



GSAS
GATE

User Manual 2016



www.gord.qa

User Manual 2016

COPYRIGHT © 2016

All rights reserved to Gulf Organisation for Research and Development. No part of this document may be reproduced in any form by any means.

Crafting a Green Legacy



Table of Content

1.1 General use	1
1.1.1 Logging in to GSASgate	1
1.1.2 My projects & certifications	1
1.1.3 My tasks	1
1.1.4 Audit log	2
1.1.4.1 Audit log page	2
1.1.4.2 Audit log buttons.....	3
1.1.5 My preferences	4
1.2 Certification workflow	5
1.2.1 Creating a project.....	5
1.2.2 Applying for a certificate	5
1.2.3 Certification statuses	5
1.2.4 CGP project manager responsibilities	7
1.2.4.1 Setting targeted scores.....	7
1.2.4.2 Adding members to the project team	7
1.2.4.3 Allocating project team responsibility	8
1.2.4.4 Reviewing documents.....	8
1.2.4.5 Submitting criteria	9
1.2.5 Project team member responsibilities	10
1.2.5.1 Uploading documents	10
1.2.5.2 Providing requirements	11
1.2.5.3 Setting submitted scores.....	11

Table of Figures

Figure 1	“My projects & certifications” page	1
Figure 2	“My tasks” page.....	2
Figure 3	“Audit log” page.....	3
Figure 4	Audit log buttons in the “Certification details” box	3
Figure 5	“My preferences” page	4
Figure 6	Certification status box on a certification page	5
Figure 7	Setting targeted scores	7
Figure 8	Adding members to the project team	7
Figure 9	Allocating project team responsibility	8
Figure 10	Reviewing documents	8
Figure 11	Submitting criteria	9
Figure 12	Uploading documents.....	10
Figure 13	Providing requirements	11
Figure 14	Setting submitted scores	11

1.1 General use

This chapter explains the usage of the general parts of the application.

1.1.1 Logging in to GSASgate

GSASgate can only be accessed with a valid [linkme.qa](http://www.linkme.qa) account. Users that do not have an account should first create one via http://www.linkme.qa/general/register_start.asp.

1.1.2 My projects & certifications

Click on the “My projects & certifications” link in the main menu to get an overview of all certifications by project. Only projects and certifications you have access to will be shown here.

1.1.3 My tasks

The “My tasks” page shows a list of your unfinished tasks. Clicking on a task description will redirect you to the page in GSASgate where you can perform the necessary action(s) to complete the task. The “Resource” column contains breadcrumbs to the page the task is related to. Some tasks also have a due date.

Using the filter on the right of the page, you can view tasks by project, certification, etc. After a task is completed by the user, that task will automatically be deleted by the system.

The task system is an important core feature of GSASgate. It is highly recommended that users frequently check for new tasks and complete them as soon as possible. This will result in a smooth certification process flow.

Projects & certifications					
Show 25 Per Page			Show / hide columns Copy CSV Excel Print		
Project Code	Project Name	Certification Name	Certification Status	Certification Active	Certification Typologies
Project Code	Project Name	Certification Name	Certification Status	Certification	Certification Typolo
QA-001	Project Y	Letter of Conformance 2.1	Certified	No	Healthcare 2.1
TBC	Project X	Letter of Conformance 2.1	Activating	Yes	Commercial 2.1 Core + Shell 2.1
Showing 1 to 2 of 2 entries				Previous	1 Next
New project					

Figure 1 “My projects & certifications” page

1.1.4 Audit log

1.1.4.1 Audit log page

The “Audit log” page contains a chronological history log relating your projects and all underlying resources. There are two types of audit log records:

- **System message:** these messages are generated by the system in response to a user event in the application. System messages have a grey background color.
- **User comment:** these messages represent direct user input. User comments are usually, but not always, related to system messages. User comments generated by the project team have a green background color. User comments generated by the GSAS trust team have an orange background color.

Every log record is linked to a specific resource, e.g. a project, a certification, a requirement, etc. Breadcrumbs to the resource are displayed above the audit log message next to the date and time it was created on and the user it is related to.

Using the filter on the right of the page, you can view audit logs by project, certification, user, date etc.

.....

The audit log system is a powerful core feature of GSASgate. Using the correct filter, a lot of valuable information can be derived from the audit log page.

.....

Description	Resource	Due date
Allocate criteria requirements to project team members	Projects / Project X / Letter of Conformance, 2, 1 (Submitting)	-

Tasks filter

Project
- All Projects -

Apply filter **Remove filter**

Figure 2 “My tasks” page

1.1.4.2 Audit log buttons

In addition to the audit log page, you can find audit log buttons on several pages of the application. These buttons typically reside in the top right corner of a resource information box. By clicking on one of these buttons, a window with audit logs directly concerning that resource will be opened.

Notice that audit logs from underlying resources will not be displayed in this window. For a full overview of a resource and its underlying resources, users need to utilize the audit log page.

For a detailed overview of the audit log page, see “1.1.4.1 Audit log page”.

For example, by clicking on one of the buttons in the figure below, audit logs directly concerning the “Letter of Conformance” certification will be shown. Audit logs linked to underlying criteria or requirements of the certification will not be displayed.

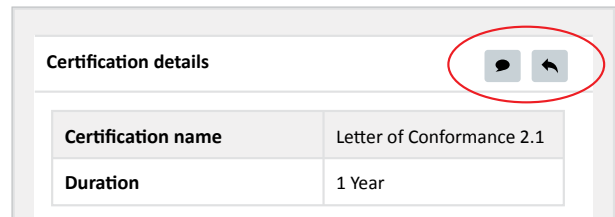


Figure 4 Audit log buttons in the “Certification details” box

The button on the right will display all audit log messages for this resource, while that on the left will only display user comments.

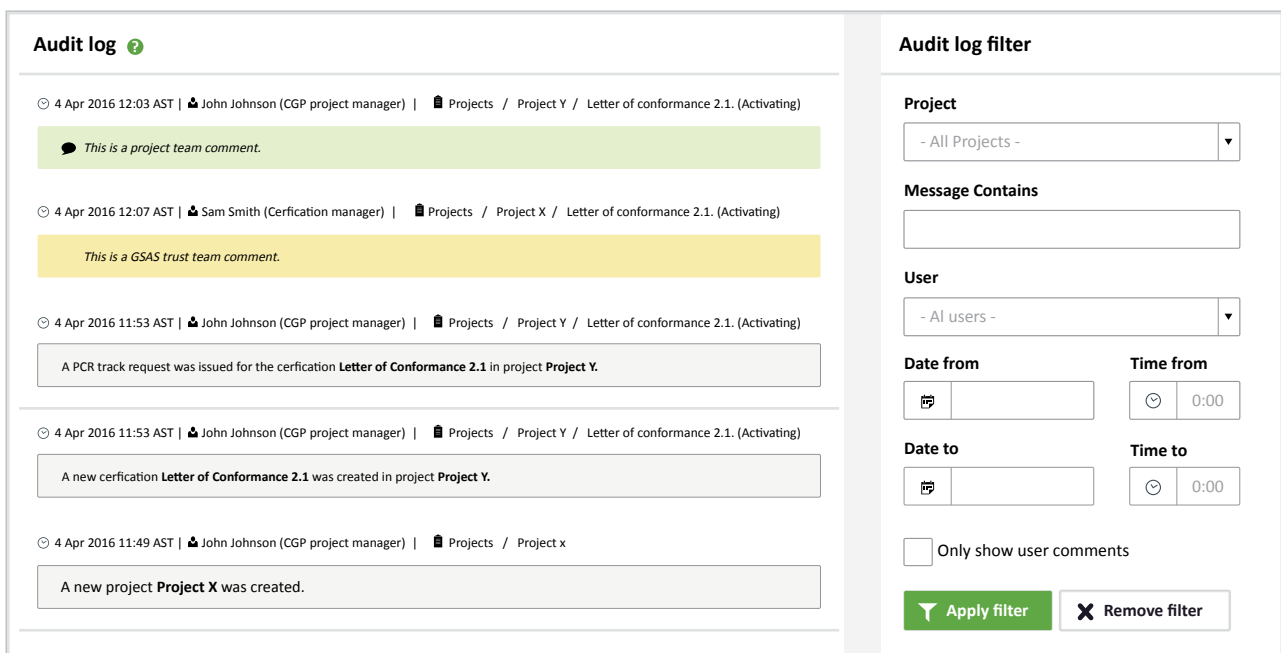


Figure 3 “Audit log” page

1.1.5 My preferences

On the “My preferences” page you can change your e-mail notification settings. You can specify for which types of audit logs and tasks you want to be notified by email. Some settings are application wide while others are specified on a project level.

To reduce the amount of mails that is sent to GSASgate users, most notifications will be bundled in a daily email. Users will however be notified immediately of some important events, e.g. when a user is added to a project.

User E-mail Notifications

i Below you can select for which types of audit log and task events a notification must be included in the digest e-mail. Some event types can be specified on a per project basis. These event types will be visible after first selecting a project. Changes will only be saved for the currently selected projects.

Project independent notification preferences

☒ Project created

☒ New task

Project dependent notification preferences

- All Projects -


 Update Preferences

Figure 5 “My preferences” page

1.2 Certification workflow

To acquire a certificate all steps of the certification workflow have to be completed. This paragraph explains what a typical certification flow looks like.

1.2.1 Creating a project

To apply for a certificate a CGP project manager has to navigate to a project page. If not starting from an existing project, he or she needs to create a project first. This can be done by clicking on the “New project” button on the “My projects & certifications” page. Only users with a CGP license can create projects.

After the user fills out the project details form, the project will be created. By default the user will have the “CGP project manager” role. For a detailed description of application and project roles.

1.2.2 Applying for a certificate

A CGP project manager can apply for a certificate by navigating to the project page and clicking on the “Apply” button next to the preferred certificate.

After filling out the details of the certificate, the certification is registered.

1.2.3 Certification statuses

During the certification flow the status of a certification will advance. Depending on this certification status the system will create tasks for certain users related to the project. For a detailed description of the task system, see “1.1.3 My tasks”.

The “Certification status” box on the certification page displays the current status of the certification at the top and all previous statuses below. On the left of every status there is an icon that indicates who will need to take action while the certification has this particular status. A green icon is used to indicate that the project team will have to take action, while an orange icon indicates that some user(s) of the GSAS trust team will need to take action.

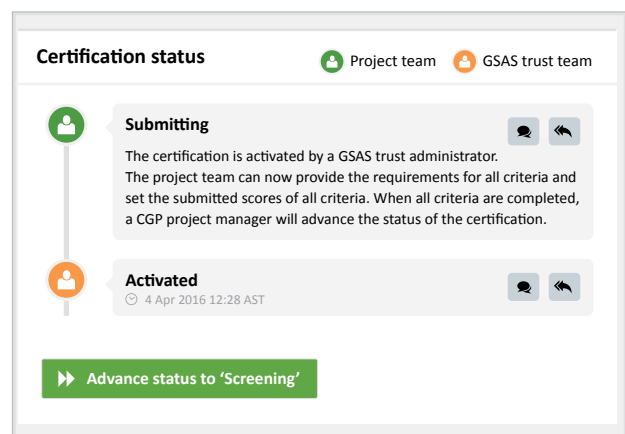


Figure 6 Certification status box on a certification page

By clicking on one of the audit log buttons on the right of a status, you will be redirected to the audit log page. A filter will be active that will show you all audit logs of the certification and its underlying resources created when the certification had this particular status. For a detailed overview of the audit log page, see “1.1.4.1 Audit log page”.

The following list describes all certification statuses. Although these statuses are chronologically ordered, some statuses can be skipped.

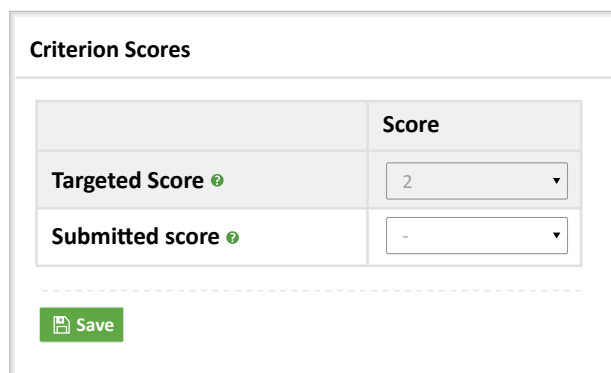
- **Activating:** The certification is registered. After payment is received, a GSAS trust administrator will advance the status of the certification.
 - **Submitting:** The certification is activated by a GSAS trust administrator. The project team can now provide the requirements for all criteria and set the submitted scores of all criteria. When all criteria are completed, a CGP project manager will advance the status of the certification.
 - **Screening:** The project team has completed all criteria. After the GSAS trust team has screened the criteria input, a GSAS trust certification manager will advance the status of the certification and provide screening comments.
 - **Submitting after screening:** The GSAS trust team has screened and commented the criteria input. The project team can process this feedback by editing the existing criteria input. When all criteria are completed, a CGP project manager will advance the status of the certification.
 - **Verifying:** The project team has completed all criteria. The GSAS trust team will now review all criteria input and set the the achieved scores of the criteria. After all criteria are verified, a GSAS trust certification manager will advance the status of the certification.
 - **Acknowledging:** The GSAS trust team has verified all criteria. A CGP project manager will now decide to accept all scores or apply for appeal. After this, the certification status will be advanced.
 - **Processing appeal payment:** An appeal was requested by a CGP project manager. After payment is received, a GSAS trust administrator will advance the status of the certification.
 - **Submitting after appeal:** An appeal was requested by a CGP project manager. The project team can now (re)provide the requirements for all criteria and set the submitted scores of all criteria. When all criteria are completed, a CGP project manager can advance the status of the certification.
 - **Verifying after appeal:** The project team has completed all criteria. The GSAS trust team will now review all criteria input and set the the achieved scores of the criteria. After all criteria are reviewed, a GSAS trust certification manager will advance the status of the certification.
 - **Acknowledging after appeal:** The GSAS trust team has verified all criteria. After a CGP project manager acknowledges the achieved scores, he will advance the status of the certification.
 - **Approving by management:** The GSAS trust team approved this certification. The GSAS trust management will now give their approval and advance the status of the certification.
 - **Approving by top management:** The GSAS trust management approved this certification. The GSAS trust top management will now give their approval and advance the status of the certification.
 - **Certified:** The GSAS trust team has issued this certification.
 - **Not certified:** The GSAS trust team has denied this certification.
- Depending on the current status of a certification a user will be responsible for advancing the certification to the next status. This can be done by clicking on the “Advance status to ...” button in the “Certification status” box.

1.2.4 CGP project manager responsibilities

This paragraph describes the main responsibilities of a CGP project manager in GSASgate.

1.2.4.1 Setting targeted scores

In the “Submitting” phase a CGP project manager can set the targeted scores of criteria. This can be done by navigating to a criterion page and changing the “Targeted score” field in the “Criterion scores” box.



	Score
Targeted Score ⓘ	2 ▼
Submitted score ⓘ	- ▼


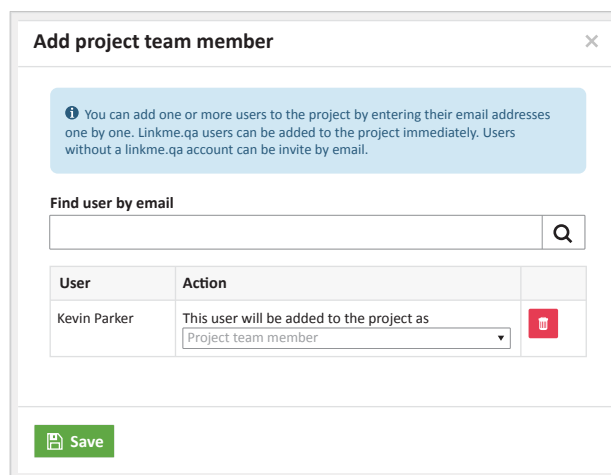
 Save


Figure 7 Setting targeted scores


1.2.4.2 Adding members to the project team


In the “Submitting” phase a CGP project manager can add other team members to the project. This can be done by clicking on the “Add team member” button in the “Project team” box on the project page.



Add project team member ✕

 You can add one or more users to the project by entering their email addresses one by one. Linkme.qa users can be added to the project immediately. Users without a linkme.qa account can be invite by email.

Find user by email 

User	Action
Kevin Parker	This user will be added to the project as Project team member ▼ 


 Save

Figure 8 Adding members to the project team

1.2.4.3 Allocating project team responsibility

In the “Submitting” phase a CGP project manager will have to allocate responsibility of criteria requirements to project team members. This can be done by clicking on the “Allocate project team responsibility” button on the certification page.

Using the form on the next page, the CGP project manager can select requirements and assign them to a member of the project team. A due date can be set as well.

The screenshot shows two side-by-side forms. The left form, titled "Select requirements to allocate", has a blue information box stating: "Use the checkboxes and the form to update the status of requirements or to assign requirements to project team members. Submitted criteria or criteria without requirements will not be listed here." Below this is a table with a header "COMMERCIAL" and a yellow star icon. The table has columns for checkboxes, requirement descriptions, "Allocated to", "Due date", and "Status".

		Allocated to	Due date	Status
<input type="checkbox"/>	UC.1: Proximity to Infrastructure			
<input checked="" type="checkbox"/>	Letter signed/stamped by Authorities, municipalities, if any, that provide services.	Kevin Parker		Required
<input checked="" type="checkbox"/>	On-site Infrastructure Drawings.	Kevin Parker		Required
<input type="checkbox"/>	Planned infrastructure drawings, if claimed.			Required

The right form, titled "Allocate selected requirements", contains fields for "User" (a dropdown menu showing "Kevin Parker"), "Due date" (a date picker), and "Status" (a dropdown menu showing "Required"). At the bottom are three buttons: "Save", "Save and continue", and "Cancel".

Figure 9 Allocating project team responsibility

1.2.4.4 Reviewing documents

In the “Submitting” phase, after a project team member has uploaded a document, a CGP project manager will need to review the document. This can be done by clicking on the status of a document in the “Documentation” box on a criterion page.

The following list describes all document statuses:

- **Approved:** the document was approved by a CGP project manager.
- **Rejected:** the document was rejected by a CGP project manager. The project team member that uploaded this document will have to re-upload a new version.
- **Awaiting approval:** the document was uploaded by a project team member and is waiting for approval.

The screenshot shows a table titled "Documentation". It has columns for "File name", "File size", "Uploaded by", "Upload date", "Status", and "Actions".

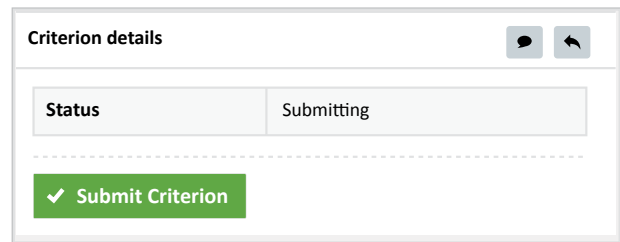
File name	File size	Uploaded by	Upload date	Status	Actions
a-textfile.txt	1.49 KB	Kevin Parker	4 Apr 2016 12:45 AST	Approved	
blank.pdf	8.64 KB	Kevin Parker	4 Apr 2016 12:45 AST	Awaiting approval	

Figure 10 Reviewing documents

1.2.4.5 Submitting criteria

In the “Submitting” phase, after all requirements are provided by the project team and all criteria documents are reviewed by the CGP project manager, a CGP project manager will have to submit the criterion. This can be done by clicking on the “Submit criterion” button on the criterion page.

Please note that, at this stage, the submitted criterion will not be reviewed by the GSAS trust team yet. The GSAS trust team will start reviewing after all criteria are submitted by the project team and after the certification status is advanced by the CGP project manager.



The screenshot shows a web interface titled "Criterion details". In the top right corner, there are two small icons: a speech bubble and a back arrow. Below the title, there is a status bar with the label "Status" and the value "Submitting". A horizontal dashed line separates the status bar from the bottom section, which contains a green button with a white checkmark and the text "Submit Criterion".

Figure 11 Submitting criteria

1.2.5 Project team member responsibilities


This paragraph describes the main responsibilities of a project team member in GSASgate.



1.2.5.1 Uploading documents


In the “Submitting” phase a project team member will have to upload documents in order to complete his or her assigned criteria requirements. This can be done by dropping files

in the “Upload documentation” box on a criterion page. The uploaded documents will now be reviewed by a CGP project manager.


Upload documentation

 Drop files here or click to upload documentation.

File name	File size	Upload progress	Actions
a-textfile.txt	1.5 KB	<div></div>	
blank.pdf	8.8 KB	<div></div>	

Additional requirements 

+ Select additional criteria

Notes to support the documentation 


 Upload documentation

Figure 12 Uploading documents

1.2.5.2 Providing requirements

In the “Submitting” phase, after the required documents were uploaded, a project team member will have to change the status of requirements that were assigned to him or her

to “Provided”. This can be done by clicking on a requirement in the “Your requirements” box on a criterion page.

The screenshot shows a web interface titled "Your requirements" with a help icon. It contains a list of requirements. The first requirement, "Letter signed/stamped by Authorities, municipalities, if any, that provide services.", is checked and has a status of "Provided". Below this requirement, there are fields for "Responsibility" (Kevin Parker), "Due date" (with a calendar icon), and "Status" (Provided). At the bottom of this section are two buttons: "Save" (green) and "Refuse this requirement" (red). Below this is another requirement, "On-site Infrastructure Drawings.", which is unchecked.

Requirement	Responsibility	Due date	Status
<input checked="" type="checkbox"/> Letter signed/stamped by Authorities, municipalities, if any, that provide services.	Kevin Parker		Provided
<input type="checkbox"/> On-site Infrastructure Drawings.			

Figure 13 Providing requirements

1.2.5.3 Setting submitted scores

In the “Submitting” phase a project team member can set the submitted scores of criteria. This can be done by navigating to a criterion page and changing the “Submitted score” field in the “Criterion scores” box.

The screenshot shows a web interface titled "Criterion Scores". It contains a table with two rows: "Targeted Score" and "Submitted score". Both rows have a dropdown menu next to them. The "Targeted Score" dropdown is set to 3, and the "Submitted score" dropdown is set to 2. Below the table is a "Save" button (green).

	Score
Targeted Score	3
Submitted score	2

Figure 14 Setting submitted scores

Contact Us

If you have additional questions about GSASgate, don't hesitate to contact:
v.dixit@gord.qa

Gulf Organisation for Research & Development
T: +974 4404 9010, F: +974 4404 9002
Qatar Science & Technology Park (QSTP)
Tech 1, Level 2, Suite 203
P.O. Box: 210162, Doha, Qatar

Thank you.