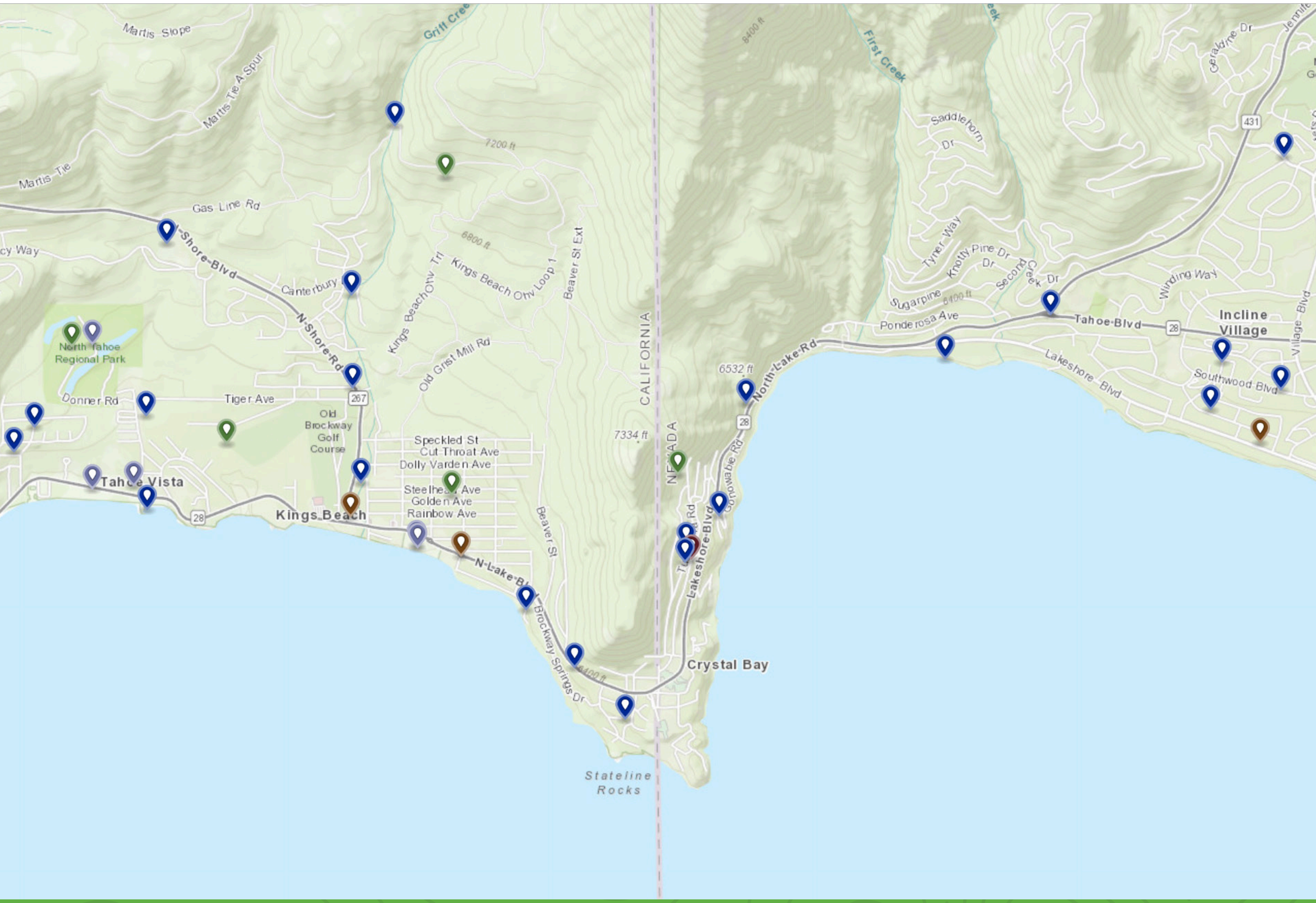
ProjectFirma™



ProjectFirma™ Customization Guide

A guide to the administrative tools and best practices for personalizing your ProjectFirma instance.

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OVERVIEW

ProjectFirma is an online platform for tracking project performance and expenditures to help managers and other stakeholders analyze program results. Clients use it to track high-level project information for a portfolio of projects. ProjectFirma grew out of the Lake Tahoe Info system, **www.LakeTahoeInfo.org**, that Sitka designed, built, maintains, and hosts for the Tahoe Regional Planning Agency (TRPA). The online platform is available via an open-source license so that TRPA and other member organizations can benefit from and extend the shared platform functionality. The platform is uniquely suited to track, share, plan, and analyze your organization's projects.

This guide is intended to be a helpful resource for launching your own instance of the ProjectFirma open-source platform.

PLATFORM FEATURES

While ProjectFirma can be customized and extended to meet specific program requirements, every instance includes the following baseline features:

- **Program Tracking**
    - Program map that shows all projects mapped by environmental outcomes and/or regulations
    - Project proposal workflow for partners and implementers to propose new projects
    - Project reporting workflow for implementing partners to report expenditures and accomplishments
    - Project fact sheets that are auto-generated and ready to print
    - Project mapping through interactive web-GIS or by uploading an ArcGIS geodatabase
    - Project detail page with rich content editors to specify partners, expenditures by funding source, performance measures, before and after photos, and links to regional objectives
- **Hierarchical Project Classification System**
    - Configurable project classification system to identify projects in a flexible way, such as:
        - Conservation targets
        - Regulatory frameworks
        - Program taxonomies
        - Strategic plan goals and objectives
    - Roll up project accomplishments and expenditures for custom reporting based on project classification
- **Funding Source Management**
    - Overview page for each funding source
    - Ability to associate funding sources with organizations and projects
    - Map and tabular display of all projects associated with each funding source

- **Performance Measure Management**
    - Overview page for each performance measure
    - Quantitative tracking of project performance measure impacts
    - Charts and tables showing annual performance measure results
    - Map and tabular display of all projects associated with each performance measure

- **Organization Management**
    - Overview page for each partner organization
    - Map and tabular display of all projects associated with each organization

- **User Account Management**
    - Account management handled using Sitka's Keystone Identity Manager™
    - Users can request accounts and manage passwords without administrator intervention

PLATFORM CONFIGURATION

With ProjectFirma, there are three ways that projects are categorized and quantified. These are:

1. Taxonomy / Hierarchical
2. Themes / Classifications
3. Performance Measures / Quantitatively

The labels and values for each categorization can be customized. A good place to look when defining these parameters are required annual reports and recent grant submittals. Structuring the project categorizations to align with existing reporting needs can facilitate using your ProjectFirma instance to better support ongoing activities.

Taxonomy

A taxonomy is a hierarchical structure used to slot projects into mutually-exclusive categories for reporting and analysis purposes. This approach is useful when "rolling up" reports for expenditures or metrics, as there is no double-counting of projects across the taxonomy. The number of taxonomy tiers is set in the system by Sitka and an administrator can add, edit, and/or remove elements in the tiers through the Manage menu. Some notes and limitations about the taxonomy:

- Can be a 1, 2, or 3-tiered hierarchy
- Can only have one taxonomy in the system
- Each taxonomy element must have a unique name
- Can assign each of the elements at the top-level hierarchy a color that shows on the hierarchy page and on the project map
- Each project should have a primary association with only one item in the lowest level of the hierarchy
- ProjectFirma can also support secondary taxonomy assignments for each project (A Sitka administrator must turn on this functionality before the ProjectFirma instance will support multiple secondary relationships)

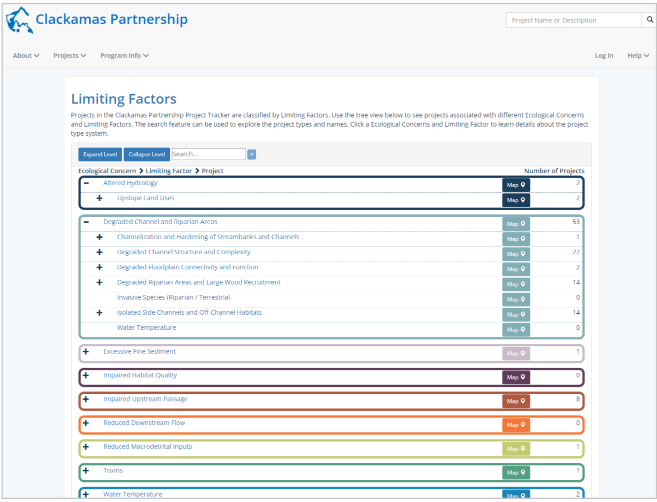


Figure 1: An example of a two-tiered taxonomy of limiting factors and ecological sub-concerns.

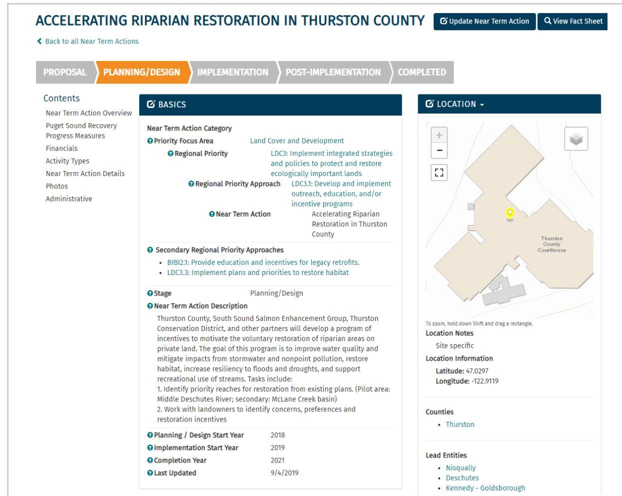


Figure 2: An example of secondary taxonomy assignments.

TWO-TIER TAXONOMY EXAMPLES

- **Lake Tahoe Transportation Tracker**
  Strategy > Objective > Project
  transportation.laketahoeinfo.org/ProgramInfo/TransportationTaxonomy

- **Clackamas Partnership Project Tracker**
  Ecological Concern > Limiting Factor > Project
  www.clackamaspartnership.org/ProgramInfo/Taxonomy

- **California RCD Project Tracker**
  Resource Area > Program > Project
  www.rcdprojects.org/ProgramInfo/Taxonomy

THREE-TIER TAXONOMY EXAMPLES

- **Environmental Improvement Program Project Tracker**
  Focus Area > Program > Action Priority > Project
  eip.laketahoeinfo.org/ProgramInfo/EipTaxonomy

- **Action Agenda for Puget Sound**
  Priority Focus Area > Regional Priority > Regional Priority Approach > Near Term Action
  actionagenda.pugetsoundinfo.wa.gov/ProgramInfo/Taxonomy

KEY DECISIONS

- **How many tiers to use?**
  Fewer is simpler to define and manage, but it allows for less granular reporting.

- **What values to define for each tier?**
  Check out the examples above for inspiration.

Themes / Classifications

Themes and classifications provide the ability to capture the multi-benefit nature of projects. A project can be assigned as many classifications as desired. Up to two distinct and independent classification systems can be defined. The number of classification systems and the name of each system is configured by Sitka, and an administrator can add and/or edit each system through the Manage menu. Some notes and limitations about the classification systems:

- Each classification system is a list of project classifications and each element in the classification system must have a unique name
- Each classification system can be assigned a color and an image
- While there can be multiple classification systems, user experience will be degraded if there are more than two
- Each project can be associated with one or more elements in each classification system

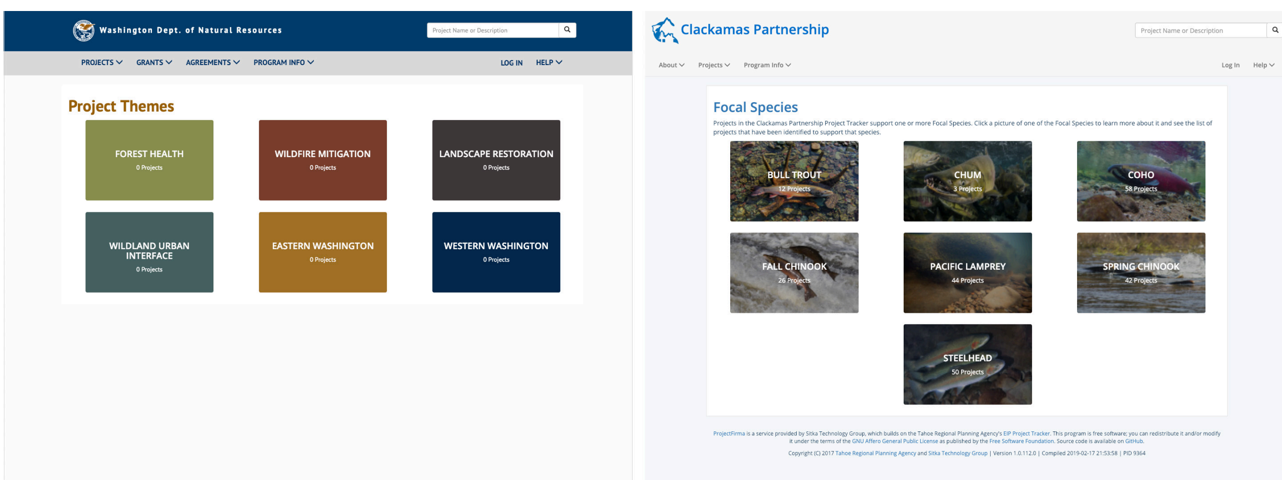


Figure 3: Examples of classification systems with and without images.

THEME AND CLASSIFICATION EXAMPLES

- **California RCD Project Tracker**
  Project Themes
  www.rcdprojects.org/ProgramInfo/ClassificationSystem/2

- **Clackamas Partnership Project Tracker**
  Focal Species
  www.clackamaspartnership.org/ProgramInfo/ClassificationSystem/1

- **Environmental Improvement Program Project Tracker**
  Environmental Threshold Categories
  thresholds.laketahoeinfo.org

KEY DECISIONS

- **What name to use for the classification system?**
- **What values to define for the classification system?**
- **What will be the key images, theme colors, and goal statement for each classification?**

Performance Measures

Performance Measures are used to quantify the project benefits. They are entered for both “Expected” values for planned future projects and “Reported Accomplishment” for projects that are underway or complete. Performance Measures can be reported across multiple dimensions via “subcategories.” For example, if the Performance Measure is “Acres of Forest Fuels Reduction” a subcategory could be “Forest Type” and options would be “Deciduous” or “Evergreen.”

PERFORMANCE MEASURE EXAMPLES

- **Environmental Improvement Program Project Tracker**
  EIP Performance Measures
  eip.laketahoeinfo.org/EIPPerformanceMeasure/Index

- **California RCD Project Tracker**
  RCD Performance Measures
  www.rcdprojects.org/PerformanceMeasure/Index

- **Clackamas Partnership Project Tracker**
  Clackamas Partnership Performance Measures
  www.clackamaspartnership.org/PerformanceMeasure/Index

KEY DECISIONS

- **What label to use for the Performance Measures? (Some prefer the term "Indicator" or "Metric")**
- **What is the appropriate list of Performance Measures?**

SITE CONFIGURATION

The following can be customized by the client's program administrator.

Home Page

ProjectFirma's home page supports an optional image carousel, custom content, and featured projects. Home page images and featured projects can be added through the Manage menu. Custom page content can be edited using the in-page editor.

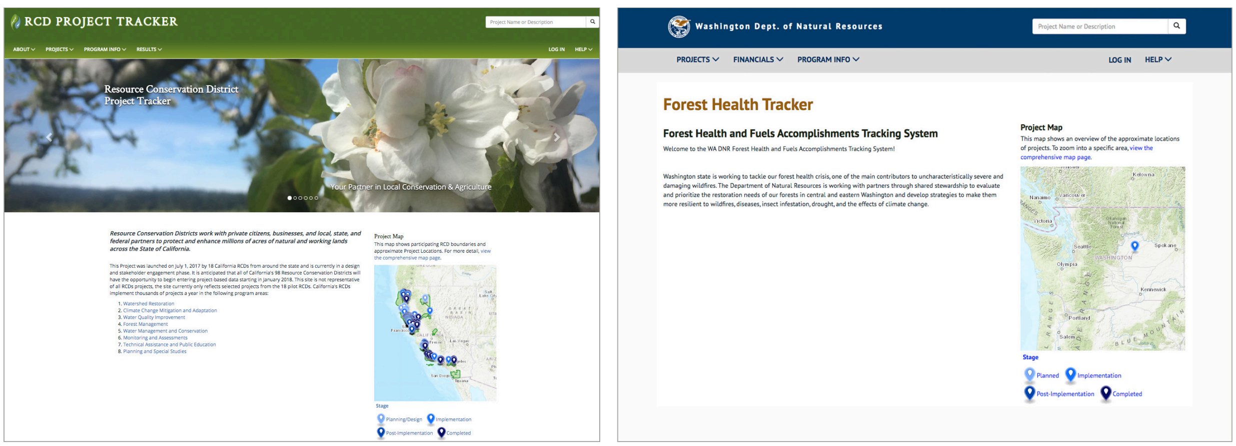


Figure 4: Examples of home pages with and without image carousel and featured projects.

IMAGE CAROUSEL

- Optional
- Optimized for 3-6 images
- Notes on how to select images:
  - Images need to work for a variety of screen resolutions/aspect ratios
  - Preview how the images respond to narrow browser windows; be sure to view on your smartphone and compare portrait and landscape modes
  - If the focal point of interest is in the middle of the image, it tends to work well
  - High resolution images are always better
- Can specify image caption and sort order for all images

CUSTOM CONTENT

- Rich-text editor can be used to layout content that appears to the left of the project map (see the following Custom Page Content for more information)

FEATURED PROJECTS

- Optional
- Optimized for 3-6 projects
- Appears as a carousel if there is more than one featured project

Custom Page Content

Throughout ProjectFirma, there are sections of the pages reserved for optional custom content. When logged in, administrators see a gray box with an "Edit" button in the upper right where custom content can be added. The custom content is usually below the page title at the top of each page. Administrators can add narrative content or rich text (e.g., bulleted lists, links, tables, images) using the in-page editor or access a full list of all pages with optional custom content through the Manage menu.

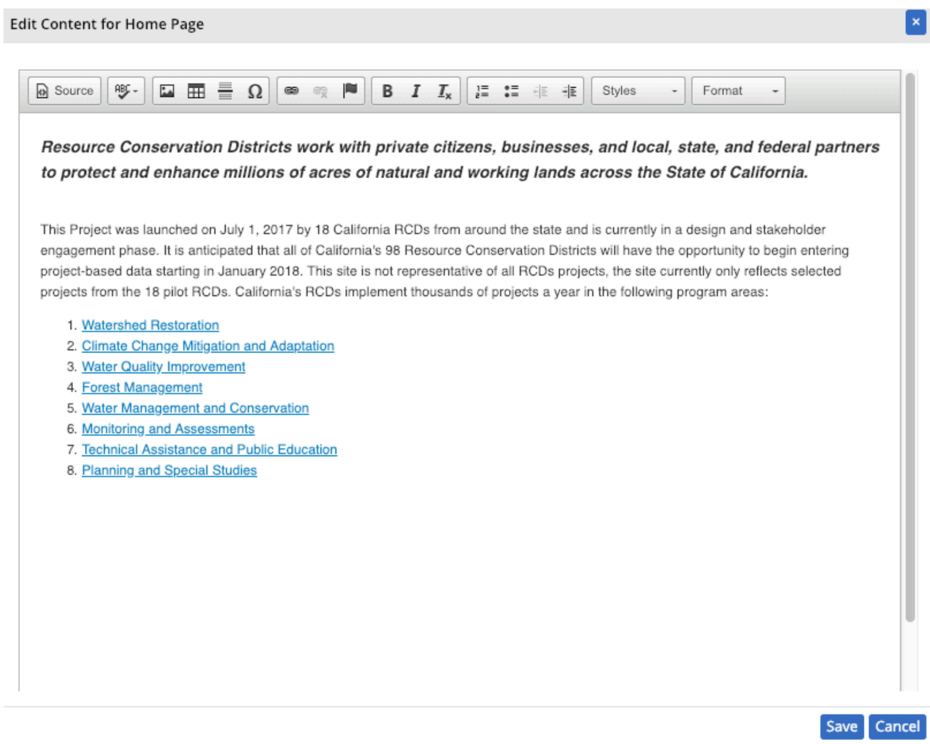


Figure 5: Custom home page content editor.

About Pages

ProjectFirma supports one or more free-form pages accessible via the About menu. An administrator can edit the page title, the page content, and the status of the page. The page status controls who can view the page. Protected pages are only visible to logged-in users and public pages are visible to any site visitor. If a page is disabled, it doesn't appear in the About menu. Custom About pages can be managed through the Manage menu.

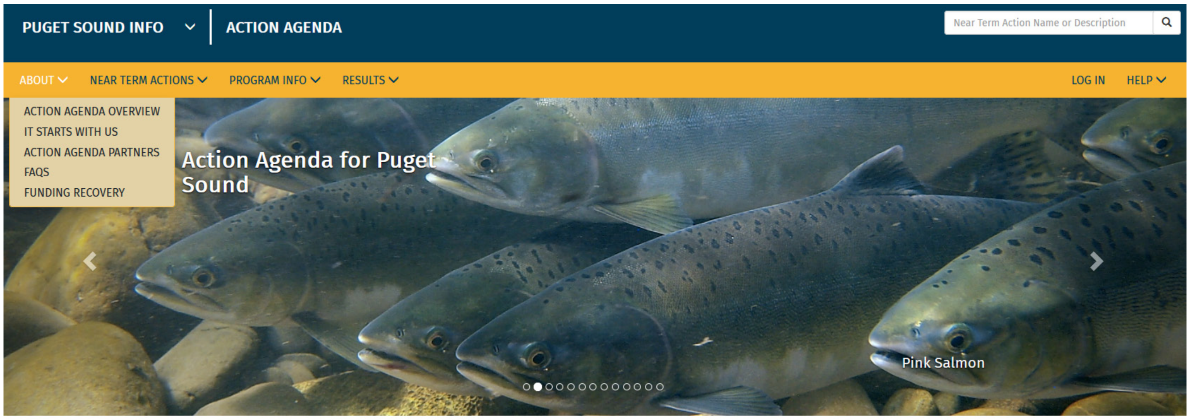


Figure 6: About menu with five public pages.

Field Names and Definitions

The terminology of each ProjectFirma instance can be defined by an administrator by setting field names and definitions for terms used throughout the system. There are over 100 fields that can be defined through the Manage menu. These definitions provide guidance or help to users who are viewing or editing information in the system. Definitions are visible to users when viewing a page or editor that lists these fields (e.g., the summary page for a project).

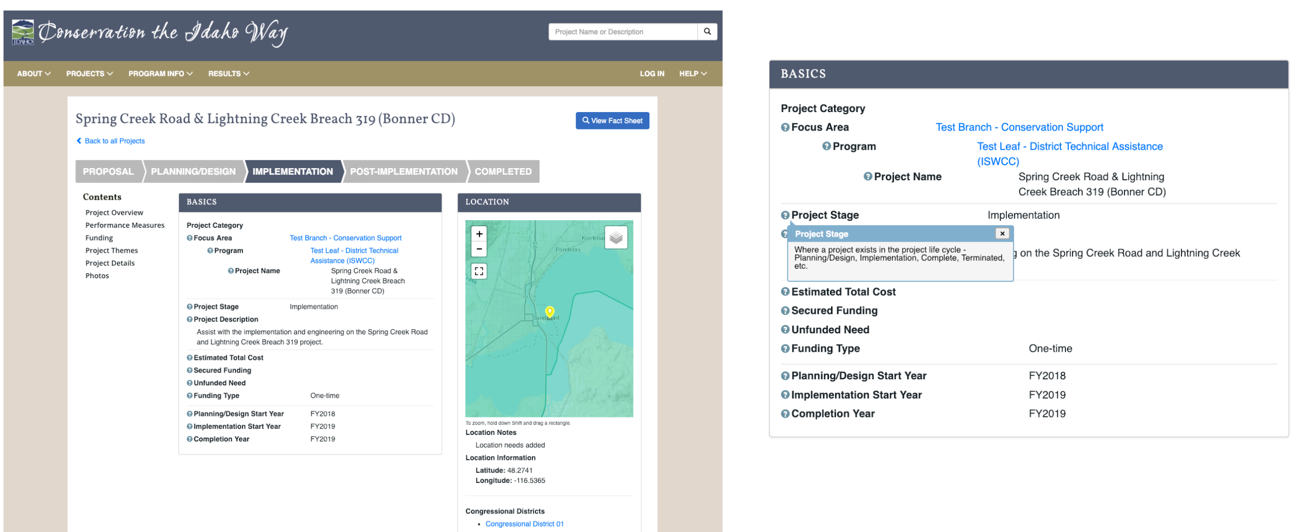


Figure 7: Field definitions are used throughout the site to provide users with guidance for unusual or unknown terms. The definitions are available by clicking the "?" icons next to the terms.

Project Custom Attributes

ProjectFirma includes built-in support for tracking many basic project attributes (e.g., project name, description, start/end dates) and the ability to add additional custom attributes that are program specific. An administrator can define many custom attributes by specifying the name and description of the attribute, the type of data to be collected (e.g., integer value, a single selection from a list of options), and whether the attribute is required for all projects. An administrator can also control the visibility and editability of custom attributes and assign them to Custom Attribute groupings. An administrator can control if the attribute is displayed in the project grid using the Customize Project Grids feature. Custom attributes can be added and edited by an administrator through the Manage menu.

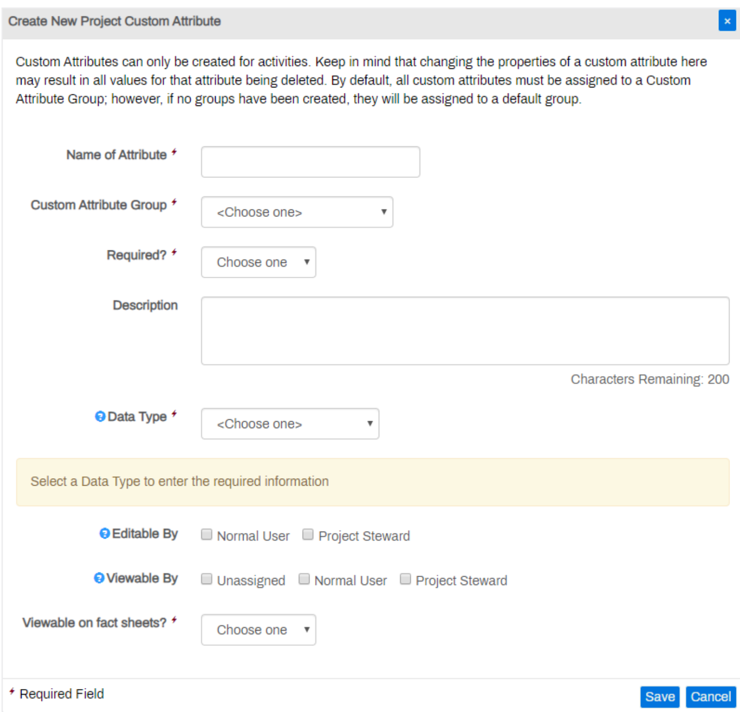


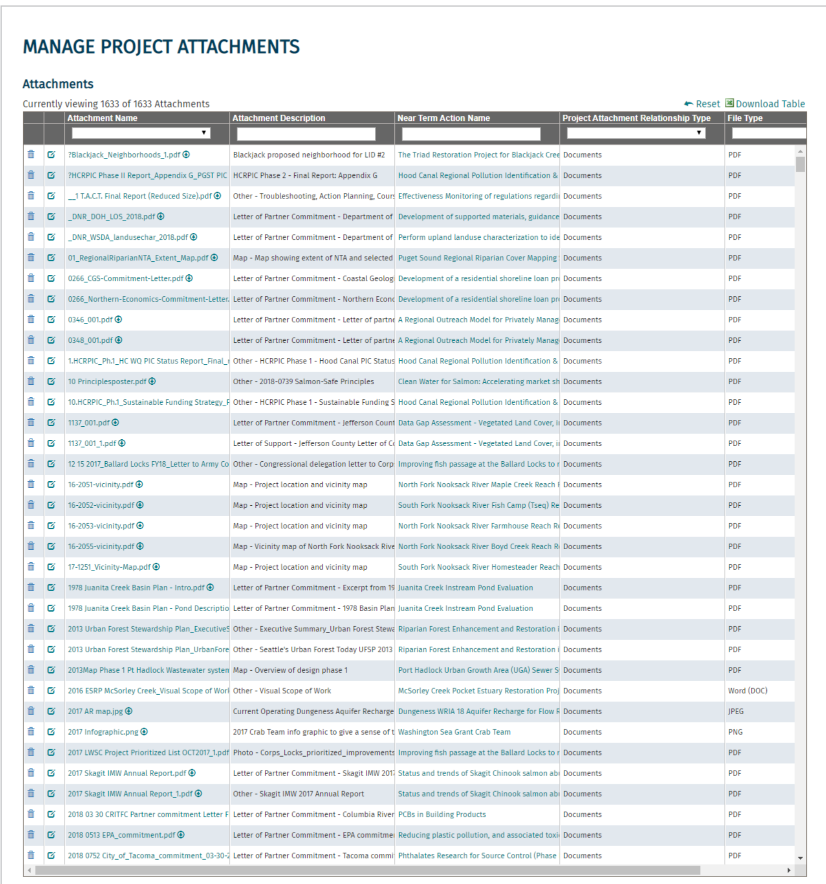
Figure 8: Example of how to add a custom project attribute. Data types include: decimal value, integer value, string, date/time, pick one from a list of options, pick many from a list of options, long string (text box), and true/false.

Funding Source Custom Attributes

ProjectFirma includes built-in support for tracking project financials by funding source. The funding source has several system-defined attributes (e.g., funding source name, description, organization) and the ability to add custom attributes to capture program-specific metadata. An administrator can define many custom attributes by specifying the name and description of the attribute, the type of data to be collected (e.g., integer value, a single selection from a list of options), and whether the attribute is required for all funding sources. Funding source custom attributes can be added and edited by an administrator through the Manage menu.

Project Attachment Types

Project attachments can be organized according to attachment type, which can be defined by program administrators. Attachments are grouped by type on the Project Detail page, and they can be added/viewed/edited/deleted in one place by program administrators in a project attachments grid. For ProjectFirma instances who haven't defined custom attachment types, or would prefer not to, all attachments are in a default category called "Documents."



MANAGE PROJECT ATTACHMENTS

Attachments

Currently viewing 1633 of 1633 Attachments

Reset Download Table

		Attachment Name	Attachment Description	Near Term Action Name	Project Attachment Relationship Type	File Type
		?Blackjack_Neighborhoods_1.pdf	Blackjack proposed neighborhood for LID #2	The Triad Restoration Project for Blackjack Cree	Documents	PDF
		?HCRPIC Phase II Report_Appendix G_PGST PIC	HCRPIC Phase 2 - Final Report: Appendix G	Hood Canal Regional Pollution Identification &	Documents	PDF
		__1 T.A.C.T. Final Report (Reduced Size).pdf	Other - Troubleshooting, Action Planning, Cour	Effectiveness Monitoring of regulations regardi	Documents	PDF
		_DNR_DOH_LOS_2018.pdf	Letter of Partner Commitment - Department of	Development of supported materials, guidance	Documents	PDF
		_DNR_WSDA_landusechar_2018.pdf	Letter of Partner Commitment - Department of	Perform upland landuse characterization to ide	Documents	PDF
		01_RegionalRiparianNTA_Extent_Map.pdf	Map - Map showing extent of NTA and selected	Puget Sound Regional Riparian Cover Mapping	Documents	PDF
		0266_CGS-Commitment-Letter.pdf	Letter of Partner Commitment - Coastal Geologi	Development of a residential shoreline loan pr	Documents	PDF
		0266_Northern-Economics-Commitment-Letter.	Letter of Partner Commitment - Northern Econ	Development of a residential shoreline loan pr	Documents	PDF
		0346_001.pdf	Letter of Partner Commitment - Letter of partne	A Regional Outreach Model for Privately Manag	Documents	PDF
		0348_001.pdf	Letter of Partner Commitment - Letter of partne	A Regional Outreach Model for Privately Manag	Documents	PDF
		1.HCRPIC_Ph.1_HC WQ PIC Status Report_Final_	Other - HCRPIC Phase 1 - Hood Canal PIC Status	Hood Canal Regional Pollution Identification &	Documents	PDF
		10 Principlesposter.pdf	Other - 2018-0739 Salmon-Safe Principles	Clean Water for Salmon: Accelerating market sh	Documents	PDF
		10.HCRPIC_Ph.1_Sustainable Funding Strategy_F	Other - HCRPIC Phase 1 - Sustainable Funding S	Hood Canal Regional Pollution Identification &	Documents	PDF
		1137_001.pdf	Letter of Partner Commitment - Jefferson Count	Data Gap Assessment - Vegetated Land Cover, i	Documents	PDF
		1137_001_1.pdf	Letter of Support - Jefferson County Letter of C	Data Gap Assessment - Vegetated Land Cover, i	Documents	PDF
		12 15 2017_Ballard Locks FY18_Letter to Army Co	Other - Congressional delegation letter to Corp	Improving fish passage at the Ballard Locks to r	Documents	PDF
		16-2051-vicinity.pdf	Map - Project location and vicinity map	North Fork Nooksack River Maple Creek Reach	Documents	PDF
		16-2052-vicinity.pdf	Map - Project location and vicinity map	South Fork Nooksack River Fish Camp (Tseq) Re	Documents	PDF
		16-2053-vicinity.pdf	Map - Project location and vicinity map	North Fork Nooksack River Farmhouse Reach R	Documents	PDF
		16-2055-vicinity.pdf	Map - Vicinity map of North Fork Nooksack Rive	North Fork Nooksack River Boyd Creek Reach R	Documents	PDF
		17-1251_Vicinity-Map.pdf	Map - Project location and vicinity map	South Fork Nooksack River Homesteader Reach	Documents	PDF
		1978 Juanita Creek Basin Plan - Intro.pdf	Letter of Partner Commitment - Excerpt from 19	Juanita Creek Instream Pond Evaluation	Documents	PDF
		1978 Juanita Creek Basin Plan - Pond Descriptio	Letter of Partner Commitment - 1978 Basin Plan	Juanita Creek Instream Pond Evaluation	Documents	PDF
		2013 Urban Forest Stewardship Plan_ExecutiveS	Other - Executive Summary_Urban Forest Stewa	Riparian Forest Enhancement and Restoration i	Documents	PDF
		2013 Urban Forest Stewardship Plan_UrbanFore	Other - Seattle's Urban Forest Today UFSP 2013	Riparian Forest Enhancement and Restoration i	Documents	PDF
		2013Map Phase 1 Pt Hadlock Wastewater system	Map - Overview of design phase 1	Port Hadlock Urban Growth Area (UGA) Sewer S	Documents	PDF
		2016 ESRP McSorley Creek_Visual Scope of Work	Other - Visual Scope of Work	McSorley Creek Pocket Estuary Restoration Proj	Documents	Word (DOC)
		2017 AR map.jpg	Current Operating Dungeness Aquifer Recharge	Dungeness WRIA 18 Aquifer Recharge for Flow R	Documents	JPEG
		2017 Infographic.png	2017 Crab Team info graphic to give a sense of t	Washington Sea Grant Crab Team	Documents	PNG
		2017 LWSC Project Prioritized List OCT2017_1.pdf	Photo - Corps_Locks_prioritized_improvements	Improving fish passage at the Ballard Locks to r	Documents	PDF
		2017 Skagit IMW Annual Report.pdf	Letter of Partner Commitment - Skagit IMW 2017	Status and trends of Skagit Chinook salmon ab	Documents	PDF
		2017 Skagit IMW Annual Report_1.pdf	Other - Skagit IMW 2017 Annual Report	Status and trends of Skagit Chinook salmon ab	Documents	PDF
		2018 03 30 CRITFC Partner commitment Letter F	Letter of Partner Commitment - Columbia River	PCBs in Building Products	Documents	PDF
		2018 0513 EPA_commitment.pdf	Letter of Partner Commitment - EPA commitme	Reducing plastic pollution, and associated toxi	Documents	PDF
		2018 0752 City_of_Tacoma_commitment_03-30-2	Letter of Partner Commitment - Tacoma commi	Phthalates Research for Source Control (Phase	Documents	PDF

Figure 9: Attachments types can be added/viewed/edited/deleted in one place by program administrators.

Project Update Schedule and Notifications

Projects in the Planning/Design, Implementation, and Post-Implementation stages should be reviewed and updated annually to ensure a complete and accurate project record. Administrators can configure a schedule for the project tracker to email the project's primary contact(s) with a request to update the project. An administrator can use the Configure Notifications panel on the Manage Project Updates page to enable project update notification emails and customize the email content and schedule.

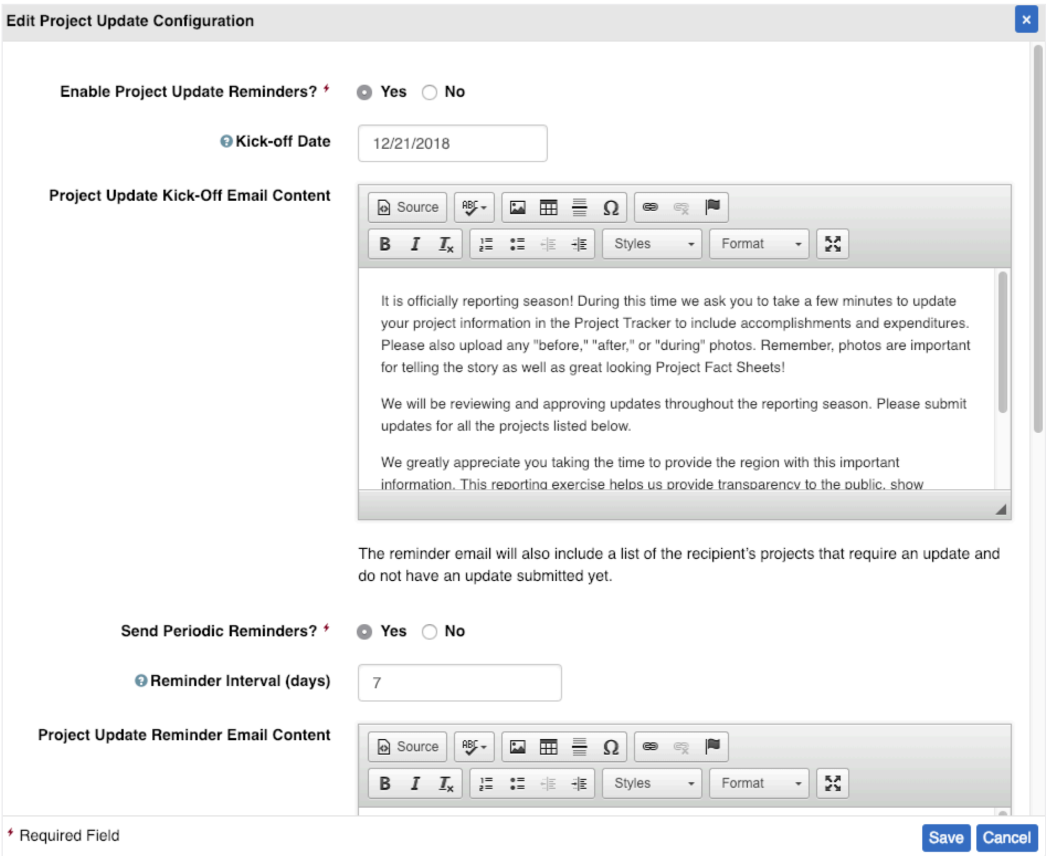


Figure 10: Example of how to enable project update reminders and customize the email content.

Custom Project Grids

A program administrator can customize the columns that appear in project data grids. From the Manage menu, select "Project Custom Grids." On this page, the administrator can select which columns to show and in what order. There are two configurations currently available, one is for the Full Project Grid and another is for Default grids that appear on many pages throughout the site (e.g., classification, taxonomy).

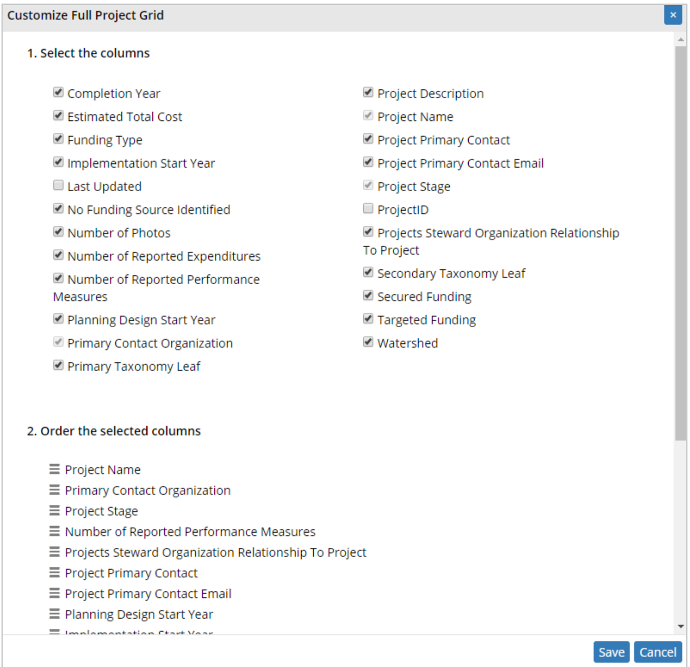


Figure 11: The administrator can select which columns to show and in what order.

Sitka-Assisted Customizations

For technical and/or efficiency reasons, there are a number of customizable aspects of ProjectFirma that require Sitka's assistance to implement. Depending on the level of work, urgency of the request, and number of iterations, the customizations may require additional funding to implement.

PROJECTFIRMA TRACKER NAME AND URL

The system name, logo, browser tab short name, browser tab favicon, and URL are customizable by Sitka. We recommend providing these important elements early to limit the change management involved with switching URLs and re-branding the system.

OVERALL STYLE

The overall style of the site is set by a single stylesheet (CSS file) which can be provided or Sitka can create. If no stylesheet is provided, and if Sitka is not budgeted to create a custom "look and feel," ProjectFirma uses a default stylesheet. The styles can be previewed on the Style Guide page accessible through the Manage menu.

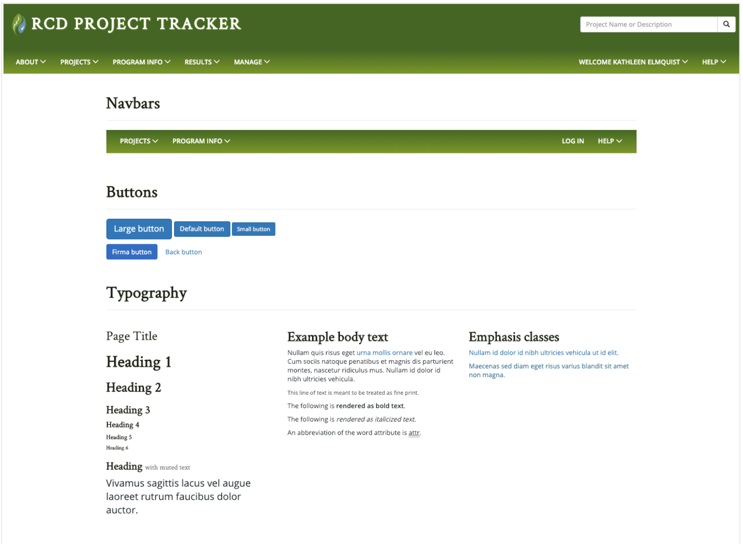


Figure 12: Style Guide page allows an administrator to preview web component styles.

GEOGRAPHIC AREAS

Up to five geospatial areas, such as watershed, priority area, and legislative district boundaries, can be included in ProjectFirma. Once the areas are imported, the system automatically rolls up associated project accomplishments and expenditures on each geospatial area detail page.

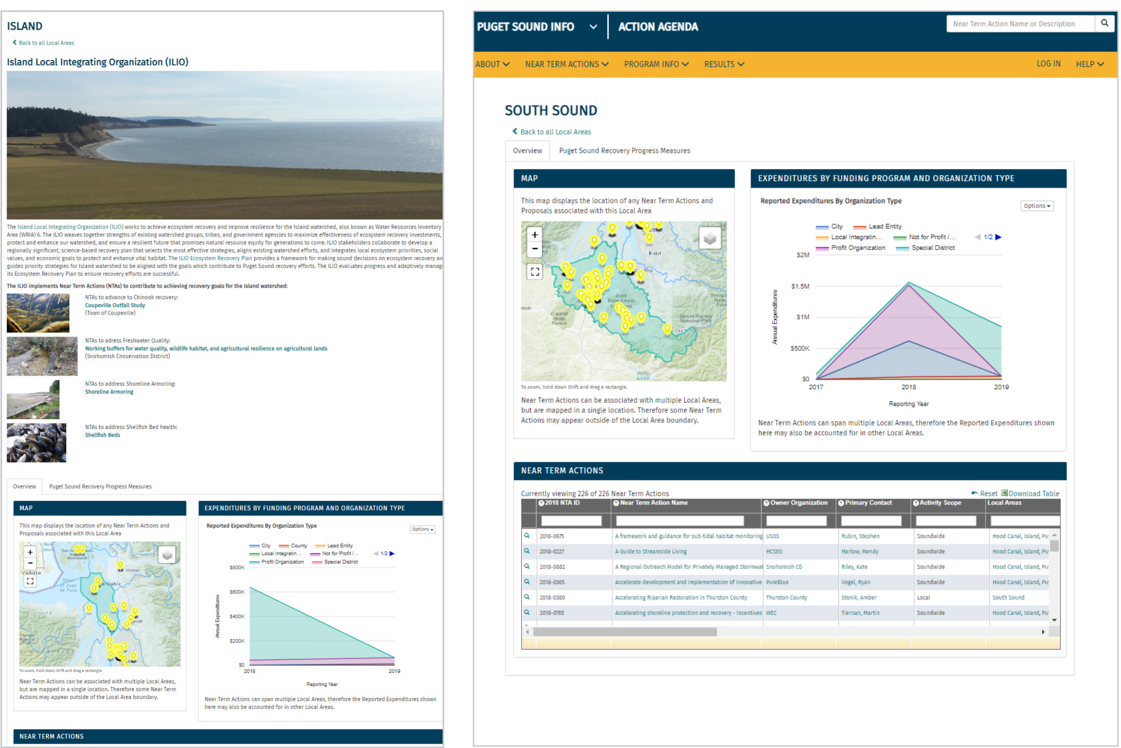


Figure 13: Administrators can customize introduction text and optionally add images at the top of each geospatial area detail page.

ORGANIZATION TYPES

ProjectFirma comes “out-of-the-box” with four organization types: federal, local, private, and state. If the system needs to support more types, they can be added on an as-needed basis by Sitka. We recommend using the system for awhile to determine which additional types are needed. The types of Organization-Project associations (e.g., Partner) can also be customized by Sitka.

CONTACT TYPES

ProjectFirma comes “out-of-the-box” with one contact type, which is the project’s primary contact. If the system needs to support more contact types, they can be added on an as-needed basis by Sitka. The types of Contact-Project associations (e.g., one association or allowing multiple contacts per type) can also be customized by Sitka. A user can be a different contact type on different projects.

BUDGET TYPES

ProjectFirma has two options for budget type configurations: Simple Budget and Annual Budget by Cost Type. The simple budget allows a user to enter a budget by funding source with values for secured and targeted. The annual budget by cost type accommodates more detailed financial reporting. A Sitka administrator must set the configuration and specify the cost type values, and it is recommended to select the appropriate budget type early to limit the need for data migration or change management with partners. If Annual Budget by Cost Type is selected, users will be able to enter expenditures by cost type as well.

PROJECT EDITING AND APPROVAL PERMISSIONS

To ensure data quality, editing projects and approving pending projects, project proposals and updates can only be done by users who are authorized through their role in the system.

Administrators are users who are assigned the role “Administrator” in the system. They can edit all projects, assign other users a role, as well as manage the system (including all customizations mentioned in this document). We recommend limiting the number of system administrators to a few users who understand the tool and need access to add/edit organizations and manage user roles.

Project Stewards are users who are assigned the role “Project Steward” in the system. The field name “Project Steward” can be customized and defined through the Manage menu. (For more information, see the Field Name and Definitions section of this document.) Project Stewards can edit all projects and approve pending projects, project proposals, and updates. An optional customization is to define an attribute of a project that can be used to limit which projects a Project Steward can manage. For example, Washington Department of Natural Resources Forest Health Tracker is the project management tool for all six regions throughout Washington State. Each project is associated with a region and an administrator can assign a region to each Project Steward. The result is that Project Stewards can only manage projects in their assigned region(s).

PUBLIC OR PROTECTED PROPOSALS

The system can be configured to show or hide project proposals from the public. When the public option is set, projects in the pending approval state will be shown on project maps and on the proposal page. When the option is set to protected, no proposals will be visible to anonymous users (i.e., users who are not logged in).

GET STARTED

For organizations interested in improving transparency and accountability of their environmental programs with ProjectFirma, please contact us at **1.800.805.6740** or **sales@sitkatech.com**
For more information, please visit: **www.sitkatech.com/ProjectFirma**

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Sitka Technology Group is the leading provider of enterprise-level software solutions to streamline and power the acquisition, management, and visualization of field data for environmental conservation efforts.
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