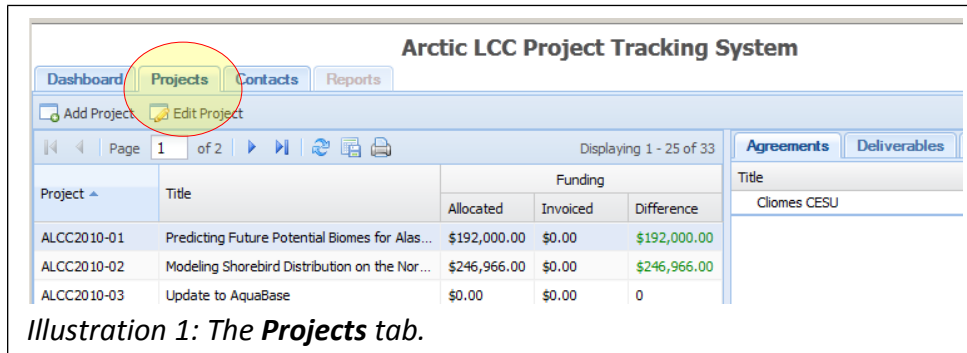


PTS Quick-Start Guide

Link to Arctic LCC PTS: <http://ifw7fair-web:8080/>

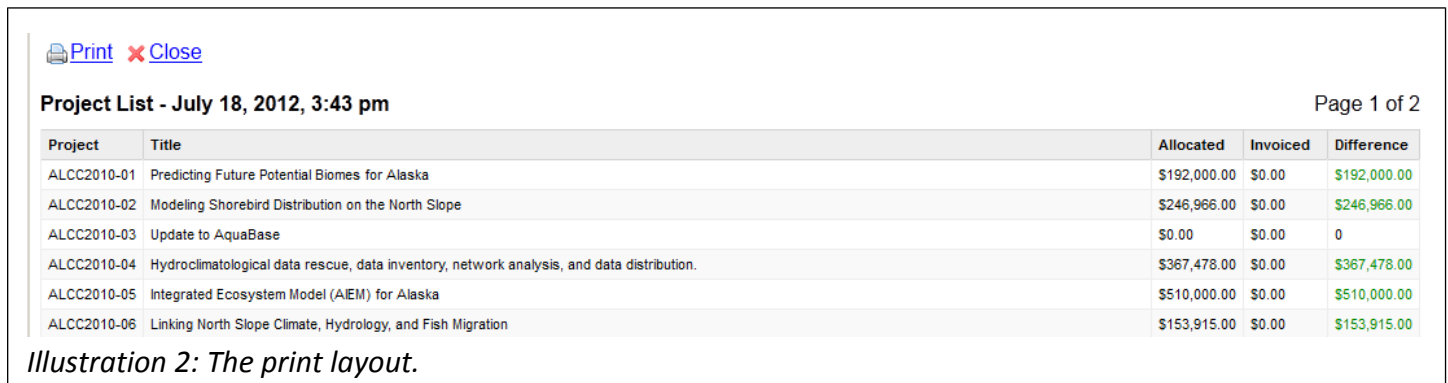
Printing and Downloading the Project List

Users can either print or download a list of projects from the Projects tab.



Printing visible records

To print the visible records click the printer icon. A new screen that displays the records will open in your browser. Remember that no more than 25 records are displayed at once. If you need to print more than one page, go back to the **Projects** tab and select the next page to print.



Downloading records

To download the records click the disk icon. A small window will appear on the page with a link to the download. Users can either save the file or open it with Excel or another program.



Printing and Downloading lists of Deliverables and Tasks

Users can either print or download a list of project deliverables and tasks from the PTS **Dashboard**. When a user clicks the Calendar entry, a new window will open that takes the user directly to the record. Users may also double-click a row in the Deliverable or Task grid to open the record.

Due Date	Assignee	Title
06/29/2012	Philip Martin	Review ecological subsection map draft
07/06/2012	Joshua Bradley	Post report to arcticlcc.org

Illustration 4: Users can toggle between **Tasks** and **Deliverables** using the tabs on the right of the screen.

The example that follows is for **Deliverables**, but the process is identical for Tasks

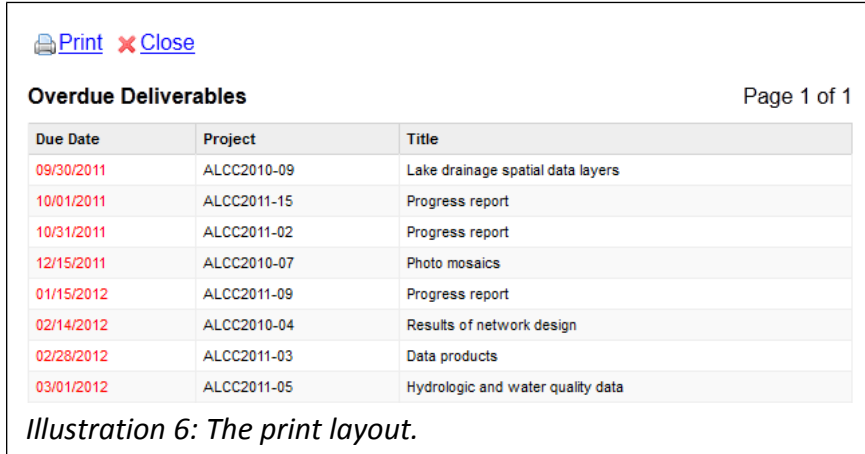
Users also have the option to filter the data (i.e., Due Soon, All, Completed). Users can click the button to cycle through the four different filters or click the down arrow and select the view from the pull-down menu.

Due Date	Project	Title
09/30/2011	ALCC2010-09	Lake drainage spatial c
10/01/2011	ALCC2011-15	Progress report
10/31/2011	ALCC2011-02	Progress report
12/15/2011	ALCC2010-07	Photo mosaics
01/15/2012	ALCC2011-09	Progress report
02/14/2012	ALCC2010-04	Results of network design
02/28/2012	ALCC2011-03	Data products
03/01/2012	ALCC2011-05	Hydrologic and water quality data

Illustration 5: This example shows a list of overdue deliverables.

Printing visible records

To print the visible records click the printer icon located on the task bar. A new screen that displays the records will open in your browser. Remember that no more than 25 records are displayed on the **Dashboard** at once. If you need to print more than one page, go back to the **Dashboard** and select the next page to print.



Print Close


Overdue Deliverables Page 1 of 1

Due Date	Project	Title
09/30/2011	ALCC2010-09	Lake drainage spatial data layers
10/01/2011	ALCC2011-15	Progress report
10/31/2011	ALCC2011-02	Progress report
12/15/2011	ALCC2010-07	Photo mosaics
01/15/2012	ALCC2011-09	Progress report
02/14/2012	ALCC2010-04	Results of network design
02/28/2012	ALCC2011-03	Data products
03/01/2012	ALCC2011-05	Hydrologic and water quality data

Illustration 6: The print layout.

Downloading records

To download the records click the disk icon. A small window will appear on the page with a link to the download. Users can either save the file or open it with Excel or another program.



Download

Click to Download - 6 KB
This file link will be active for two weeks.

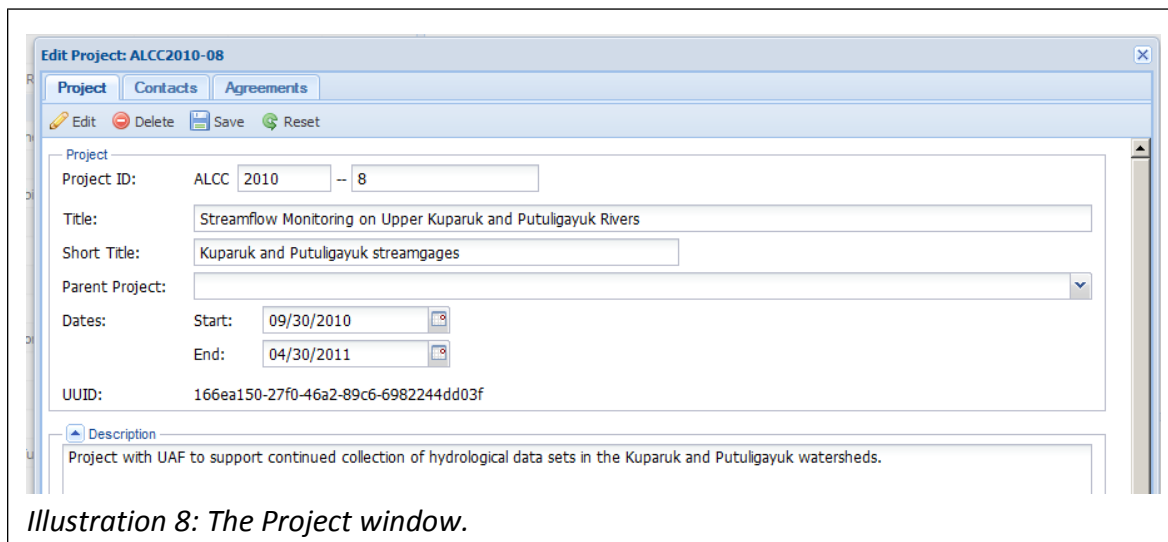
Illustration 7: The download window.

Updating information about deliverables

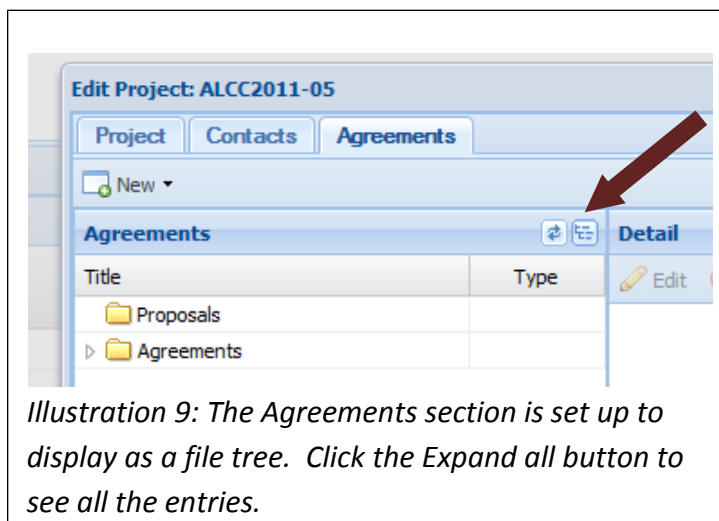
One of the most common tasks that PTS users will encounter is the need to update information about a project's deliverables. Remember that project deliverables are associated with its **Agreements**. There are two ways to access the list of deliverables for a project.

Accessing deliverables from the Projects Tab

1. Double-click a record under the **Projects** tab and a new window will open that contains details about a project.



2. Click the **Agreements** tab.



Accessing records from the Dashboard

When deliverables are entered into the system, entries on the Dashboard Calendar are also generated. When a user places their cursor on an entry on the Calendar, information about that entry will be displayed in a pop-up window. Clicking the Calendar entry will open a new window that takes the user directly to the record. Users may also double-click a row in the Deliverable or Task grid to open the record.

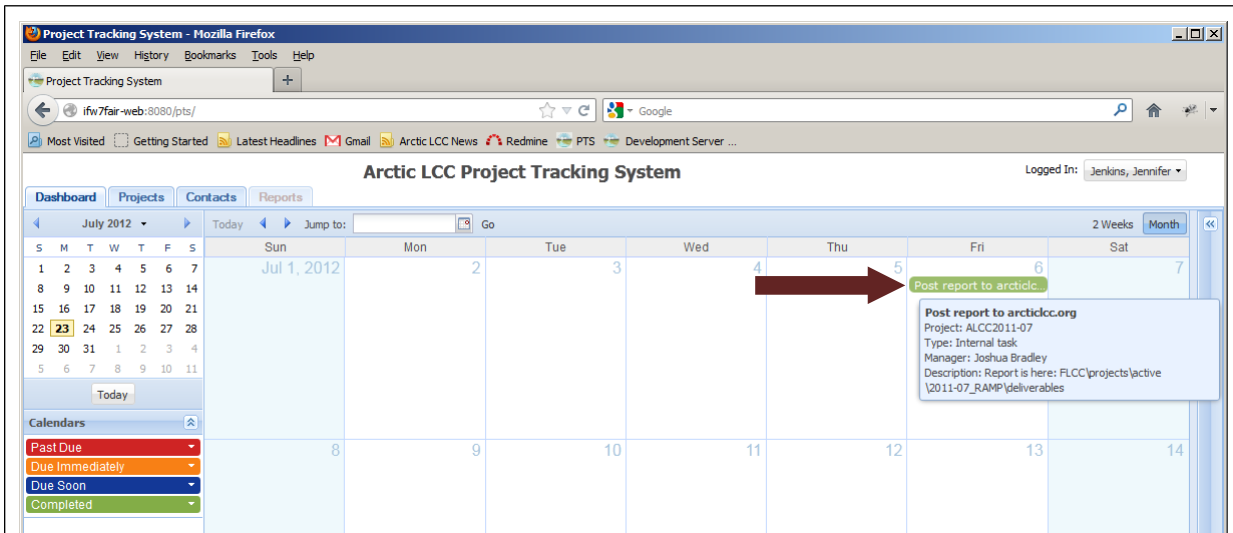
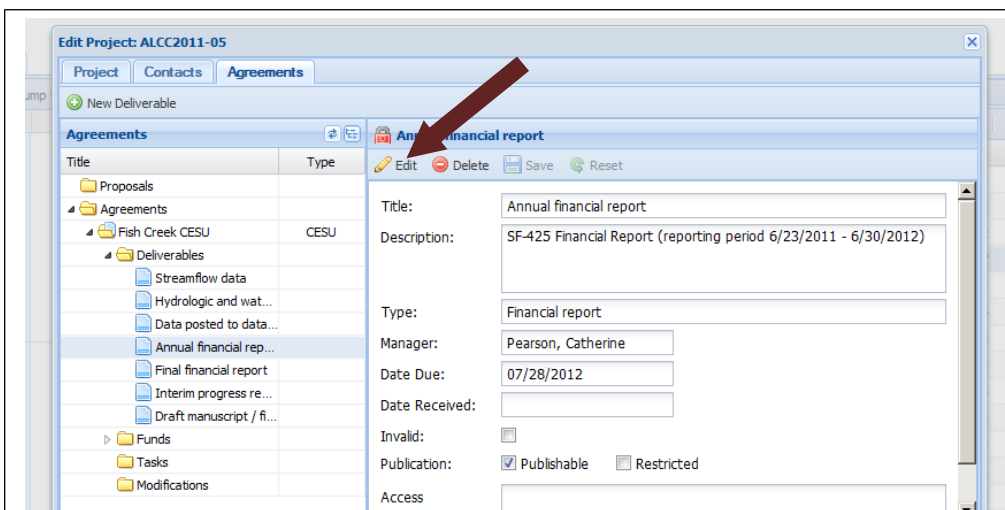


Illustration 10: When a user clicks the Calendar entry, a new window will open that takes the user directly to the record.



*Illustration 11: If you need to edit the record, you **must unlock** it first by clicking the **edit** button.*

Recording Deliverable* Status

*The following also applies to “Tasks”

The PTS allows deliverable status to be recorded. Multiple status entries may be entered for each deliverable.

Each entry contains:

- Status(lowest to highest rank):
 - Overdue: Deliverable or Task is overdue.
 - Received: Deliverable or Task has been delivered.
 - Reviewing: Deliverable or Task is under review - received but not accepted.
 - Revising: Deliverable or Task is being revised.
 - Completed: Deliverable or Task has been accepted as complete.
 - Archived: All items generated by the Deliverable or Task have been archived.
 - Published: All publishable items generated by the Deliverable or Task have been published.
- Effective Date: limited to current and past dates
- User: user creating/editing the entry, automatically updated by the system and is not editable
- Comment (optional)

Status	Effective Date	User	Comment
Received	09/16/2011	Balogh, Greg	This status was automatically generated during a system

Update Cancel

Illustration 12: The Status panel.

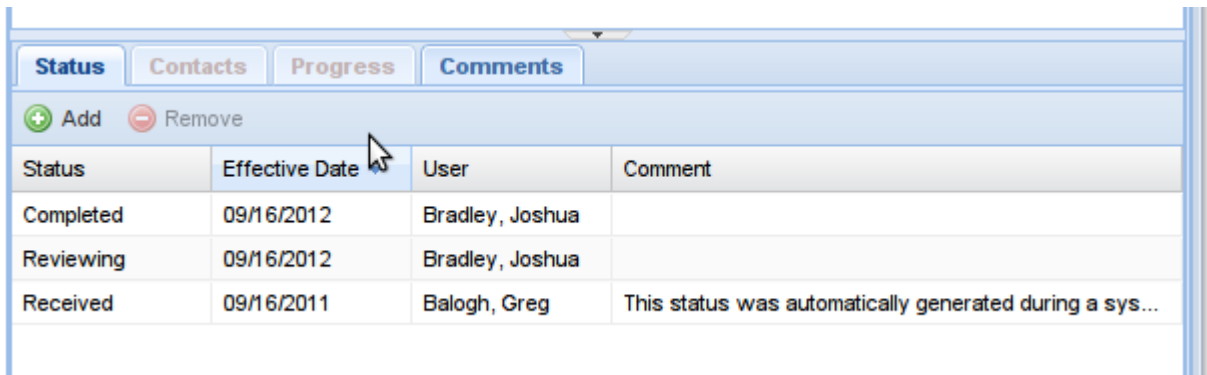
Relationship Between Status and Date

The PTS determines the current status of a deliverable by examining the effective date and “rank”(see previous section) of any status entries assigned to the deliverable. Higher rank statuses take precedence when statuses are assigned the same effective date.



Status	Effective Date	User	Comment
Reviewing	09/28/2012	Bradley, Joshua	Reviewing the reivisions
Revising	09/16/2012	Bradley, Joshua	Initial revisions
Reviewing	09/16/2012	Bradley, Joshua	Taking a first look.
Received	09/16/2011	Balogh, Greg	This status was automatically generated during a sys...

Illustration 13: Status precedence is determined using effective date and rank.



Status	Effective Date	User	Comment
Completed	09/16/2012	Bradley, Joshua	
Reviewing	09/16/2012	Bradley, Joshua	
Received	09/16/2011	Balogh, Greg	This status was automatically generated during a sys...

Illustration 14: For example, if a deliverable is designated as received, reviewed, and completed on the same day, the PTS will determine the status to be completed.

Overdue Deliverables

The PTS calculates overdue status using specific rules. Deliverables are determined to be overdue when the following rules apply(in order of precedence):

1. The deliverable is **manually** assigned the *Overdue* status. In this instance, the PTS follows the rules outlined in the previous [section](#).
2. The deliverable has not been assigned the *Received* or *Completed* status by the deliverable *Due Date*. This rule is automatically enforced by the PTS. However, the statuses *Reviewing* and *Revising* are not considered when determining overdue status. Note, the system does not assign the deliverable a status, rather it calculates the overdue status “on-the-fly”.



Status	Effective Date ▼	User	Comment
Overdue	09/28/2012	Bradley, Joshua	The revisions are overdue
Revising	09/16/2012	Bradley, Joshua	Initial revisions
Reviewing	09/16/2012	Bradley, Joshua	Taking a first look.
Received	09/16/2011	Balogh, Greg	This status was automatically generated during a sys...

Illustration 15: 2. Note that a deliverable may be Received and also marked as Overdue on a subsequent date.

Reporting Deliverable Status

Calendars

The calendars display deliverables and tasks according to the color scheme displayed in the calendar's legend.

Past Due Not received by the deliverable's *Due Date* or marked *Overdue*

Due Immediately Due in less than 30 days

Due Soon Due more than 30 days into the future

Received Received but not completed

Completed Accepted as complete

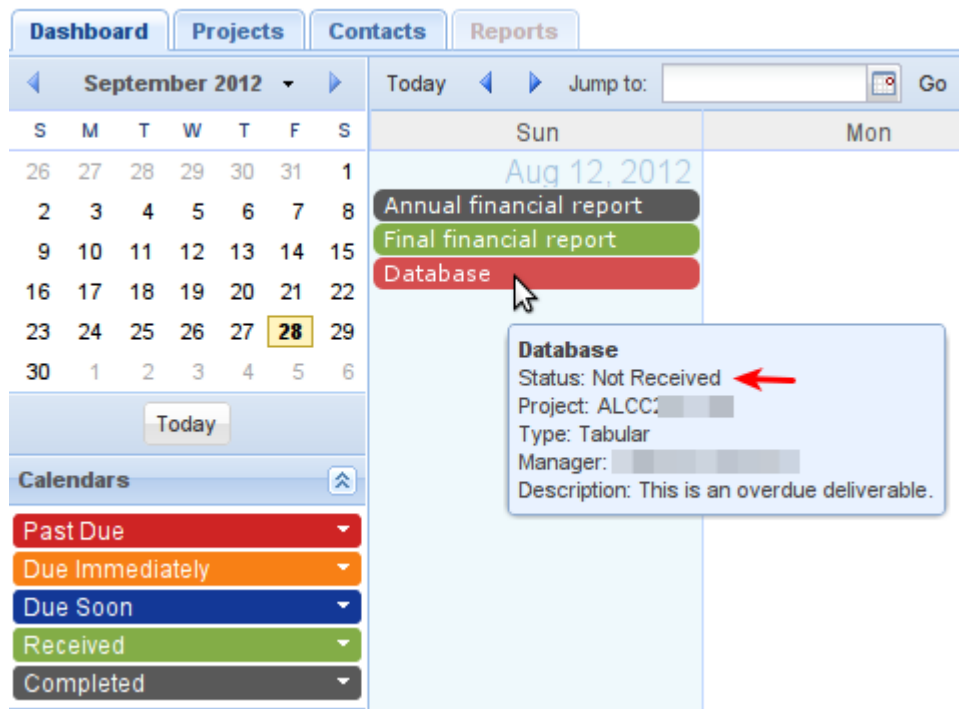


Illustration 16: The deliverable status is identified by color and listed in the hover tip

Dashboard Grids

Status information is available for each deliverable or task in their respective grids on the Dashboard. Status information for deliverables is shown by default. For tasks, it is hidden.

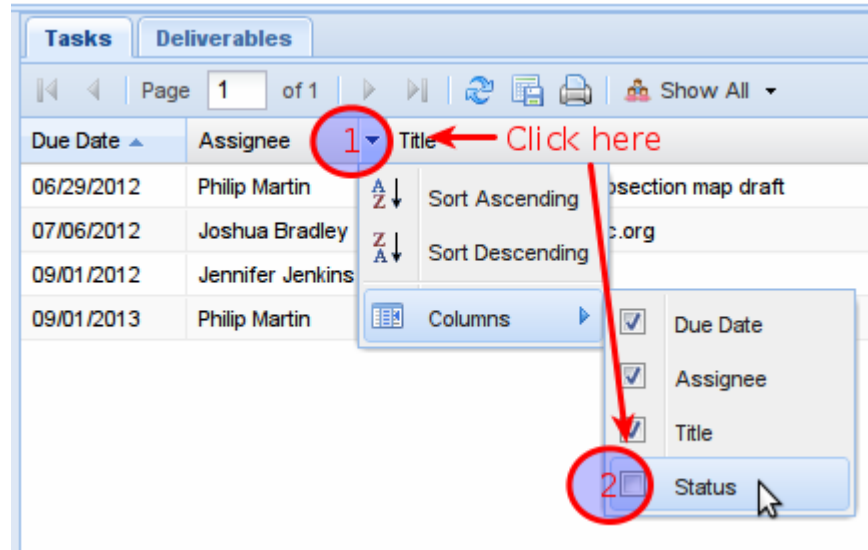


Illustration 17: How to show hidden fields in grids.

Use the button on the toolbar to filter the deliverables according to status in the Deliverable grid. The *Incomplete* filter will display deliverables that have been *received but not completed*. This includes received deliverables that are manually assigned the overdue status. Note that in this scenario the *Days Past Due* are calculated from the effective date of the overdue status.

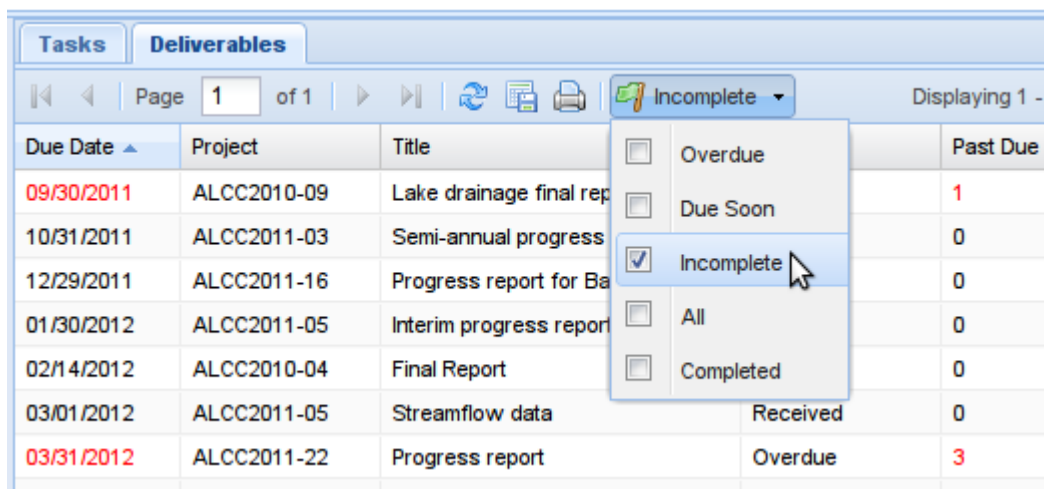


Illustration 18: The Deliverable grid panel with the Incomplete filter applied. Notice the deliverables which have been manually marked as overdue.

Appendix A: Description of “Role” Types

Any contact assigned to a Project must be assigned a “Role”. The table below provides a description for roles available in the pull-down menu.

Role	Description
Collaborator	Person or agency other than the Principle Investigator that makes significant contribution to the project. Typically this will be the agency/organization receiving funding for a given project.
Contributor	Person or agency/organization that makes both financial and intellectual contribution to a project.
Custodian	Person or agency that accepts accountability and responsibility for the data and ensures appropriate care and maintenance of the resource.
Funder	Agency/organization providing all or some of the funding for this project.
Financial Officer	Person or agency/organization that is responsible for the project finances.
Metadata Distributor	Person or agency/organization serving as a metadata clearinghouse for this project.
Primary Contact	Person or agency/organization to contact for acquiring knowledge about this project.
Principal Investigator	Key person or agency/organization responsible for gathering information and conducting research.
Publisher	Person or agency that prepares and maintains the data for this project.