# GLOBAL DELIVERY PORTAL USER GUIDE

August 2023

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## Global Delivery Portal

The Global Delivery Portal (GDP) is a web-based application used by Delivery and Practice Owners to report on engagement status, overall health, and risk attributes. The tool is owned and maintained by the Global Services PMO. The purpose of the tool is to allow Delivery and Practice team members and leaders to see consolidated status data, and to allow our Information Security team to pull security and risk information as needed. This user guide will cover the basics of navigation and how to use the various tools and reports focusing on the following areas:

- Engagement Status Dashboard (Home Page)
- Engagement Details
- Status Report
- Security Profile
- Risk Survey
- Reports Page

## Best Practices/Expectations

The Global Delivery Portal is used primarily by the Delivery teams to validate and track information about the engagements and keep a steady and consistent view of engagement status for leadership. The tool has built in “Green, Yellow, Red” traffic light style data tracking to provide quick visibility into the different statuses of engagements. Leadership uses the reports to see and track if there are additional resources or assistance needed for customer situations. This is a not used as a negative tick on an engagement, or a “bad list”. We want to ensure that all challenging situations have the right level of support and visibility so that we can ensure customer success.

We ask that Delivery teams perform the following steps:

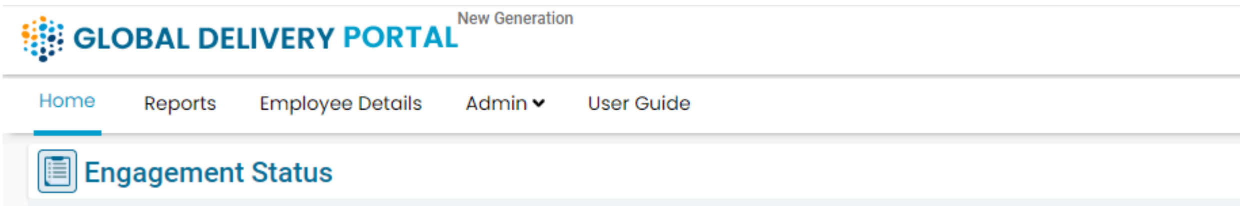
1) Engagement Start Up
    a. Make sure that the appropriate record is set up and that the data in the Engagement Details are correct
    b. Select the Risk Survey attributes and the Security Profile answers
2) Weekly
    a. Update the Status Report with current information
3) Quarterly or as attributes change (re-assess during PCR process and/or every 90 days)
    a. Update the Risk Survey and Security Profile

For details on how to navigate the systems and fill out your reports, see the appropriate sections below.

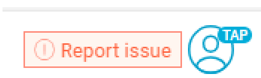
## General Navigation

The Global Delivery Portal (GDP) has been designed to make it easy to access just what you need to be able to get your various jobs done. The navigation is a series of icons on the top of the landing page as shown below in the image. The default view is to have the Icons and Titles collapsed to just the Icon view as seen here.




1) HOME: This is the main page where you will find the Engagement Status Report Dashboard.
2) REPORTS: Use this link to access a variety of standard reports from the GDP.
3) Employee details: This feature is to search employee id for internal resources. In case you cannot find the resource in this list, reach out to the resource or CSA .
4) ADMIN: **NOTE: only Administrators will see this button!**
5) USER GUIDE: This link provides access to the GDP User Guide and online training in Degreed.
6) Report Issue: Use this link to log a ticket for GDP support. Which is at top right end of the landing page.

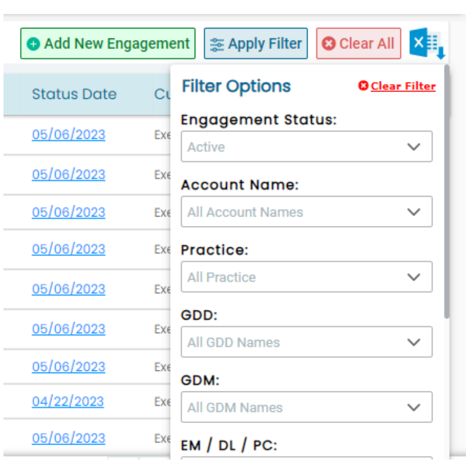



## Engagement Status (Home)

The GDP home page and dashboard view allows quick access and easy filtering to the content that you need access to the most. Use the Apply filters to locate the records you would like to view or take any action on.

### Filtering:

Your status report view can be filtered by selecting from a single filter or multiple filters. To use, select an item from your chosen drop-down list. Click on “Clear filter” to reset all filters.



Your filter choices are:

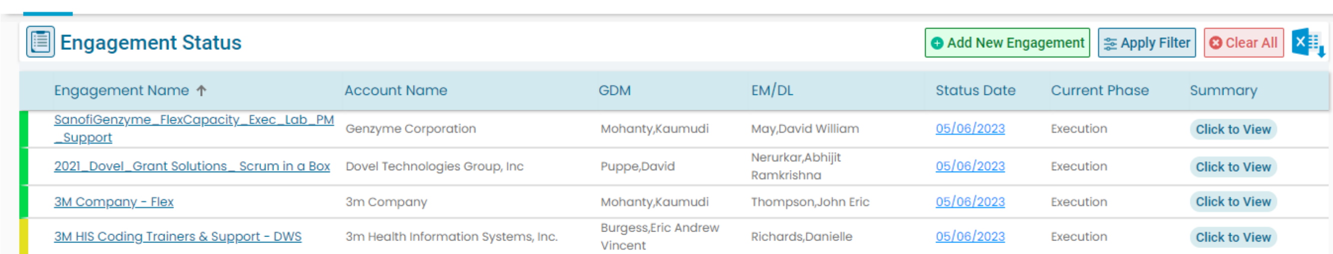
- Engagement Status: you can select Active, Closed, or All Engagements to pull active and closed at the same time
- Account Name: you can filter by Customer Account Name
- Practice: you can filter by all Practices or select as per your choice
- GDD: you can filter by using Global Delivery Director
- GDM: you can filter by all Global Delivery Managers or select a specific name(s)
- EM / DL / PC: you can filter by all Delivery owners or select a specific name(s). Project coordinators are also included as part of the list.
- Business Unit: you can filter by all Business Units or engagements aligned to specific Business Units
- PeopleSoft Project Id: you can filter by project id, multiple project id can also filtered
- GDP ID: you can filter by GDP ID
- The filter criteria is stored in user local cache which means the filters criteria selected will be available even after navigating across different tabs in the application

### Search Results


There is a default of 15 items per page for performance, but you can increase the display as you see fit. The Excel download will grab the entire data set, NOT just the view set.

## The Dashboard

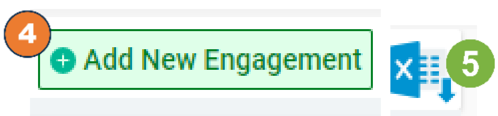
The dashboard is the default view that you will see on the home page and it displays the engagement statuses listed in alphabetical order by Engagement Name. The intention of this section is to provide users the ability to quickly access the information you need. It lists the Engagement Name, Account Name, GDM, EM/DL assigned, Status Date, and Status Summary. Your filters will drive what you see in the dashboard.



1) When you click on the Status Tom, it will take you to the Status Report details for that engagement. You will have the ability to edit, view, and create new Status Reports from this location (see the Status Report Section).
2) When you click on the Engagement Name, it will take you to the Engagement Details landing page (see Engagement Details section).
   a. You will be able to make changes and/or view the base data that makes up the engagement information.
3) The Status indicator tom is a visual cue of all of the statuses in the status report. This is not a calculated field, but a representation of the presence of risks and issues. This means if all sections are Green, the indicator will show as green. If there are any Yellow or Red statuses, the indicator will show Yellow or Red as appropriate to make the current situation easily visible.

**NOTE: As a reminder, this is not being used a "gotcha" report. We have a vested interest as a company in providing as much support as necessary for customers and engagements in need.**

Two features to call your attention too that will be used "as needed" are on the right side of the Dashboard bar: Add New Engagement and the Excel download icon.

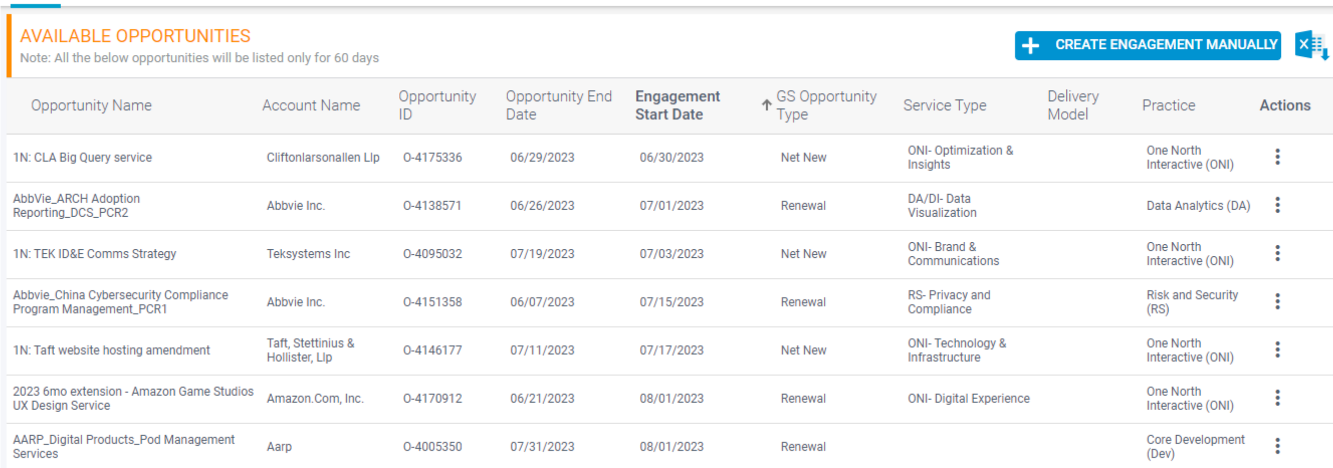



4) Add New Engagement will predominantly be utilized by the PMO team to make sure all new opportunities are attached to the appropriate GDP record, or used to create a new one. A few key features are highlighted below in **Add a New Engagement**.
5) The Excel download icon will download the data you have selected in the filter and search results.
   a. If you select no filters in your Search criteria, it will download the entire data set.
   b. If you select a filter, it will only download your filtered results.
   c. The data elements available in filter criteria like GDM and Business Unit are also included in the export.

## Add a New Engagement

For most engagements, with the exception of Flex engagements and work based in EMEA, the average user should not need to use the Add New Engagement feature. The PMO engagement startup process will be leveraged to create new engagements or attach opportunities to existing engagement records. This section will be largely for informational purposes only.

As part of the engagement startup process, when an opportunity is flagged as "Closed Won", a GDP/SMP notification will be sent during which the PMO will request Practice/Delivery Leadership to provide the direction on whether to create a new record or add the opportunity to an existing engagement. There are also rare occasions when the opportunity has not flowed into the GDP from Connected and we will need to create the record manually. When you click on "Add New Engagement" it will show the following landing page:



AVAILABLE OPPORTUNITIES
Note: All the below opportunities will be listed only for 60 days
CREATE ENGAGEMENT MANUALLY

| Opportunity Name | Account Name | Opportunity ID | Opportunity End Date | Engagement Start Date | GS Opportunity Type | Service Type | Delivery Model | Practice | Actions |
|---|---|---|---|---|---|---|---|---|---|
| 1N: CLA Big Query service | Cliftonlarsonallen Llp | 0-4175336 | 06/29/2023 | 06/30/2023 | Net New | ONI- Optimization & Insights | | One North Interactive (ONI) | ⋮ |
| AbbVie_ARCH Adoption Reporting_DCS_PCR2 | Abbvie Inc. | 0-4138571 | 06/26/2023 | 07/01/2023 | Renewal | DA/DI- Data Visualization | | Data Analytics (DA) | ⋮ |
| 1N: TEK ID&E Comms Strategy | Teksystems Inc | 0-4095032 | 07/19/2023 | 07/03/2023 | Net New | ONI- Brand & Communications | | One North Interactive (ONI) | ⋮ |
| Abbvie_China Cybersecurity Compliance Program Management_PCR1 | Abbvie Inc. | 0-4151358 | 06/07/2023 | 07/15/2023 | Renewal | RS- Privacy and Compliance | | Risk and Security (RS) | ⋮ |
| 1N: Taft website hosting amendment | Taft, Stettinius & Hollister, Llp | 0-4146177 | 07/11/2023 | 07/17/2023 | Net New | ONI- Technology & Infrastructure | | One North Interactive (ONI) | ⋮ |
| 2023 6mo extension - Amazon Game Studios UX Design Service | Amazon.Com, Inc. | 0-4170912 | 06/21/2023 | 08/01/2023 | Renewal | ONI- Digital Experience | | One North Interactive (ONI) | ⋮ |
| AARP_Digital Products_Pod Management Services | Aarp | 0-4005350 | 07/31/2023 | 08/01/2023 | Renewal | | | Core Development (Dev) | ⋮ |

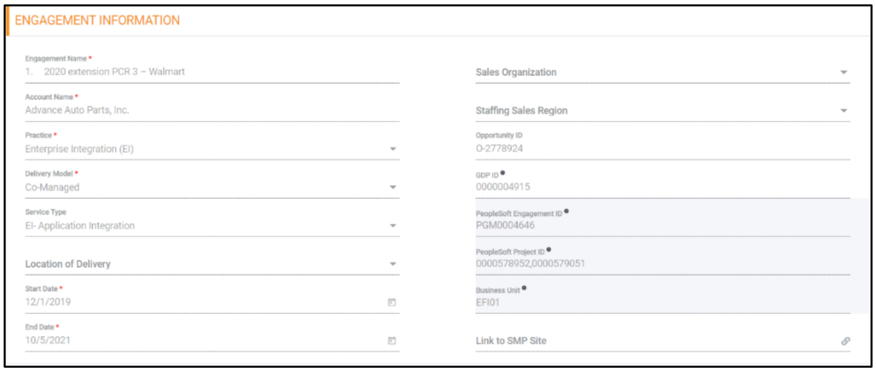
Click on the 3 dots on the right side of the opportunity to display the **Actions** menu

1) The first selection is **Create New Engagement** to create a new record populated with the opportunity data. Status reports, security profiles and risk surveys will still need to be filled out.
2) If you select **Attach to Existing Engagement**, it will connect a new opportunity to an existing engagement record. This will be used for renewals, extensions and other expansions within the same program, and will not require a new set of status reports, security profiles, or risk surveys
3) **Create Engagement Manually**: This is the feature that the PMO (or Delivery teams) will use to create a new project from scratch if an opportunity was not in the system or the engagement needs to be set up without one.
    a. The process will require filling out the Engagement Details content manually instead of automatically from the opportunity.
4) Click on the Excel download icon to download the list in an Excel format for whatever needs you may have.

## Engagement Details

We leverage the GDP to track and connect our engagements with the correct source data, like practices, location, service type and more. The Engagement Details page contains all of this information, as well as the ability to assign stakeholders to the engagement for quick access and viewing. To access the Engagement Details, click your Engagement Name on the Dashboard and it will take you to this landing page: the top section is the Engagement Information, and bottom section has Engagement Stakeholders. The very bottom of the page also will display a change log that will allow you to see the changes that were done over time.

## Engagement Information




The Engagement Information has several content areas that will need to be filled in. Most of the data should come from the opportunity record as it gets published into the GDP. The next grid will cover which fields are included and need to be entered in. Anything that is required will need to be filled out before the record can be saved.

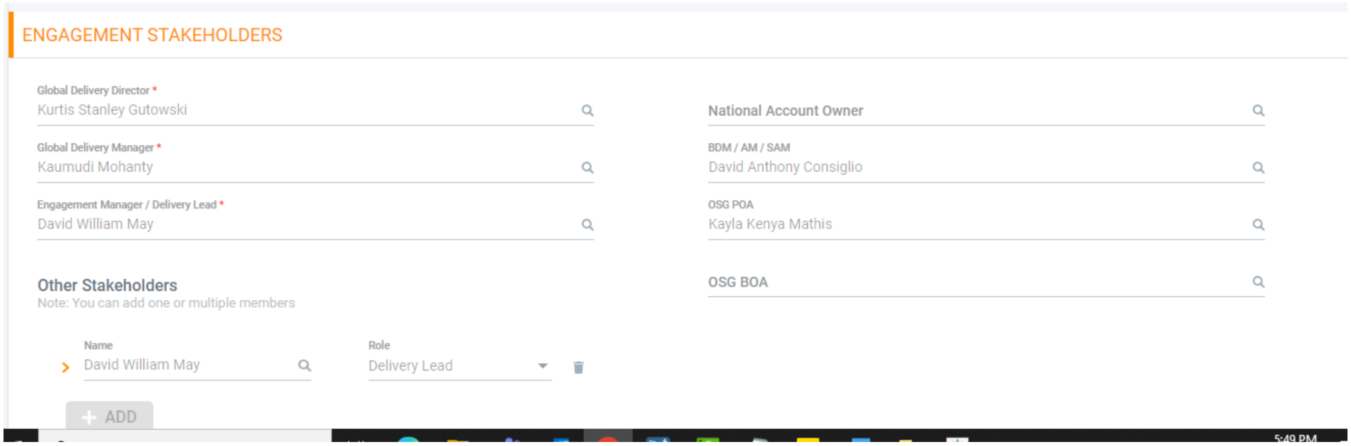
### Engagement Information Fields

| Label | Source | Description |
|---|---|---|
| **Engagement Name (Required)** | Opportunity Record | Name of the Engagement / typically this is the same as the Opportunity Name |
| **Account Name (Required)** | Opportunity Record | Name of the Customer/Client/Account |
| **Practice (Required)** | Opportunity Record | Named primary Practice of the engagement as identified on the PeopleSoft Project ID. |
| **Delivery Model (Required)** | Opportunity Record | The high-level categorization of the services provided to a customer, describing the type of partnership needed to mee the customer's needs. |
| **Service Type** | Opportunity Record | Defined offering delivered by a Practice, used to describe the work being performed for customers within the professional services portfolio. |
| **Location of Delivery** | Opportunity Record | Where the engagement will be worked from. Select all locations that apply |
| **Start Date (Required)** | Opportunity Record/PSN/SOW | Enter the start date of the Engagement |
| **End Date (Required)** | Opportunity Record/PSN/SOW | Enter the end date of the Engagement |
| **Sales Organization** | Opportunity Record | Select the Sales Organization from the drop-down list. |
| **Staffing Sales Region** | Opportunity Record | Select the correct Staffing Sales Region |
| **Opportunity ID** | Opportunity Record | Opportunity ID from Connected |
| **GDP ID** | GDP | Auto generated ID for the GDP. Users are unable to edit. |

| | | |
|---|---|---|
| **PeopleSoft Engagement ID** | PeopleSoft/PSN | A unique identifier within PeopleSoft Proposal Management used to group Project ID's together. An Engagement ID is used for Reporting purposes in order to analyze the profitability of a Contract that spans across multiple Projects. |
| **PeopleSoft Project ID** | PeopleSoft/PSN | Auto generated upon sync from PeopleSoft. Users are unable to edit. |
| **Business Unit** | PeopleSoft/PSN | Auto generated upon sync from PeopleSoft. Users are unable to edit. |
| **Link to SMP** | Created by the PMO | Link to SharePoint Portal |

## Engagement Stakeholders

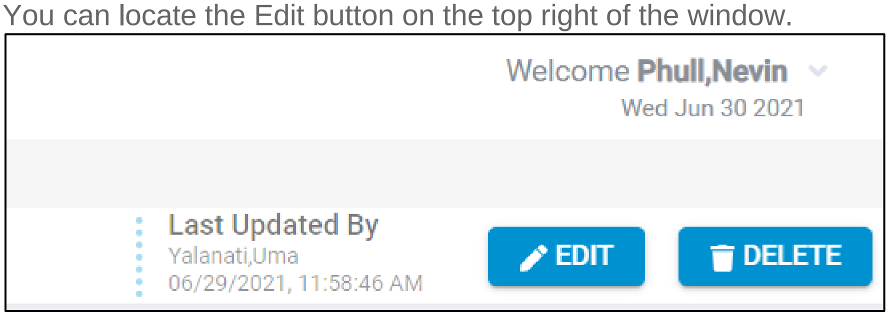



The required roles are the GDD, GDM and EM or DL on the engagement. If you have multiple Delivery and Practice personnel that need to be added, you can add other stakeholders by clicking on **Edit** at the top of the screen and clicking on **Add** in the bottom of the window. See below for the details on how to do this.

**NOTE: There is no limit to the number of additional resources you can add. If you have a large complex cross practice engagement with 20 or more delivery and practice leaders involved, you can add them all here.**

## Edit Engagement Details

You can locate the Edit button on the top right of the window.

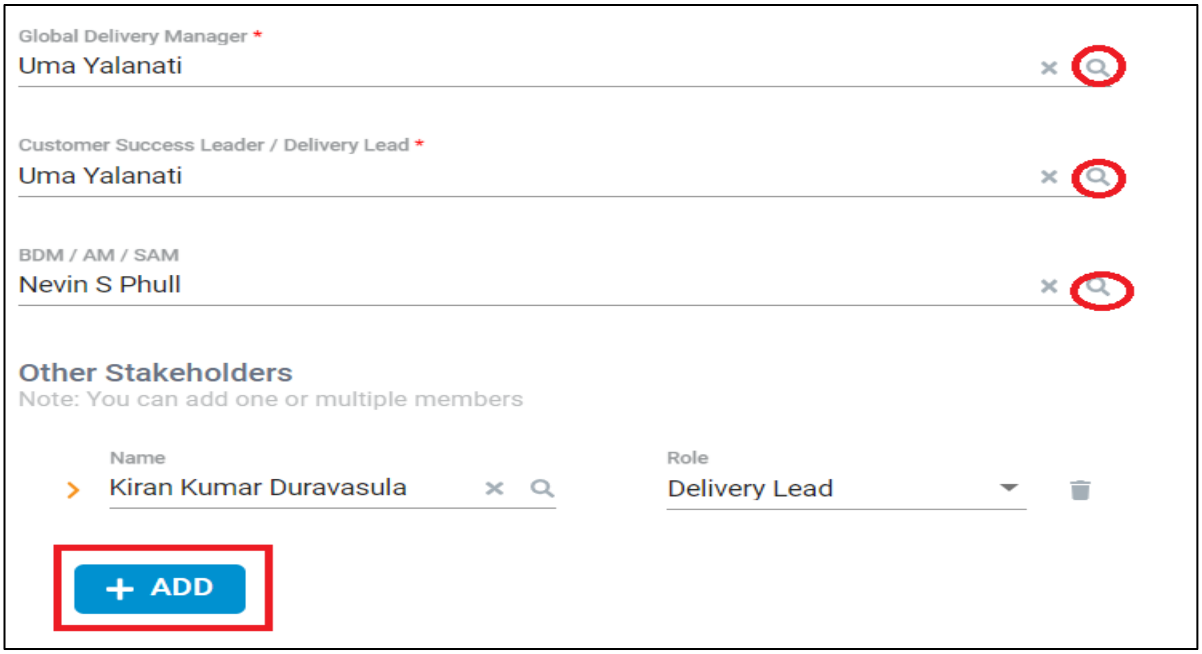



When you click on the Edit button, it will set the page to be edited in whatever fields you need. Most of the sections are set as a drop-down, so simply select the right item in the appropriate field to make a change.

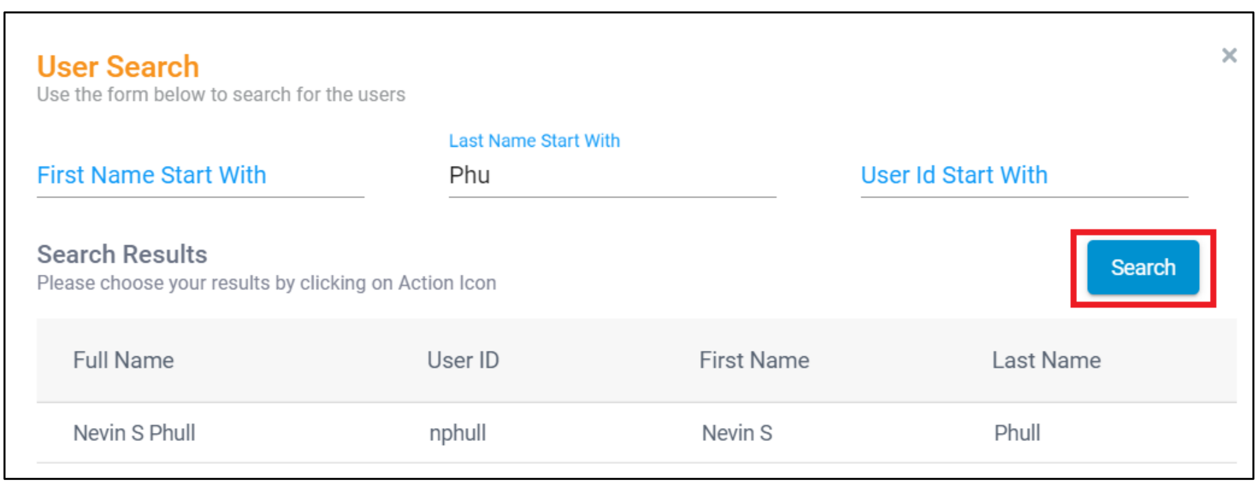
To commit the change to the page, you will find the Update button at the bottom right of the window. Alternatively, you can Cancel out of the changes by using the Cancel button on the left side of the page, or the Reset to bring it back to the last saved state.

### Adding Stakeholders

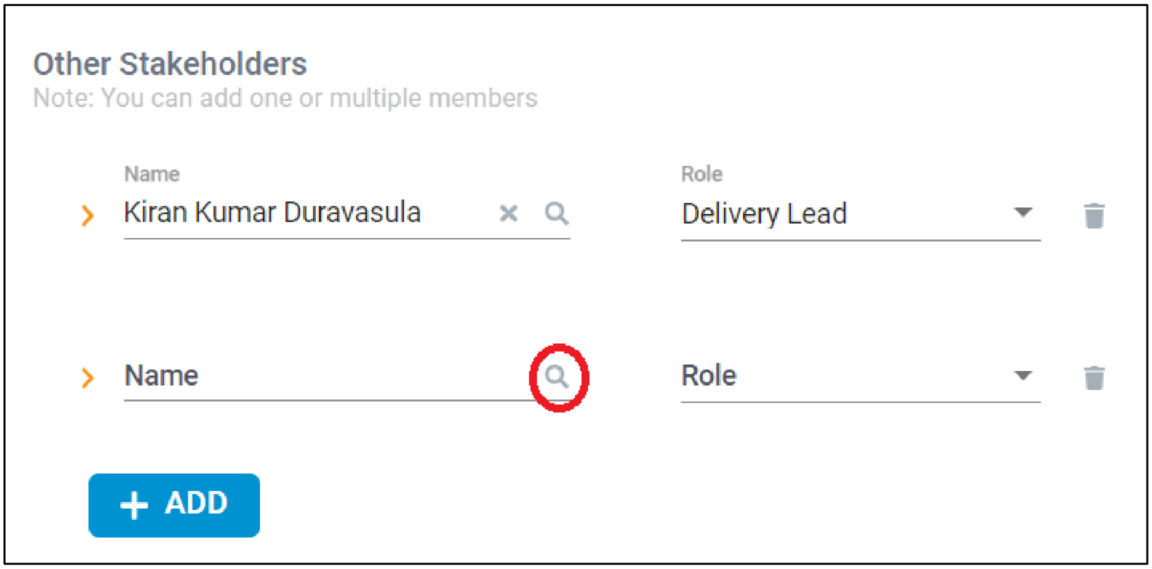
To add in a new stakeholder, you will first need to click the Edit button in the above section. Once that is done, the Add buttons, or the Magnifying Glass, will be selectable.




Once the Magnifying Glass has been selected, the User Search Window will pop up. You can search on any combination of first name, last name, or User ID, and click on Search. You do NOT need to type in full names – a few letters will work. Once the search results populate, double click on the name you wish to add.




If you click on the Add Button, a new row will be added to find the appropriate name. You will populate the name using the Magnifying Glass on the window, as above. You will also need to select the correct role from the drop-down menu.

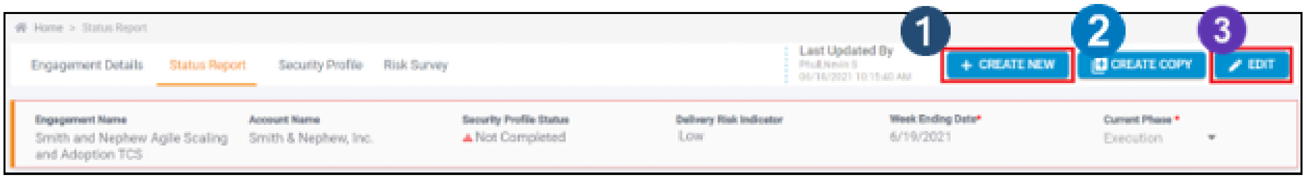



## Engagement Details Change Log


At the bottom of the Engagement Details Page, there will be a change history that is tracked any time the information is altered. If you click on the header for "Engagement Details Change Log" it will display the tracked data around who made the change, and when.

## Status Report

The Status Report is where the Delivery teams will go to fill out the weekly Engagement Status Report.

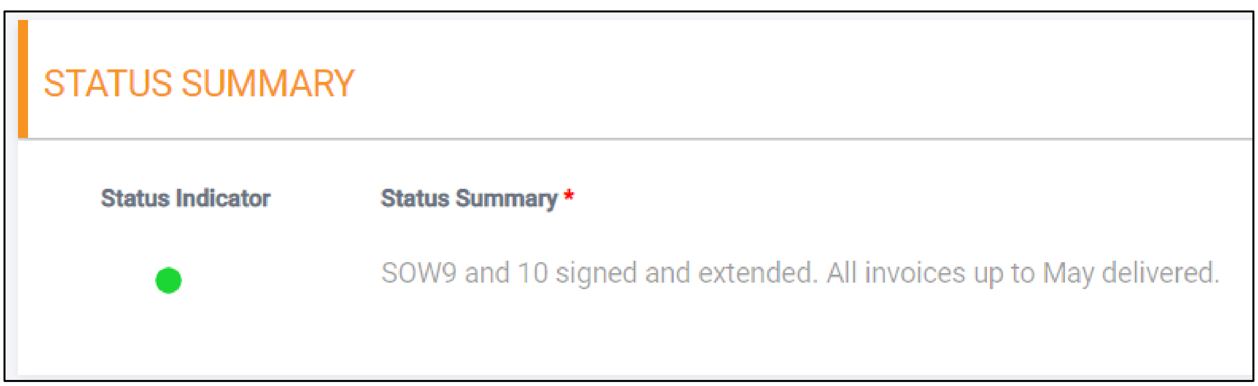



The top section will list the Engagement Name, Account Name, Security Profile Status, Delivery Risk indicator, Week Ending Date, and Current Phase. **The first time you come to this page to create a status report** this page will be editable. You will only need to use Create New, Create Copy, or Edit when you add status reports in later weeks.

1) The Create New button is what you will click on to create a new/empty status report.
2) The Create Copy **(Best Practice!)** button will be used to copy the previous status report to a new entry that allows you to enter in the content you want for this week.
3) Edit will be used to modify the current week's status report.

**NOTE: If you have Milestones – Use Create Copy Only to keep the Milestones you have already created on the next report.**

### Status Summary




The Status Summary contains only 2 key elements: Status indicator which is a traffic light of Green, Yellow, Red and the Executive Summary. This will reflect the color selections on the status sections below. If they are all Green, it will display Green. If there is one Yellow or Red, it will show Yellow or Red accordingly.

## Status Details


The status key performance indicators (KPI) are Schedule, CSAT, Budget, Engagement Risk, and Resources. Green, Yellow, or Red should be selected for each KPI.  In this section, we will cover more details around how to identify the status of an engagement and each KPI to provide the best clarity for your leadership.

### Overall Status Definitions

**An engagement is Green when:**

- Engagement is performing per plan. No risks or issues that will have an impact to the measured result
- No additional support required

Note:  Opportunity expansion is only possible when we are in GREEN

**An engagement is considered Yellow when risks are identified:**

- Actively mitigating risks and addressing issues - will not negatively impact current measured goal or expected result
- Status should include a clear “Path to Green”
- Practice, Delivery and Sales Leadership should be monitoring and providing support and oversight

**An engagement is Red when issues are active:**

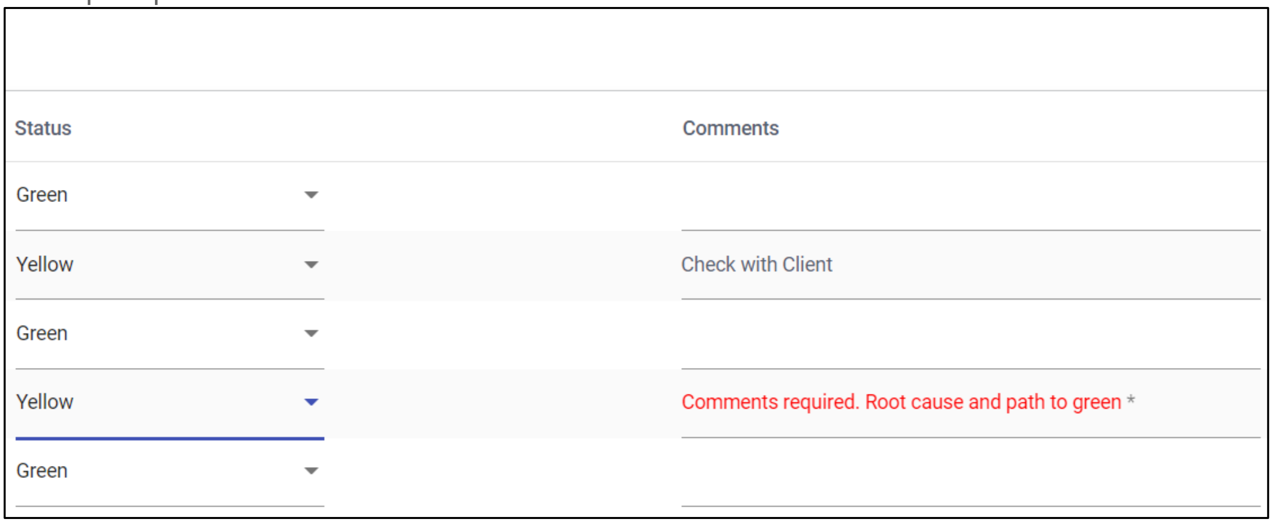
- Issue resolution and root cause analysis occurring
- Practice, Delivery and Sales Leadership should be engaged and actively supporting
- Status should include a clear “Path to Green”
- Once the corrective actions have taken place, the status turns to Yellow for monitoring

**BEST PRACTICE:** Whenever you have a risk or issue identified, it is the Delivery team's responsibility to plan the "Path to Green". Please include your plan details in these comments, and as a suggestion, notify your leadership before you save the status. *As they say, "Never surprise your boss!"*

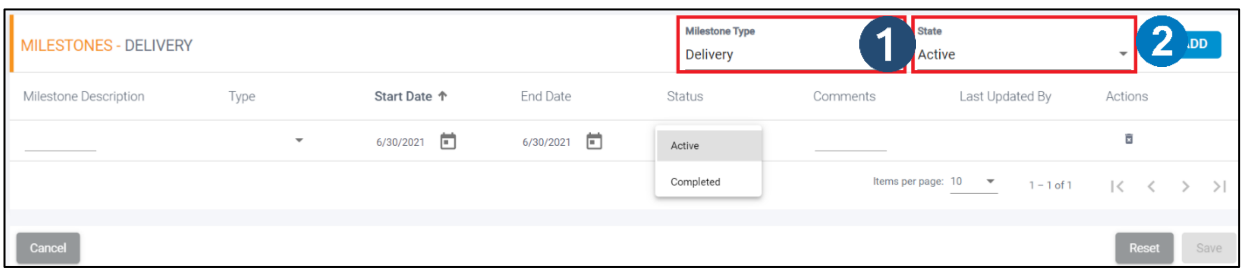
***Use this table to learn what we expect to see in terms of status indicators and scenarios. When you think about your status reports, try to include the following:***

| | Green | Yellow | Red |
|---|---|---|---|
| Schedule | Project is performing as expected per approved project schedule | Project is at risk of missing project milestones | • Project milestones have been missed<br>• Corrective action is required |
| CSAT | • Clear understanding of customer success criteria (defined in quality plan)<br>• Evidence of customer satisfaction based on touch points, feedback<br>• Steering and Advisory Meetings (QBR) confirm customer satisfaction level | • Unsure customer is satisfied with the service being provided<br>• Concerned we are not delivering to the standards and success criteria defined in the quality plan | • Customer has voiced concern / dissatisfaction regarding any of our deliverables or delivery processes |
| Budget (Revenue, GP%, Invoice) | • Project is expected to close at or greater than approved GP%<br>• Project is expected to close at or greater than approved Revenue<br>• All invoices have been processed and approved within SOW/MSA guidelines | • Project is at risk of missing approved GP% by 2% or greater<br>• Project is at risk of missing revenue target by 2% or greater<br>• Invoices have not been processed and approved within SOW/MSA guidelines. OSG has been notified to identify next steps<br>• PCR Submitted, working with budget, have verbal approval | • Project is performing under the approved GP% and will miss the approved GP by 2% or greater unless a corrective action occurs<br>• Project will perform under the approved revenue target by 2% or greater unless a corrective action occurs<br>• Invoices have not been processed and approved within SOW/MSA guidelines. OSG has escalated to customer's AP<br>• PCR Submitted, Working without budget or verbal approval |
| Engagement Risk | Performing as planned | • Mitigation planning / action required. Customer expectations must be managed<br>• Customer Project Sponsorship / dynamics change | • Corrective action required; Customer relationship is being negatively impacted |
| Resources | Resources available and performing as planned | • Resource availability may impact plan<br>• Resource morale / performance may impact plan<br>• Resource morale issue may impact plan<br>• Customer expectations must be managed | • Resource availability has impacted plan<br>• Resource morale / performance has impacted plan<br>• Resource morale issues impacting performance<br>• Corrective action required |

**Green Statuses do not require comments**, but you are welcome to add them. **If you select Yellow or Red** you must fill out comments to identify the "Path to Green". The tool will remind you with the below prompt in the comments box.




## Milestones-Delivery




Delivery can also enter and track milestones for the engagement. If you have a sprint based, milestone based, or other outcome-based process that can be tracked by dates, you can leverage the GDP to provide clarity around the timeline and performance. If you have a need to fill out the Milestone section, you can filter the items by:

1) Milestone Type: Delivery or Agile Sprint
2) State: Active, Completed, or All

As you build the milestones, you will fill out and select the following:

- Milestone Description:  Short description of the Milestone
- Type: Go Live, Other, Phase Sign off, or UAT
- Start and End Dates: Click on the Calendar Icon to select the correct date
- Status: Active of Completed
- Comments
- Last Updated By: Name and Date
- Actions

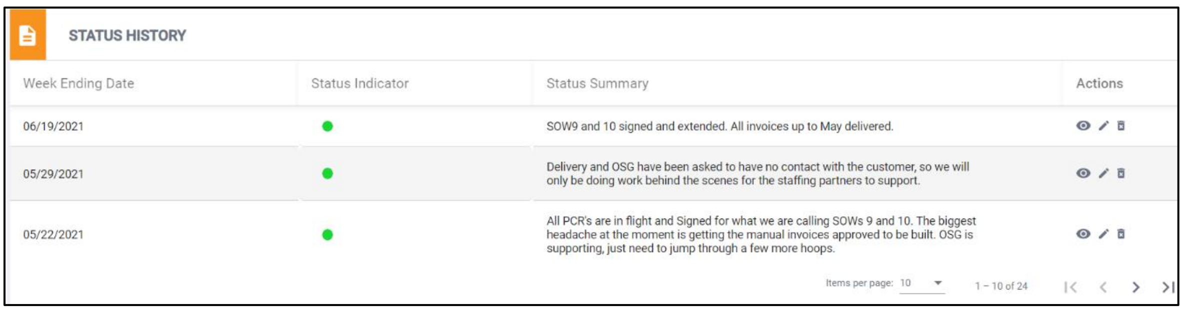
Once you have filled out the Milestone details, click on **Save** on the bottom right side of the page.

If you start creating a Milestone, but no longer need to do so, click on the **Cancel** Button on the bottom left hand side of the Milestone window.

If you need to reset the data fields and start over, click on the **Reset** and the fields will reset for you to start over.

If you have more milestones than are on display, you can click on the page right or page left to see additional items.
**REMINDER:** To carry forward the milestones / sprint data in status report, use **Create Copy** option only.

### Status History

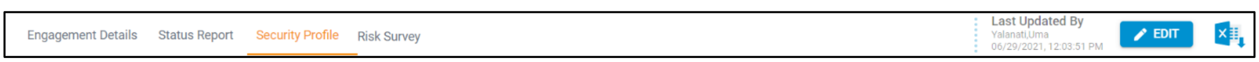

STATUS HISTORY

| Week Ending Date | Status Indicator | Status Summary | Actions |
|---|---|---|---|
| 06/19/2021 | ● | SOW9 and 10 signed and extended. All invoices up to May delivered. | |
| 05/29/2021 | ● | Delivery and OSG have been asked to have no contact with the customer, so we will only be doing work behind the scenes for the staffing partners to support. | |
| 05/22/2021 | ● | All PCR's are in flight and Signed for what we are calling SOWs 9 and 10. The biggest headache at the moment is getting the manual invoices approved to be built. OSG is supporting, just need to jump through a few more hoops. | |

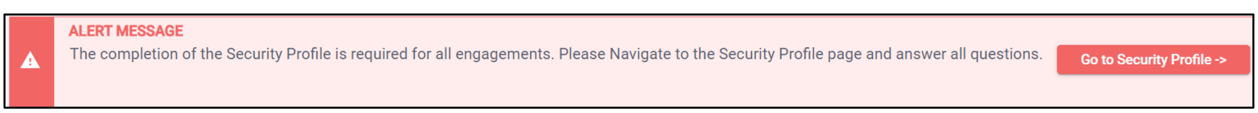
Items per page: 10  1 – 10 of 24

At the bottom of the Status Report Page, a history of all the Status Report entries will be listed. You can click on the "Eye" shaped icon to view the full details, or within the same week you can click on the "Pen" icon to edit the report, or the "Trash can" to delete it if necessary.

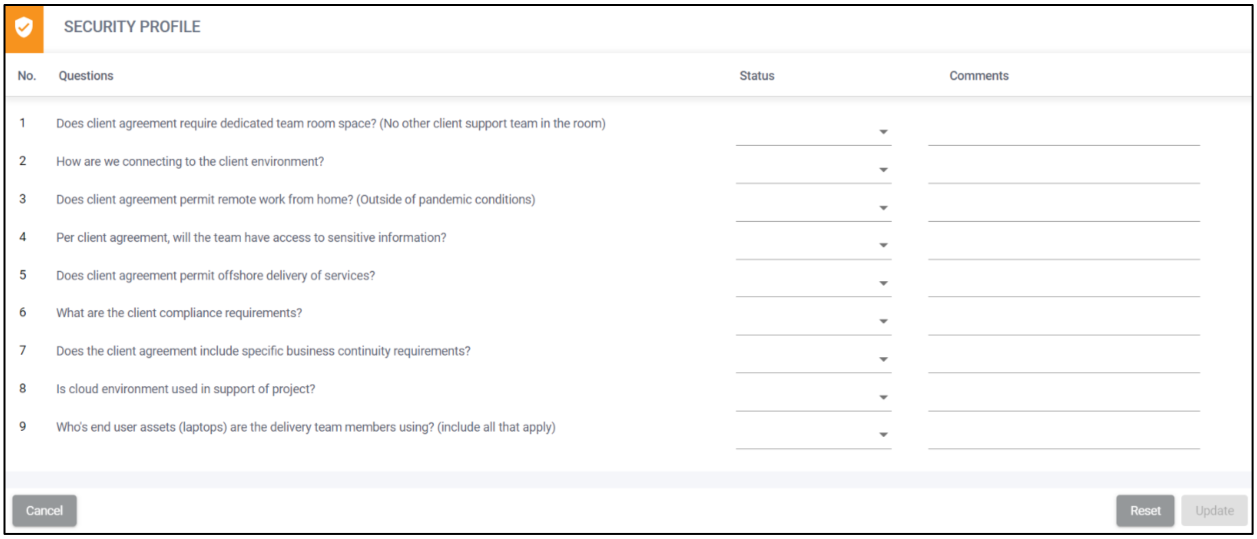
## Security Profile




You will be expected to complete the Security Profile and Risk Survey when you first create your Status Report. When this message shows, you can click on the link to the Security Profile to fill it out, or click on the menu link at the top of the page.




The Security Profile is meant to be the source of record (our first go-to) for security configuration reference. It calls out the common configuration items we see in agreements and currently consists of 9 questions that our Information Security (IS) team will use to help monitor the level of support and configuration that may be needed to support the engagement. This information will be reviewed and modified by both Delivery and IS. A communication feature that the GDP will provide is if at any time the data changes or we determine that we need additional questions added, the assigned CSL or Delivery Lead and IS will receive an email notifying both teams of the change. So, as you run your engagement, plan to review and update the information as needed, as these situations could drastically change the level of risk we take on.



SECURITY PROFILE

| No. | Questions | Status | Comments |
|---|---|---|---|
| 1 | Does client agreement require dedicated team room space? (No other client support team in the room) | | |
| 2 | How are we connecting to the client environment? | | |
| 3 | Does client agreement permit remote work from home? (Outside of pandemic conditions) | | |
| 4 | Per client agreement, will the team have access to sensitive information? | | |
| 5 | Does client agreement permit offshore delivery of services? | | |
| 6 | What are the client compliance requirements? | | |
| 7 | Does the client agreement include specific business continuity requirements? | | |
| 8 | Is cloud environment used in support of project? | | |
| 9 | Who's end user assets (laptops) are the delivery team members using? (include all that apply) | | |

Cancel Reset Update

Click on the EDIT button on the top right of the screen and answer each question to the best of your ability. Some of the answers are set up as Yes/No, while other answers are Multi Select. We will provide the definitions of the existing survey answers below for additional clarity. If you do not know the answer, you will want to work with your Sales and Solution team, or the Customer, to help identify the impact or needs. For each question, select the correct response for your engagement and add in any comments that you believe will add clarity. The comments field does not have a character limitation so you can provide as much clarity as you see fit.

**NOTE: You will be asked by the tool to update the information every 90 days**

**Security Profile Question/Response Table**

| Question | Response | Definition |
|---|---|---|
| #1 – Dedicated Room Space | Yes/No | Customer agreement requires work to be performed from dedicated team room space in one of our Solution Centers. |
| #2 – Connecting to Client Environment | Client VPN | Connect to customer environment by using a client-provided VPN client on the workstation |
| | Site to Site VPN (Tunnel) | Connect to customer environment with VPN tunnel between TEK and the customer networks. |
| | Citrix or other VDI | Connect to customer provided Virtual environment |
| | Direct Access to Client Systems | Connect directly to client systems over the internet. |

| | | |
|---|---|---|
| #3 Remote Work Permitted | Yes/No | Customer agreement permits resources to work remotely, away from the customer site or from a Center. |
| #4 Sensitive information | PII | Personally Identifiable Information: any data, whether alone or combined with other data, that could potentially identify a specific individual |
| | PII (GDPR) | Personal data from individuals who live in the European Union (EU) |
| | PHI | Protected Health Information: PHI is personally identifiable information (PII) that is tied to health information, such as what is found in a medical record, as well as PII tied to health insurance company records. |
| | Pay Card Data (PCI) | Payment Card Industry (PCI) – any data related to card holders names, credit card numbers or other credit card information, such as PIN, credit card number, data stored on card’s magnetic strip or chip. |
| | No Sensitive Data | No sensitive data |
| | Other Sensitive Information | Any data not covered by the other entries.  Please document in the comments what we are working with. |
| #5 Client Permit Offshore work | Yes/No | MSA/PSA allowing for work offshore (outside of United States). |
| #6 Compliance Requirements | ISO 27001 Certification | Customer agreement(s) require ISO 27001 compliance and certification |
| | HITRUST Certification | Customer agreement(s) require HITRUST compliance and certification |
| | Other | Any other certification standard we may be operating under. Please clearly outline the needs in the comments field. |
| #7 Client-specific Business Continuity | Yes/No | The customer agreement contains specific business continuity requirements. |
| #8 Cloud usage | No | Cloud services are not being used for this engagement |
| | Yes-TEK | We are using TEKsystems Global Services Cloud Environments |
| | Yes – Customer | We are using customers cloud environments |

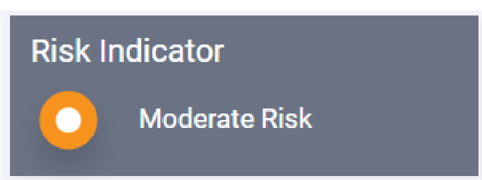
| | | |
|---|---|---|
| #9 Asset Provisioning | Allegis – issued to non-center-based FTE's | Full Time Internal Employees that are working with Allegis provisioned laptops |
| | Customer Provided | Contractors or FTEs are using Customer-provisioned laptops |
| | TGS Center Assets | Laptops ordered and provisioned by one of the Centers. |
| | TGS Hardware Depot Assets | Laptops ordered and issued to contractors working in the field and not tied to a Center. |
| | Other | Other |

At the bottom of the window, much like the other pages, there is a change log that will keep track of changes made over time.  Also, make note that the IS team and the CSL will receive an email anytime there are changes/updates.

## Risk Survey

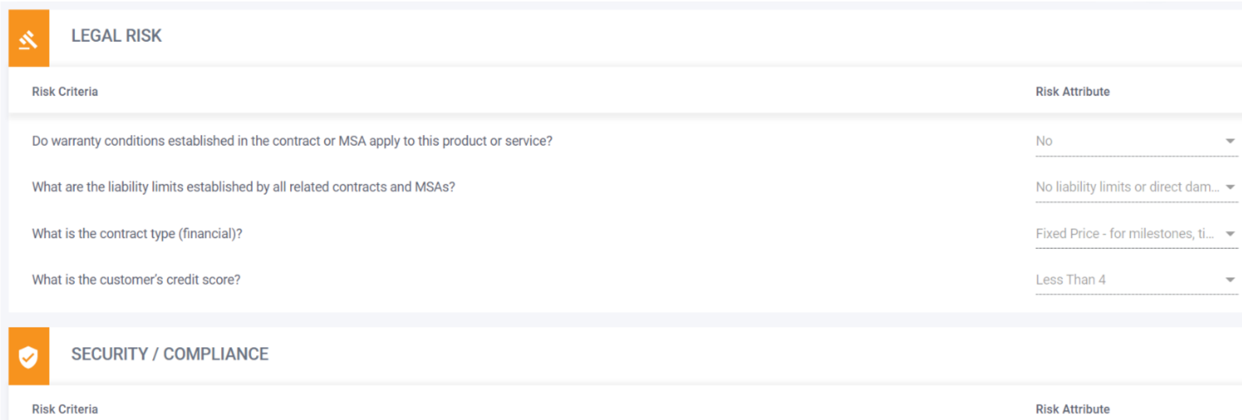

The Risk Survey page has a series of questions and information that we capture as part of the Solution set up to determine how much corporate risk we are taking on in the engagement.  To fill out the Risk Survey, start by clicking on the Edit button on the top right of the menu bar.

### Risk Indicator




Each engagement will have a general risk category that is determined by the data in the Risk Survey attributes. The weighting of each answer is determined by our Front Office and Information Security teams and will be updated as our tolerance or concern levels change. **Engagements tagged as High Risk** will be allocated additional levels of support and review to ensure we are doing the right things for both our customer and TEKsystems success.

## Survey Sections



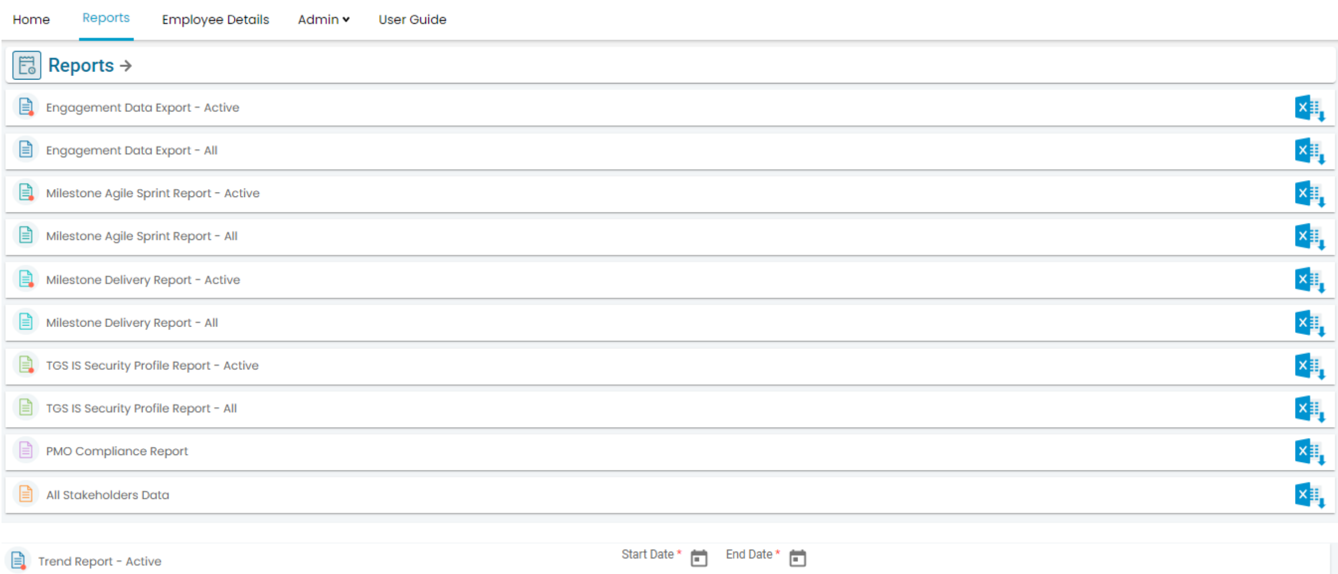

There are 4 Sections that will need to be filled out as part of the Risk Survey.

- Legal Risk
  - This section contains 4 questions about our exposure to various levels of Legal exposure. This information will usually be identified in our solution process and captured as part of the Engagement Start Checklist.
- Security/Compliance
  - This section covers questions about regulatory or protected information. This information is usually identified during the solution process and will be captured in the Engagement Start Checklist.
- Delivery/Value
  - This section covers specific questions around how we will be delivering the engagement as a whole. This information should be available in the Opportunity record, SOW and other Solution Documents.
- Automatic High-Risk indicator
  - Use this section to document reasons you believe this engagement should be tagged as high risk for additional resources, and set the Risk Attribute entry to Yes.

At the bottom of the window, much like the other pages, there is a change log that will keep track of changes made to the Risk Survey over time.

You can submit a status report without completing the survey, but there will be a big red reminder / alert until it is completed.

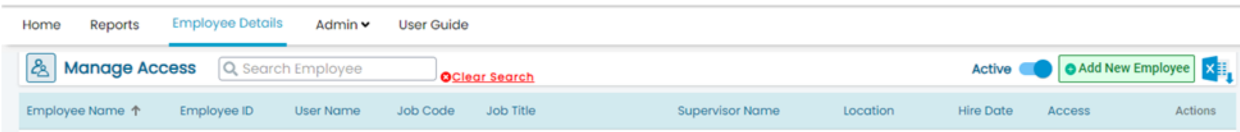
## Reports




There are 11 standard reports that can be generated automatically in Excel.

1) Engagement Data Export – Active: this report will export all engagement data for active engagements
2) Engagement Data Export – All: like the Engagement Data Export Active report, this report will also include all of the closed engagements
3) Milestone Agile Sprint Report – Active: this report will provide data for any engagements with milestone data created where Agile Sprint is selected for the milestone type, and the milestone is still categorized as active
4) Milestone Agile Sprint Report – All: like the Milestone Agile Sprint Active report, this will export all milestones that are listed as active and completed as well
5) Milestone Delivery Report – Active: this report will provide data for any engagements with milestone data created where Delivery is selected for the milestone type, and the milestone is still categorized as active
6) Milestone Delivery Report – All: like the Milestone Delivery Active report, this will export all milestones that are listed as active and completed as well
7) TGS IS Security Profile Report – Active: this report will be used by our IS team to pull and review all current Security Profile data on all active Engagements
8) TGS IS Security Profile Report – All: like the IS Security Profile Report Active, this report will include closed projects as well
9) PMO Compliance Report: used by the PMO to export current GDP data for Delivery Compliance activities.
10) All Stakeholders Data: this report will give details of all the stakeholders details given in engagement details page
11) Tend Report: used by PMO to export project status

## Employee details




This functionality is helpful for the users to search the employee id of any internal resource in TGS while submitting PCN etc. The availability of the employee details depends upon the source system data. If you don't find the id in GDP, reach out to the resource or CSA team to get the details.

## Revision History

| Issue Date | Issue | Reason for Change | Author |
|---|---|---|---|
| 7/5/2021 | V 1.0 | Document creation | Nevin Phull |
| **7/29/2021** | V 1.1 | Update for filters cache | Bheem Annayolla |
| **8/5/202~~0~~1** | V 1.2 | Update for Employee details and PC inclusion in filter criteria | Bheem Annayolla |
| **8/24/2021** | V 1.3 | Minor edits in Filter criteria | Bheem Annayolla |
| **08/03/2023** | V 1.4 | Home page modified to new generation look and feel. GDD option added in filters. | Kiran Kumar Duravasula |