

# PROJECT DASHBOARD User's Manual

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Karina Juarez.

IT Intern – Strategic Projects

# INDEX

Manual is divided per role that may go inside the tool.

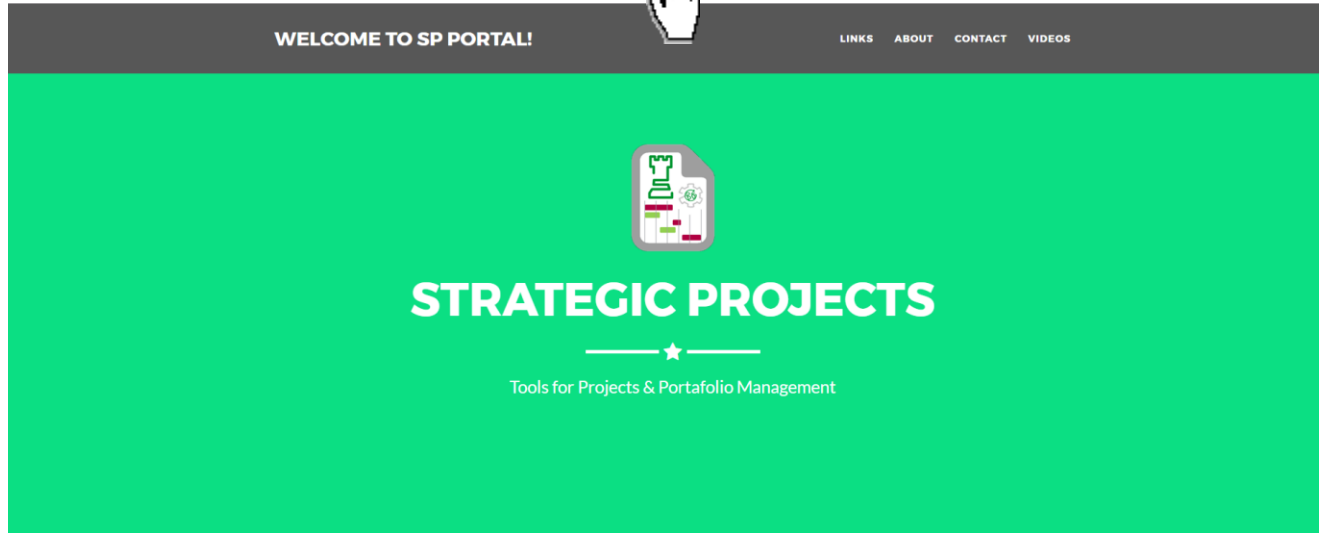
- General User..... 3 to 11
- Project Manager (PM) ..... 12 to 17
- Project Engineer (PE) ..... 18 to 23



PROJECT DASHBOARD

# Step 1

Enter to this link: <http://10.166.181.143/SPPL/welcome.aspx>



FOR A BETTER FUNCTIONALITY, PLEASE USE GOOGLE CHROME

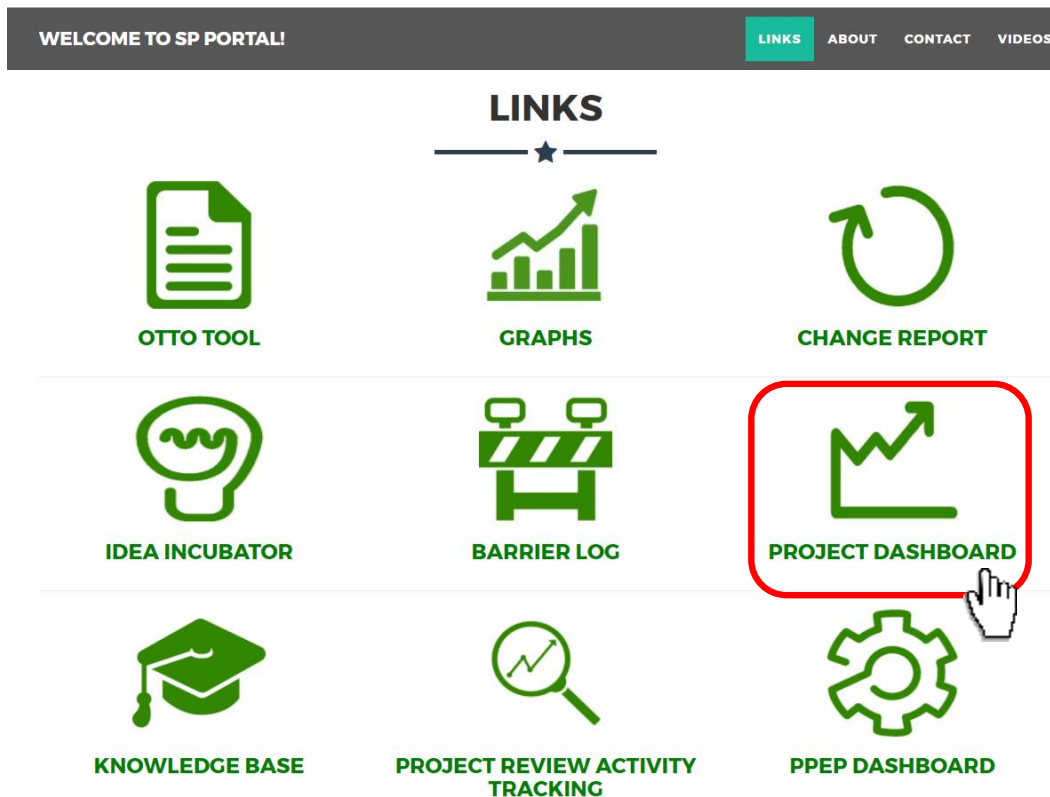


## Step 2

Go to the Links Section and click PROJECT DASHBOARD image



PROJECT DASHBOARD



# Step 3

Inside Dashboard is a set of filters that you can combine in order to reflect the information needed, click on Refresh button to generate the lines.



PROJECT DASHBOARD



## Dashboard

BACK TO SP PORTAL



### Strategic Project Team

### General Information

### Groups

Select PM

Select Cluster

OTTO ID

Select PE

Select BU

Groups

Select SQE

Select Commodity

Select Lever

Active

Select Year



### Control

Refresh

Edit Mode

### More Information

Show Core Team

Show Financial Info

Click to refresh if you move the filters.



General Information											Status				PPEP Information	
ID	Status	Action Plan Title	OTTO ID	Project Lead Idea Evolution Leader	Lever	Commodity	P&L Impact Date	Entity	Cluster	BU	P&L Impact Risk	General Status	Barriers / Escalations	Comments	Progress by PPEP Approval	Go to PPEP Dashboard
451	Active	17_G4_PCB_COS_Triconex	199090	Carlos Montemayor	COS	G4	Nov 2016, Dec 2016, Sep 2017, Oct 2017, Nov 2017, Feb 2018, Dec 2018	Reynosa Invensys Electronica	NAM ELECTRONICS	Industry	-	-	-		<div><div>86%</div></div>	PPEP
408	Active	16_INT_024-03_UMP-Deltran & SPI to Asia	189893	Karla Alonzo	COS	K2	Sep 2017	Monterrey 3 (Controls)	MTS / MTO	Industry	LOW RISK	OK	OK	Tool for part number 090-03 was modified after qualification had been completed and prior to first production order, delayed savings until October 2017	<div><div>91%</div></div>	PPEP

# Step 4

To see PPEP information, click on PPEP button.



PROJECT DASHBOARD



## Dashboard

BACK TO SP PORTAL



### Strategic Project Team

Select PM ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Select Commodity ▼

Active ▼

### Groups

OTTO ID

Groups ▼

Select Lever ▼

Select Year ▼



### Control

Refresh

Edit Mode

### More Information

Show Core Team

Show Financial Info

General Information											Status				PPEP Information	
ID	Status	Action Plan Title	OTTO ID	Project Lead Idea Evolution Leader	Lever	Commodity	P&L Impact Date	Entity	Cluster	BU	P&L Impact Risk	General Status	Barriers / Escalations	Comments	Progress by PPEP Approval	Go to PPEP Dashboard
451	Active	17_G4_PCB_COS_Triconex	199090	Carlos Montemayor	COS	G4	Nov 2016, Dec 2016, Sep 2017, Oct 2017, Nov 2017, Feb 2018, Dec 2018	Reynosa Invensys Electronica	NAM ELECTRONICS	Industry	-	-	-		<div>86%</div>	PPEP
408	Active	16_INT_024-03_UMP-Deltran & SPI to Asia	189893	Karla Alonzo	COS	K2	Sep 2017	Monterrey 3 (Controls)	MTS / MTO	Industry	LOW RISK	OK	OK	Tool for part number 090-03 was modified after qualification had been completed and prior to first production order, delayed savings until October 2017	<div>91%</div>	PPEP

# Step 5

After clicking on PPEP button, this is the next general view from selected PPEP.

If you want to see detail progress, click on Hide/Unhide button.



PROJECT DASHBOARD

PROGRESS BY PPEP NUMBER

PROGRESS BY SQE

BACK TO SP PORTAL

GROUPS

Strategic P

PPEP STATUS

-

PPEP OWNER

Aldo Carde

PART NUMBER

PPEP NUMBER

OTTO ID

199090

Refresh

Hide / Unhide

Action Plan Title	PPEP Owner	Part Number	PPEP Number	Savings	PPEP Link	OTTO ID	PPEP Status	Progress of PPEP Number
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300191-001	AAEU-AFYUQB	-7,612.00	PPEP Link	199090	Approved	100%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300299-001	AAEU-ANTNUW	-110.00	PPEP Link	199090	On Going	85%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300307-001	AAEU-AGCTSX	-4,603.00	PPEP Link	199090	Approved	100%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300320-001	AAEU-ACUP7M	-143.00	PPEP Link	199090	On Going	90%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300323-001	AAEU-ABBT7V	-292.00	PPEP Link	199090	Approved	100%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300333-001	AAEU-AFYUNS	-12,066.00	PPEP Link	199090	Approved	100%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300337-001	AAEU-AB4HOM	-237,377.00	PPEP Link	199090	Approved	100%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300341-001	AAEU-A7ESBT	-81,625.00	PPEP Link	199090	Approved	100%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300342-001	AAEU-A7ETGH	-223,798.00	PPEP Link	199090	Approved	100%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300344-001	AAEU-ACUP9T	-205,605.00	PPEP Link	199090	On Going	60%
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300346-001	AAEU-AG8QCT	-95,018.00	PPEP Link	199090	On Going	20%

# Step 6

This is the detail version of PPEP progress.



PROJECT DASHBOARD

## PROGRESS BY PPEP NUMBER

PROGRESS BY SQE

BACK TO SP PORTAL

GROUPS

PPEP STATUS

PPEP OWNER

PART NUMBER

PPEP NUMBER

OTTO ID

Strategic Pro

-

Aldo Cardenas

199090



Refresh

Hide / Unhide

Action Plan Title	PPEP Owner	Part Number	PPEP Number	Savings	PPEP Link	OTTO ID	PPEP Status	Progress of PPEP Number	PPEP Supplier Signature	Design Records	Logistics Files	Component Verification Plan	Traceability	Incoming Inspection Plan	Historical Data Transfer	Process Flow Charts	Process FMEA	Supplier QA Control Plan	FAIR	Short Term Process Capability Studies	Process Measurement System Analysis	Preventive Maintenance Plan	Third Party Requirements	Certificate of Conformance	Supplier Process Audit	3 P's	Functional Product Evaluation	Final Approval	
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300191-001	AAEU-AFYUQB	-7,612.00	<a href="#">PPEP Link</a>	199090	Approved	<div><div>100%</div></div>	Done	Done	Done	Done	NR	Done	NR	NR	NR	NR	Done	NR	NR	NR	Done	NR	NR	Done	Done	Done	
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300299-001	AAEU-ANTNUW	-110.00	<a href="#">PPEP Link</a>	199090	On Going	<div><div>85%</div></div>	On Going	Done	Done	Done	Done	NR	NR	Done	Done	Done	Done	Done	Done	NR	NR	NR	Done	Done	On Going		
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300307-001	AAEU-AGCTSX	-4,603.00	<a href="#">PPEP Link</a>	199090	Approved	<div><div>100%</div></div>	Done	Done	Done	Done	NR	Done	NR	NR	NR	NR	Done	NR	NR	NR	Done	NR	NR	Done	Done	Done	
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300320-001	AAEU-ACUP7M	-143.00	<a href="#">PPEP Link</a>	199090	On Going	<div><div>90%</div></div>	Done	Done	Done	Done	NR	Done	NR	NR	NR	NR	Done	NR	NR	NR	Done	NR	NR	Done	Done	On Going	
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300323-001	AAEU-ABBT7V	-292.00	<a href="#">PPEP Link</a>	199090	Approved	<div><div>100%</div></div>	Done	Done	Done	Done	NR	Done	NR	NR	NR	NR	Done	NR	NR	NR	Done	NR	NR	Done	Done	Done	
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300333-001	AAEU-AFYUNS	-12,066.00	<a href="#">PPEP Link</a>	199090	Approved	<div><div>100%</div></div>	Done	Done	Done	Done	NR	Done	NR	NR	NR	NR	Done	NR	NR	NR	Done	NR	NR	Done	Done	Done	
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300337-001	AAEU-AB4OOM	-237,377.00	<a href="#">PPEP Link</a>	199090	Approved	<div><div>100%</div></div>	Done	Done	Done	Done	Done	Done	NR	Done	Done	Done	Done	Done	Done	Done	Done	Done	Done	NR	Done	Done	Done
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300341-001	AAEU-A7ESBT	-81,625.00	<a href="#">PPEP Link</a>	199090	Approved	<div><div>100%</div></div>	Done	Done	Done	Done	Done	Done	NR	Done	Done	Done	Done	Done	Done	Done	Done	Done	Done	NR	Done	Done	Done
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300342-001	AAEU-A7ETGH	-223,798.00	<a href="#">PPEP Link</a>	199090	Approved	<div><div>100%</div></div>	Done	Done	Done	Done	Done	Done	NR	Done	Done	Done	Done	Done	Done	Done	Done	Done	Done	NR	Done	Done	Done
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300344-001	AAEU-ACUP9T	-205,605.00	<a href="#">PPEP Link</a>	199090	On Going	<div><div>60%</div></div>	Done	Done	Done	Done	NR	Done	NR	NR	NR	NR	On Going	NR	NR	NR	Done	NR	NR	On Going	On Going	On Going	
17_G4_PCB_COS_Triconex	Aldo Cardenas	T7300346-001	AAEU-AGBQCT	-95,018.00	<a href="#">PPEP Link</a>	199090	On Going	<div><div>20%</div></div>	On Going	On Going	On Going	On Going	NR	On Going	NR	NR	NR	NR	Done	NR	NR	NR	On Going	NR	NR	On Going	Done	On Going	



# Step 7

To see Core Team assigned to the project click on "Show Core Team" button



PROJECT DASHBOARD



## Dashboard

BACK TO SP PORTAL 

### Strategic Project Team

Select PM ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Select Commodity ▼

Active ▼

### Groups

OTTO ID

Groups ▼

Select Lever ▼

Select Year ▼



### Control

Refresh

Edit Mode

### More Information

Show Core Team

Show Financial Info



General Information															Status			
ID	Status	Action Plan Title	OTTO ID	Project Lead Idea Evolution Leader	PE	SQE	MPL	Buyer	Lever	Commodity	P&L Impact Date	Entity	Cluster	BU	P&L Impact Risk	General Status	Barriers / Escalations	C
451	Active	17_G4_PCB_COS_Triconex	199090	Carlos Montemayor	Catalina Gonzalez	Aldo Cardenas			COS	G4	Nov 2016, Dec 2016, Sep 2017, Oct 2017, Nov 2017, Feb 2018, Dec 2018	Reynosa Invensys Electronica	NAM ELECTRONICS	Industry	-	-	-	

# Step 8

To see Core Team assigned to the project click on "Show Financial Info" button



PROJECT DASHBOARD



## Dashboard

BACK TO SP PORTAL



### Strategic Project Team

Select PM ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Select Commodity ▼

Active ▼

### Groups

OTTO ID

Groups ▼

Select Lever ▼

Select Year ▼



### Control

Refresh

Edit Mode

### More Information

Show Core Team

Show Financial Info



General Information										2017					2018					Status				PPEP Information	
Status	Action Plan Title	OTTO ID	Project Lead Idea Evolution Leader	Lever	Commodity	P&L Impact Date	Entity	Cluster	BU	EOY Current Year OnGoing	EOY WOCF Current Year OnGoing	EOY Current Year Closed	TOTAL EOY Current Year	TOTAL EOY WOCF Current Year	EOY Next Year OnGoing	EOY WOCF Next Year OnGoing	EOY Next Year Closed	TOTAL EOY Next Year	TOTAL EOY WOCF Next Year	P&L Impact Risk	General Status	Barriers / Escalations	Comments	Progress by PPEP Approval	Go to PPEP Dashboard
Active	17_G4_PCB_COS_Triconex	199090	Carlos Montemayor	COS	G4	Nov 2016, Dec 2016, Sep 2017, Oct 2017, Nov 2017, Feb 2018, Dec 2018	Reynosa Invensys Electronica	NAM ELECTRONICS	Industry	-63,754	-135,291	-285,616	-349,371	-420,908	-151,624	-412,450	0	-151,624	-412,450	-	-	-		86%	PPEP
Active	16_INT_024-03_UMP-Deltran & SPI to Asia	189893	Karla Alonzo	COS	K2	Sep 2017	Monterrey 3 (Controls)	MTS / MTO	Industry	-60,888	-81,183	0	-60,888	-81,183	-121,775	-162,367	0	-121,775	-162,367	LOW RISK	OK	OK	Tool for part number 090-03 was modified after qualification had been completed and prior to first production order, delayed savings until October 2017	91%	PPEP

# Step 9



PROJECT DASHBOARD

Download the information generated by clicking on Excel button.



## Dashboard

### Strategic Project Team

Select PM ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Select Commodity ▼

Active ▼

### Groups

OTTO ID

Groups ▼

Select Lever ▼

Select Year ▼



### Control

Refresh

Edit Mode

### More Information

Show Core Team

Show Financial Info

BACK TO SP PORTAL





## PROJECT DASHBOARD

PM

# Step 10



## PROJECT DASHBOARD

As a PM you are able to upload projects you are working in, and also assign yourself as the PM in case the Project is already uploaded, to do this you need to go to Edit Mode.



## Dashboard

### Strategic Project Team

Select PM ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Select Commodity ▼

Active ▼

### Groups

OTTO ID

Groups ▼

Select Lever ▼

Select Year ▼



### Control

Refresh

Edit Mode

BACK TO SP PORTAL



### More Information

Show Core Team

Show Financial Info

# Step 11

Login as PM, enter Username and Password




PROJECT DASHBOARD

## DASHBOARD



Please Login

 Submit



Don't have a user account?

Register Now!

Forgot your password?

Get Password

Back

# Step 12

Select filters needed.



PROJECT DASHBOARD

LOG OFF



## Dashboard

### Strategic Project Team

Karina Juarez ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Active ▼

### Groups

OTTO ID



### Control

Refresh

New Project

Assign Myself as Resource

### More Information

Show Core Team

Show Financial Info

Click to  
refresh if  
you move  
the filters.

# Step 12

If you want to create a new Project, click in button.



PROJECT DASHBOARD



## Dashboard

LOG OFF

### Strategic Project Team

Karina Juarez ▼  
Select PE ▼  
Select SQE ▼

### General Information

Select Cluster ▼  
Select BU ▼  
Active ▼

### Groups

OTTO ID



### Control

Default  
New Project  
Assign myself as...

### More Information

Show Core Team  
Show Financial Info

## New Project

\* Mandatory field

OTTO ID:  \*

☐ I do not have a OTTO ID

Action Plan Title:  \*

Project Leader / Project Manager:  \*

Lever:  \*

Impact Date:  \*

Entity:  \*

Cluster:  \*

Business Unit:  \*

Month Savings:  \*

EOY Current Year On Going:  \*

EOY WOFC Current Year On Going:  \*

EOY Current Year Closed:  \*

Search

Submit   
Cancel

Do not forget to  
save changes.

1. Enter OTTO ID and click on search.
2. If the OTTO ID is found information will be filled automatically.
3. If the Project do not have an OTTO ID, select the checkbox and fill mandatory information.



# Step 13



PROJECT DASHBOARD

If Project is already uploaded in the Dashboard you can assign yourself as Resource (PM).

Go to section marked below, enter OTTO ID and click save.



## Dashboard

LOG OFF



### Strategic Project Team

Karina Juarez ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Active ▼

### Groups

OTTO ID



### Control

Refresh

New Project

Assign Myself as Resource

### More Information

Show Core Team

Show Financial Info

## Assign To:

\* Mandatory field

OTTO ID:

Project Leader / Project Manager:

Karina Juarez ▼

Save



ie Is On

Schneider  
Electric



PE

# Step 14



## PROJECT DASHBOARD

As a PE you are able to upload projects you are working in, and also assign yourself as the PE in case the Project is already uploaded, to do this you need to go to Edit Mode.



## Dashboard

### Strategic Project Team

Select PM ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Select Commodity ▼

Active ▼

### Groups

OTTO ID

Groups ▼

Select Lever ▼

Select Year ▼



### Control

Refresh

Edit Mode



### More Information

Show Core Team

Show Financial Info

BACK TO SP PORTAL



# Step 15

Login as PE, enter Username and Password




PROJECT DASHBOARD

## DASHBOARD



Please Login

 Submit

Don't have a user account?

Register Now!

Forgot your password?

Get Password

Back

# Step 16

Select filters needed.



## Dashboard

### Strategic Project Team

Karina Juarez ▼

Select PE ▼

Select SQE ▼

### General Information

Select Cluster ▼

Select BU ▼

Active ▼

### Groups

OTTO ID



PROJECT DASHBOARD

LOG OFF



### Control

Refresh

New Project

Assign Myself as Resource

### More Information

Show Core Team

Show Financial Info

Click to  
refresh if  
you move  
the filters.

# Step 17

If you want to create a new Project, click in button.



PROJECT DASHBOARD



## Dashboard

LOG OFF



### Strategic Project Team

Karina Juarez ▼  
Select PE ▼  
Select SQE ▼

### General Information

Select Cluster ▼  
Select BU ▼  
Active ▼

### Groups

OTTO ID



### Control

Default  
New Project  
Assign myself as...

### More Information

Show Core Team  
Show Financial Info

## New Project

\* Mandatory field



OTTO ID:  \*

☐ I do not have a OTTO ID

Action Plan Title:  \*

Project Leader / Project Manager:  \*

Lever:  \*

Impact Date:  \*

Entity:  \*

Cluster:  \*

Business Unit:  \*

Month Savings:  \*

EOY Current Year On Going:  \*

EOY WOCF Current Year On Going:  \*

EOY Current Year Closed:  \*

Search



Submit  
Cancel




Do not forget to  
save changes.


1. Enter OTTO ID and click on search.
2. If the OTTO ID is found information will be filled automatically.
3. If the Project do not have an OTTO ID, select the checkbox and fill mandatory information.

# Step 18

If Project is already uploaded in the Dashboard you can assign yourself as Resource (PE).  
Go to section marked below, enter OTTO ID and click save.



## Dashboard

LOG OFF 

### Strategic Project Team

Karina Juarez ▼

Select PE ▼

Select SQE ▼

### General Information


Select Cluster ▼

Select BU ▼

Active ▼

### Groups

OTTO ID



### Control

Refresh

New Project

Assign Myself as Resource

### More Information

Show Core Team

Show Financial Info

## Assign To:

OTTO ID:  
Project Leader / Project  
Manager:

\* Mandatory field

Karina Juarez ▼

Save



Life Is On



**Schneider**  
Electric