PEO STRI Process Management System User Guide

1. **Dashboard:**

   The dashboard will include all the basic/quick information that the user needs. All dashboard widgets are clickable and would direct the user to the information that the widget is representing.

2. **My Tasks**

   This menu tab will include all tasks that the user is required to complete. Each task listed will have basic information that includes a title, start date, and suspense date. By clicking on a task, the user will gain access to the task page to complete the assigned task.

3. **My Project**

   Under this menu tab, the user will be able to see all the project that they are assign to. The information that the user will be able to see on the My Project home page will include a brief description that includes the title, start date, suspense date, status, users, team name, time to complete, date of creation, and last updated date.

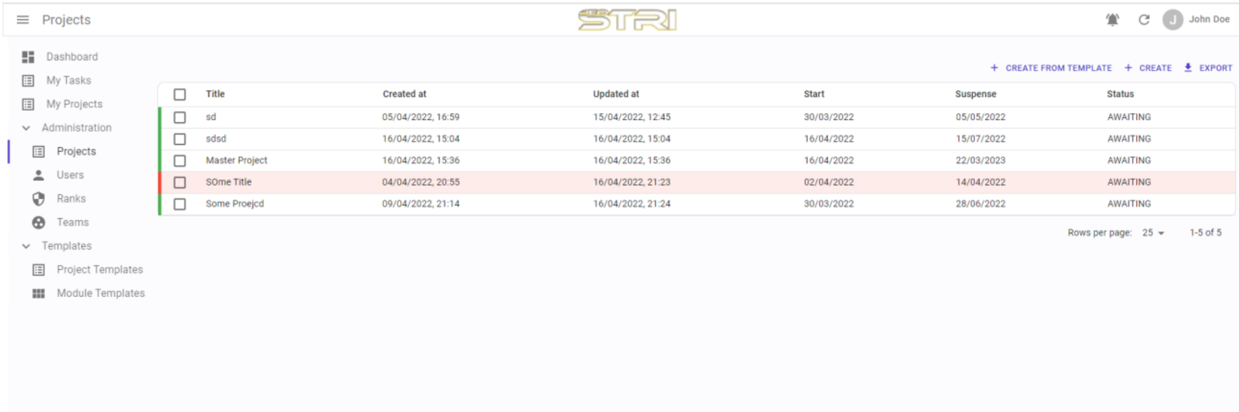
   Clicking on a project will direct the user to the main project page that includes more information about the project and the tasks that needed to be completed by the user.

4. **Projects:**

   4.1 Main Project Page:

   In the main project page, the user will be able to see the list of all projects on going in the system. On the main page, each project will have basic information that includes the title, creation date, last day updated, start date, suspense date, and project status. In addition to the project status, all projects are labeled with three colors (Green, Amber, Red) that indicated if the project is on time or not.

   - Green – project is on time
   - Amber – project suspense time getting close
   - Red – Project passed suspense time



4.2 <u>Creating a New Project:</u>

There are two main ways for a user to create a new project. The user can create a project based on existing templets that include all modules needs (templets are explained in section 7) or create a custom project. Custom project will allow the user to add existing modules or create new modules.

4.2.1 <u>Create Project from Template:</u>

- Click on “CREATE FROM TEMPLATE”
- Once click, the user will have the option to choose a project template. After choosing a template from the list, click “CREATE”
- On this page, the user will enter the following information
  - Project Title
  - Start Date
  - Assign Members to Project
- After filling in the project information, the user will now be able to manage all the modules in for the project. Since we are using an existing templet, the user does not have to create anything new; however, user still have the option to add/modify/delete modules and steps.
- To modify a module, click on one of the tasks in the bubble
  - The user will be able to change the title, add or delete tasks within the module.

    - Once completed, click “CREATE” and the project will be created in the system.

4.2.2 Manual Project Creation:

- Click “CREATE”
- Add project information (Title, Start Date, Project Members)
- On the Module Management page, the user will have three options to create modules: Add template (from Module Templates, create new module, add step)
- To add an existing module temple
    - Click “ADD TEMPLATE”
    - Choose module of choice from the options
    - Click create
- To create a new module
    - Click “ADD MODULE”
    - Fill in module information: title, status, waver option (Document of approval needed)
    - Adding a new task:
        - Click “ADD TASK”
        - Fill in task information
        - Click “CREATE”
    - NOTE: if tasks can be worked on simultaneously, the tasks should be placed on the same step. If not, click on “ADD STEP” and repeat creating a new task.

5 Users (proper authorization required):

On the main page of the user tab, the user will be able to view the list of all users in the system. The information on the main page will include basic information.

5.1 View/Editing a User (proper authorization required):

By clicking on a user, the user will be able to see more information about the user. On this page the user will also be able to edit user information, rank, and active status.

5.2 <u>Creating a New User (proper authorization required):</u>

- Click on "CREATE"
- Fill in user information
- Click "CREATE"

6 <u>Teams:</u>

Under the team's tab, the user will be able to see a list of all the teams that they are a part of.

6.1 <u>View/Editing a Team (proper authorization required):</u>

By clicking on a team, the user will be able to see more information about the team and will include the team members and team name. On this page the user will also be able to edit the team.

6.2 <u>Creating a New Team (proper authorization required):</u>

- Click on "CREATE"
- Fill in team name
- Select team members from user list
- Click "CREATE"

7 <u>Templets</u>

Under the template menu section, the user will be able to view, edit, create, and delete templates. This section is divided into two sub menus for project templets and module templets.

7.1 <u>Project Templets</u>

Under the Project Templets page the user is able to see a list of all project templets that are on the system. The user will be allowed to edit or delete existing project templates and will be able to create a new project template.

7.1.1 <u>Creating a new project template</u>

- Click "CREATE"

- Fill in general information
- On the Module Management page there are two options to add new modules (templet or create a new module):
  - Click "ADD TEMPLATE" to add existing module templates
  - To create a new module
    - Click "ADD MODULE"
    - Fill in module information: title, status, waver option (Document of approval needed)
    - Adding a new task:
      - Click "ADD TASK"
      - Fill in task information
      - Click "CREATE"
    - NOTE: if tasks can be worked on simultaneously, the tasks should be placed on the same step. If not, click on "ADD STEP" and repeat creating a new task.
    - Once a task has been created, it is possible to drag it in between steps

7.1.2 <u>Editing/deleting existing templates:</u>

- Click on the desired project to edit/delete
  - To delete template, click on delete
  - To edit, make any desired changes of general information
  - Click "NEXT" when changes are made (if no changes needed, just click "NEXT").
  - In the module manager page, click on the bubble task that needs to be edited. Once edits are completed, click "SAVE".
  - During editing it is possible to drag task and modules in between steps.

7.2 <u>Module Templates</u>

Under the Module Template page, the user will be able to a list of all the module templates in the system. The user will be allowed to edit or delete existing module templates and will be able to create a new module template.

7.2.1 <u>Editing/deleting existing templates:</u>

7.2.1.1 Click on “CREATE”

7.2.1.2 Fill in general information

- Adding a new task:
    - Click “ADD TASK”
    - Fill in task information
    - Click “CREATE”
- NOTE: if tasks can be worked on simultaneously, the tasks should be placed on the same step. If not, click on “ADD STEP” and repeat creating a new task.
- Once a task has been created, it is possible to drag it in between steps

7.2.2 <u>Editing/deleting existing templates:</u>

- Click on the desired module to edit/delete
    - To delete a template, click the “DELETE” button
    - To edit, make any desired changes of general information
    - Click “NEXT” when changes are made (if no changes needed, just click “NEXT”).