Program Tracking Documentation

Sacramento, California

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1 Definitions

***Activities*:** General activities expected for the project. Detailed updates and information should be entered under Status Updates once the new project has been submitted.

***Category (for Status Updates)*:** Categories are predefined and intended to be general enough to be used by all groups; when a row in the drop-down list is highlighted a pop-up tip will describe the general information about the category type. It is up to each group/section/branch to determine how these categories fit into their requirements. The bold items are required to meet minimum reporting requirements.

- Administration
- **Deliverable**
- Deployment
- Development
- Enhancements
- **Highlights/Milestones**
- Installation/Configuration
- Maintenance
- Meetings/Conferences
- Operations
- Outreach
- Report
- Support
- Training

***Contacts*:** This is intended for individuals or other contacts to which the project is to be sent upon completion.

***Project*:** A project can consist of a general project heading, such as "General Training" or be a specific long term/short term project.

***State (for Projects)*:** When entering a new, or editing the status allows a project to be designated as active, open, ongoing, on hold, or re-opened.

***Status Update*:** This is specific information regarding actual actions taken along the course of the project. These must have a date associated (can be approximate) to aid the reporting process.

Status Updates are the data queried when generating bi-weekly reports (or any other period of time).

Note: *Status Updates can only be made to Activities already entered in Program Tracker.*

Team**:** Individuals who are working on the project.

Viewing: These views have a gray colored theme and are used solely for viewing data. This view can be accessed via the *View* selection in menu bar. 3

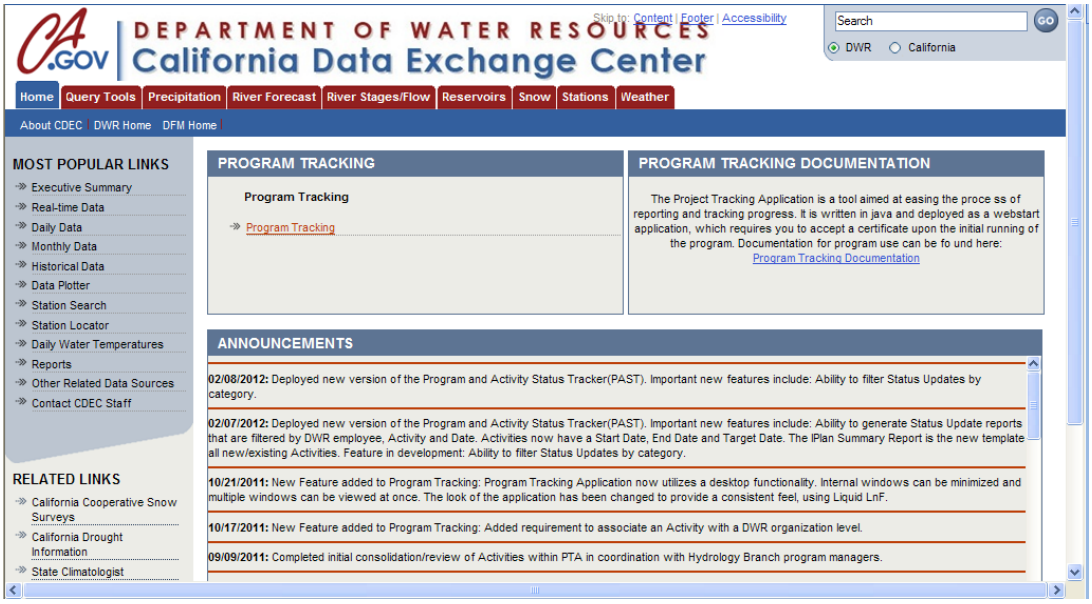
IPlan Summary Report: Contains all the activity formatted like the IPlan.

Status Update Report: Contains the Status Updates that fall between the dates selected in the date fields. Reports can be sorted in two ways: Date only and Category, then by date.

2 Getting Started

Note: *If the Program Tracker database application is not on your computer Desktop, ask Nick Perez of the CDEC section to load it.*

1. Double-click the Program Tracker icon on your desktop. The below screen will appear. This is the CDEC window.



2. Select the red text ‘Program Tracking’ from the above window.

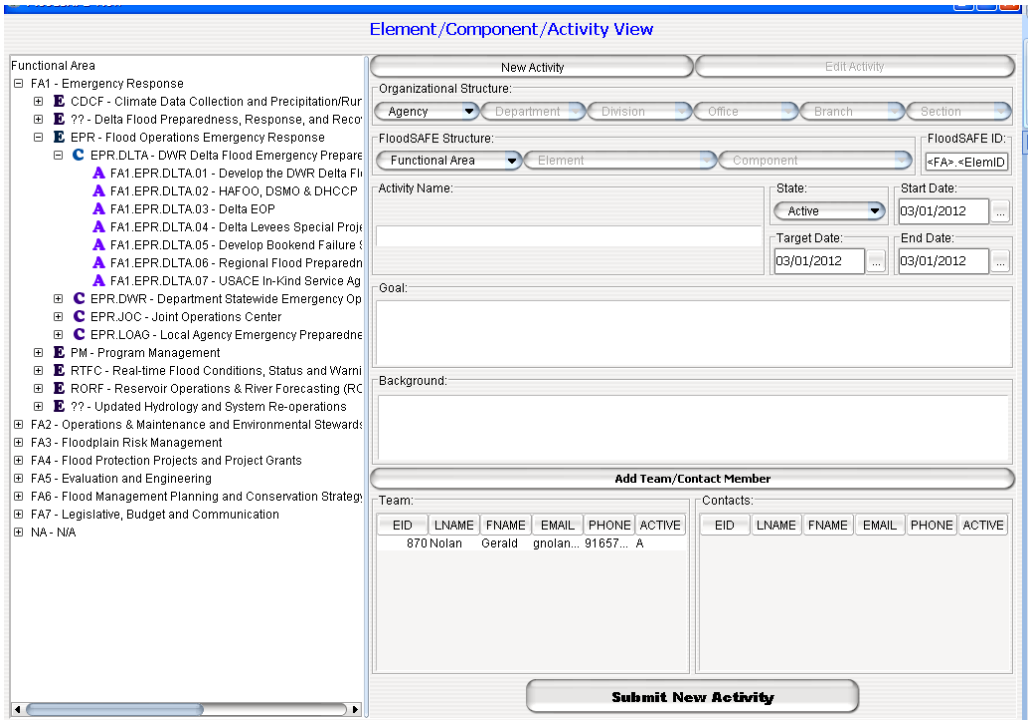
3. Program Tracker will display the window that you worked on last. You may close all other windows at this time, and, if you like, close all previously opened PT windows until you see the below basic Program Tracker window.

3 Adding and Editing

3.1 Add a New Activity

Note *– Program Tracker allows for the development of 8 Functional Areas, FA1- FA7 and NA. HAFOO program activity is organized under FA1 – Emergency Response.*

1. From the main screen menu bar, select Tools, FloodSAFE Management Tool. The below Element/Component/Activity View screen will appear.



1. At the above window, select 'New Activity' at the top middle of the screen.
2. Determine the next ECA ID # to be used by expanding the Element Grouping (left side of screen) for the Functional Area to which the new Activity will belong.

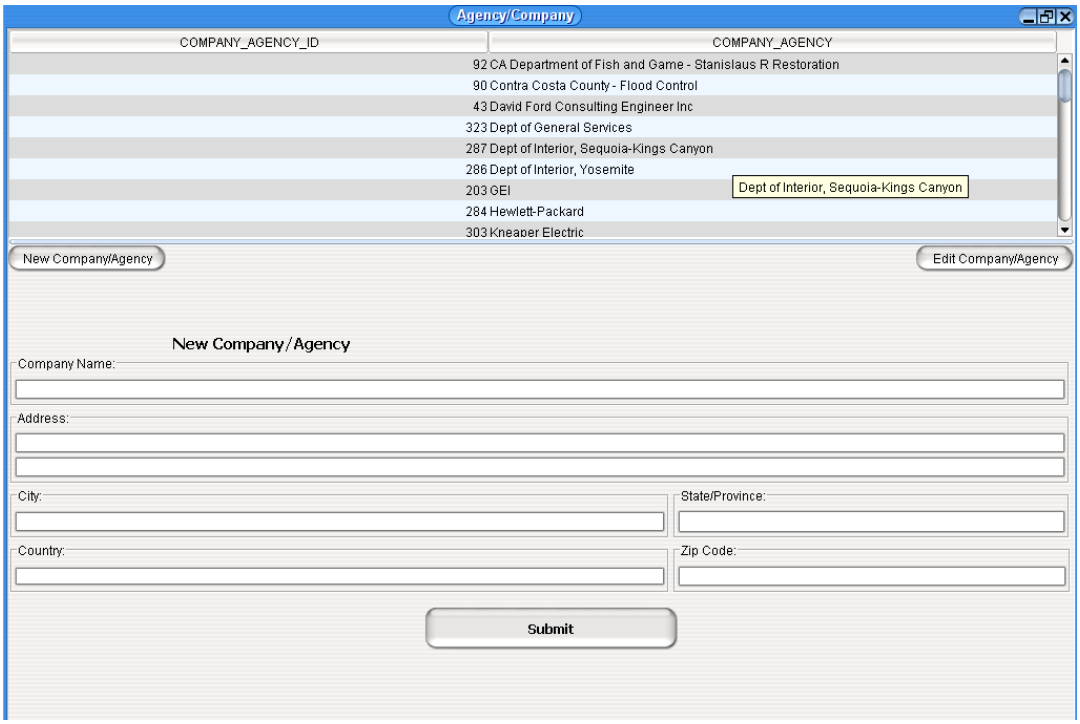
   Example – if your team agrees that a new activity is needed to capture work being performed in the area of DWR Delta Flood Emergency Preparedness, you will expand Element 'EPR – Flood Operations Emergency Response', and then expand Component 'DWR Delta Flood Emergency Preparedness'.

   If, after reviewing the existing Activities under Component 'DWR Delta Flood Emergency Preparedness', your team still feels that a new activity is needed (use existing activities whenever possible), you will use the next 'ECA ID number' in that section. Per the above window, the next 'ECA ID number' is FA1.EPR.DLTA.08.

3. Complete the sections in the main area of this window and insert the new ECA ID number in the section 'FloodSAFE Structure'. Much of the other information may be gotten from contract Statements of Work.

3.2 Add a New Agency/Company

1. On the menu bar, select *File>Company/Agency* for the below window.



2. To add New Company/Agency, click on the 'New Company/Agency' button in the left middle of the screen.

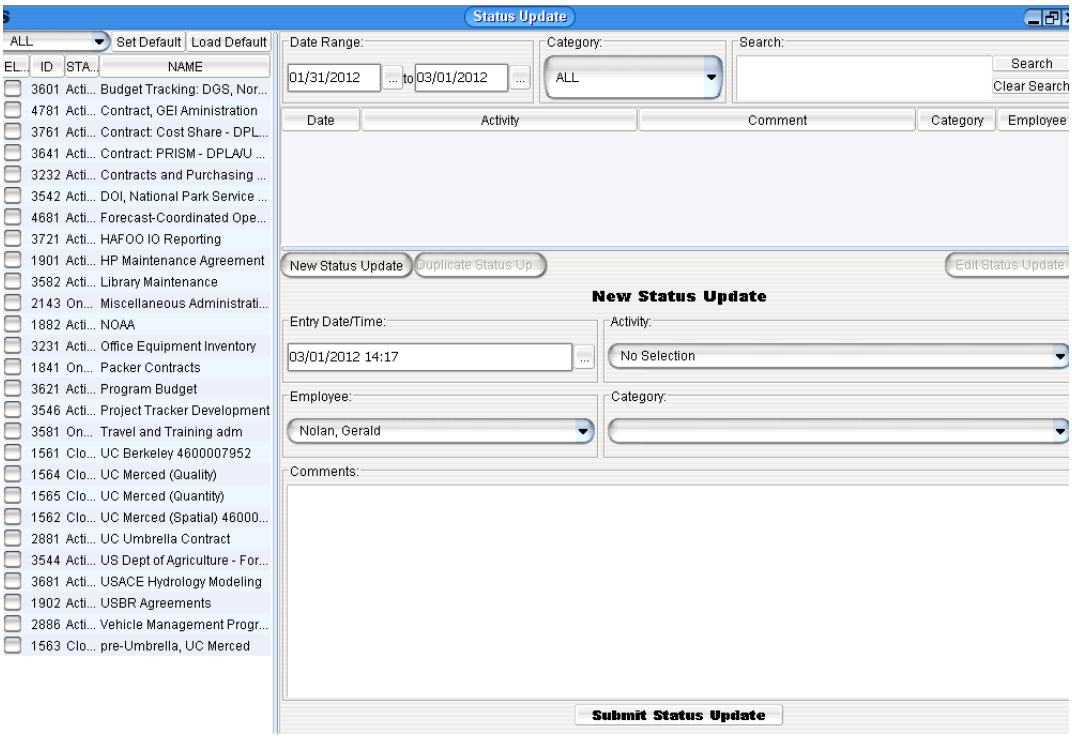
3. Complete the fields in the lower section and click 'Submit'.

4. After restarting the program, the newly installed agency/company will be displayed in the upper window and available for use throughout the program.

3.3 Add a New Status Update

Note: *Status Updates can only be made to Activities already entered in Program Tracker.*

1. On the menu bar, select *File>Status Update* for the below window.

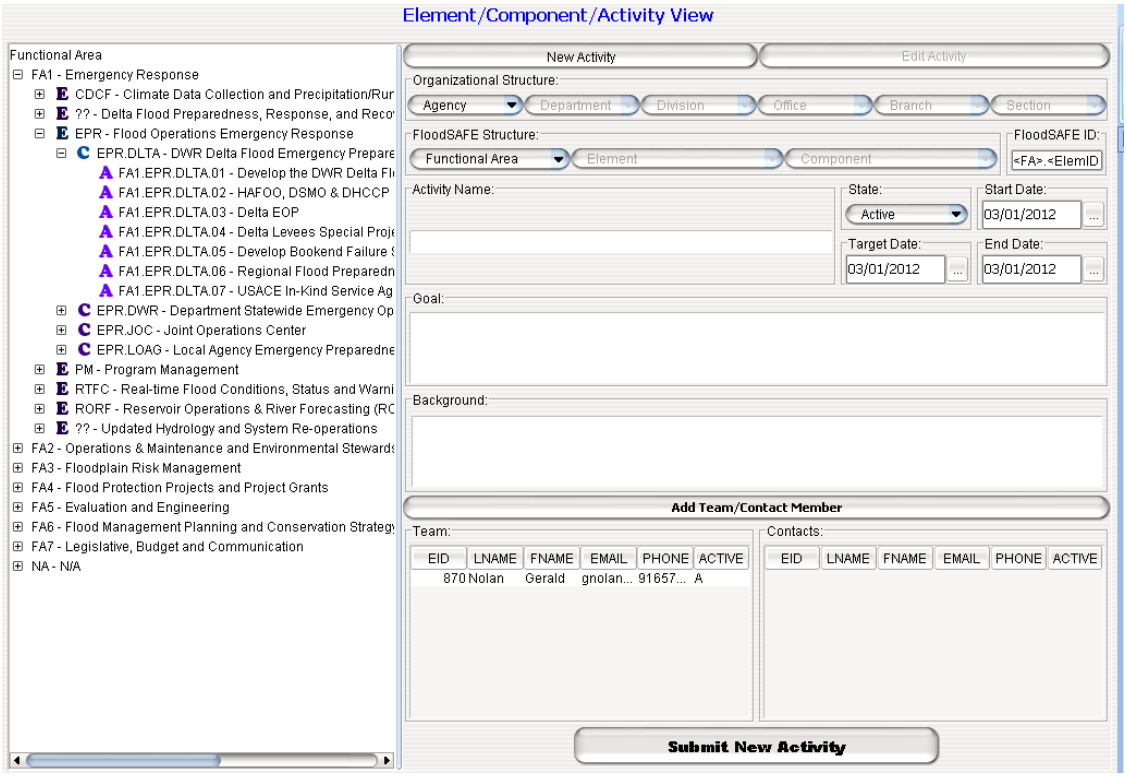


2. Screen sections explained –
   a. The **left column** displays all activities of which you are a team member.
      i. To add your name as a team member, go to 'Add Team/Contact Member' section at bottom of **Activity** screen
   b. The **upper part of the right column** will display existing updates for whatever activity(ies) you check in the left column.
   c. The **lower part of the right column** is where you
      i. Create New Status Updates, and
      ii. Edit existing Status Updates

3. New Status Update
   a. Select New Status Update button in upper left of New Status Update section
   b. Complete the fields in the lower section and click 'Submit Status Update'.
   c. Select 'OK' in the pop-up window

3.4 Edit an Existing Activity

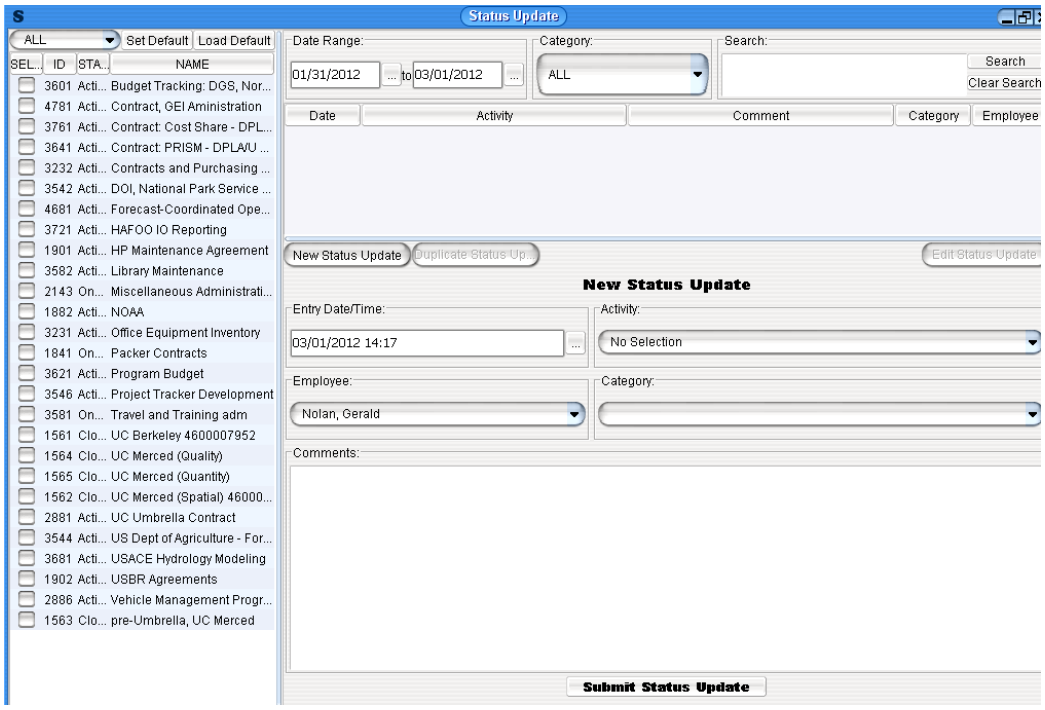
1. On the menu bar, select *File>Activity* for the below window.



2. From the left column, double-click on the activity to be edited.
3. Select ‘Edit Activity’ at the top right portion of the screen.
4. Edit the fields, as necessary.
5. To add Team/Contact Member –
    a. Select ‘Add Team/Contact Member
    b. Select agency with which the person is associated
    c. Select ‘Add to Team’ or ‘Add to Contact’ and close window
6. To delete Team/Contact Member –
    a. Right click on name of team member or contact
    b. Select ‘Delete Row’
7. Click ‘Submit Changes to Activity’.
8. Select ‘OK’ in the pop-up window

3.5 Edit an Existing Status Update

1. On the menu bar, select *File>Status Update* for the below window.

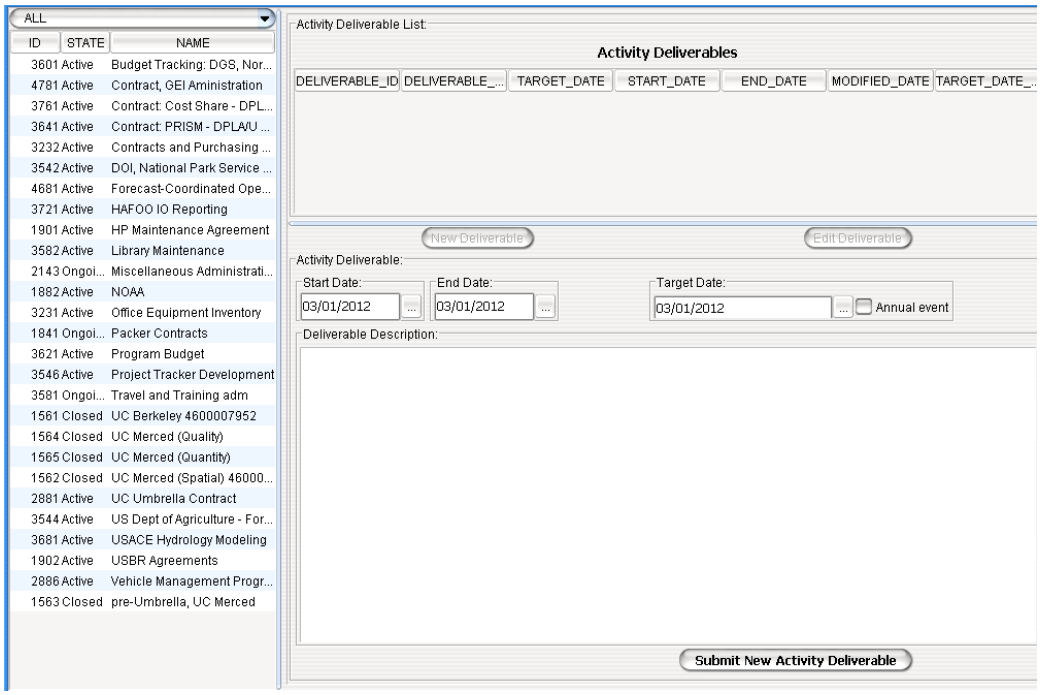


2. From the left column, double-click on the activity to be edited.
3. In the upper part of the screen, double-click on the status update to be edited
4. In the lower part of the screen, select the ‘Edit Status Update’ button.
5. Make necessary changes.
6. Click ‘Submit Status Update’.
7. Select ‘OK’ in the pop-up window

4 Activity Deliverables

4.1 Adding a New Activity Deliverable

1. Go to *File->Activity Deliverables*



4.2 Editing an Existing Component Deliverable

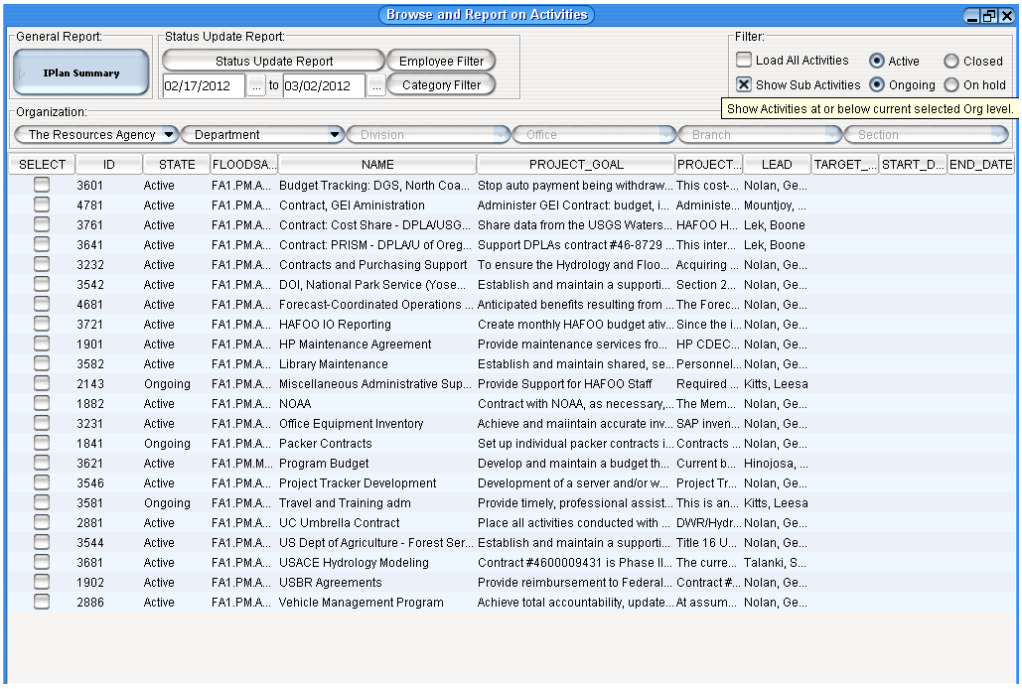
4.3 Adding/Editing a Component Deliverable Milestone

5 Reporting

5.1 By Individual

Note: *The reports by individual are used by Administrative staff members to support their presentations at the Admin and Support Staff meetings.*

1. On the menu bar, select *View>Browse Activities* for the below 'Browse and Report on Activities' window.



Note: *This window displays all activities of which you are a team member and/or contact. To add your name as a team member, go to 'Add Team/Contact Member' section at bottom of* ***Activity*** *screen.*

2. Place cursor over the main section of the window where the activities are displayed.

3. Right click mouse and choose 'Select All'.

4. In top section of the above window, select 'Status Update Report'.

5. Move the resulting Status Updates Report window so you can see both windows – 'Status Updates Report' and 'Browse and Report on Activities'.

6. On the window 'Browse and Report on Activities', uncheck any activity for which you took no actions during the reporting period (see dates just below button 'Status Update Report').

7. Close 'Status Update Report'

8. Run an updated 'Status Update Report'.

9. Print final report using the icon in the top left portion of the Report.

10. If necessary, take the below actions.

a. <u>Add omitted Status Updates</u>

   i. Leave open the 'Browse and Report on Activities' window.

   ii. Select *File >Status Update* from the same window.

   iii. Complete any necessary status updates.

   iv. Close the Status Update window. This will reveal the 'Browse and Report on Activities' window.

   v. Place cursor over the main section of the window where the activities are displayed.

   vi. Right click mouse and choose 'Refresh Table'.

   vii. Repeat steps 4 thru 6 above.

b. <u>Remove activities for which you don't share reporting responsibilities</u>

   i. Leave open the 'Browse and Report on Activities' window.

   ii. Select *File>Activity* from the same window.

   iii. Highlight the activity from the left column for which you don't share reporting responsibility.

   iv. Select the button 'Edit Activity' at the upper right part of the window.

   v. In the section 'Add Team/Contact Member'

      1. Highlight your name and right click.

      2. Select 'Delete Row'

   vi. Select bottom button 'Submit changes to Activity'.

   vii. Select 'OK' in pop-up window.

   viii. Repeat steps 8c thru 8g, as necessary.

5.2 By Activity

5.3 By Component Deliverable

5.4 By Section

5.5 By Branch

6 Resources

"Program Tracking Documentation" California Department of Water Resources, 2008