot complete the task until a new one is purchased. The user can create a follow-up task for the purchase of a new tire pressure gauge.

By clicking **Add New**, a user can manually create a follow-up task.

The screenshot displays the 'One-time Task' modal window within the CCIRS COMPASS Compliance Information Reporting System. The window is titled 'One-time Task' and contains various fields for task creation. On the left, a 'Planner Menu' sidebar lists options like 'My Overdue Tasks', 'My Pending Tasks', 'My Reassigned Tasks', 'My Backup Tasks', 'My Completed Tasks', 'My Issues', 'My Notifications', 'My Settings', 'Add New Task', 'My Task Definitions', 'Template Tasks', 'Planner Administration', and 'Back to Dashboard'. The main form includes sections for 'Regular or Template Task' (with radio buttons for Regular and Template), 'Private Task' (with radio buttons for No and Yes), 'Task Name', 'Task Description', 'File Location (Paper and/or Electronic)', 'Report is sent to', 'Task Priority' (a dropdown menu), 'Media' (a dropdown menu), 'Task Activity Type' (a dropdown menu), 'Task Sign-off type' (with radio buttons for Single User and Multiple Users), 'Responsible User' (a dropdown menu), 'Backup Responsible User' (a dropdown menu), 'Task Due Date' (a date picker), 'Attach documents to task' (a file upload area), and 'Notifications Settings' (a dropdown menu set to 'System Defaults' with a 'View' button). At the bottom, there are 'Save Follow-up Task' and 'Clear Form' buttons. The browser's address bar shows the URL 'https://pdc.ccirs.pdcdev.com/planner/view.aspx?params=4%2bqy1BJp5TU%2bYhF8xz7BNjcANhRU6wy1Yp5DA6J5F6j7zW24Gj8JkTEj4vHpFk'. The status bar at the bottom indicates 'Internet | Protected Mode: On'.

Figure 4.1.2d

After **Add New** is clicked, the resulting **One-Time Task** modal window will allow the user to create the new task, as illustrated in Figure 4.1.2d. For details regarding task creation, please reference [Section 4.3](#) in this manual. When the task construction is complete, clicking on **Save Follow-Up Task** will create the task.

A user can also specify a task that already exists as a follow-up task. The task can be assigned to themselves, or another user. By clicking **Add Existing**, a user can choose any one-time task(s) that have been created in the user's Facility.

6. **Issues** – Issues can be created for tasks, and can be accessed from the task for which they were created or the **My Issues** Planner menu option. Issues also have their own comments section.

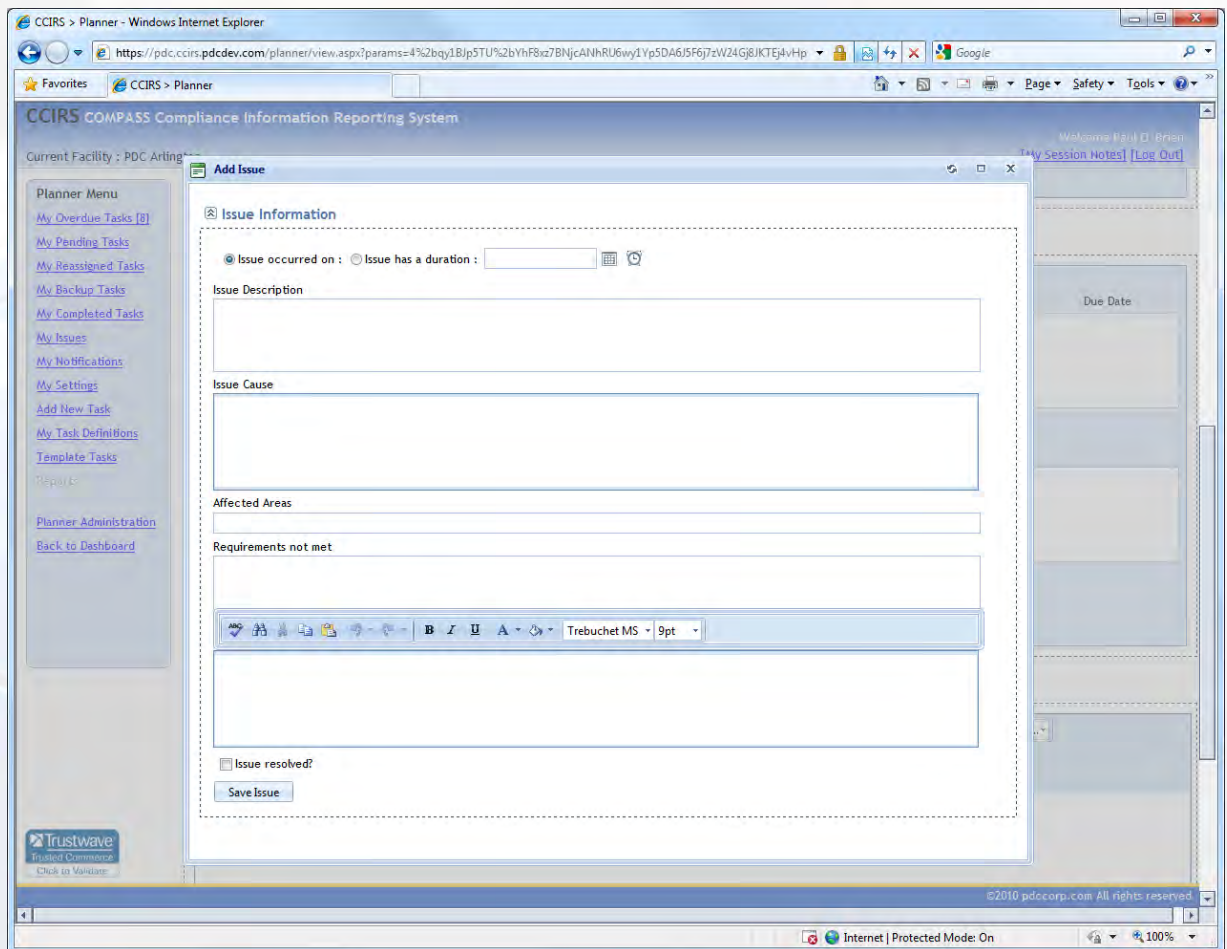




Figure 4.1.2e

To add a new issue, a user must click on **Add New**. The resulting **Add Issue** modal window, illustrated in Figure 4.1.2e, will allow a user to create an issue. An issue can have an occurrence date, an occurrence duration, or multiple occurrence durations. A specific date and time can be entered by using the date and time selectors  . The available fields in the **Add Issue** window may be utilized by users in any way they or their business policies see fit.

The last item on the **Add Issue** window is a **Issue Resolved** checkbox. In order for a task to be completed, for which an issue is created, all issues must be resolved. **Therefore, if the Issue Resolved checkbox is left unchecked, the task cannot be given a completed status.** An issue can be created and left unresolved, and then resolved at some future date.

The **Add Existing** button on the Task Details page, will allow a user to link a previously created issue to the current task. The resolved status of linked issues will not affect a user's ability to complete a task, as opposed to Added Issues needing to be resolved prior to completion.

4.1.3 Task Comments

The last section of a task's detail page is provided for comments, as illustrated by Figure 4.1.3. This area is designed to centralize comments or discussions relating to tasks in one area.

The screenshot displays the 'Task Comments' section of a web application. At the top is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and zoom. Below the toolbar is a large text area for entering comments. At the bottom of the editor are 'Design' and 'Preview' tabs, and a status bar showing 'Words: 0 Characters: 0'. Below the editor is an 'Add Comment' button, followed by a green message: 'Comment added successfully!'. Below this is a section titled 'Comments' with a comment list. The first comment is 'Comment 1 posted by Paul O'Brien on 8/24/2010 4:02:22 PM, 0 days ago' with links for 'Forward', 'Edit', and 'Delete'. The comment text is 'Test Comment, all others will appear threaded.'


Figure 4.1.3

To post a comment, a user enters their comment in the **Add Comments** field, and then clicks **Add Comment**. After **Add Comment** is clicked, the comment will be posted directly below in the **Comments** section in a threaded fashion.

Users can only edit and delete comments that they author (*Planner Managers can edit or delete comments posted by any user*), and may forward any comment to another user. Forwarded comments include a web link for the task, so the receiving Planner User can also leave comments.

4.2 Workflow Tasks

A “Planner Workflow” is a collection of specific operating rules and tasks that interact with each other in a pre-determined fashion. Any type of task can be involved in a workflow (*i.e. One-Time, Recurring, or Continuous*).

If a task is involved in a workflow, its Task Detail Screen will display the  symbol (illustrated in Figure 4.2a). This workflow symbol, and its subsequent modal window, is available to all Planner Users.

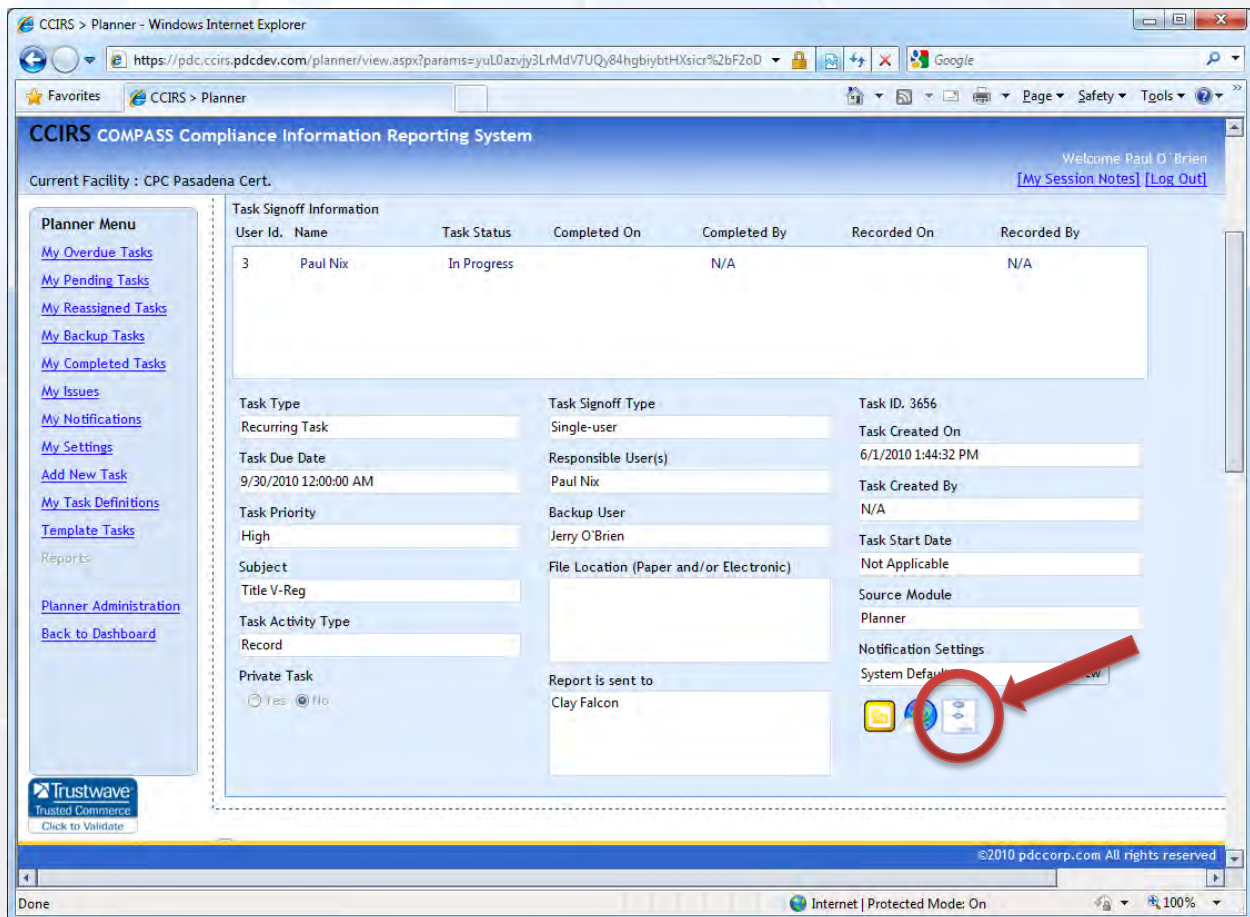


Figure 4.2a

When this Workflow Button is clicked, the resulting modal window will display other tasks that the current workflow has created. The first row in the grid will always be the first Triggering Task in the workflow. Figure 4.2b illustrates the Workflow Tasks modal window.

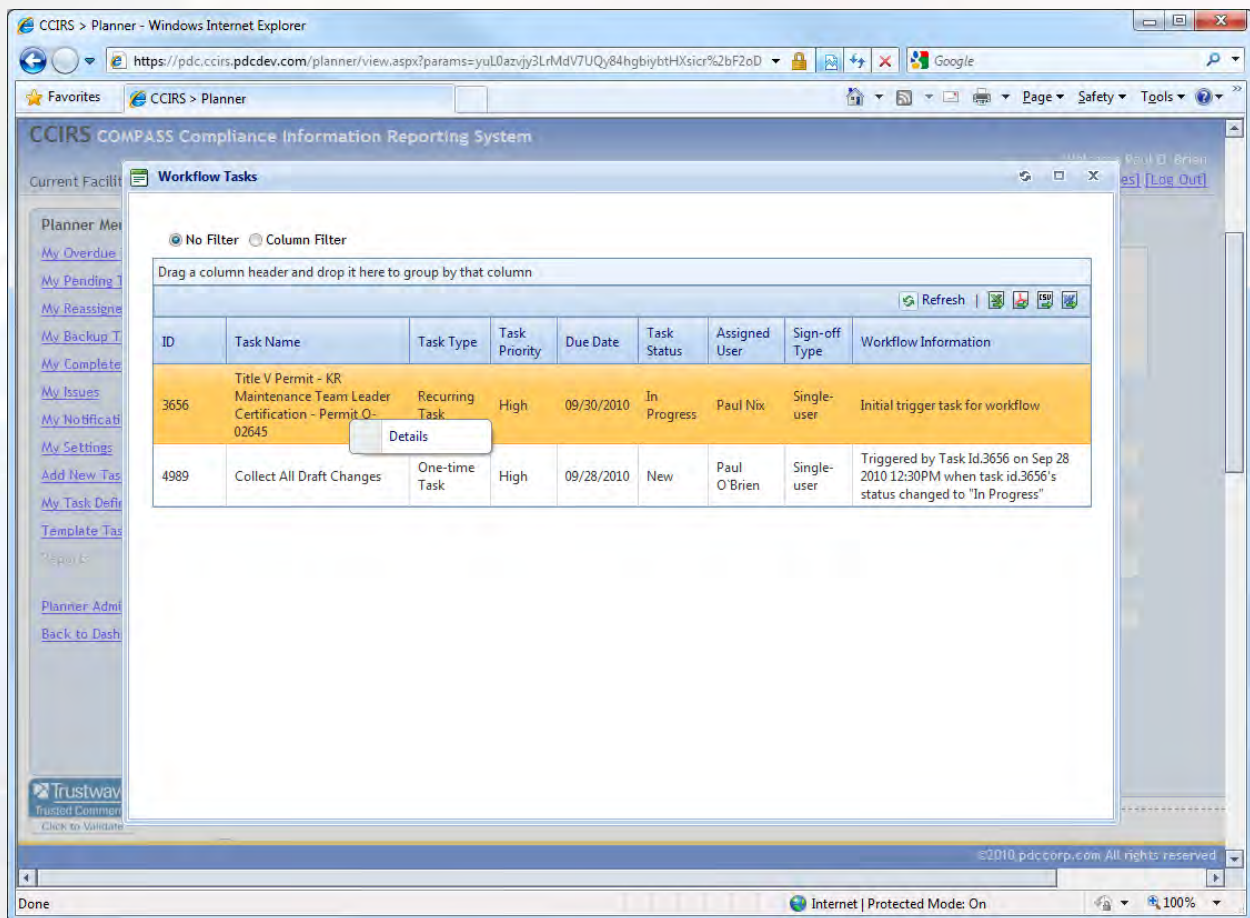


Figure 4.2b

The last column in the Workflow Tasks modal window contains Workflow Information, such as how and when a task was created. A User can right-click on any row, and click **Details** in order to navigate to a task's Detail Screen. The Workflow Tasks window can be extremely valuable in analyzing a workflow's progress, or when fetching relevant documents within a workflow.

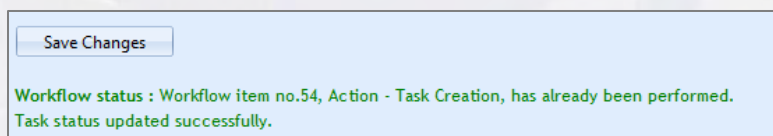


Figure 4.2c

When updating a task's status from the Task Detail page, the system will inform the User of the task's

involvement in a workflow. Depending on what is triggered by the status change, the resulting action will be displayed when the status change is submitted (illustrated in Figure 4.2c).

4.3 Adding Tasks

A user can create tasks for themselves or any other user of Planner by clicking on **Add New Task** from the Planner Menu. If a user does not have task approval rights in the system, the task must be approved by a Manager before the task will be assigned to the designated user. A task entry screen is illustrated in Figure 4.3. After all required fields have been completed; clicking **Save New Task** at the bottom of the page will create the task.

The screenshot displays the 'COMPASS Compliance Information Reporting System' interface. The top navigation bar includes the PDC logo, the system name, and user information for Robert Gordon. The left sidebar contains a 'Planner Menu' with links such as 'My Overdue Tasks', 'My Pending Tasks', 'My Reassigned Tasks', 'My Backup Tasks', 'My Completed Tasks', 'My Issues', 'My Notifications', 'My Settings', 'Add New Task', 'My Task Definitions', 'Template Tasks', 'Supervisor Overdue', 'Supervisor Pending', 'Supervisor Com', 'Planner Administration', and 'Back to'. The main content area is titled 'CCIRS >> Planner >> Add New Task'. It features a 'Select task type' section with radio buttons for 'One-Time Task', 'Recurring Task', and 'Continuous Task'. Below this is a 'One-time Task' form with fields for 'Regular or Template Task' (radio buttons for 'Regular' and 'Template'), 'Private Task' (radio buttons for 'No' and 'Yes'), 'Task Name', 'Task Description', 'File Location (Paper and/or Electronic)', 'Report is sent to', 'Task Priority' (dropdown), 'Subject' (dropdown), 'Task Activity Type' (dropdown), 'Task Sign-off type' (radio buttons for 'Single User' and 'Multiple Users'), 'Responsible User' (dropdown), 'Backup Responsible User' (dropdown), 'Task Due Date' (calendar picker), 'Attach documents to task' (file upload area), and 'Notifications Settings' (dropdown). A 'Save New Task' button is located at the bottom right. The footer includes a Trustwave logo and copyright information for PDC Corp.

Figure 4.3

1. Task Type – There are three types of tasks supported in Planner. After the desired task type is selected, due date options on this page will change appropriately.
 - a. Recurring Task – A recurring task creates unique instances of itself on a specified recurring schedule (e.g. daily, weekly, annually, etc.).
 - b. One-Time Task – A one-time task is due on one specific date, and will not recur.
 - c. Continuous Task – A continuous task has a start date, and can have an optional end date. If a continuous task has only a start date, then the task will always be present on a user's pending task list until it is completed. If a continuous task has an end date, then the task will have a specific duration.
2. Regular or Template – When adding a new task, the task can be added as a regular task or as a template task. If **Template** is selected, then the task will be created as a template task. Template tasks reside in the Template Task area, which can be accessed from the **My Template Tasks** Planner menu item. For more information about template tasks, see [Section 4.7](#) of this manual.
3. Private Task – If a task is set to private, the task will only be visible to the logged-in user. The task will not be visible to supervisors or managers, and will not be included in managerial reports or visualizations.
4. Task Name – This is a short description of the task's main purpose, and is limited to 500 characters. Task names are used to identify tasks in Planner grid views.
5. Task Description – This is a complete task description containing duties associated with the task, and is limited to 4000 characters (including formatting).
6. File Location – This field is optional, and can be used to specify either an external physical or electronic file location. This field is limited to 1000 characters.
7. Report Sent to – This field is optional, and can be used to specify an external entity to which a report must be sent. This field is limited to 1000 characters.
8. Priority – A task can have one of three different priorities; High, Medium, or Low. Task priority affects the notifications associated with the task.
9. Subject – The value in the media field comes from a customizable list that is common across the current Facility. It is used to classify tasks into groups in order to aid task retrieval.
10. Activity Type – The value in the activity type field comes from a customizable list that is common across the current Facility. It is used to classify tasks into groups in order to aid task retrieval.
11. Sign-off Type – Task sign off types are discussed in Section 4.3 of this manual.
12. Task Due Date – The Add Task Page shown in Figure 4.3 is for a one-time task. Therefore, this due date field is present. For a one-time task, one date is entered here. Please see [Section 4.5](#) of this manual for recurring task due date options.
13. Documents – Documents can be attached to new task by clicking **Add New**. When the task is generated, attached documents will be seen. In the case of recurring tasks, attached documents will be associated with every new individual instance of the recurring task.
14. Notification Settings – E-mail notification settings for this task are defined here. There are four options from which to choose:
 - a. System Defaults: This will apply the default notification values that were defined by a system administrator.

- b. User Defaults: This will allow user preferences to be used as the notification settings for this task. In the event that the Responsible User(s) does not have user settings defined, the system defaults will be used.
- c. Task Level Notification Settings: This option will allow the user to specify task level notification settings on this page. Therefore, a unique task level notification configuration can be created for a new task.
- d. Template Notification Settings: This option will only appear if a user has created one or more template notification settings.

4.4 Sign-off Types

Planner tasks support two different sign-off types; Single User and Multiple User sign-off. A Single User Task has one Responsible User and one optional Backup User. It is recommended that single user tasks have a Backup User designated. Having a Backup User enables painless task reassignments by a Responsible User or manager, such as when the Responsible User is sick or goes on vacation.

The screenshot shows the 'Task Sign-off type' section. The 'Multiple Users' radio button is selected. Below it, there are two white selection boxes. The left box, labeled 'Select responsible users', contains the names 'Kallol Mahata', 'Paul O'Brien', and 'System Administrator'. The right box is empty. Between the boxes are four directional buttons: a right arrow, a left arrow, a double right arrow, and a double left arrow. To the right of the right box are two small icons: a plus sign and a minus sign.

Figure 4.4a

Multiple User Tasks have can have two or more Responsible Users (*there is no upper limit on the number of users*). The multiple user selection area will appear when the **Multiple User** radio button is selected under sign-off type, as shown in Figure 4.4a.

The white selection box on the left will display all of the users in the current Facility. The white selection box on the right contains all of the Responsible Users for this task. Users can be moved from the available user's box on the left to the Responsible User list by either clicking and dragging the names, or using the directional buttons between the boxes. After the list of Responsible Users is complete, a sign-off method must be chosen from the drop down list. There are three options to choose from, as shown in Figure 4.4b.

If **Any One** is selected, then any user in the Responsible User list can complete the task. This would force the task to a completed status for every user.

The screenshot shows the 'Task Sign-off type' section with the 'Multiple Users' radio button selected. The dropdown menu for 'Any One' is open, showing three options: 'Any One', 'Everyone', and 'Everyone in sequence'. The left box contains 'Kallol Mahata' and 'Paul O'Brien'. The right box is empty.

Figure 4.4b

If **Everyone** is selected, then all Responsible Users must give the task a completed status before the task will be completed.

If **Everyone in Sequence** is selected, then all Responsible Users must give the task a completed status in the order in which they appear before the task will be completed. The task will appear as a pending task for the first person in sequence, and will not appear to the second person until the first person completes the task. The sequence can be altered by dragging the Responsible Users up and down in the list.

Although different users can give multiple user tasks different statuses, it is important to remember that a multiple user task is still one task. Responsible Users and their reported status can be seen from a task's detail screen, or from a grid view. To view this information from the grid, a user may hover over the sign-off type of the desired task (*illustrated in Figure 4.4c*).











Drag a column header and drop it here to group by that column				User Id	User Name	Status	Completed On	Completed By	Recorded On	Recorded By	Refresh    		
	Actions	ID	Task Name	4	Paul O'Brien	New		N/A		N/A	Sign-off Type	Private	
	Quick Edit Details Copy	4369	Performance testing	1	System Administrator	New		N/A		N/A	Single-user		
	Quick Edit Details Copy	4840	Test									Multi-user everyone 	

Figure 4.4c

4.5 Recurring Task Due Dates

There are many options that can be used to establish a recurring task's due date, as illustrated in Figure 4.5a.

The screenshot shows a web form for configuring a recurring task. It includes fields for Task Frequency (set to Daily), Start date, and Due date options. The Due date options section has sub-sections for Select Month, Select Instance, Day of Week, Day of Month, and Day Exceptions. There is also a link to 'Click for next due date' and a 'Move due date backward' button. The Task Active Status is set to Inactive, and there is a Task End Date field.

Task Frequency	:	Daily
Start date	:	<input type="text"/>

Due date options	:	Select Month : <input type="text"/>
	:	Select Instance : <input type="text"/> Day of Week : <input type="text"/> OR
	:	Day of Month : <input type="text"/> <input type="checkbox"/> Business Day
	:	Day Exceptions : <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun <input type="button" value="Move due date backward"/>
	:	Click for next due date

Task Active Status	:	<input type="radio"/> Active <input checked="" type="radio"/> Inactive
Task End Date	:	<input type="text"/>

Figure 4.5a

The Task frequencies supported in Planner are:

- Daily
- Weekly
- Bi-Weekly
- Monthly
- Bi-Monthly
- Quarterly
- Semi-Annually
- Annually
- 1x/2 – 1x/10 Years

After a frequency is selected, a start date must be entered. The start date is the first day that the task will be due, and is also used to calculate the start of a 1x/n Year task. However, the due date options will be used to further control the first due date of the newly created task. For example, if a start date of 01/01/11 is entered with the business day due date option checked, and 01/01/11 is on a Sunday, then the actual first due date will be on 01/02/11.

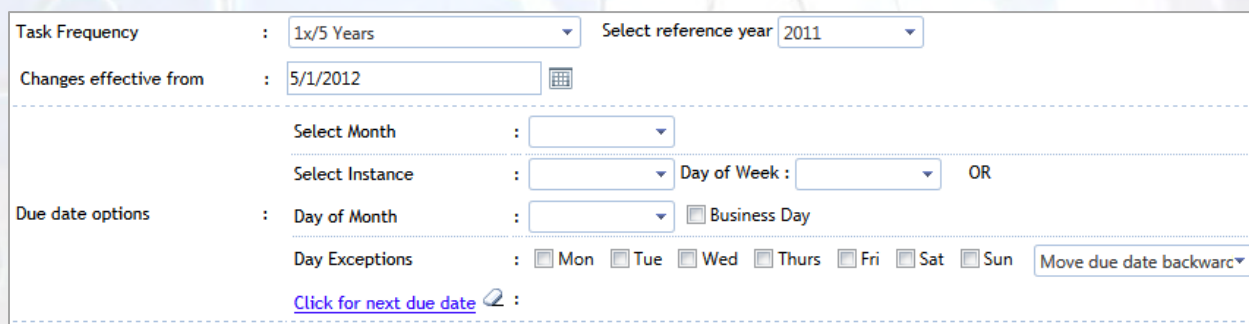
Different due date options will be available for use depending on what frequency is selected. In the case of quarterly, semi-annual, the month field will be used to establish the recurring cycle. For example, if a quarterly frequency is selected and January is selected as the month, then the quarterly cycles will follow standard calendar quarters. Likewise, if February is selected as the month, then the quarterly cycle will be one month behind standard calendar quarters.

Setting day exceptions will ensure that tasks will never be due on those days of the week. Due dates may then be moved forward or backwards. After the options are completed, a user can click on **Click for Next Due Date** to see what the next due date will be, based on the information entered. Subsequent clicks will display subsequent due dates. Clicking the eraser button will clear the calculator.

An end date may also be entered for the task; however, an end date is optional and may be left blank. If an end date is specified, then the task will recur as specified until the end date.

4.6 Task Definitions

Every task has a task definition, which is the basis for generated task instances. Task definitions may be seen by right clicking on any task from a grid view and selecting **View Task Definition**. The **My Task Definitions** menu item on the Planner Menu will show a user all one-time, recurring and continuous task definitions. The date range above the Task Definitions Grid will allow a user to filter results for one-time and continuous tasks only *all recurring task definitions are shown*. Viewing a task definition will not only show a user how the Add New Task Page looked when the task was created, but it will also allow a user to make changes to the task configuration. A Task Definition page will also display meta-data about the task, such as its ID, creation date and last edited date.



The screenshot shows a web form for task configuration. It includes fields for 'Task Frequency' (set to '1x/5 Years'), 'Select reference year' (set to '2011'), and 'Changes effective from' (set to '5/1/2012'). Below these are 'Due date options' including 'Select Month', 'Select Instance', 'Day of Week', and 'Day of Month'. There are also checkboxes for 'Business Day' and 'Day Exceptions' (Mon, Tue, Wed, Thurs, Fri, Sat, Sun). A 'Move due date backward' button is present. At the bottom, there is a link 'Click for next due date' with a calendar icon.

Figure 4.6

A user can change any task attribute, including the task's recurring schedule (as shown in Figure 4.6). A user can specify when they want their changes to take effect; the present date is entered by default. If a date in the past is entered, then the system will update pending and overdue uncompleted (not closed) tasks to reflect the changes. Completed tasks will NOT be altered! If a future date is entered, then the changes will only affect task instances after that date.

In the case of quarterly, semi-annual and 1x/X year tasks, the Month and Reference year fields will be used to establish the recurring cycle. These fields will reflect the original cyclical settings, but they may be changed.

After clicking **Update Definition** at the bottom of the page, the task configuration will be updated. Planner Managers can alter Task Definition attributes in a group using a special function discussed in [Section 8.2](#) of this manual.

4.7 Template Tasks

Template Tasks enable Users to create tasks in advance that they may use in the future. Template Tasks are created by choosing the **Template Task** option on the Add New Task screen. After creation, Template Tasks reside in the Template Task area and be accessed from the **Template Tasks** Planner menu item (illustrated in Figure 4.7a).

Template Tasks also enable Planner Managers to construct Planner Workflows, because Template Tasks are required when constructing Planner Workflows that create tasks. A Template Task will serve as the task definition that will be “copied from” when the workflow creates a task.

CCIRS COMPASS Compliance Information Reporting System

Current Facility : PDC Arlington

Welcome Paul O'Brien
[\[My Session Notes\]](#) [\[Log Out\]](#)

Planner Menu

- [My Overdue Tasks \[9\]](#)
- [My Pending Tasks](#)
- [My Reassigned Tasks](#)
- [My Backup Tasks](#)
- [My Completed Tasks](#)
- [My Issues](#)
- [My Notifications](#)
- [My Settings](#)
- [Add New Task](#)
- [My Task Definitions](#)
- [Template Tasks](#)
- [Reports](#)
- [Planner Administration](#)
- [Back to Dashboard](#)

CCIRS >> Planner >> Template Tasks

☐ Column resizing ☒ Column reorder ☒ No Filter ☐ Column Filter ☐ Advanced Filter

Group Functions : [Delete](#)

Drag a column header and drop it here to group by that column

	Actions	ID	Task Name	Task Type	Is Trigger Task	Is Trigger Action	Task Priority	Task Media	Task Activity Type	Responsible User	Backup User	Notification Type	Created By	Sign-off Type
<input type="checkbox"/>	Copy Definition	24	Monitor crystal performance	Continuous Task	Yes	Yes	Medium	Corp	Record	Kallol Mahata	Paul O'Brien	System Defaults	Kallol Mahata	Single-user
<input type="checkbox"/>	Copy Definition	25	Planner production databases backup	Continuous Task	Yes	Yes	High	Corp	Other	Sagari Bellamkonda	Kallol Mahata	System Defaults	Sagari Bellamkonda	Single-user
<input type="checkbox"/>	Copy Definition	28	1st task	One-time Task	Yes	No	Medium	Air	Record	Kallol Mahata	N/A	System Defaults	Kallol Mahata	Single-user
<input type="checkbox"/>	Copy Definition	29	2nd task	One-time Task	Yes	Yes	Medium	Air	Record	Paul O'Brien	N/A	System Defaults	Kallol Mahata	Single-user
<input type="checkbox"/>	Copy Definition	30	3rd task	One-time Task	No	Yes	Medium	Air	Record	Sagari Bellamkonda	N/A	System Defaults	Kallol Mahata	Single-user

Trustwave
Trusted Commerce
Click to Validate

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Internet | Protected Mode: On

Figure 4.7a

Three action items are available for Template Tasks; Copy, View Definition and Delete (from right-click menu). When a user wishes to utilize a Template Task, the **Copy** function will populate a new task window. The user can alter any desired fields before clicking **Save Copied Task**. After **Save Copied Task** is selected, an instance of the Task will be created, but the original Template Task will not be altered.

A Template Task may be altered by clicking **View Definition**, making necessary changes, and then clicking **Update Definition**.

Chapter 5 - My Notifications

The **My Notifications** Planner Menu option will allow users to view copies of Planner notifications that were sent to them via e-mail.

CCIRS >> Planner >> My Notifications

Select Mail Type : Start Date - 11/9/2010 End Date - 5/9/2011 Submit

Select : Action :

[\[Report - Print Format\]](#) [\[Report - Grid Format\]](#) Page size : 20 rows

ID	From	Subject	Priority	Retry Count	Sent On	Task Association	Action
41151	CCIRS System	My Responsible Pending Tasks - Daily Task Forecast Notification	Medium	0	May 9 2011 7:04AM	No Association	Forward
41144	CCIRS System	Escalation Notification : Pending Task - Id No. 5056 - Check server event logs	Medium	0	May 9 2011 7:05AM	Task Id. No. 5056	Forward
41126	CCIRS System	Administrator Weekly Task Forecast Notification - All Pending Tasks	Medium	0	May 8 2011 7:03AM	No Association	Forward
41122	CCIRS System	Administrator Weekly Task Forecast Notification - All Overdue Tasks	High	0	May 8 2011 7:03AM	No Association	Forward
41090	CCIRS System	My Responsible Pending Tasks - Daily Task Forecast Notification	Medium	0	May 6 2011 7:05AM	No Association	Forward
41064	CCIRS System	Escalation Notification : Overdue Task - Id No. 5038 - Check server event logs	High	0	May 4 2011 7:04AM	Task Id. No. 5038	Forward
41053	CCIRS System	Escalation Notification : Overdue Task - Id No. 5038 - Check server event logs	High	0	May 3 2011 7:03AM	Task Id. No. 5038	Forward
41045	CCIRS System	My Responsible Pending Tasks - Daily Task Forecast Notification	Medium	0	May 2 2011 7:05AM	No Association	Forward
41033	CCIRS System	Escalation Notification : Pending Task - Id No. 5038 - Check server event logs	Medium	0	May 2 2011 7:05AM	Task Id. No. 5038	Forward
41010	CCIRS System	Administrator Weekly Task Forecast Notification - All Pending Tasks	Medium	0	May 1 2011 7:04AM	No Association	Forward
41006	CCIRS System	Administrator Weekly Task Forecast Notification - All Overdue Tasks	High	0	May 1 2011 7:04AM	No Association	Forward

1. Users can narrow their searches for notifications using the date range options.
2. By clicking on the Notification Subject, users may see the notification that was e-mailed to them.
3. When a notification has No Association, that means the notification was a Forecast Notification. A forecast notification is a notification that references one or more tasks, therefore, it cannot be associated with only one Task ID.

When a notification is associated with a Task ID, the Task ID may be clicked to view the task that was the subject of the notification.

Notifications that have been viewed in the Planner system will not be shown in bold font, and the row color will be changed to light blue.

Chapter 6 - My Settings

6.1 My Forecast Settings

Forecast Notifications are e-mail notifications that reference one or more tasks that are due or are overdue within a designated time interval. One or more reports may optionally be attached to these e-mail notifications (*for more information regarding report and/or report types, please see [Chapter 10](#)*). If a user wishes to specify settings, that are different from the system defaults, then they may do so in this section of the My Settings page. The options below are used to specify the frequency of the forecast notification e-mails that will be sent to a user.

My Forecast Notification Settings

1 My Responsible : Tasks

Grouped Pending Notification : ☐ Daily ☐ Weekly ☐ Monthly Attach report *No reports attached* Report Format Acrobat (PDF) File

Grouped Overdue Notification : ☐ Daily ☐ Weekly ☐ Monthly Attach report *No reports attached* Report Format Acrobat (PDF) File

2 My Backup : Tasks

Grouped Pending Notification : ☐ Daily ☐ Weekly ☐ Monthly Attach report *No reports attached* Report Format Acrobat (PDF) File

Grouped Overdue Notification : ☐ Daily ☐ Weekly ☐ Monthly Attach report *No reports attached* Report Format Acrobat (PDF) File

Save Settings

Figure 6.1a

1. These are the Forecast settings for tasks for which the user is responsible. If Daily is checked, then the user will receive one e-mail every morning containing all the tasks that are due that day. If Weekly is checked, then the user will receive one e-mail every Sunday containing all the tasks that are due during that week. The monthly option follows the same logic, and will send the e-mail on the first of every month. An example of such a grouped forecast e-mail is illustrated in Figure 6.1b:

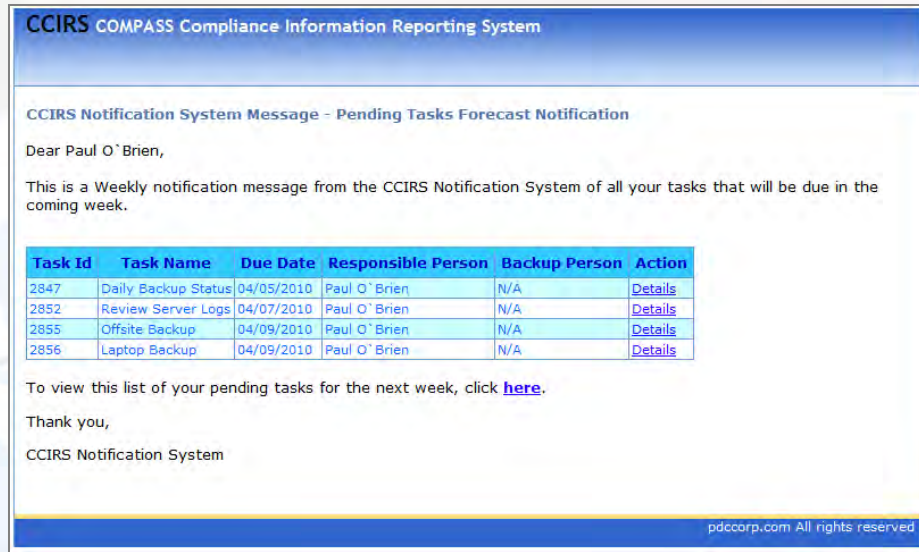


Figure 6.1b

- These are the Forecast settings for tasks for which the user is the Backup User. The same checkmark actions, as described above, apply to these Backup User notifications.

6.2 My Task Level Notifications

Task Level Notification preferences are set in this area (shown in Figure 6.3). These Task Level notifications only apply to tasks that have "User Defaults" Task Level Notification settings applied to them.

My Task Level Notifications Settings

Select frequency: Select priority:

Task Status	Notification settings for responsible person	Notification Escalation Carbon copy following users
Pending Notifications	1st - Send <input type="text"/> days before task due date.	<input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager
	2nd - Send <input type="text"/> days before task due date.	<input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager
	3rd - Send <input type="text"/> days before task due date.	<input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager
	4th - Send <input type="text"/> days before task due date.	<input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager
Overdue Notifications	Send overdue task notification daily : <input checked="" type="radio"/> Yes <input type="radio"/> No	1st - <input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager 2nd - <input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager 3rd - <input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager 4th - <input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager > 4 - <input type="checkbox"/> Backup <input type="checkbox"/> 1st Supervisor <input type="checkbox"/> 2nd Supervisor <input type="checkbox"/> Manager

Figure 6.2

1. Every Frequency and Priority combination may have its own task level notification preference. Therefore, a user must select a Frequency and a Priority before entering any task level notification settings.
2. A user can receive up to 4 task pending task notifications for a pending task. A user simply enters the number of days before the task due date that they want to receive a pending notification. If a user wants to receive a pending task notification on the day a task is due, then "0" would be entered into one of the fields.
3. Users can also send copies of these notifications to the individuals listed. These associations are established by the system administrator.
4. When Yes is selected here, the user will receive an e-mail every day after a task becomes overdue.
5. Copies of daily overdue notifications may be sent to these individuals.
6. Save Settings must be clicked in order to save any changes before moving to a new frequency-priority combination, or away from the page.

6.3 Template Notification Settings

Task level notification settings can be created and saved as templates. When the user creates a task in the future, they can retrieve Task Level Settings from a template they have saved.

Chapter 7 - Supervisor Operation

In every Planner user's user profile, administered by Planner System Administrators, a supervisor can be identified for every user. Users who have been identified as a supervisor for one or more users have additional views, features and privileges as opposed to non-supervisors. Supervisors may change that statuses of tasks that are assigned to the people they supervise.

7.1 Supervisor Views

Supervisors can view overdue, pending and completed tasks for their supervised users from the main Planner Menu and the one-click menu system, as shown in Figures 7.1a and 7.1b below.

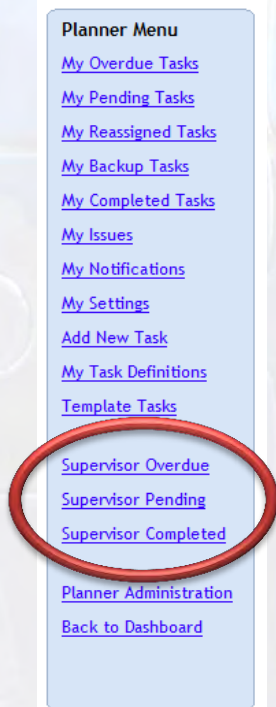


Figure 7.1a

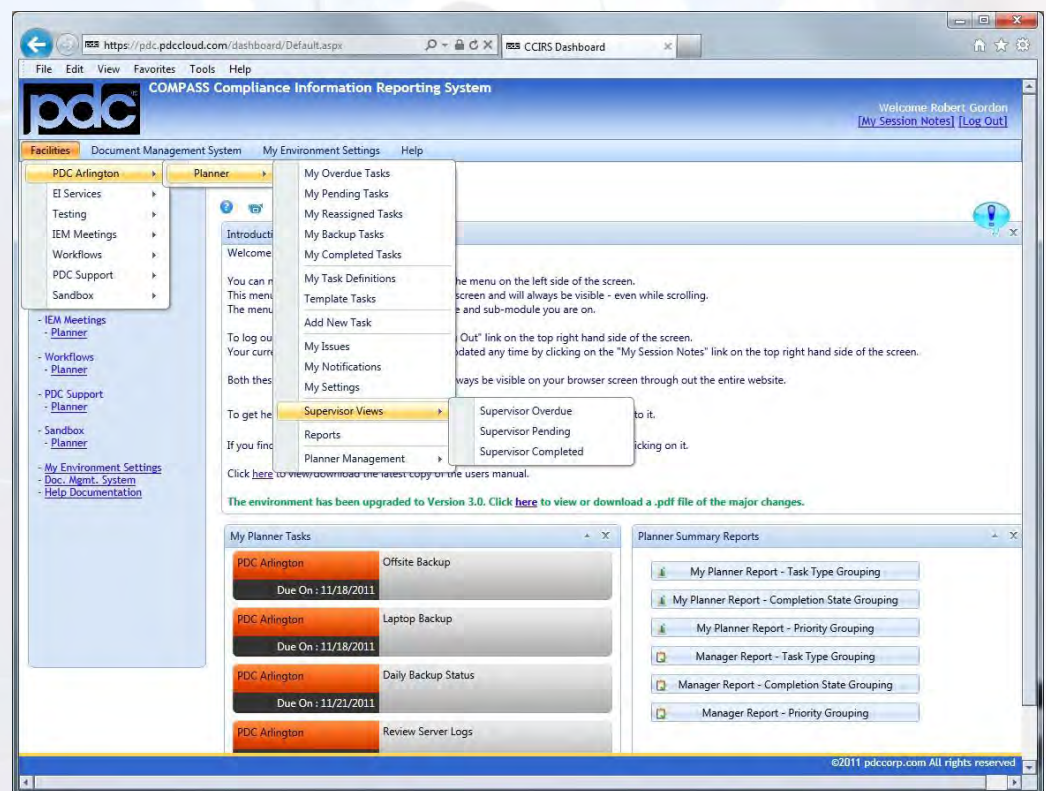
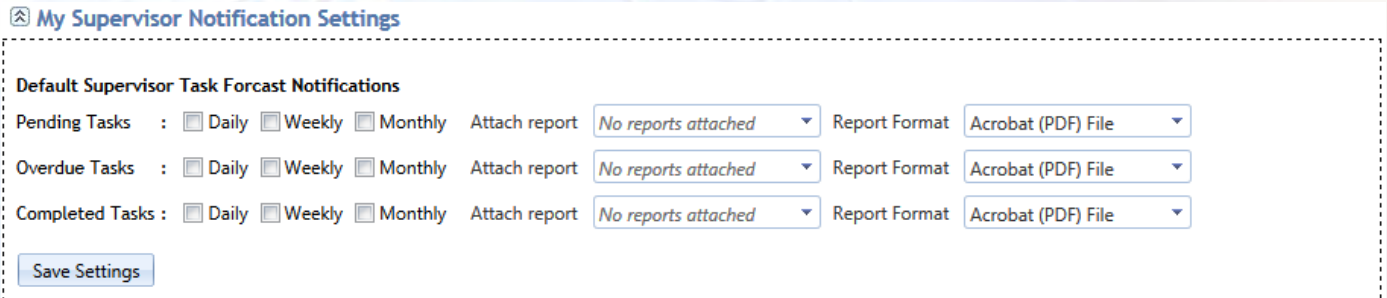



Figure 7.1b

7.2 Supervisor Notifications

Supervisors can receive daily, weekly and/or monthly forecast notifications that contain either pending, overdue or completed tasks assigned to the people they supervise. If a user is a supervisor, then they can activate these options on their personal settings page (*illustrated in Figure 7.2a*). Managers can also enable these notifications by default on the Manager's Settings page within a facility. Optionally, reports may be attached to these forecast e-mail notifications.



 **My Supervisor Notification Settings**

Default Supervisor Task Forecast Notifications

Pending Tasks : ☐ Daily ☐ Weekly ☐ Monthly Attach report Report Format

Overdue Tasks : ☐ Daily ☐ Weekly ☐ Monthly Attach report Report Format

Completed Tasks : ☐ Daily ☐ Weekly ☐ Monthly Attach report Report Format

Figure 7.2a

In addition to these forecast notifications, a Supervisor may also receive escalation notifications if any subordinate tasks have task specific notifications configured to send a CC' to a Supervisor.

Chapter 8 - Manager Operation

8.1 Accessing Planner Management

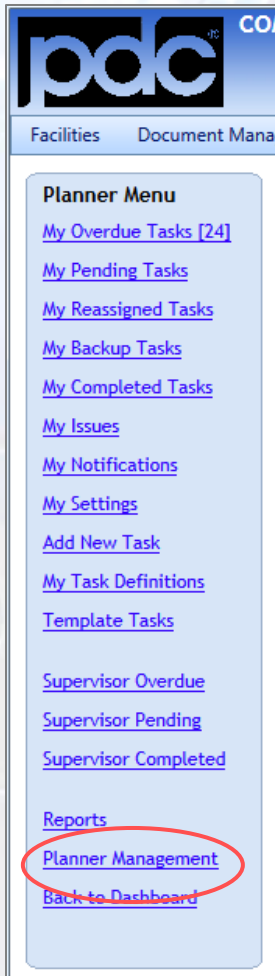


Figure 8.1a

Planner Manager functions are only accessible to users that have been designated as Managers in the System. Planner Manager Functions may be accessed by clicking on the **Planner Management** link on a user's Planner Menu, as illustrated in Figure 8.1a, or by clicking **Planner Management** from the One-Click Menu System.

After clicking on **Planner Management**, the user is directed to the Management Dashboard for a desired facility (illustrated in Figure 8.1b).



Figure 8.1b

The Management Visualizations are interactive, as discussed in [Section 2.4](#). However, the Graph Drill-Down Window will contain an additional column that will list the Responsible User for each task. The visualizations will show task information for the entire facility the manager is currently accessing. Several Dashboard Reports, as discussed in [Section 10.2](#), are available to Managers between the breadcrumb navigation line and the visualizations. The **Planner Management** menu is always visible on the left-hand side of the user's web browser, and contains the following items:

- All Overdue Tasks – Displays all tasks within the facility that have not been completed, and whose due dates are in the past. *Only tasks that are due within the global “look ahead” range will be displayed: 200 days is the system default.*
- All Pending Tasks – Displays all tasks within the facility that have not been completed, and whose due dates are still in the future.
- All Completed Tasks – Displays all tasks within the facility that were completed.
- All Task Definitions – Displays all recurring, continuous and one-time task definitions. For more information about Task Definitions, see [Section 4.6](#) of this manual.
- All Issues – Displays all issues created within the facility.
- Template Tasks – Tasks can be created as Template Tasks, and created Template Tasks can be seen here. For more information about Template Tasks, see [Section 4.7](#) of this manual.

- Task Approval – Tasks that require a manager’s approval reside in this area. If a user, who does not have task approval rights, creates a task for another user, the task will be sent here to await a Manager’s approval or disapproval before being placed onto the Responsible User’s list.
- Add Task – Users may create tasks for themselves or others here. For more information about adding new tasks, see [Section 4.3](#) of this manual.
- Workflows – Displays workflows that have been constructed. For more information about managing Workflows, see [Section 8.3.3](#) of this manual
- Add Workflow – Allows a user to construct new workflows. For more information about constructing workflows, see [Section 8.3.2](#) of this manual.
- Planner Notifications – Copies of Planner E-mail Notifications that were sent to users regarding tasks within the current facility can be seen here.
- Template Notification – Users can create custom notifications here. (*Template Notifications or solely used in Planner Workflows*) For more information on Template Notifications, see [Section 8.4](#) of this manual.
- Settings – Facility specific settings are managed here. Some of these settings include close out statuses, default notification settings, and notification e-mail formats.
- Back to Dashboard – This link will take a user back to the CCIRS Dashboard.
- Reports – Navigates a user to the Reporting Module, which is discussed in [Chapter 10](#).
- Back to Planner – This link will take the user back to their Planner User Dashboard

8.2 Updating Task Definitions as a Group

Planner Managers may alter task definitions as a group on either the **All Task Definitions** or **Template Tasks** page.

CCIRS >> Planner >> Administration >> All Task Definitions

Column resizing ☒ Column reorder ☒ No Filter ☒ Column Filter ☐ Advanced Filter ☐

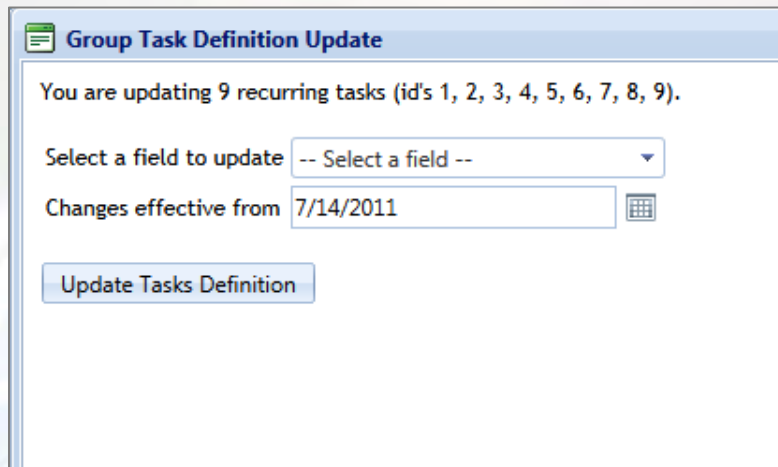
Select date filter : 7/14/2011 1/14/2012 Submit Dates

Group Function : **Update definition** Delete

Drag a column header and drop it here to group by that column

	Actions	ID	Task Name	Task Type	Task Priority	Subject	Task Activity Type	Responsible User	Backup User	Notification Type	Created By	Sign-off Type
<p>Refresh [Export Icons]</p>												

Figure 8.2a



Group Task Definition Update

You are updating 9 recurring tasks (id's 1, 2, 3, 4, 5, 6, 7, 8, 9).

Select a field to update -- Select a field --

Changes effective from 7/14/2011

Update Tasks Definition

To use this function, a user must select one or more tasks before clicking the **Update Definition** button as shown in Figure 8.2a. After **Update Definition** is clicked, a modal window illustrated by Figure 8.2b, will appear. The user may then select one field to update, enter the new value, Changes effective from date and then click update. The entered value and change effective date will be applied to all tasks in the selected group.

Figure 8.2b

The fields that are available to be updated will be dependent on the tasks that are selected. For example, if a user selects a one-time task and a recurring task, the Due date/frequency/duration field will not be available for editing because their task types are different. After one field is updated, a second field may be updated to the same group immediately after clicking **Update Tasks Definition** without navigating back to the grid.

8.3 Task Approval

If a user, who does not have task approval rights, creates a task for another user, the task will be sent to the **Task Approvals** area to await a Manager's approval or disapproval. The **Task Approvals** screen is illustrated in Figure 8.3a

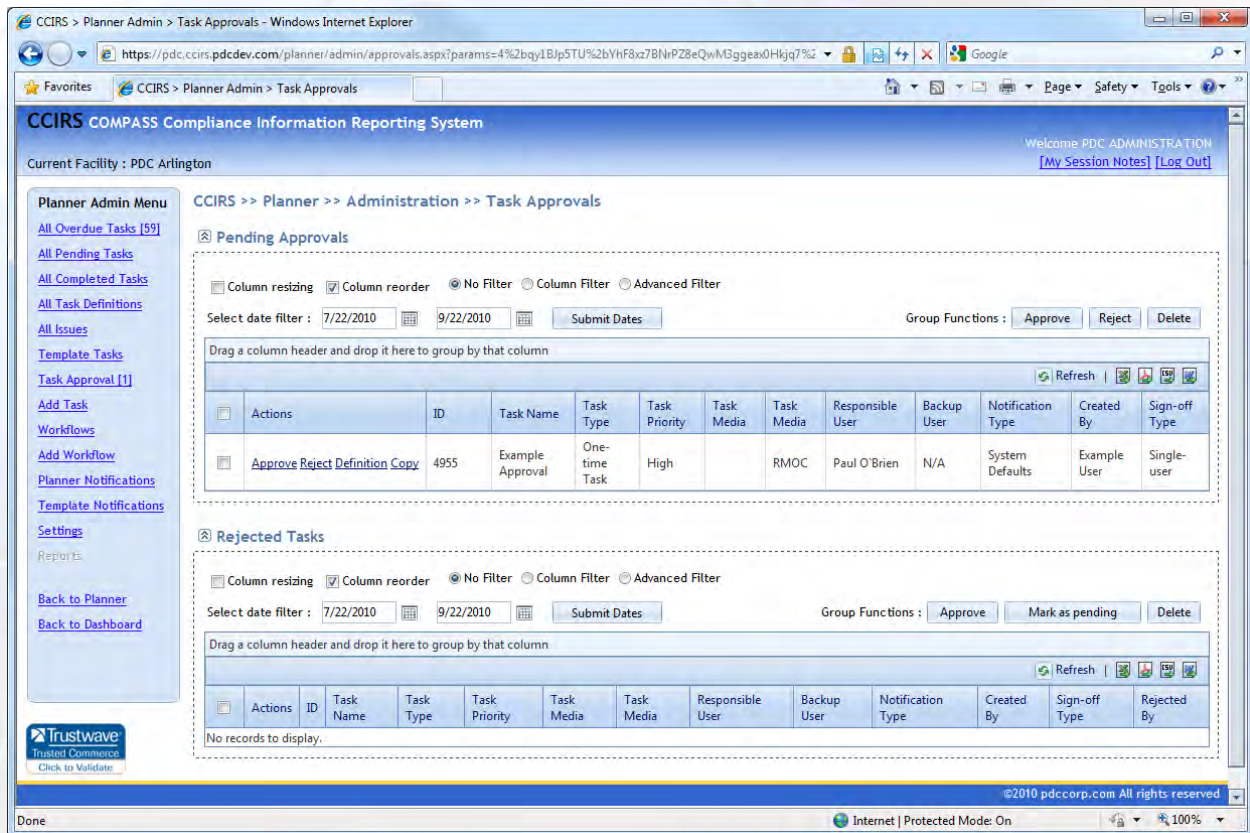


Figure 8.3a

From the **Task Approval Screen**, a Manager can either approve or reject a task. They can also click **Definition** to make changes before approving, or use the **Copy** feature against the task. If a manager rejects a task, the rejected task will be moved to the **Rejected Tasks** section. However, it can still be approved even after it has been rejected.

8.4 Planner Workflows

Only Planner Managers and System Administrators can construct workflows within Planner. A "Planner Workflow" is a collection of specific operating rules and tasks that interact with each other in a pre-determined fashion. Any type of task can be involved in a workflow (*i.e. Template, One-Time, Recurring, or Continuous*). These interactions are orchestrated by configured Workflow Items.

8.4.1 Understanding Workflow Items

A single Workflow Item (*node*) consists of three components; a Triggering Task, a Trigger Condition, and a Trigger Action.

- Triggering Task – Since workflows progress via task evolution, every Workflow Item must have one Triggering Task. A Triggering Task can be a Regular Task (i.e. a task that is actively assigned to a User), or a Template Task. *If a Template task is designated as the first Triggering task in a workflow, then the workflow is a Template Workflow, and must be “Launched” from the workflow screen when it is needed.*
- Trigger Condition – A Trigger Condition refers to the triggering task event that will elicit an action. A Manager can choose from three Trigger Conditions:
 1. Task Status Change – This option will allow a Manager to choose any task status option (*for the current facility*) as the trigger. For Example, if a Manager chooses this trigger condition, and chooses “Completed” as the status, then this workflow item will apply when the Triggering Task is given a “Completed” status.
 2. Issue is Reported – This Trigger Condition will invoke this workflow item if an issue is created for the Triggering Task (*only the first created issue will invoke this rule*).
 3. Task Goes Overdue – This Trigger Condition will invoke this workflow item if the Triggering Task goes overdue. *If the due date for the Triggering Task is altered in such a way that it goes overdue more than once, this workflow item will ONLY be invoked on the first occasion.*
- Trigger Action – A Trigger Action is the desired outcome of the workflow item. When the Trigger Condition is met for the Triggering Task, the Trigger Action will be performed by the system. There are three Trigger Actions available to choose from:
 1. Notification – A Notification action will send one or more e-mail notifications in accordance with a Notification Template.
 2. Create Task – A Create task action will generate one or more tasks.
 3. Follow-up Task Check – This Trigger Action is only applicable to the “Status Change” and “Issue is Reported” Trigger Conditions. The Follow-up Task Check Trigger Action will not permit the task status, specified in the Trigger Condition to be submitted, or an issue to be created, unless one or more Follow-up Tasks have been created for the Triggering Task.

8.4.2 Constructing Workflows

Workflow construction is performed on the **Add Workflow** Page, accessible from the **Planner Admin Menu**. The **Add Workflow** screen is illustrated in Figure 8.4.2a.

The screenshot displays the 'Add Workflow' page within the CCIRS application. The breadcrumb trail is 'CCIRS >> Planner >> Administration >> Add Workflow'. The form includes fields for 'Workflow Name' and 'Workflow Description'. Below these are 'Triggering Task', 'Trigger Condition', and 'Trigger Action' dropdown menus, followed by 'Regular', 'Added Templates', and 'Template' buttons. 'Save Workflow Item' and 'Clear' buttons are at the bottom right of the form. A table below the form shows no existing workflow items. The table has columns: Actions, Trg. Task ID, Trigger Task, Task Type, Template, Trg. Condition, Trg. Condition Value, and Trg. Action. The footer includes a Trustwave logo and copyright information: '©2011 pdccorp.com All rights reserved'.

Figure 8.4.2a

It is extremely important to carefully plan an effective workflow strategy before beginning this process! The first step in Workflow construction is entering a Name and Description for the new Workflow. Next, the first Workflow Item may be created. A Triggering Task can be a Regular Task (i.e. a task that is actively assigned to a User) or a Template Task.

If a Regular Task is the first Triggering Task in the workflow, then the workflow will always be active unless it is deactivated. If a Template task is designated as the first Triggering task in a workflow, then the workflow must be “Launched” from the workflow screen. To read more about managing workflows, please see [Section 8.4.3](#) of this Manual.

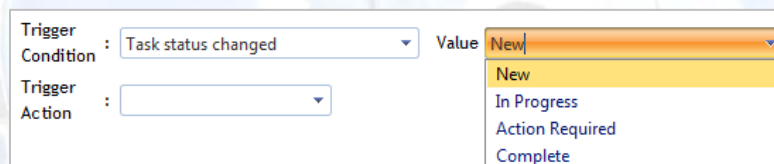
This close-up shows the 'Triggering Task' dropdown menu, which is currently empty. To the right of the dropdown are three buttons: 'Regular', 'Added Templates', and 'Template'.

Figure 8.4.2b

To choose a Regular Task, a Manager should click the **Regular** button shown in Figure 8.4.2b. After clicking on the **Regular** button, a modal window will appear containing all of the Regular Tasks assigned to all of the Users in the current facility.

To choose a Template Task, a Manager should click on the **Template** button shown in Figure 8.4.2b. After clicking on the **Template** Button, a modal window will appear containing all of the Template Tasks that have been created within the current facility. *If a Manager wishes to change attributes of the first Template Task for the purposes of the new workflow, those changes can be made when the Launch Workflow action is performed.*

The **Added Templates** option will show Template Tasks that have already been used in the current workflow, which is extremely useful when creating multi-level or multi-node workflows. In such instances, the **Added Templates** button is the only button that will need to be used after the first workflow item is added. **The Added Templates button cannot be used during the first Workflow Item's configuration, and will display an empty grid if clicked!**



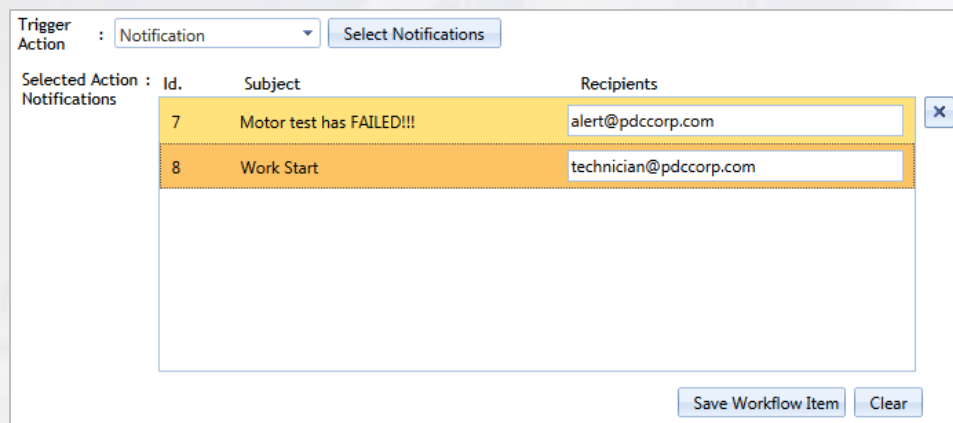
Trigger Condition : Task status changed Value: New

Trigger Action :

New
In Progress
Action Required
Complete

Figure 8.4.2c

Figure 8.4.2c shows the status option drop-down when the Task Status Change Trigger Condition is selected. Figure 8.4.2d shows the Notification Trigger action. A Manager can click the **Select Notifications** button and choose from the list of notification templates that have been created. After notification templates are chosen, a Manager can enter a different recipient than is in the template, or a group of recipients separated by a comma (*if the field is left blank, Planner will use the recipients specified in the notification template. If addresses are entered in this recipient field, the recipient specified in the template will be ignored!*).



Trigger Action : Notification Select Notifications

Selected Action : Id. Subject Recipients

7	Motor test has FAILED!!!	alert@pdccorp.com
8	Work Start	technician@pdccorp.com

Save Workflow Item Clear

Figure 8.4.2d

The **Create Task** Trigger Action option allows for several runtime customizations, and is illustrated in Figure 8.4.2e.

Trigger Action : **Create Task** Select Tasks

Selected Action Tasks :

Id.	One-time Task Name	Days to due date
28	1st task - test	5

Id. Continuous/Recurring Task Name Days to start date Duration

31	"Recommendation for employment" form processing	0	4 Years
----	-------------------------------------------------	---	---------

Save Workflow Item Clear

Figure 8.4.2e

After **Create Task** is chosen for the Trigger Action, the **Select Tasks** button will display a list of all One-Time, Recurring and Continuous Template Tasks in the current facility. Depending on what type of task is selected, the chosen task(s) will be placed into the One-Time or Continuous/Recurring Task boxes. As Figure 8.4.2e illustrates, more than one task can be selected from the Select Tasks modal window.

Each One-Time Task can have its own **Days to due date** value (i.e. the number of days the created task will be due, following the satisfaction of the Triggering Task's Trigger Condition.). Continuous and Recurring Tasks have a start date and duration value (i.e. a recurring and continuous task can begin a certain number of days following the satisfaction of the Triggering Task's Trigger Condition, and only be active for a pre-determined duration.).

After a workflow item is configured, clicking the **Save Workflow Item** will save the workflow item and place it in the grid view, located at the bottom of the **Add Workflow** Page. Each row in the grid is dedicated to each Workflow Item. Each Triggering Task, its Trigger Condition and its Trigger Action is shown in each row. In addition, each row can be expanded to view the Trigger Action Item(s) as illustrated in Figure 8.4.2f.

Drag a column header and drop it here to group by that column

Refresh |

	Actions	Trg. Task ID	Trigger Task	Task Type	Template	Trg. Condition	Trg. Condition Value	Trg. Action																		
▼	Details Copy	1	Complete Initial Draft	Template One-time Task	<input checked="" type="checkbox"/>	Task status changes	Action Required	Create Task																		
<table> <tr> <th>Temp. Task ID</th><th>Task Name</th><th>Task Type</th><th>Sign-off Type</th><th>Responsible User</th><th>Backup User</th><th>Days to start date</th><th>Duration</th><th>Days to due date</th></tr> <tr> <td>11</td><td>Schedule Meeting With TC and Leadership Team</td><td>One-time Task</td><td>Single-user</td><td>Jerry O'Brien</td><td>N/A</td><td></td><td>N/A</td><td>2</td></tr> </table>									Temp. Task ID	Task Name	Task Type	Sign-off Type	Responsible User	Backup User	Days to start date	Duration	Days to due date	11	Schedule Meeting With TC and Leadership Team	One-time Task	Single-user	Jerry O'Brien	N/A		N/A	2
Temp. Task ID	Task Name	Task Type	Sign-off Type	Responsible User	Backup User	Days to start date	Duration	Days to due date																		
11	Schedule Meeting With TC and Leadership Team	One-time Task	Single-user	Jerry O'Brien	N/A		N/A	2																		
▼	Details Copy	1	Complete Initial Draft	Template One-time Task	<input checked="" type="checkbox"/>	Task status changes	Complete	Create Task																		
<table> <tr> <th>Temp. Task ID</th><th>Task Name</th><th>Task Type</th><th>Sign-off Type</th><th>Responsible User</th><th>Backup User</th><th>Days to start date</th><th>Duration</th><th>Days to due date</th></tr> <tr> <td>2</td><td>Distribute the Safety Standard Initial Draft</td><td>One-time Task</td><td>Single-user</td><td>Jerry O'Brien</td><td>N/A</td><td></td><td>N/A</td><td>30</td></tr> </table>									Temp. Task ID	Task Name	Task Type	Sign-off Type	Responsible User	Backup User	Days to start date	Duration	Days to due date	2	Distribute the Safety Standard Initial Draft	One-time Task	Single-user	Jerry O'Brien	N/A		N/A	30
Temp. Task ID	Task Name	Task Type	Sign-off Type	Responsible User	Backup User	Days to start date	Duration	Days to due date																		
2	Distribute the Safety Standard Initial Draft	One-time Task	Single-user	Jerry O'Brien	N/A		N/A	30																		
▶	Details Copy	2	Distribute the Safety Standard Initial Draft	Template One-time Task	<input checked="" type="checkbox"/>	Task status changes	Complete	Create Task																		
▶	<input checked="" type="checkbox"/> Details Copy	2	Distribute the Safety Standard Initial Draft	Template One-time Task	<input checked="" type="checkbox"/>	Task status changes	Complete	Create Task																		
▶	Details Copy	11	Schedule Meeting With TC and Leadership Team	Template One-time Task	<input checked="" type="checkbox"/>	Task status changes	Complete	Create Task																		

Save Workflow Clear Form

Figure 8.4.2f

8.4.3 Managing Existing Workflows

Constructed Workflows can be managed by clicking on the **Workflows** button from the **Planner Admin Menu**. The Workflows Page is illustrated in Figure 8.4.3a

CCIRS >> Planner >> Administration >> Workflows

Regular Workflows

☐ Column resizing ☒ Column reorder ☒ No Filter ☐ Column Filter ☐ Advanced Filter Group Functions : [Delete](#)

Drag a column header and drop it here to group by that column

Refresh |

Actions	ID	Workflow Name	Created By	Created On	Last Updated By	Last updated On	Active
Details Deactivate Copy	37	Test Regular	Paul O'Brien	9/27/2010 3:26:20 PM	N/A		<input checked="" type="checkbox"/>

Template Workflows

☐ Column resizing ☒ Column reorder ☒ No Filter ☐ Column Filter ☐ Advanced Filter Group Functions : [Delete](#)

Drag a column header and drop it here to group by that column

Refresh |

Actions	ID	Workflow Name	Created By	Created On	Last Updated By	Last updated On	Active
Launch workflow Details Copy	36	Test	Paul O'Brien	9/8/2010 10:03:44 AM	Paul O'Brien	9/8/2010 10:05:18 AM	<input checked="" type="checkbox"/>

Figure 8.4.3a

There are two separate workflow grids on the Workflows Page, and workflows will be placed into one of them automatically after they are created. If the first Triggering Task in a workflow is a Regular Task, then the workflow will reside in the Regular Workflows area. If the first Triggering Task in a workflow is a template task, then the workflow will reside in the Template Workflows Area.

Regular Workflows are flagged as Active by default after they are created. They can, however, be deactivated at any time by clicking the **Deactivate** button on the desired row. After a Regular Workflow has been deactivated, it can be activated again. While a workflow is deactivated, it will not perform any workflow actions.

In the case of Template Workflows, a Template Task is the very first Triggering Task in the workflow. Since the Template Task is not currently assigned to a user, it would not be possible for the workflow to be called to action. Therefore, the first Template Task must be created for a user by clicking the **Launch Workflow** button.

The screenshot displays the CCIRS COMPASS Compliance Information Reporting System interface. The main window is titled "One-time Task" and contains a form for creating a new task. The form includes fields for "File Location (Paper and/or Electronic)", "Report is sent to", "Task Priority" (set to High), "Subject" (set to Plant), "Task Activity Type" (set to Report), "Task Sign-off type" (set to Single User), "Responsible User" (set to Paul O'Brien), "Backup Responsible User", "Task Due Date", and "Attach documents to task". There is also a "Notifications Settings" dropdown set to "System Defaults". The form has "Save New Task" and "Clear Form" buttons at the bottom. On the right side, there are two "Delete" buttons and two "Active" checkboxes. The left sidebar contains a navigation menu with links like "Planner Admin", "All Overdue Tasks", "All Pending Tasks", "All Completed Tasks", "All Task Definitions", "All Issues", "Template Tasks", "Task Approval", "Add Task", "Workflows", "Add Workflow", "Planner Notifications", "Template Notifications", "Settings", "Reports", "Back to Planner", and "Back to Dashboard". The bottom status bar shows "©2010 pdccorp.com All rights reserved" and "Internet | Protected Mode: On".

Figure 8.4.3b

After the **Launch Workflow** button is clicked for a given Template Workflow, a One-Time Task modal window will appear for the first Template Task in the workflow (illustrated in Figure 8.4.3b). Any task attribute can be altered before **Save New Task** is clicked. After **Save New Task** is clicked, the first

Template Triggering Task in the workflow will be copied to a regular task for the designated Responsible User.

The **Copy** function, as discussed in [Section 3.2](#) of this Manual, can also be applied to workflows. By clicking **Copy**, a new workflow will be created with duplicate Workflow Items (*Template Tasks are not copied, just the Workflow Items*). A Manager can then edit the desired Workflow Items in the copied workflow.

8.5 Templates Notification

Templates Notifications are solely utilized in workflows. As mentioned in [Section 8.4.2](#) of this manual, sending an e-mail notification can be a Trigger Action. The desired notification must be created as a Template Notification.

Clicking on **Template Notifications** from the **Planner Management** menu will display all existing Template Notifications, and a new Template Notification may be created by clicking on **Add New Record**. System Tokens can be utilized in the To, Subject and Body fields. System Tokens that are available for use are listed in [Appendix B](#) of this manual.

The screenshot displays the 'Add Template Notification' form within the CCIRS web application. The browser address bar shows the URL: https://pdc.pdccloud.com/planner/admin/temp_notification.a. The page header includes the 'pdc' logo, the title 'COMPASS Compliance Information Reporting System', and a welcome message for Robert Gordon. The navigation menu on the left lists various options under 'Planner Admin Menu', including 'All Overdue Tasks [53]', 'All Pending Tasks', 'All Completed Tasks', 'All Task Definitions', 'All Issues', 'Template Tasks', 'Task Approval', 'Add New Task', 'Workflows', 'Add Workflow', 'Planner Notifications', 'Template Notifications', 'Settings', 'Back to Planner', and 'Back to Dashboard'. The main content area is titled 'CCIRS >> Planner >> Administration >> Add Template Notification'. It contains several input fields: 'Meta Information' (a dropdown menu), 'Message Priority' (a dropdown menu set to 'Medium'), 'From' (a dropdown menu set to 'Planner System Generated'), 'To' (a text field with a placeholder 'Type email addresses separated by commas'), 'Subject' (a text field), and 'Attachments' (two checkboxes: 'Attach trigger task information to message' and 'Attach trigger task documents to message', with a 'Select Documents' button). Below these fields is a rich text editor for the 'Body' field, featuring a toolbar with various formatting options like bold, italic, underline, and font color. The footer of the page includes a 'Trustwave Trusted Commerce' logo and a copyright notice: '©2011 pdccorp.com All rights reserved'.

Figure 8.5a

Figure 8.5a illustrates the Add Template Notification Page, on which a Planner Manager can specify:

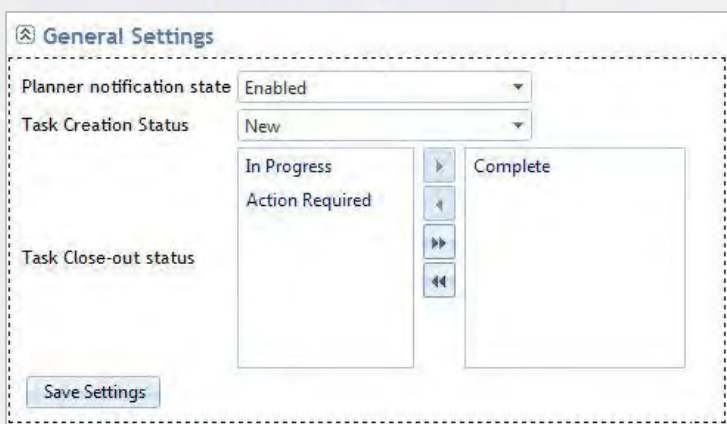
- Message Priority – E-mails generated from this Template can be given a high, medium or low priority.
- Recipients – Approximately forty e-mail recipients may be entered into the “To” field.
- Subject – This will be the subject line of the Notification E-mail.
- Attachments – The task details, of the Triggering Task that caused the Notification to be sent, may be attached to the Notification E-mail. In Addition, any documents that were attached to the Triggering Task may also be attached to the Notification E-mail. Any other documents from the Document Management System may also be attached to the e-mail Notification.
- Body – The body of the E-mail Notification can be customized using the Feature Rich Field.

8.6 Settings

Clicking on **Settings** from the **Planner Management** menu will allow a Planner Manager to alter settings that will affect the entire facility.

8.6.1 General Settings

The first setting under **General Settings**, as shown in Figure 8.6.1a, is **Planner Notification State**. This option will globally enable or disable ALL e-mail notifications for the entire facility the Manager is



The screenshot shows a web interface titled "General Settings". It contains three main sections: "Planner notification state" with a dropdown menu set to "Enabled"; "Task Creation Status" with a dropdown menu set to "New"; and "Task Close-out status" which features two columns of status names ("In Progress", "Action Required" on the left; "Complete" on the right) and a set of four arrow buttons (right, left, double right, double left) between them. A "Save Settings" button is located at the bottom left of the settings area.

Figure 8.6.1a

accessing. The second setting, **Task Creation Status**, controls the status given to newly created task instances. The Third option, **Task Close-out Status**, establishes which status(us) will “close” a task (i.e. move a task to the Completed list).

After any changes, the **Save** button should be clicked.

8.6.2 [Default Notification Settings](#)

Default Forecast and Task Level Notification values are set in the **Default Forecast Notification Settings** and **Default Task Level Notification Settings** section. If a User has not set their own Forecast Settings, then these default values will be used. When “System Defaults” is chosen as a task’s notifications setting, then these task specific settings will be used. For detailed information about configuring these settings, see [Chapter 6](#).

A Planner Manager may also create Template Notification Settings that will be available to all users within the current facility.

8.6.3 [Manager Notification Settings](#)

A Planner Manager can elect to specify default Manager Forecast Notification settings that will only be applied if other Facility Managers have not specified their own Manager Notification Settings. These notifications will contain all tasks within the current facility on a daily, weekly or monthly basis. For example, if a Manager chooses to receive a weekly pending task Forecast Notification, the e-mail will contain pending tasks assigned to ALL users within the facility that are due in the coming week.

8.6.4 [Supervisor Notifications](#)

A Planner Manager can elect to specify Default Supervisor Forecast Notifications that will only be applied if Supervisors within the facility have not specified their own Supervisor Notification Settings. These notifications will contain subordinate tasks on a daily, weekly or monthly basis. Supervisor designations are administered by a CCIRS/Planner System Administrator.

8.6.5 [Notification E-mail Formats](#)

A Planner Manager can customize the attachments and formatting of standard notification e-mails, such as overdue and pending task notifications within the current facility. To accomplish this, an e-mail type must be selected from the **Select email type** drop-down list (illustrated in Figure 8.6.5a).

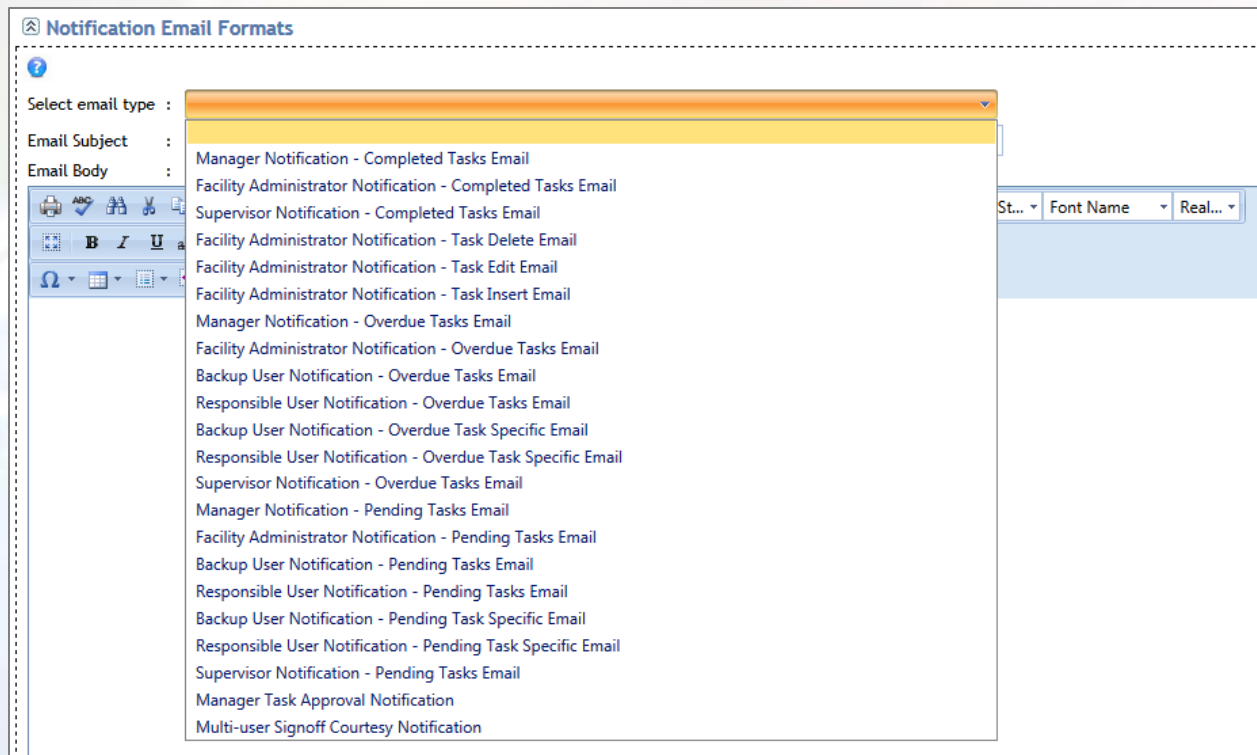


Figure 8.6.5a

Email Subject contains the subject line for the notification e-mail, and can contain System Tokens. The body can contain images, text and System Tokens. System Tokens will be replaced with specific data at runtime (*when e-mails are sent by the system*). System Tokens that can be used are listed in [Appendix A](#) of this manual.

Chapter 9 - Document Management System

The CCIRS Document Management System (DMS) is accessible from the CCIRS dashboard Menu. The DMS is designed to enhance workflow by incorporating documents with tasks. There are four options in the DMS Menu:

- All Documents
- Create Document
- Upload Document
- DMS Administration
- Reports

There are several meta-data attributes which appear on DMS entry pages. Therefore, the following explanations will apply to many DMS pages.

- Facility Association – The user can associate the Planner document with one Facility, in order to ensure it is only used in that Facility. If no Facility association is made, then the document will be available to be used in all facilities.
- Module Association – The user can associate the Planner document with one module, in order to ensure it is only used in that module. If no module association is made, then the document will be available to be used in all modules.
- Document Category – Users can establish document categories in order to better organize their documents. If the user wishes to create a new category for a document, they may type the new category into the field.
- Document Name – A descriptive document name will aid future retrieval attempts made for the document.
- Document Description – A descriptive document description will aid future retrieval attempts made for the document.
- Read-only – If a document is read-only, then the user creating the document will be the only user who will have rights to edit the document.
- Private Document – If a document is private, then the user creating the document will be the only user who can see the document.
- Template Document – If a document is a template document, then it can be used by recurring tasks to create new copies of itself (i.e. If a template document is attached to a recurring task definition, then every new instance of the recurring task will have a fresh copy of the template document attached.).

9.1 Document Types

There are three ways in which documents may be created or uploaded into the CCIRS DMS.

9.1.1 Native Documents

The DMS document creation page is accessed by clicking on the **Create Document** DMS Menu item. Planner Created Documents reside natively in the system, and offer users many benefits, such as:

- Version control: Previous versions of DMS created documents will be archived and available for retrieval.
- Check-in / Check-out: Users can check-out DMS created for any length of time, in order to perform editing. If another user wishes to edit the document, they can request the document from the user who has the document checked out.
- Access From Anywhere: Since DMS documents reside within the system, users will be able to access DMS created documents from any log-in location.
- Auto-Saving: While a user is creating a DMS document, the system will automatically perform an auto-save.

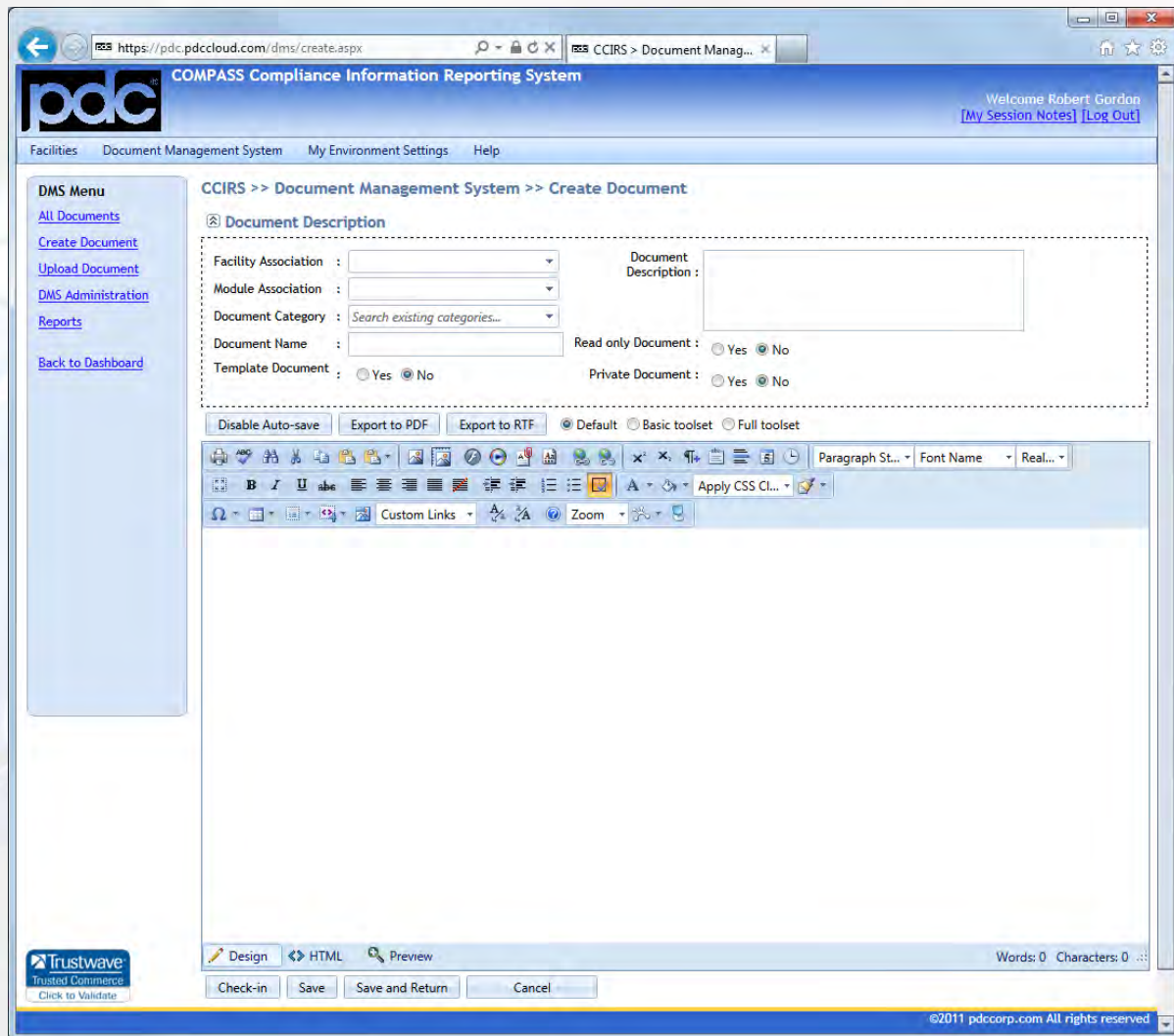


Figure 9.1.1a

The attributes listed on the Planner document creation page, illustrated in Figure 9.1.1a, are explained in this chapter's introduction.

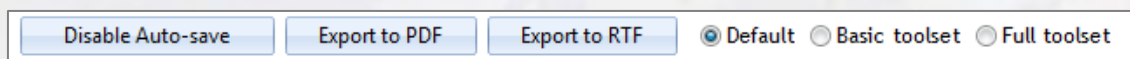


Figure 9.1.1b

A user can disable auto saving by clicking the disable button pictured in Figure 9.1.1b. The document can also be exported to an Adobe® PDF or Rich Text File at any time. Choosing different toolkit options will change the amount of tools that are available in the feature rich editor.

Many advanced operations can be performed in this feature-rich editor such as inserting images, videos, hyperlinks and tables. Formatted material from other applications such as Microsoft Word® or

Microsoft Excel® can be pasted in these fields, and much of the formatting will be retained. Complex forms can be created including radio buttons, check boxes and other objects.

9.1.2 Uploaded Documents

Any external file type may be uploaded into Planner (*e.g. docx, xlsx, pdf, jpg, wmv, etc.*). When users view uploaded documents, the document will be opened with the program associated with the document's file extension on the user's local machine. In order to edit an uploaded document, it must be saved to a user's local machine and then re-uploaded into the DMS.

Clicking on **Upload** Document from the DMS Menu will allow a user to upload a document. There are two ways uploaded documents can be saved in the DMS.

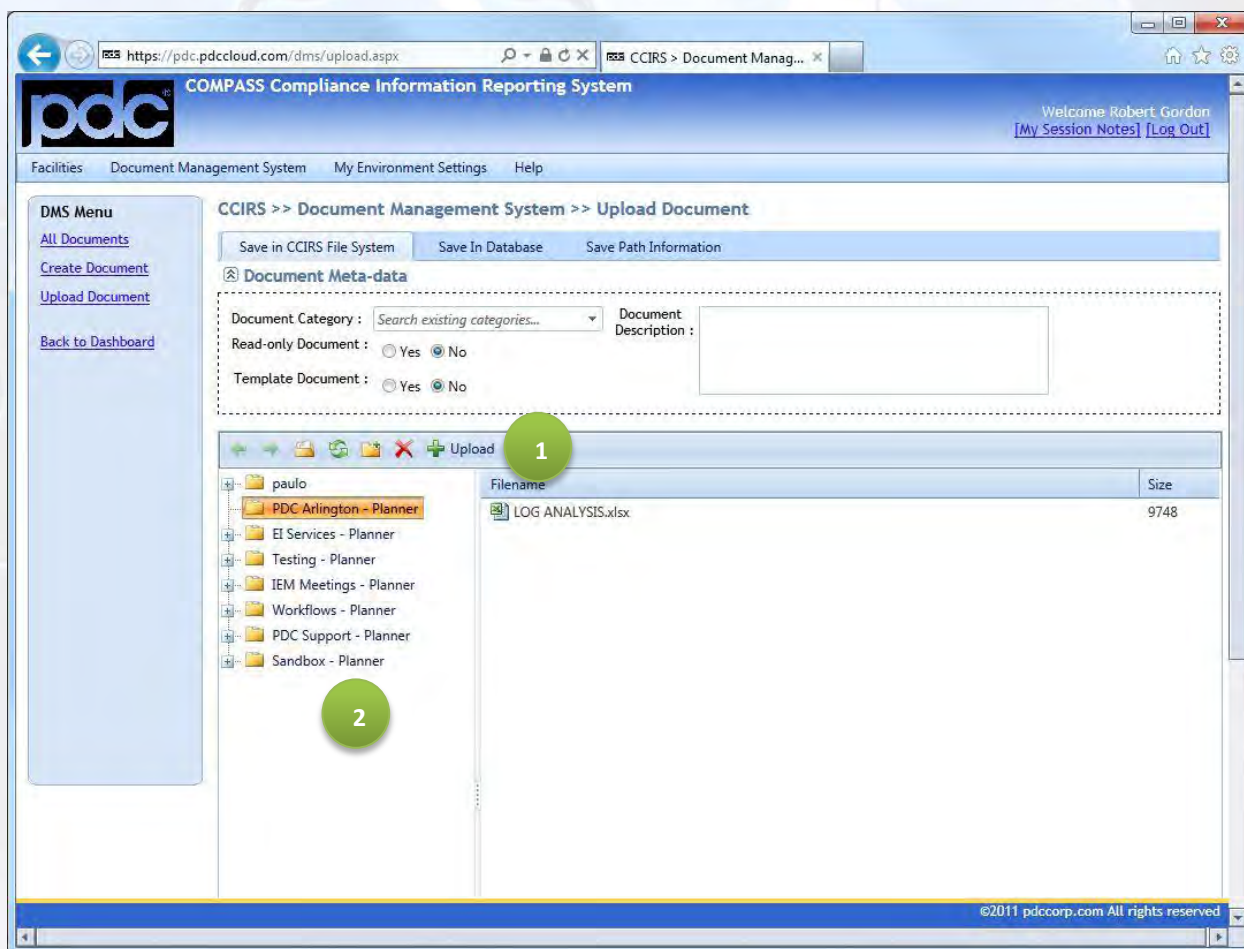


Figure 9.1.2a

The first way to upload documents into the DMS is to use the CCIRS File System, as illustrated in Figure 9.1.2a. A document category and description can be given to the document. The DMS document name will use the actual file name of the document being uploaded.

The file system tree begins with a personal folder for the user (*illustrated by Green Bubble #2 in Figure 9.1.2a*), which can receive the uploaded files. All other facilities to which a user has access are also displayed; they can also receive uploaded files. Uploading a file into a facility folder is equivalent to giving the document a facility association, as discussed in the previous section. By clicking on **Upload** (*illustrated by Green Bubble #1 in Figure 9.1.2a*) and selecting a file, a user can upload a file into the file system.

The second way to upload documents into the DMS is to upload into the database. This upload option is accessed by clicking **Upload Document** from the DMS Menu, and then selecting the **Save in Database** tab. The save in database upload page, illustrated in Figure 9.1.2b, can be used to upload several documents at once. The DMS document name will use the actual file name(s) of the document(s) being uploaded if the name field is left blank. If uploading more than one document simultaneously, then the meta-data provided will be applied to all documents in the upload (*with the exception of description, as documents can have unique descriptions*).

The screenshot displays the 'COMPASS Compliance Information Reporting System' interface. The browser address bar shows 'https://pdc.pdcorp.com/dms/upload.aspx'. The page title is 'CCIRS > Document Management System'. The user is logged in as 'Robert Gordon' with links for 'My Session Notes' and 'Log Out'. The main navigation bar includes 'Facilities', 'Document Management System', 'My Environment Settings', and 'Help'. The left sidebar contains the 'DMS Menu' with links: 'All Documents', 'Create Document', 'Upload Document', 'DMS Administration', 'Reports', and 'Back to Dashboard'. The main content area is titled 'CCIRS >> Document Management System >> Upload Document'. It features three tabs: 'Save in CCIRS File System', 'Save In Database' (which is selected), and 'Save Path Information'. Under the 'Save In Database' tab, there is a 'Document Meta-data' section with the following fields: 'Facility Association' (a dropdown menu), 'Module Association' (a dropdown menu), 'Document Category' (a dropdown menu with the text 'Search existing categories...'), 'Read only Document' (radio buttons for Yes and No, with 'No' selected), 'Private Document' (radio buttons for Yes and No, with 'No' selected), and 'Template Document' (radio buttons for Yes and No, with 'No' selected). Below these fields is a section labeled 'Select file(s) to upload :'. It contains a table with two columns, 'Add' and 'Delete', and a status message 'No files uploaded yet'. At the bottom of this section are three buttons: 'Upload', 'Upload and Return', and 'Cancel'. The footer of the page includes the 'Trustwave' logo and the text '©2011 pdcorp.com All rights reserved'.

Figure 9.1.2b

9.1.3 Path Documents

Path information consisting of various protocols can be stored as documents in the DMS. This upload option is accessed by clicking **Upload Document** from the DMS Menu, and then selecting the **Save Path Information** tab.

The screenshot shows a web browser window with the URL <https://pdc.pdccloud.com/dms/upload.aspx>. The page title is "COMPASS Compliance Information Reporting System". The user is logged in as "Robert Gordon" and has links for "My Session Notes" and "Log Out". The navigation menu includes "Facilities", "Document Management System", "My Environment Settings", and "Help". The "DMS Menu" on the left contains links for "All Documents", "Create Document", "Upload Document", "DMS Administration", "Reports", and "Back to Dashboard". The main content area is titled "CCIRS >> Document Management System >> Upload Document". It features three tabs: "Save in CCIRS File System", "Save In Database", and "Save Path Information". The "Save Path Information" tab is active, showing a "Document Meta-data" section with fields for "Facility Association", "Module Association", "Document Category" (with a search option), "Document Name", "Document Description", "Read only Document" (Yes/No), and "Private Document" (Yes/No). Below this is a "Protocol" dropdown menu set to "http://" and a "Path/Data" text input field. "Save" and "Save and Return" buttons are at the bottom. A Trustwave Trusted Commerce logo is in the bottom left, and a copyright notice "©2011 pdc corp. All rights reserved" is in the bottom right.

Figure 9.1.3a

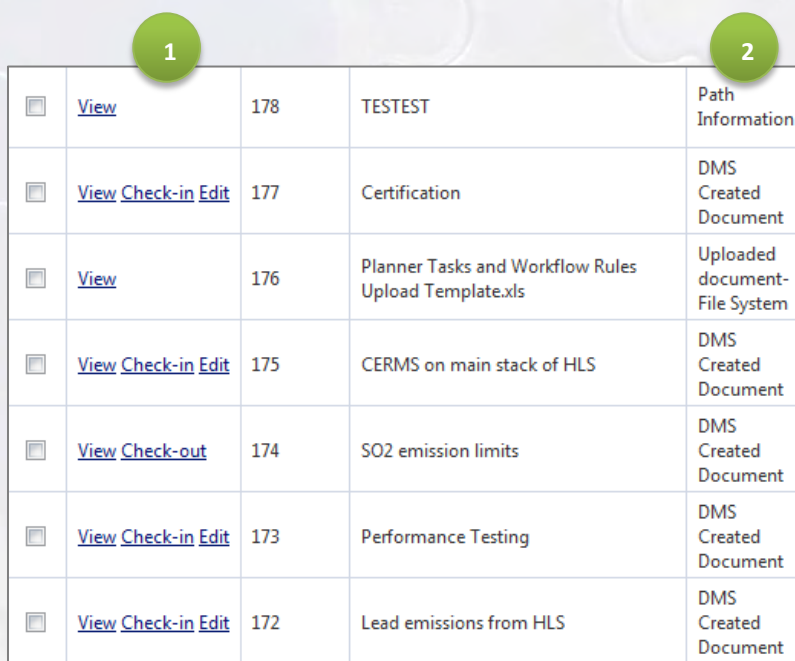
The meta-data attributes shown on the **Save Path Information** page, as shown in Figure 9.1.3a, are explained in this chapter's introduction. To create a path document, a user must first select the protocol that will call the document, and then specify the path of the desired document. The protocol options available from the protocol drop-down list are:

- http:// - Common web page (not secure)
- https:// - SSL secured web page
- ftp:// - File Transfer Protocol
- file:/// - File Protocol URI scheme, used for local files (Example: file:///c:/file.txt)
- UNC Protocol – Universal Naming Convention, used for local or network files (Example //filesrv/reports/numbers.xls)
- Email – Allows a user to fill in common e-mail message attributes. When opened from a web browser, the user's default mail client will open a new message using the attributes in this file.

9.2 Viewing All Documents

Selecting **All Documents** from the DMS menu will take a user to a grid, which will show all documents residing in the DMS.

A grid operation is discussed in Chapter 3 of this manual. Different actions will be available to users, depending on a document's state as shown in Figure 9.2a.



<input type="checkbox"/>	View	178	TESTEST	Path Information
<input type="checkbox"/>	View Check-in Edit	177	Certification	DMS Created Document
<input type="checkbox"/>	View	176	Planner Tasks and Workflow Rules Upload Template.xls	Uploaded document-File System
<input type="checkbox"/>	View Check-in Edit	175	CERMS on main stack of HLS	DMS Created Document
<input type="checkbox"/>	View Check-out	174	SO2 emission limits	DMS Created Document
<input type="checkbox"/>	View Check-in Edit	173	Performance Testing	DMS Created Document
<input type="checkbox"/>	View Check-in Edit	172	Lead emissions from HLS	DMS Created Document

Figure 9.2a

1. Document Actions:

- a. View: Any document may be viewed by clicking on this button
- b. Check-in: If a user currently has a DMS created document checked out, they will see this option. All other users would see a **request** option.
- c. Check-out: If a DMS created document is available for check-out, a user can perform a check-out option by clicking this button.
- d. Edit: After a user has a DMS created document checked out, they can edit the document by clicking on this button.
- e. Request Check-in: If another user has a document checked out, this option will be available. Clicking on this button will send an e-mail to the user who has the document checked out, requesting that it be checked back in.

2. A column in the grid will display the document type.

Chapter 10 - Reporting Tools

CCIRS Reporting tools are designed to present information in easy to read, printable, and exportable formats. Since the CCIRS Reporting Service is an embedded solution, environment maintenance and configuration operations are performed with little effort. This chapter will discuss the different types of reports CCIRS can generate, and the multitude of methods that may be used to create them.

10.1 Reporting Service

Users can navigate to the Reporting Service by clicking on **Reports** from either the Planner Dashboard Menu, One-Click Menu or from another reporting shortcut in Planner. A clean reporting page is shown below:

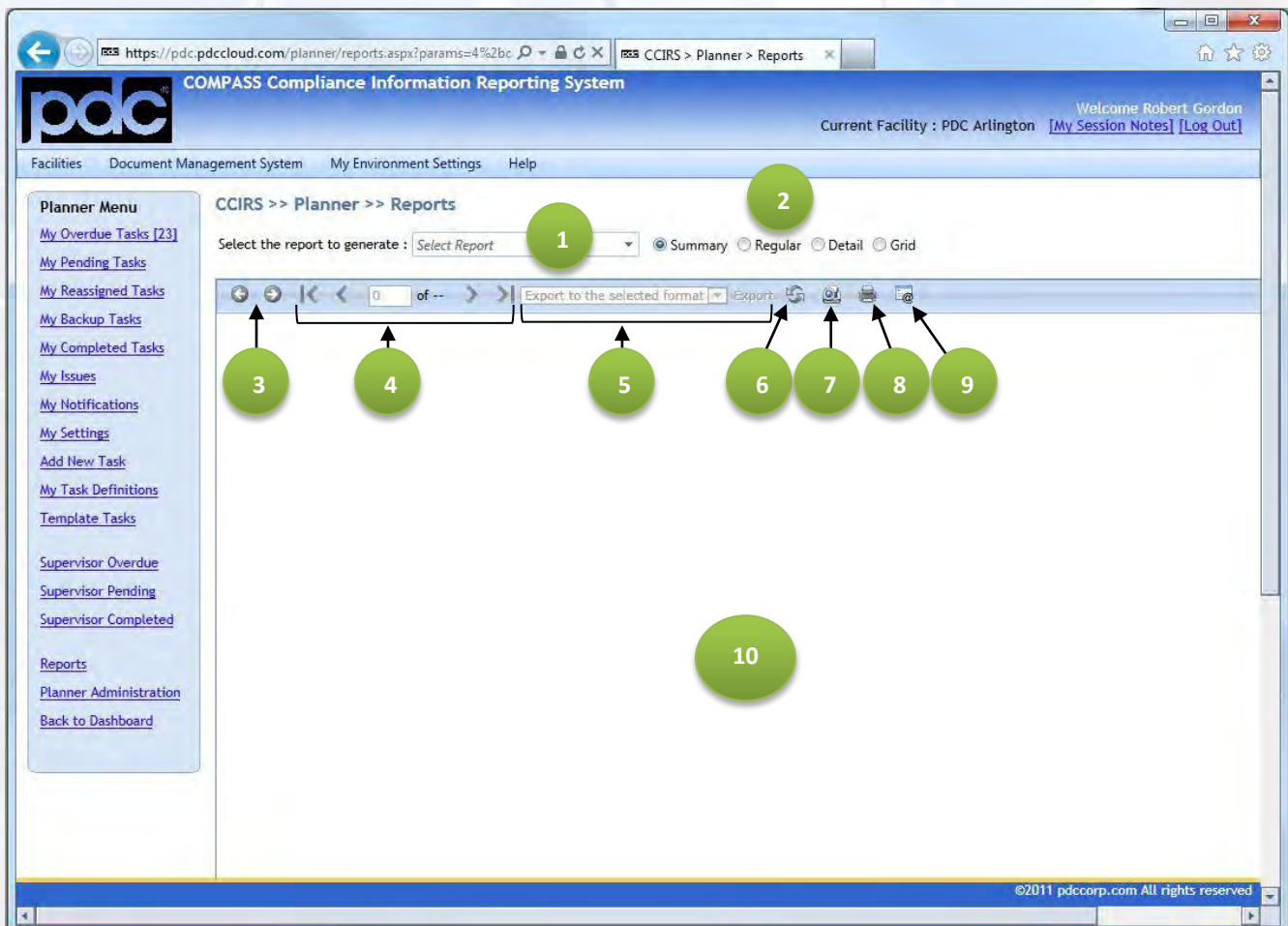
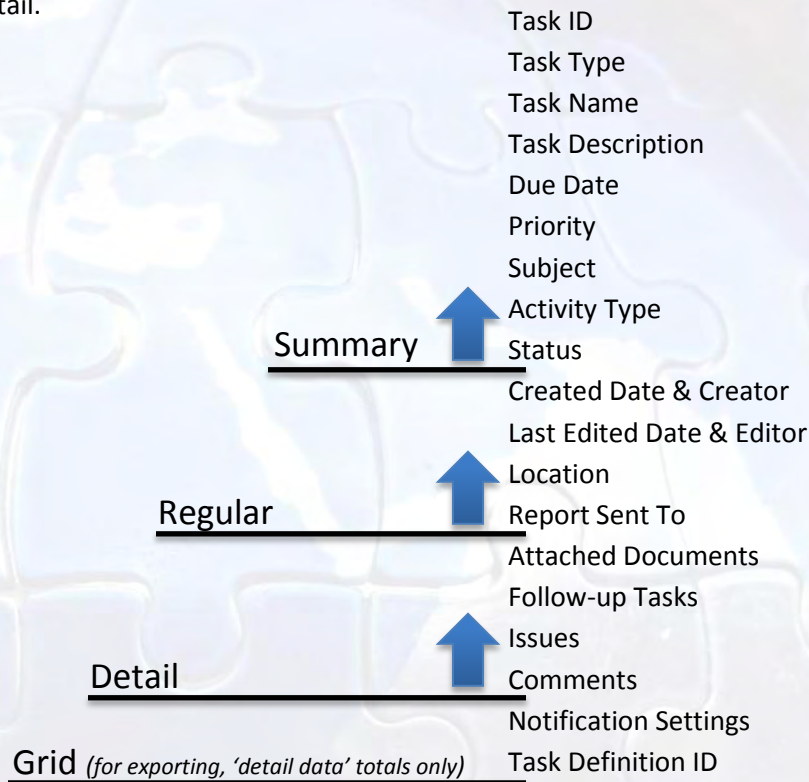


Figure 10.1a

1. Report To Generate – Users will see various reports that are available to them in this drop-down list (e.g. “My Pending Tasks”, “My Issues”).
2. Type of Report – Four types of reports may be generated, each of which showing different levels of task detail.



3. Report Session History - The Report Viewer retains a session history of up to 20 generated reports, and this Back and Forward button will navigate through them. Whenever a user clicks on the **Generate Report** button, as shown in Figure 10.1b, the generated report will be stored in the session history. After the page is refreshed or navigated away from, the report session history will be cleared.
4. Report Pages – If a report contains multiple pages, a user can navigate through the report by entering a specific page number, by advancing or regressing one page at a time or by directly going to the first or last page.
5. Exporting – A user can export their report into a variety of formats by selecting the desired format from the drop-down list, and then clicking **Export**.
6. Refresh – When a user clicks this icon, any data that has changed in the CCIRS Database, since the current report has been generated, will be updated.

7. **Print Preview** – Although the Report Viewer is designed to present reports in a standard 8 ½ X 11 letter format, the Viewer may choose not to wrap certain text for viewing ease. Clicking on this icon will show the user exactly how the report would look if printed.
8. **Print Report** – This print option will prepare the current report for printing, and display your standard print dialogue box.

NOTE: The Google Chrome browser contains a built in PDF viewer that may sometimes interfere with this print function. To resolve this issue in Google Chrome, navigate to <chrome://plugins/> and make sure that the 'Adobe Acrobat' plugin is enabled, and that the Chrome PDF viewer plugin is disabled. This print function should operate normally after the browser is restarted.

9. **Filter Options Toggle** - A user can toggle the visibility of the filter condition section by clicking this icon in the Report Viewer. If filter conditions are applied to a report, they will be listed on the top of page 1 of the report.
10. **Report Viewer** – After a report is generated, it will be displayed in this area. Depending on the type of report being generated and amount of data being collected, the time it takes the system to generate the report will vary. Some reports will contain rows of data than may be expended or collapsed by clicking on the '+' or '-' symbols.

After a **Report to Generate** and a **Report Type** is chosen, filter options may appear on the page based on the report generated:

Select the report to generate : My Pending Tasks		<input checked="" type="radio"/> Summary <input type="radio"/> Regular <input type="radio"/> Detail <input type="radio"/> Grid	
Enter Start Date: 11/23/2011	Enter End Date: 12/23/2011	<div>Generate Report</div>	
Task Name Like: %%	Description Like: %%		
Filter by Status: <select a value> <input checked="" type="checkbox"/> Disable	Filter by Priority: <select a value> <input checked="" type="checkbox"/> Disable		
Filter by Subject: <select a value> <input checked="" type="checkbox"/> Disable	Filter by Activity: <select a value> <input checked="" type="checkbox"/> Disable		

Figure 10.1b

The **Task Name Like** and **Description like** fields allow users to filter by Task Name and Task Description using the Contains, Starts With or Ends With filter conditions. The “%” acts as the wildcard symbol. Examples of the three filter conditions are displayed below:

- **Contains:** The objective is to locate a task that contains the word, “Sever”, in the Task Name. A user would enter, “**%Server%**”.
- **Starts With:** The objective is to locate a task whose Task Name starts with the word “Inspect”. A user would enter, “**Inspect%**”.
- **Ends With:** The objective is to locate a task whose Task Name ends with the words “Tower 12”. A user would enter, “**%Tower 12%**”.

10.2 Dashboard Reports

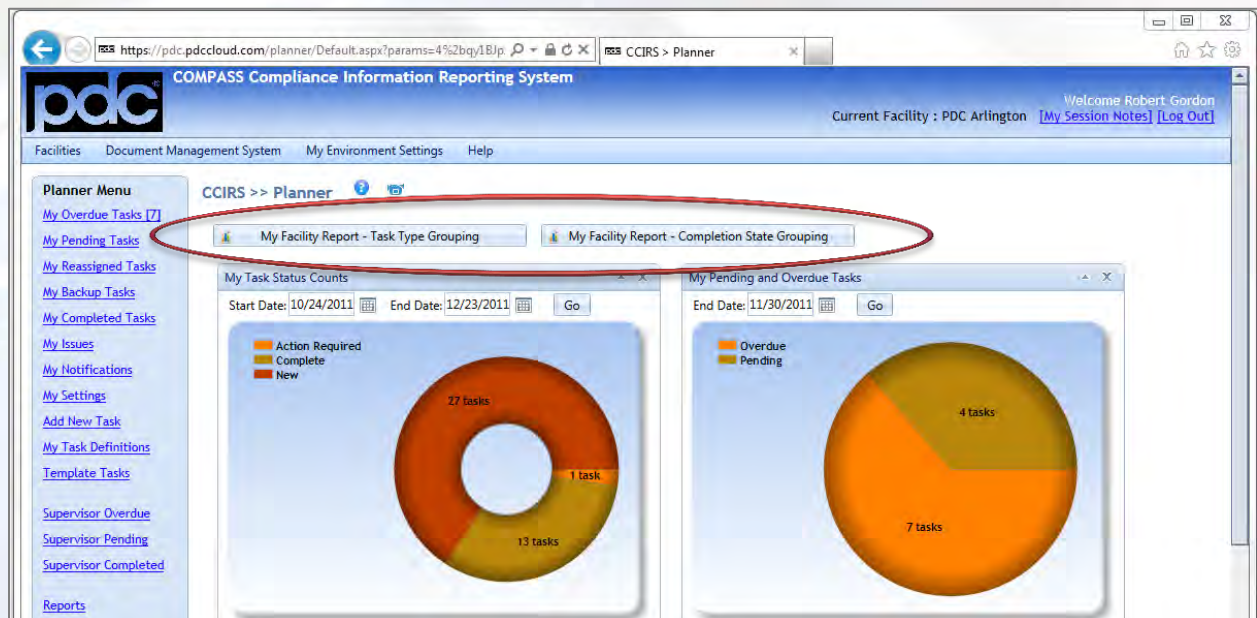


Figure 10.2a

Certain reports are available to users on the Planner Dashboard, and are located above the visualizations. These reports contain facility wide data in order to present a high level facility overview of the user's current standing. These reports will differ in column grouping options. For example, one report's columns are grouped by Task Type (i.e. recurring, one-time or continuous), and current task statuses are sub-grouped below the main column grouping. Also, Priority, Subject and Activity typed are grouped in rows, along with their subsequent individual values. An example Facility Report, grouped by completion state, is shown below in Figure 10.2b.

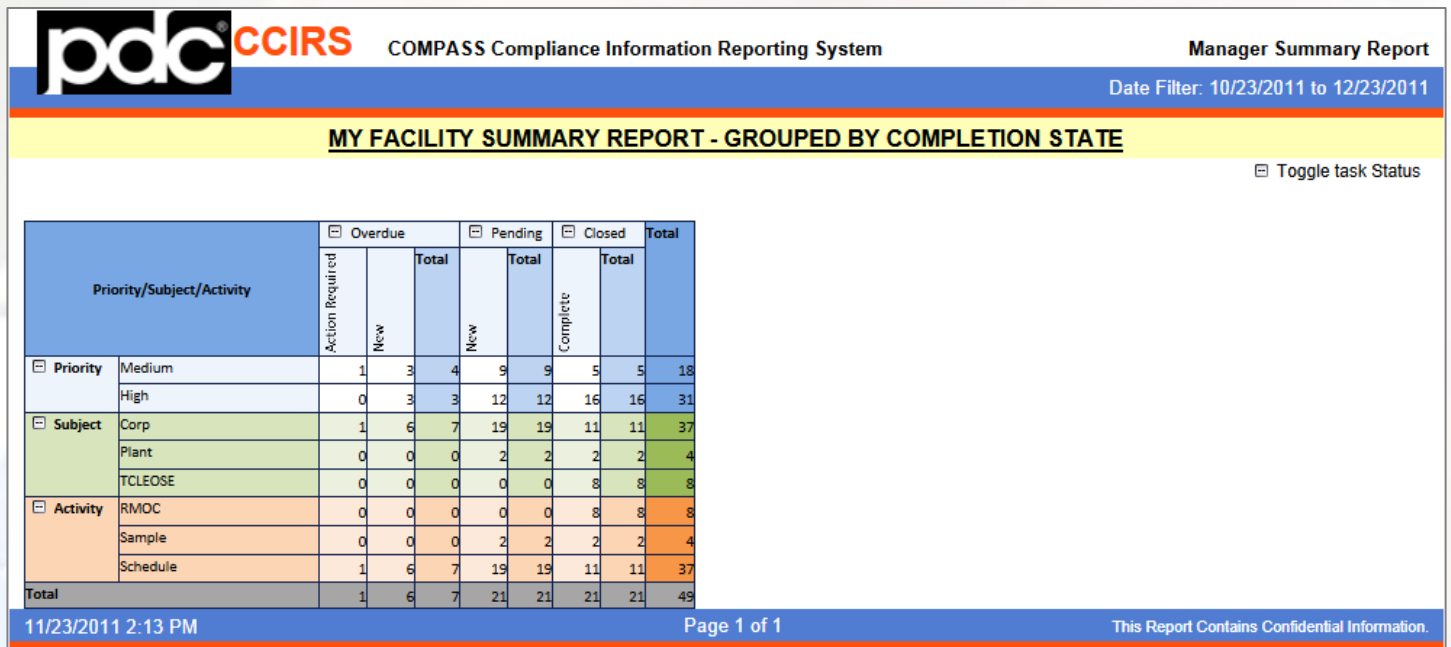


Figure 10.2b

10.3 Report Shortcuts



Figure 10.3a

Most Planner Gridview pages have a **Reports** button underneath the breadcrumb navigation line, which will present a user with several reporting options when clicked.

When the **Reports** button is clicked, a box will appear (*illustrated by Figure 10.3b*) with several reporting options.

The Planner page that a user is currently visiting establishes the report that will be generated (i.e. if a user is on the Pending Tasks page, the report will be a Pending Task Report. A Summary, Regular, Detail or Grid report (*as explained in Section 10.1*) may be generated by clicking on the appropriate button.

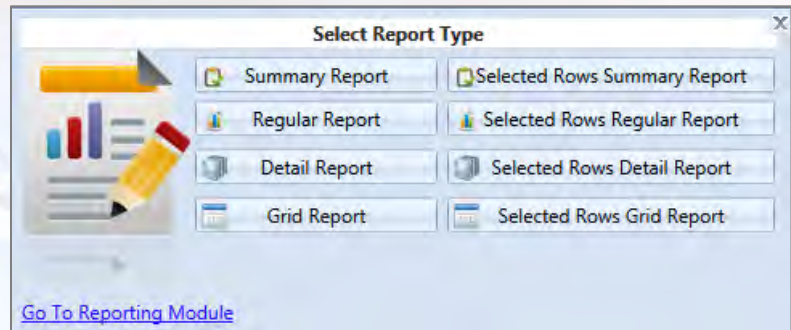


Figure 10.3b

Reports may also be generated that show data for specific rows that have been selected within a grid. After the desired row(s) have been selected, a user may click the **Reports** button on the page, and then chose their desired level of **Selected** report detail.

At the bottom of the box, is a link that will navigate a user to the dedicated Reporting Service Page.

Chapter 11 - System Administration

In work



Technical Support

Please contact Process Data Control Corporation (PDC) with any questions or problems using Planner:

Process Data Control Corporation

1803 W. Park Row Dr. Suite A
Arlington, TX 76013

- Tel: (817) 459-4488
- Fax: (817) 459-3055
- E-mail: support@pdccorp.com

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A large, faint background image of a globe composed of interlocking puzzle pieces. The puzzle pieces are light blue and white, with the white pieces forming the continents. The globe is centered on the page.

Appendix A

- Built-in E-mail Notification Tokens –

In Progress, please check back soon

Appendix B

- Template Notification E-mail Tokens -

Token & Description	Example Token value					
__APP_BASE_URL (client CCIRS URL)	https://pdc.pdccloud.com/					
__CURRENT_DATE (date e-mail is sent)	2/18/2011					
__CURRENT_DATE_LONG (date & time e-mail is sent)	Friday, February 18, 2011					
__CURRENT_TIME (time e-mail is sent)	2:09 PM					
__CURRENT_DATETIME (date & time e-mail is sent)	2/18/2011 2:09 PM					
__CURRENT_DATETIME_LONG (date & time e-mail is sent)	Friday, February 18, 2011 2:09 PM					
__APP_TITLE_SHORT	CCIRS					
__APP_TITLE_LONG	COMPASS Compliance Information Reporting System					
__TASK_ISSUES_BRIEF (brief issue information of all associated issues)	Issue Id	Issue Description	Recorded By	Recorded On	Is resolved?	Resolved on
	16	test issue for notification	Robert Gordon	2/18/2011 2:01:46 PM	Yes	2/18/2011 2:01:44 PM
	17	issue no. 2	Robert Gordon	2/18/2011 2:02:45 PM	Yes	2/18/2011 2:02:44 PM

__TASK_ISSUES_DETAILED
(all information for all associated issues)

Issue Id	Facility	Recorded By	Recorded On	Is resolved?	Resolved on
16	PDC Arlington	Robert Gordon	2/18/2011 2:01:46 PM	Yes	2/18/2011 2:01:44 PM
Issue Description					
Sample issue description					
Issue Cause					
Planner Help Documentation					
Affected Areas					
User's Manual					
Requirements not met					
Issue Action					
Issue Created					
Issue Duration					
Issue has multiple durations: 2/1/2011 12:00:00 AM - 2/2/2011 12:00:00 AM 2/9/2011 12:00:00 AM - 2/10/2011 12:00:00 AM					
Issue Comments					
Comment posted by Robert Gordon on 2/18/2011 2:02:19 PM Example user comment!					

Comment posted by Robert Gordon on 2/18/2011 2:02:03 PM

Test issue with formatting. **comment**

Issue Id	Facility	Recorded By	Recorded On	Is resolved?	Resolved on
17	PDC Arlington	Robert Gordon	2/18/2011 2:02:45 PM	Yes	2/18/2011 2:02:44 PM

Issue Description

issue no. 2

Issue Cause

Affected Areas

Requirements not met

Issue Action

Issue Duration

Issue Comments

No comments have been recorded for this issue.

__TASK_COMMENTS <i>(user comments posted to task)</i>	Comment posted by Robert Gordon on 2/18/2011 2:04:35 PM				
	2nd task comment.				
	Comment posted by Robert Gordon on 2/18/2011 2:04:22 PM				
	Example comment with formatting				
__TASK_COMMENTS_WITH_SYS POST <i>(user comments and system posts)</i>	Comment posted by on 2/18/2011 2:07:24 PM				
	System Post: Task Status updated to 'Complete' by Robert Gordon				
	Comment posted by Robert Gordon on 2/18/2011 2:04:35 PM				
	Example task comment text				
	Comment posted by Robert Gordon on 2/18/2011 2:04:22 PM				
__TASK_DOCUMENTS <i>(all associated documents)</i>	Another example post				
	Document ID	Document Name	Document Description	Created By	Created On
	156	RMOC PROCESSING.doc		System Administrator	7/22/2010 2:40:34 PM
	157	License_Code.bmp		System Administrator	7/22/2010 2:40:34 PM
	233	Citation and Regulations Full Text		Robert Gordon	1/17/2011 4:53:22 PM

__SIGNOFF_INFORMATION (task sign-off information)	Task Signoff Type : Single-user																	
	Assigned User		Task Status		Completed By		Completed On		Recorded By		Recorded On							
	Robert Gordon		Complete		Robert Gordon		2/18/2011 12:00:00 AM		Robert Gordon		2/18/2011 2:07:24 PM							
__SIGNOFF_INFORMATION_WITH_CONTACT (task sign-off information with e-mail and phone#)	Task Signoff Type : Single-user																	
	Assigned User		Assigned User Email		Assigned User Phone		Task Status		Completed By		Completed By User Email		Completed By User Phone		Completed On		Recorded By	
	Robert Gordon		rgordon@pdccorp.com		Not available		Complete		Robert Gordon		rgordon@pdccorp.com		Not available		2/18/2011 12:00:00 AM		Robert Gordon	
TASK_RECID (task ID of task instance)	4336																	
FACILITY_RECID (facility ID where the task resides)	10																	
FACILITY_NAME (facility name where task resides)	PDC Arlington																	
SOURCE_MODULE_NAME (module that generated the task)	Planner																	
TASK_TYPE_TEXT (task type)	Recurring Task - Weekly																	
IS_PRIVATE (is the task a private task)	False																	
TASK (task's name)	Backup Visual Studio 2008 code																	

TASK_DESC <i>(task's full description)</i>	Backup all projects code onto common drive for ofsite backup
TASK_PRIORITY_TEXT	High
TASK_MEDIA_TEXT <i>(task's subject field)</i>	Corp
ENV_ACTIVITY_TEXT	Schedule
FILE_LOCATION	Middle file cabinet
REPORT_SENT_TO	Legal
RESP_USER	Robert Gordon
RESP_USER_EMAIL	rgordon@pdccorp.com
RESP_USER_PHONE	8174594488
BACKUP_USER	Stan Richards
BACKUP_USER_EMAIL	srichards@pdccorp.com
BACKUP_USER_PHONE	8174593055
ASSIGNED_USER	Robert Gordon
ASSIGNED_USER_EMAIL	rgordon@pdccorp.com
ASSIGNED_USER_PHONE	8174594488
CREATE_DATE <i>(date the task was created by Planner)</i>	7/31/2010 12:06:34 AM
START_DATE <i>(only applies to recurring & continuous tasks)</i>	8/20/2010 12:00:00 AM

DUE_DATE	2/16/2011 12:00:00 AM
COMPLETE_BY_USER <i>(user entered "completed by")</i>	Robert Gordon
COMPLETE_BY_USER_EMAIL	rgordon@pdccorp.com
COMPLETE_BY_USER_PHONE	8174594488
COMPLETED_DATE <i>(user entered "completed on")</i>	2/18/2011 12:00:00 AM
RECORD_BY_USER <i>(user who made the entry)</i>	Robert Gordon
RECORD_BY_USER_EMAIL	rgordon@pdccorp.com
RECORD_BY_USER_PHONE	8174594488
RECORD_DATE <i>(when the entry was recorded)</i>	2/18/2011 2:07:24 PM
STATUS_TEXT <i>(current status at time of e-mail)</i>	Complete
CREATE_USER <i>(user who created the task)</i>	Administrator
NOTIFY_TYPE_TEXT <i>(notification settings of task)</i>	Task Specific Settings
SIGNOFF_TYPE_TEXT	Single-user
APPROVE_STATUS_TEXT <i>(indicates if task went through approval process)</i>	Approved or N/A
APPROVE_BY_USER <i>(user who approved task)</i>	N/A