MFP

MAAS
SOFTWARE ENGINEERING

## Project Management Module

# Quick Start Guide

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# Introduction

The Project Management module offers an overview of all workflows in the Marine Facilities Planning system for your organisation. Workflows consist of multiple consecutive steps required to complete a specific procedure. For example, a request for ship time and/or use of equipment, or a cruise planning procedure. Each workflow step can have one or more responsible users, deadlines for when the step should be completed, and email notifications sent.

The most important function of the Project Management module is getting and keeping all project stakeholders involved. Guiding users in what they have to do and when to do it. Therefore, this module is linked to other MFP modules. Changes in other modules reflect to the Program Management module and vice versa. Together forming a modular multi-tenant system to facilitate an integrated cruise planning process.

This document gives a overview of the different Project Management sections, basic features and how to use them, and where to find configuration options for organisation specific setup.

# 1 Project Management Main Screen

The image below shows a typical main screen of the Project Management module. At the top-left you will find controls to start a new workflow, edit workflow templates, and bulk action for a selection of workflows. At the top-right a menu which, among else, gives access to the Ground Data section. Ground Data contains different configuration options regarding workflow content.

The table shows all workflows that are currently active, with the workflow identifier in the first column. This identifier is automatically generated when a new workflow is started. Although you can start new workflows from the screen, this not common practice. In most cases a new workflow is started by a scientist when creating a new application from their Scientist Portal, or a follow-up workflow is automatically created when for example, a submitted application is scheduled, and the cruise planning stage starts.

The list of workflows can be sorted on column by clicking the column header or filtered using the filter options at the top of each column.

Clicking on the identifier or alternate ID opens that specific workflow.

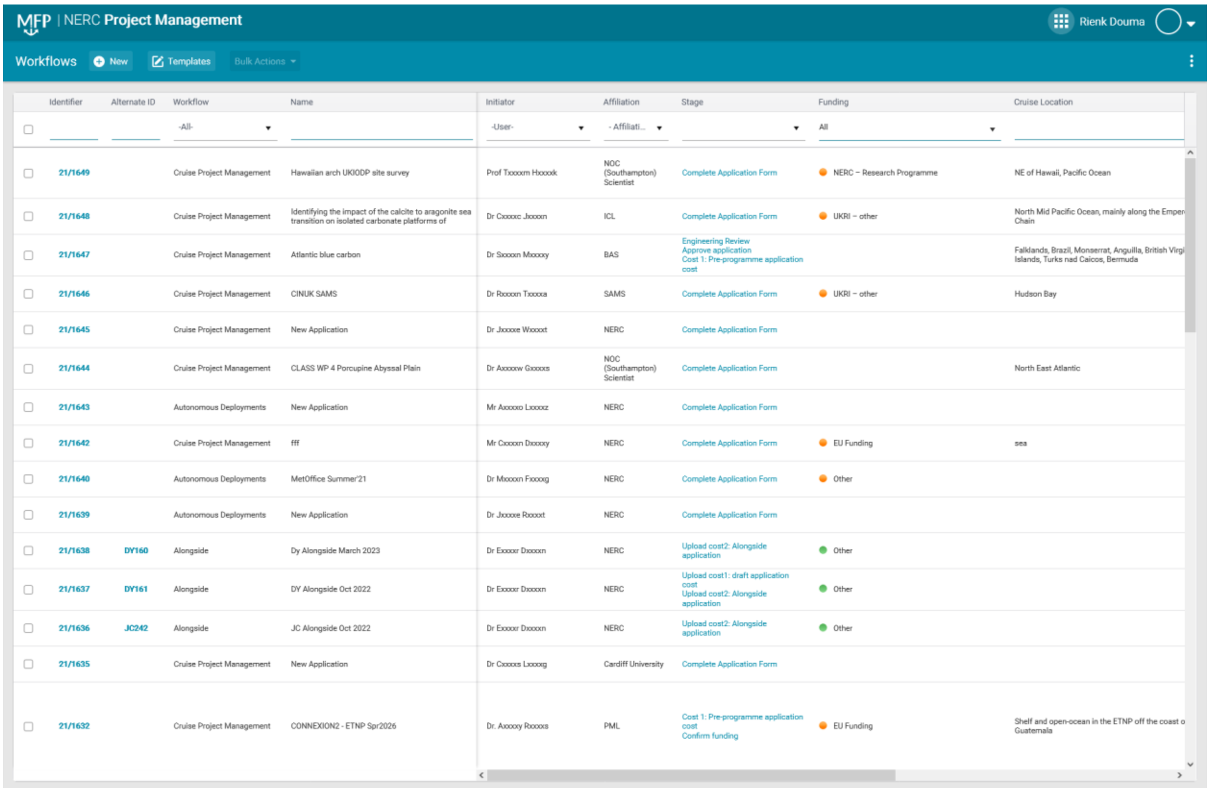



*Fig 1. Example of the Project Management main screen.*

# 2 The Workflow Overview

The workflow overview is divided into two sections. To the left basic information such as project roles, project dates and attachments added in workflow steps. Here you can also set the priority. The priority determines the position of this application in the application list within the Programme Construction module. This module is used to schedule all submitted applications.
The table shows the different workflow steps, and for each step the responsible user(s), the status, deadline, the date it was completed and the option to view or open that step.

View button: only available for completed workflow steps.
Open button: only available for active workflow steps.

When a step has the pending status, it will not show a button. Pending means a preceding step has to be completed first before this step becomes active. Predecessors can be configured in the workflow template. See chapter 3.

The active status also shows when a workflow step consists of multiple parts, such as an application form.

Users with admin rights will have the option to rollback or finish a step.

Be careful with these options as they can have great impact. The further a workflow is progressed, the greater the impact and consequence. For example, the rollback option. In the image below there are multiple workflow stages with multiple steps. In the Programme Construction stage, the application is scheduled. And probably, email notifications were sent to users when the application got scheduled. If you would rollback the Complete Application Form step, it will rollback all steps that were completed, thus removing the application from the schedule. This can create a lot of confusion.

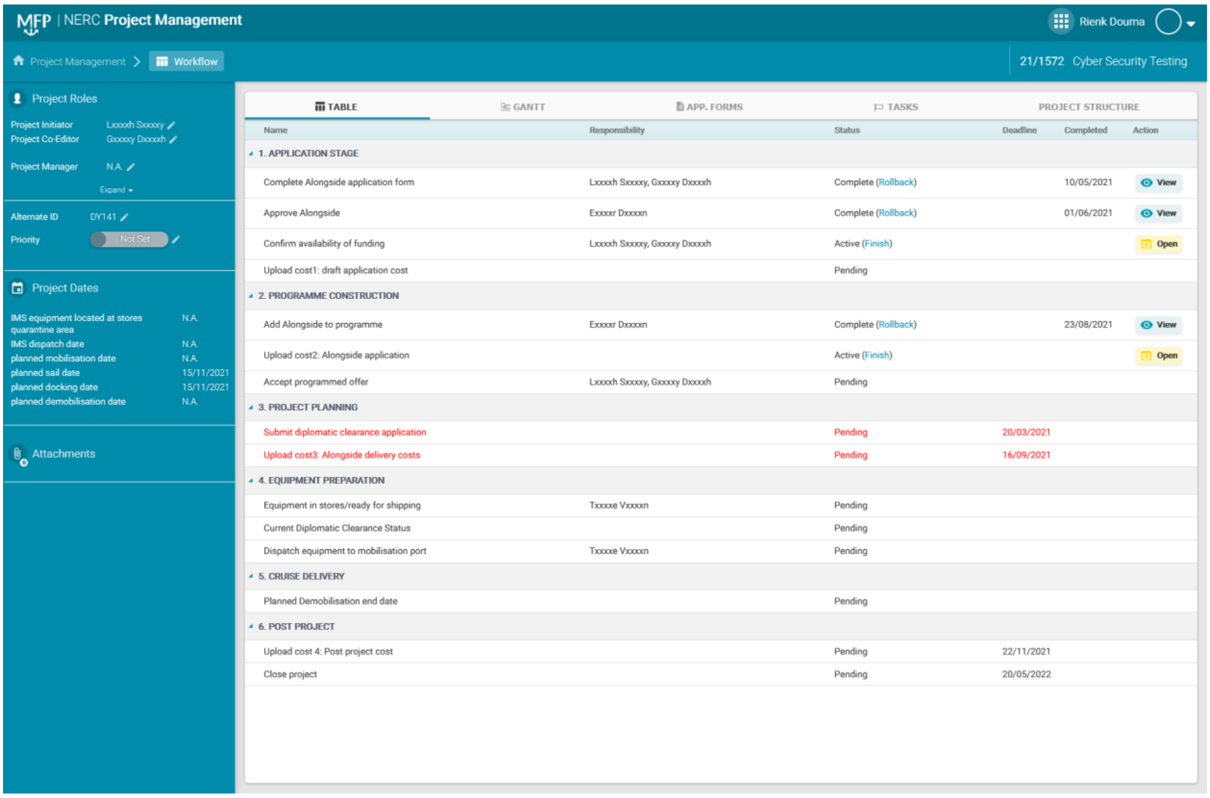



*Fig 2. Example of a workflow.*

# 3 Workflow Templates

## 3.1 General Overview and Configuration

The basic structure of workflows is preconfigured and fixed. For example, the steps of a workflow and available project roles. But within this structure it is possible to make adjustments when you have Project Administrator rights. To view and edit a workflow template, click on the Templates button in the Project Management main screen and select the template.

In the left side pane project roles can be assigned to users using the edit option (pencil icon). Not every project role has this edit option. This means that these roles are application dependent, instead of workflow dependent. These project roles a re assigned within the application form.

In the table you can make the following adjustments:

- Configure which users are responsible for a step by clicking in the Responsibility column.
- Configure which steps have to be completed before this step becomes active by clicking in the Predecessors column.
- Set a deadline for when the step has to be completed.
- Configure email notifications (see chapter 3.2).
- Delete a step. **Be aware that you can only delete a step and not add a step or undo this action.**
- Configure the content of the Post Cruise Assessment step (see chapter 3.3).

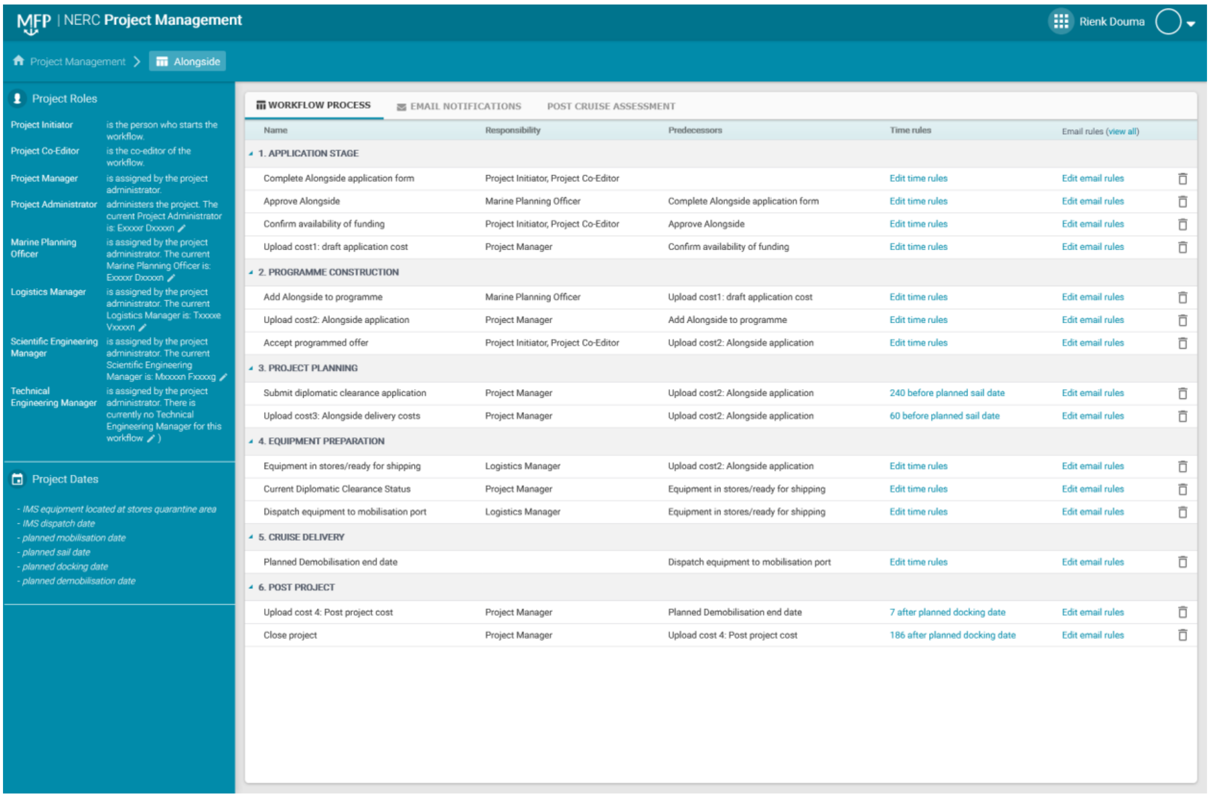



*Fig 3. Example of a workflow template.*

## 3.2 Configure Email Notifications

For each step you can configure email notifications. Click 'Edit email rules' to start creating a notification. This will show the notifications already set for this step and gives the option to add new notifications. Click the 'Add notification' button to start creating a new notification.

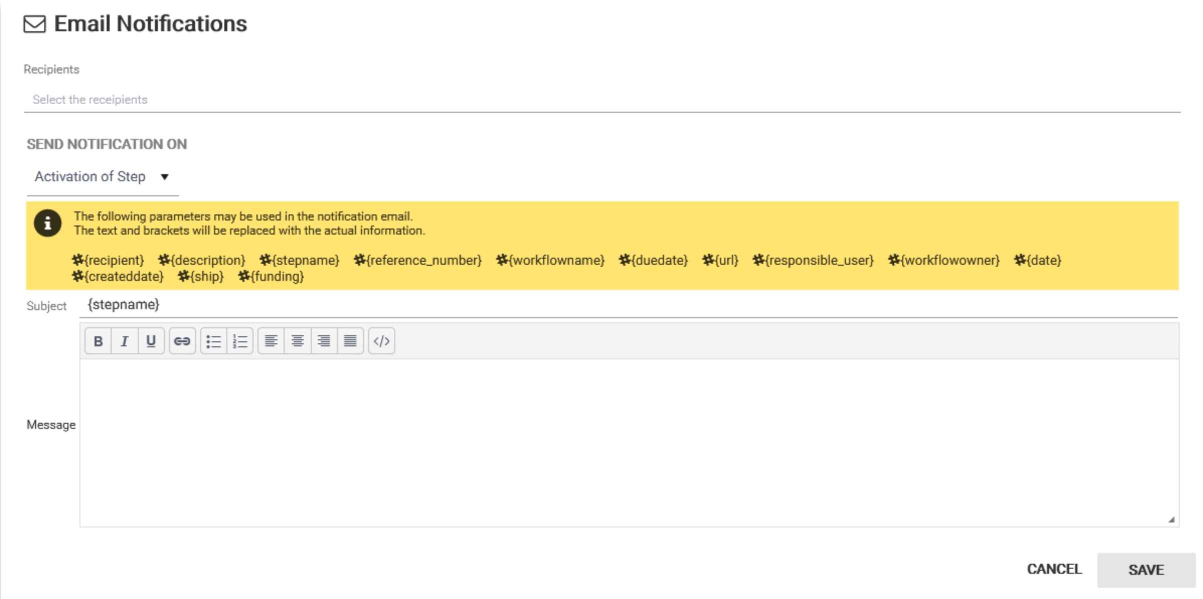



*Fig 4. Create an email notification.*

| | |
|---|---|
| Recipients: | Add project roles and/or specific users who should receive this notification |
| Send notification on: | Configure when the notification should be sent. When the step becomes active when the step is completed or on due date. Due date is the deadline that is configured. |
| Subject: | The subject of the email notification. |
| Message: | The content of the email notification. Use the parameters above (in yellow block) to add specifics. |

| Parameter | Description |
|---|---|
| #{recipient} | Name of the recipient(s) of the email |
| #{description} | *Deprecated (this shall be removed)* |
| #{stepname} | Name of the workflow step for which the email notification is set |
| #{reference_number} | MFP workflow ID (e.g., 22/136) |
| #{workflowname} | Project name |
| #{duedate} | Due date as set by the time rule for this step |
| #{url} | Link to the workflow step for which the email notification is set |
| #{responsible_user} | Name(s) of the user(s) who are set as responsible for this step |
| #{workflowowner} | |
| #{date} | Today's date |
| #{createddate} | |
| #{ship} | Requested ship(s) |
| #{funding} | Funding source + funding status |

## 3.3 Configure Post Cruise Assessment

To setup a post cruise assessment, go to the Post Cruise Assessment tab at the workflow template overview table. Here you can add question groups and questions. First add a question group by clicking the button. Select an icon for this group, enter a name and click Save. Now you can add questions.

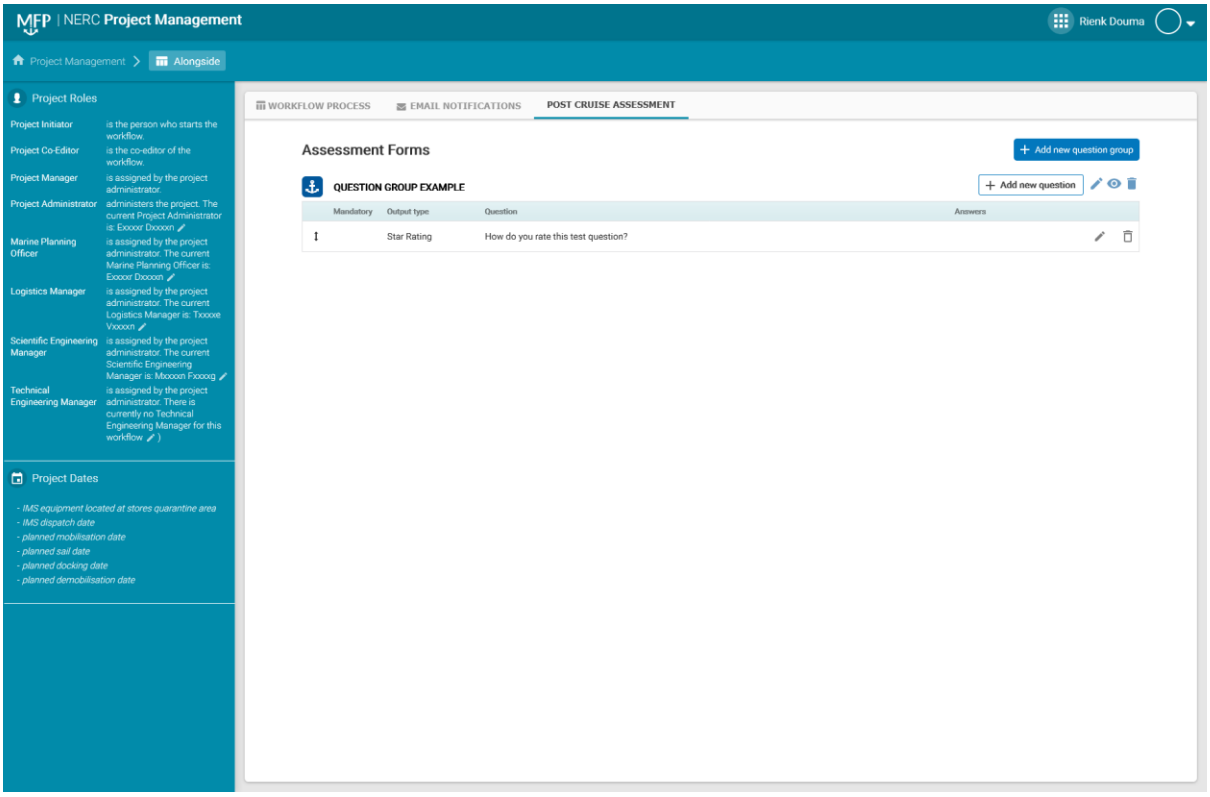



Fig 5. Setup the Post Cruise Assessment.

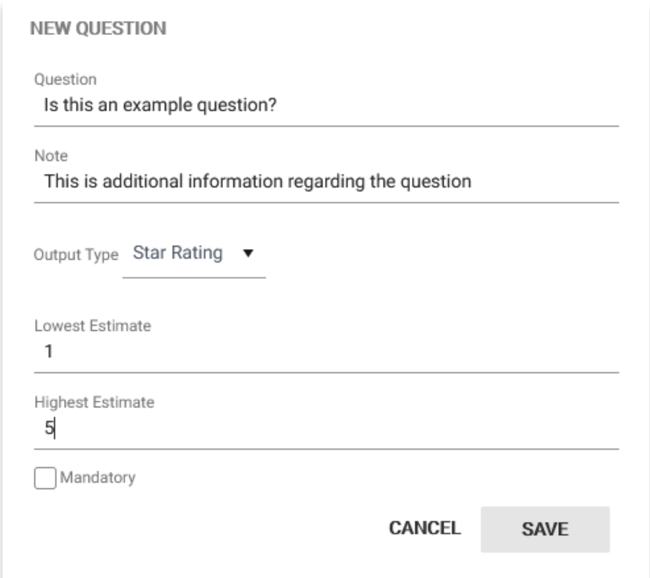


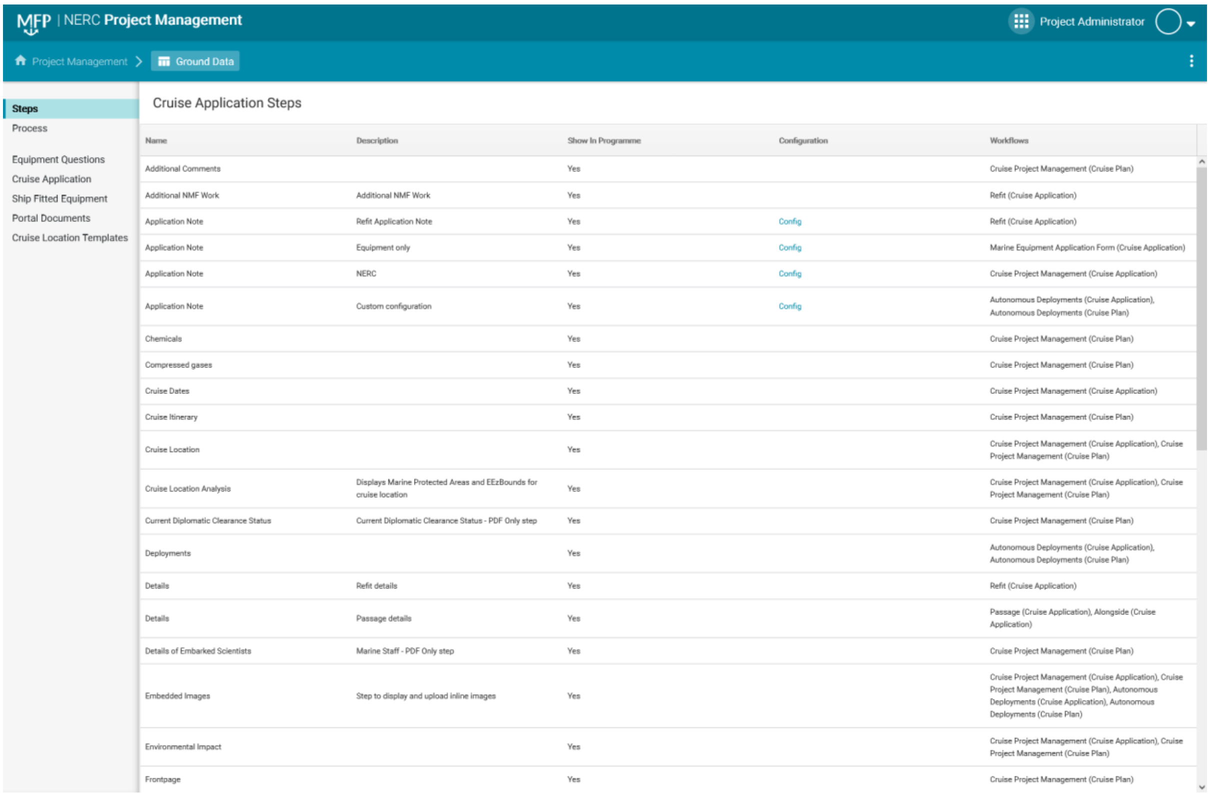

Fig 6. Create new question pop-up.

# 4 Ground Data

In Ground Data the following items can be configured:

## 4.1 Steps

This tab shows a list of steps used in the (application) forms. Steps that contain user configurable items will show a 'Config' link in the Configure column. This gives access to the configurable items. Configurable items can be a text, for example in the Application Note step, or the option to add questions in the Cruise checklist or Questionnaire steps.




| Name | Description | Show In Programme | Configuration | Workflows |
|---|---|---|---|---|
| Additional Comments | | Yes | | Cruise Project Management (Cruise Plan) |
| Additional NMF Work | Additional NMF Work | Yes | | Refit (Cruise Application) |
| Application Note | Refit Application Note | Yes | Config | Refit (Cruise Application) |
| Application Note | Equipment only | Yes | Config | Marine Equipment Application Form (Cruise Application) |
| Application Note | NERC | Yes | Config | Cruise Project Management (Cruise Application) |
| Application Note | Custom configuration | Yes | Config | Autonomous Deployments (Cruise Application), Autonomous Deployments (Cruise Plan) |
| Chemicals | | Yes | | Cruise Project Management (Cruise Plan) |
| Compressed gases | | Yes | | Cruise Project Management (Cruise Plan) |
| Cruise Dates | | Yes | | Cruise Project Management (Cruise Application) |
| Cruise Itinerary | | Yes | | Cruise Project Management (Cruise Plan) |
| Cruise Location | | Yes | | Cruise Project Management (Cruise Application), Cruise Project Management (Cruise Plan) |
| Cruise Location Analysis | Displays Marine Protected Areas and EEzBounds for cruise location | Yes | | Cruise Project Management (Cruise Application), Cruise Project Management (Cruise Plan) |
| Current Diplomatic Clearance Status | Current Diplomatic Clearance Status - PDF Only step | Yes | | Cruise Project Management (Cruise Plan) |
| Deployments | | Yes | | Autonomous Deployments (Cruise Application), Autonomous Deployments (Cruise Plan) |
| Details | Refit details | Yes | | Refit (Cruise Application) |
| Details | Passage details | Yes | | Passage (Cruise Application), Alongside (Cruise Application) |
| Details of Embarked Scientists | Marine Staff - PDF Only step | Yes | | Cruise Project Management (Cruise Plan) |
| Embedded Images | Step to display and upload inline images | Yes | | Cruise Project Management (Cruise Application), Cruise Project Management (Cruise Plan), Autonomous Deployments (Cruise Application), Autonomous Deployments (Cruise Plan) |
| Environmental Impact | | Yes | | Cruise Project Management (Cruise Application), Cruise Project Management (Cruise Plan) |
| Frontpage | | Yes | | Cruise Project Management (Cruise Plan) |

*Fig 7. The Steps tab in Ground Data.*

## 4.2 Process

The Process section can be used to select the steps used in the different forms. For example, the initial application form, follow-up cruise plan or supply agreement.

Use the drop-down menu at the top to select the form you want to configure. At the left is a list with all available steps, to the right the list with steps currently in the selected form. You can add or remove steps by dragging them in or out the form content list.

Any changes made here shall only be visible for newly started workflows. All existing workflows will still be using the "old" form step structure.

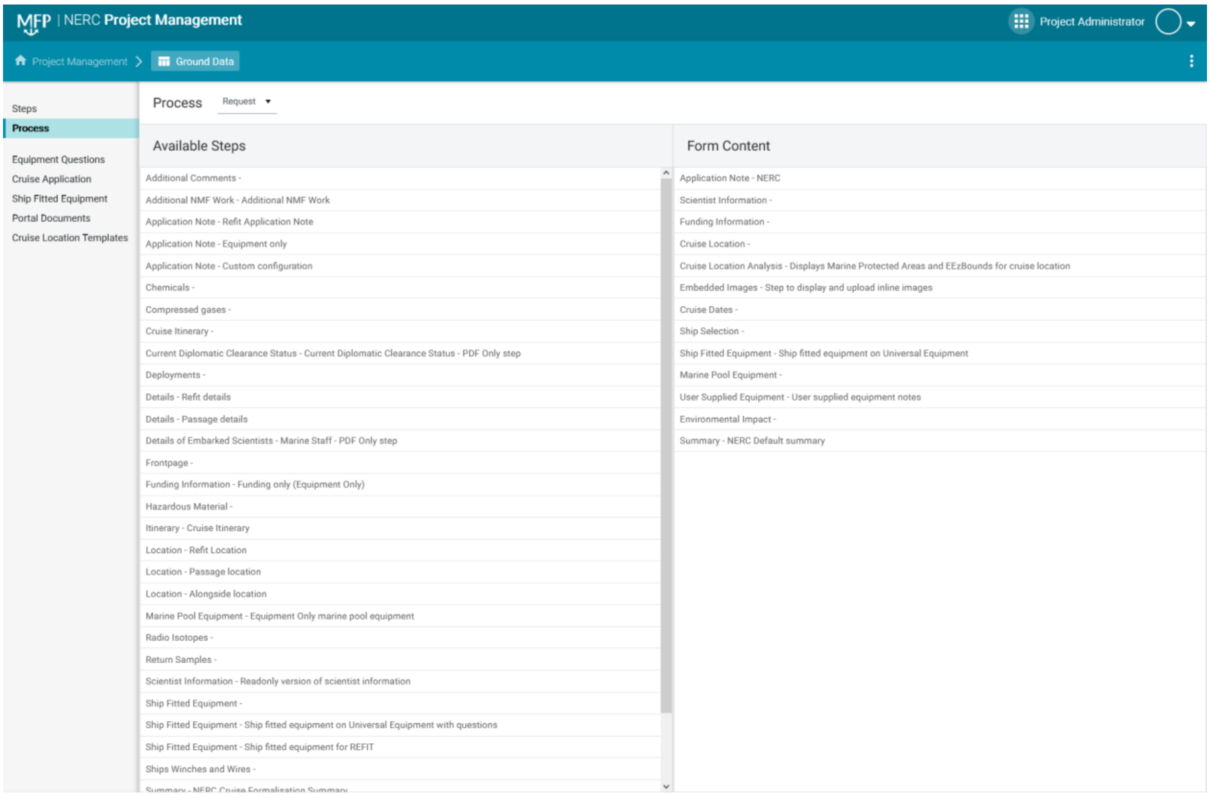



*Fig 8. The Process tab in Ground Data.*

## 4.3 Equipment Questions

This section can be used to manage the questions for equipment that is not related to a specific ship. These questions are asked in the application form. This section is explained in detail in the MFP Equipment Questions Quick Start Guide. Please refer to:

MFP-Equipment-Questions-Quick-Start-Guide.pdf

## 4.4 Cruise Application

This Cruise Application can be used to manage funding sources that are available for selection at the Funding Information step within the application form. Use the 'Add new funding source' button at the top-right of the screen to add a funding source. To delete a funding source, click the recycle bin at the far right of a source.

## 4.5 Ship Fitted Equipment

The Ship Fitted Equipment section can be used to manage the questions for ship fitted equipment. This is equipment related to a specific ship. These questions are asked in the application form at the Ship Fitted Equipment step. This section is explained in detail in the MFP Equipment Questions Quick Start Guide. Please refer to:

MFP-Equipment-Questions-Quick-Start-Guide.pdf

## 4.6 Portal Documents

The Portal Document section can be used to manage documents available at the Help & Documentation tab in the Scientist Portal and at workflow steps that offer document downloads. For example, a diplomatic clearance step where you can download a diplomatic clearance application template. It also offers the option to add a link to a webpage.

Portal Documents is divided into two sections: Portal Documents and Ship Specific Documents. Documents and links added here all appear in the Scientist Portal.

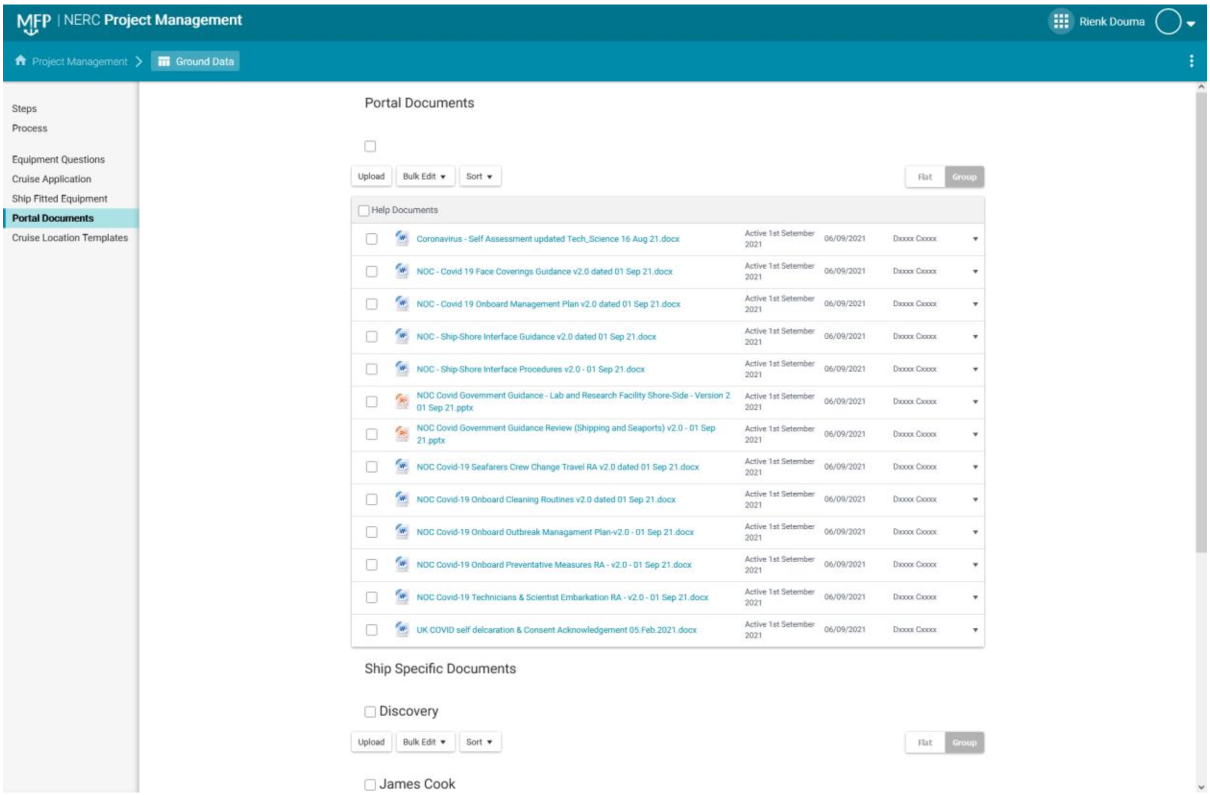


*Fig 9. The Portal Documents tab in Ground Data.*

To upload a document or link, choose a section and click the upload button. This opens the following pop-up:

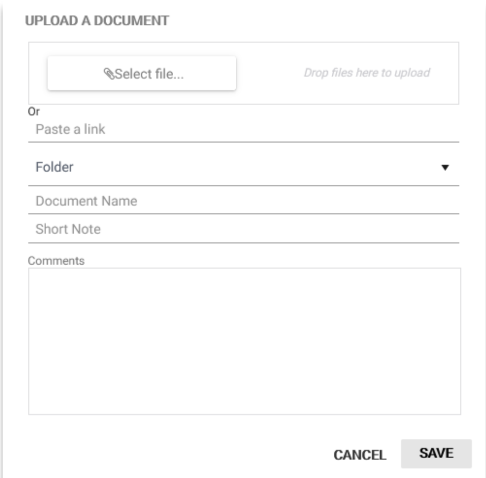


*Fig 10. Document upload pop-up.*

- Click the Select file button if you want to upload a document or paste a link.
- Select a folder. The folder is a subcategory. Subcategories can be linked to specific workflow steps, such as the previously mentioned diplomatic clearance example.
- Enter a name for the document or link.
- Enter a short note and/or comments if required.
- Click Save.

## 4.7 Cruise Location Templates

This section is only available for organisations who use cruise location templates. Cruise location templates are predefined sets of sampling stations that can be used at the Cruise Location step in the application form.