Level 2 and 3 Reporting ‘How-to’ Guide for Daptiv

Step-by-step instructions
Updated 7th September 2009
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1. Introduction

Daptiv is a tool that allows you to enter data for the generating of monthly level 2 and level 3 reports which are updated daily to the Work Slate website. Depending on your role as either a Level 2 or Level 3 delegate, you will need to enter certain information.

The reports can then be run to format the required data as HTLM, PDF, or Excel files.

An extensive help and support database is available with online manuals of how to perform actions within the tool. The following information is specific to L2 and L3 reporting. The online Help and Support can be accessed up click on Help and Support at the top right of any page and by clicking on Open Help.

1.1 Finding your Project:

1. Log in to Daptiv at: https://login.daptiv.com/default.aspx
2. After logging on, click on the ‘Projects’ tab and scroll down to find your project.
3. Click on the project name to open up your information.
4. The view table can be modified for your preference by clicking on ‘More views’ and ‘Edit Current View’.

Only the projects you are involved with will appear.

Select your project from the list
Other information depending on your view settings is displayed
1.2 The Work slate Project Profile:

This screen provides an overview of the project. Once you apply your updates these fields will change appropriately. Some key items to note are;

- Level 2 Reporting Delegate
- Level 3 Reporting Delegate
- Project Status & Updates
- Toolbar

This displays the reporting Delegates who have access to inputting data.

*note: for projects where more than 1 Delegate is assigned, only one name can show.

Toolbar: This is where you access the menus to input data

When you run your reports the information will be automatically filled in to the appropriate areas.

1.3 Configuring your browser

Ensure that either pop-ups are allowed, or that Daptiv website is added to the list of allowable pop-ups. If they are being blocked some of the windows in this guide may not appear correctly or at all.
1.4 Important Dates

Remaining Reporting Deadlines 2009

| Updates to Project Data entered by | 29 Sep | 10 Nov |

See the following section regarding the minimal monthly reporting requirements for these dates.

Details about reporting dates can be found at:

Each day (1am-4am) the reports are generated from Daptiv and updated on the Work Slate Website (http://www.usyd.edu.au/vice-chancellor/work_slate/index.shtml) automatically.

It is important to have all information updated in Daptiv at least monthly and prior to the Tuesday date in the previous section as this version is used for Senate reporting.

Please see Minimum Monthly Reporting Requirements (section 5) for the data fields that should be updated.
2. View by Report Segment

2.1 Level 2 Report Components

Vice Chancellor's Work Slate Initiative
Report 2: Project Summary Report as at 07/07/2009

<table>
<thead>
<tr>
<th>PROJECT DATA REVIEW</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Title:</td>
<td>Test Project - Bluenova-3Jul09</td>
<td></td>
</tr>
<tr>
<td>Project Code:</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Strategic Area:</td>
<td>Education</td>
<td></td>
</tr>
<tr>
<td>Project Leader:</td>
<td>DVC</td>
<td></td>
</tr>
<tr>
<td>Objective:</td>
<td>This is an example project</td>
<td></td>
</tr>
<tr>
<td>Beneficiaries:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementing Partner(s):</td>
<td>Bluenova</td>
<td>Actual</td>
</tr>
<tr>
<td>Project Duration (days):</td>
<td>Actual</td>
<td></td>
</tr>
<tr>
<td>Total Project Budget</td>
<td>$20,000.00</td>
<td></td>
</tr>
<tr>
<td>Funds Requested</td>
<td>$20,000.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROJECT FINANCIAL</th>
<th>2009 ($)</th>
<th>2010 ($)</th>
<th>2011 ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Staff</td>
<td>$10,000.00</td>
<td>$15,000.00</td>
<td>0</td>
</tr>
<tr>
<td>2. Inputs &amp; Overheads</td>
<td>$5,000.00</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3. Administration</td>
<td>$1,000.00</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sub Total</td>
<td>$16,000.00</td>
<td>$27,000.00</td>
<td>0</td>
</tr>
<tr>
<td>MINUS available resources</td>
<td>$16,000.00</td>
<td>$27,000.00</td>
<td>0</td>
</tr>
<tr>
<td>TOTALS</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

PROJECT UPDATE
Last Status Updated:

PROJECT REFLECTION

1. What is the evidence for the needs that this project addresses?
   This is where the items for question 1 were entered. Make sure you deleted the <brackets>

2. How does the project support overall strategic priorities and sector objectives?
   This is where data for item 2 was placed. Make sure you deleted the <brackets>

3. What are the project's main activities?
   Reflection question number 3 answer goes here. Make sure you deleted <brackets>

4. What is the approach towards the project's overall quality assurance and risk management?
   And question number 4's answer here. Make sure you deleted the <brackets>

5. What are the expected outcomes?
   The expected outcomes data was entered here. Make sure you deleted the <brackets>
### 2.2 Level 3 Report Components

**Vice Chancellor’s Work Slate Initiative**

*Report 3: Project Plan Report as at 09/07/2009*

<table>
<thead>
<tr>
<th>Project Title:</th>
<th>Test Project - Bluenova-3Jul09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project ID:</td>
<td>5</td>
</tr>
<tr>
<td>Strategic Area:</td>
<td>Education</td>
</tr>
<tr>
<td>Project Leader:</td>
<td>DVC</td>
</tr>
<tr>
<td>Project Manager:</td>
<td>Bluenova Support</td>
</tr>
<tr>
<td>Objective &amp; Scope:</td>
<td>This is an example project</td>
</tr>
<tr>
<td>Project Output:</td>
<td>The data you entered for proj</td>
</tr>
<tr>
<td>Start Date</td>
<td>25/07/09</td>
</tr>
<tr>
<td>Finish Date</td>
<td>25/07/09</td>
</tr>
</tbody>
</table>

#### PROJECT PLAN PHASES

<table>
<thead>
<tr>
<th>#</th>
<th>Milestones Scheduled</th>
<th>Scheduled Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Milestone name</td>
<td>25/05/2009</td>
</tr>
</tbody>
</table>

#### WORK PLAN VERIFICATION

<table>
<thead>
<tr>
<th>Resources</th>
<th>Implementation Executed</th>
<th>Implementation Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>No of Staff - FTE</td>
<td>The data you entered for project execution costs will appear here</td>
<td>Enter your data here for the outcomes</td>
</tr>
<tr>
<td>Non-staff expenses ($)</td>
<td>10,000</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>other execution goes here</td>
<td></td>
</tr>
<tr>
<td>Utilisation</td>
<td>Add info for Utilisation executed</td>
<td>Add info for Utilisation outcomes</td>
</tr>
</tbody>
</table>

#### ISSUES AND SOLUTIONS

<table>
<thead>
<tr>
<th>#</th>
<th>Issue</th>
<th>Resolution Mechanism</th>
<th>Source of Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Issue Name goes here</td>
<td>Enter in what the resolution mechanism is here</td>
<td>Put the solution here</td>
</tr>
</tbody>
</table>

#### UPDATE NOTES

These are my detailed update notes

#### FINAL OUTCOMES

This section needs filled in for the final report only once the project is complete

---

This information is used by Work Slate Admins. Changes need to be requested through a project PMO.

Information entered under **Project Data Review** Menu. See Section 4.1

Information entered under the **Tasks** Menu. See Section 4.2

Information entered under the **Work Plan Verification** Menu. See Section 4.3

Information entered under the **Issues** Menu. See Section 4.4

Information entered under **WorkSlate Project Overview > Update Status** Menu. See Section 5.5.2
2.3 View by Menu Item

This section outlines the menu items and their functions. References to sectional information are provided.

<table>
<thead>
<tr>
<th>Work Slate Project Menu</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Slate Project Overview</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
<td>F</td>
<td>G</td>
<td>H</td>
<td>I</td>
<td>J</td>
<td>K</td>
</tr>
<tr>
<td>Home</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
<td>F</td>
<td>G</td>
<td>H</td>
<td>I</td>
<td>J</td>
<td>K</td>
</tr>
<tr>
<td>Status History</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
<td>F</td>
<td>G</td>
<td>H</td>
<td>I</td>
<td>J</td>
<td>K</td>
</tr>
<tr>
<td>Update Status</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
<td>F</td>
<td>G</td>
<td>H</td>
<td>I</td>
<td>J</td>
<td>K</td>
</tr>
<tr>
<td>Customize Home</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
<td>F</td>
<td>G</td>
<td>H</td>
<td>I</td>
<td>J</td>
<td>K</td>
</tr>
</tbody>
</table>

A) Work Slate Project Overview: This Menu gives the overview of the workslate project you are viewing (see section 1.2). It also provides access to the Update Status menu (see section 5.5)

B) Admin: This menu will not show for most users

C) Members: This menu displays the users involved with the project including administrators.

D) Tasks: This menu allows you to create items for the Gant Chart View and also create Project Milestones (see section 4.2)

E) Issues: This section allows issues to be included on the L3 report under the heading Issues and Solutions (see section 4.4)

F) Doc Link: This is a section for referencing files to a location. This location is usually SharePoint so when you click on the link it retrieves the document

G) Final Outcomes: This menu allows Final Outcomes data to be entered that appears on the L3 report. Data is entered when a project is completed.

H) Financials: this menu allows the creation of Project Financial information for the L2 reports (see section 3.2). Note: Note the Funds request or Total project budget

I) Project Data Review: This is a key area to enter data for L2 reports and L3 reports. It allows access to information that heads the reports. Information includes (Project output, Beneficiaries, Implementing partners, Scheduled Duration, Total Funds requested, and project budget) (see sections 3.1, 4.1)

J) Project Reflection: this allows modification of Project Reflection data for L2 reports (see section 3.3)

K) Work Plan Verification: This is critical to L3 reports and allows entry of Work Plan Verification Data (e.g. Resources, Implementation Executed, and Implementation Outcomes). (see section 4.3)
3. Level 2 Reporting

Level 2 Reporting: How to input data

The following section outlines how to input the appropriate data for a level 2 report which includes:

- **Project Data Review:** The Planned Duration, Total Project Budget, and Funds Requested
- **Project Financial:** Budget Items ($) for the project
- **Project Reflection:** The following five questions
  1. What is the evidence for the needs that this project addresses?
  2. How does the project support overall strategic priorities and sector objectives?
  3. What are the projects main activities?
  4. What is the approach towards the project’s overall quality assurance and risk management?
  5. What are the expected outcomes?
- **Project Update Notes:** detailed update notes since the last reporting period

The following outlines the steps to enter your data

### 3.1 Project Data Review

1. Click on **Project Data Review** to bring up the options box
2. From the Options box select **List View**
In List View

1. By default there will be no entries in the field. However, in future reports there will be entries which exist.

2. To input your data click on Add Record. This will open a new pop-up box.

In Add Record View

1. Add in the date for which the report is due

2. Input the Total Projected Budget

3. Input the Project Duration Scheduled, Implementing Partners, and Beneficiaries

4. Input the Funds requested

5. Click on Save & Close.

Closing the Window without saving will not result in the changes being made. To cancel changes without saving click Cancel.

Project Output appears on the L3 report, however if you know this information you should enter it now.
The data has now been saved and will appear with the date which was entered.

To modify these data for future reports – or to change your entry
1. To modify your data **click the arrow** to bring up the drop down box
2. Click on **edit record** to bring up the previous dialogue box
3. Input any changes and press ‘Save & Close’.

*Your Project Data review will now appear when the Level 2 report is run. Additionally you must enter data, even if it is blank or else the report will not generate. Just create an entry with the date only.***

## 3.2 Project Financials

1. To enter in data for project financials click on **Financials** to open the drop down box
2. From the option box select **List View**
In List View

1. By default there will be no entries in the field. However, in future reports there will be entries which exist.

2. To input your data click on Add Item. This will open a new pop-up box.

In Add Item view

1. Select the type of data from the drop down box.

2. After selected, input the values for the corresponding years. The current year data is the most critical.

3. After inputting the data for Staff (in this example) click Save & Close.
The item for **Staff** will now appear with values for the years in which you entered values.

You need to repeat this process to enter in **inputs and overheads, administration, and other**. If the project has an internal source of funding then enter in the subtotal for the prior fields for **MINUS available resources** and Daptiv will then automatically sum the total to zero.

To insert additional items, click on **Add Item** and proceed as per the above instructions.

This is what a complete set of financial data for 2009 and 2010 may look like in the window.

*Note: The order in which the items are displayed does not matter. The report will generate this correctly.*

Once all information appears like this, the financial information has been successfully entered.

**To Edit Financial Information if required**

1. Click on the drop down **arrow**
2. The dialogue box for the item will appear
3. Input and values or changes if need be
3.3 Project Reflection

1. To enter in data for project Reflection click on **Project Reflection** to open the drop down box

2. From the option box select **List View**

---

**In List View**

1. By default there will be no entries in the field. However, in future reports there will be entries which exist with previous data

2. To input your data click on **Add Item**. This will open a new pop-up box
In the Create New Item View

1. Input a date for when the report is due

2. In each box delete the prompt text and enter in your own project reflections.

   The questions are listed for reference but need to be deleted. If you do not delete the box completely the reports will generate errors

3. When complete, click Save & Close to save your changes and close the window

   The item will now appear in the field.

To Edit the Project Reflection Answers

1. Click the arrow to bring up the drop down box

2. Select Edit Item to open the dialogue box to allow any changes.

3. Remember to Save & Close if you want to save the changes
Level 2 Report Example

The report is now ready to run. All the data will automatically be filled into the corresponding fields in the report. Here is an example of the data entered in this tutorial. The Shaded areas represent Items associated with your L2 data.

Vice Chancellor's Work Slate Initiative
Report 2 : Project Summary Report as at 07/07/2009

<table>
<thead>
<tr>
<th>PROJECT DATA REVIEW</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Title:</td>
<td>Test Project - Bluenova-3Jul09</td>
<td></td>
</tr>
<tr>
<td>Project Code:</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Strategic Area:</td>
<td>Education</td>
<td></td>
</tr>
<tr>
<td>Project Leader:</td>
<td>DVC</td>
<td></td>
</tr>
<tr>
<td>Objective:</td>
<td>This is an example project</td>
<td></td>
</tr>
<tr>
<td>Beneficiaries:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementing Partner(s):</td>
<td>Bluenova</td>
<td></td>
</tr>
<tr>
<td>Project Duration (days)</td>
<td>Actual</td>
<td>Scheduled</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8 months</td>
</tr>
<tr>
<td>Total Project Budget</td>
<td>$20,000.00</td>
<td></td>
</tr>
<tr>
<td>Funds Requested</td>
<td>$20,000.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROJECT FINANCIAL</th>
<th>2009 ($)</th>
<th>2010 ($)</th>
<th>2011 ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Staff</td>
<td>$10,000.00</td>
<td>$15,000.00</td>
<td>0</td>
</tr>
<tr>
<td>2. Inputs &amp; Overheads</td>
<td>$5,000.00</td>
<td>$10,000.00</td>
<td>0</td>
</tr>
<tr>
<td>3. Administration</td>
<td>$1,000.00</td>
<td>$2,000.00</td>
<td>0</td>
</tr>
<tr>
<td>Sub Total</td>
<td>$16,000.00</td>
<td>$27,000.00</td>
<td>0</td>
</tr>
<tr>
<td>MINUS available resources</td>
<td>$16,000.00</td>
<td>$27,000.00</td>
<td>0</td>
</tr>
<tr>
<td>TOTALS</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

PROJECT UPDATE

Last Status Updated:

PROJECT REFLECTION

1. What is the evidence for the needs that this project addresses?
   This is where the items for question 1 were entered. Make sure you deleted the < brackets>

2. How does the project support overall strategic priorities and sector objectives?
   This is where data for item 2 was placed. Make sure you deleted the < brackets>

3. What are the project's main activities?
   Reflection question number 3 answer goes here. Make sure you deleted the < brackets>

4. What is the approach towards the project’s overall quality assurance and risk management?
   And question number 4’s answer here. Make sure you deleted the < brackets>

5. What are the expected outcomes?
   The expected outcomes data was entered here. Make sure you deleted the < brackets>
4. **Level 3 Reporting**

**Level 3 Reporting: How to input data**

The following section outlines how to input the appropriate data for a level 3 report which includes:

- **Project Data Review**: The project output
- **Project Plan Phases**: Milestones scheduled and their status
- **Work Plan verification**: Implementations executed, and implementation outcomes. Each requires the anticipated cost/benefit in number of staff, non-staff expenses, other, and utilisation
- **Issues and solutions**:
  - Issues – Brief description of the problem (if any)
  - Resolution Mechanism – Brief description of the solution worked out
  - **SCR** – Source of solution and responsibility
  - **VER** – means of verifying the resolution
- **Project Update**: Providing a comment on the status since the last reporting period

### 4.1 Project Data Review

1. Click on **Project Data Review** to bring up the options box
2. From the Options box select **List View**

*‘Admin’ menu will only show if you are an administrator*
In List View

1. By default there will be no entries in the field. However, in future reports there will be entries which exist.

2. To input your data click on Add Record. This will open a new pop-up box

In Create New Record View

1. Enter in the date for which the report is due

2. Delete the text in the Project Output and enter in your new data for this field

3. Click Save & Close to save the changes and close the window

Beneficiaries, Implementing partners, Project Duration Scheduled, Total Project Budget, and Funds Requested appear on the L2 report, however if you know this information and it does not exist in the fields then you should enter it.
4.2 Project Plan Phases

To create a project Milestone

1. Click on Tasks to open the drop down option box
2. Select List View from the menu

In List View

1. By default there will be no entries in the field. However, in future reports there will be entries which exist.
2. To input your data click on Create New Task. This will open a new pop-up box
Create New Task View

To create a Project Milestone:

1. Enter in a **Task Name**

2. Enter in a **description** of the task

3. Check the Milestone box

4. Enter in a date for the Milestone. Note: the Planned start and Planned finish will be the same because a milestone can only occur on a day. **You must ensure that the duration is 0 otherwise the milestone will not appear on the report.**

5. Enter **% complete** for the milestone. This can only be 0% or 100% as they are either complete or not complete.

6. Click **Save & Close** to save the changes and close the window.

To create a Task for Gant Chart Viewing:

- Ensure the Milestone box is **unchecked**
- Enter **% Complete** (any integer)
- Enter the **Planned Start** and **Planned Finish**

*Note: if the days fall on a weekend or public holiday they will be automatically adjusted*
1. Click on **Work Plan Verification** to open the drop down box

2. Select **List View** from the options

**In List View**

1. By default there will be no entries in the field. However, in future reports there will be entries which exist.

2. To input your data click on **Add Record**. This will open a new pop-up box
In Create New Item View

1. Select from the drop down menu the information which you wish to enter
2. Enter in the data for Implementation Executed and for Implementation Outcomes
3. Click Save & Close to save the changes and close the window

*Note These are done independently for each resource: i.e. you enter in data for No. Of Staff – FTE, then save, then enter in data for other resources etc.

4. Repeat the process to enter in other resource information

When complete all items will appear in the field.

To Edit Items

1. Click on the arrow to open the drop down dialogue box
2. Select Edit Item to open the screen to input data
3. Click Save & Close to save the changes (as above)
### 4.4 Issues and Solutions

*This section includes entry of the following information:*

Is there anything you need to take extra care with now or mitigate in the future? This doesn’t have to be a catastrophic problem, but simply identifying a project aspect that you know needs controlling and the identification of how this will be resolved.

Although they will remain in Daptiv for reference, when marked as **complete** they will no longer show in the reports.

The purpose of this section is to give further context to the project when viewed by a generic reader, Senate Fellow, or VC.

| 1. | Click on **Issues** to open the drop down box |
| 2. | Select **List View** from the options |

#### In List View

1. By default there will be no entries in the field. However, in future reports there will be entries which exist.
2. To input your data click on **Add Issue**. This will open a new pop-up box.
Create New Issue View

1. Enter a **Name** for the issue

2. Input the **description** of the issue

3. A **% complete** must be entered as well as a **start date** and **deadline** for the issue

4. Input the **resolution mechanisms**

5. Input the **means of verification**

6. Input the **source of solution**

7. Click **Save & Close** to save changes and close the window

Repeat this process for as many issues as required

Each time you **Save & Close** from entering an issue it will be saved and display here

To edit individual issues

1. Click on the **arrow** to open the drop down box

2. Select **Edit Item** from the menu

3. The previous data entry screen will appear

4. Remember to click **Save & Close** if you want to save your changes
The report is now ready to run. All the data will automatically be filled into the corresponding fields in the report. Here is an example of the data entered in this tutorial. The shaded areas are representative of your data.

### Vice Chancellor's Work Slate Initiative

**Report 3 : Project Plan Report as at 09/07/2009**

<table>
<thead>
<tr>
<th>Project Title:</th>
<th>Test Project - Bluenova-3Jul09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project ID:</td>
<td>5</td>
</tr>
<tr>
<td>Strategic Area:</td>
<td>Education</td>
</tr>
<tr>
<td>Project Leader:</td>
<td>DVC</td>
</tr>
<tr>
<td>Project Manager:</td>
<td>Bluenova Support</td>
</tr>
<tr>
<td>Objective &amp; Scope:</td>
<td>This is an example project</td>
</tr>
<tr>
<td>Project Output:</td>
<td>The data you entered for project output will appear here</td>
</tr>
<tr>
<td>Start Date</td>
<td>25/05/09</td>
</tr>
<tr>
<td>Finish Date</td>
<td>25/05/09</td>
</tr>
</tbody>
</table>

### PROJECT PLAN PHASES

<table>
<thead>
<tr>
<th>#</th>
<th>Milestones Scheduled</th>
<th>Scheduled Completion</th>
<th>Status</th>
<th>Actual Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Milestone name</td>
<td>25/05/2009</td>
<td>Overdue</td>
<td></td>
</tr>
</tbody>
</table>

### WORK PLAN VERIFICATION

<table>
<thead>
<tr>
<th>Resources</th>
<th>Implementation Executed</th>
<th>Implementation Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>No of Staff - FTE</td>
<td>The data you entered for project execution costs will appear here</td>
<td>Enter your data here for the outcomes</td>
</tr>
<tr>
<td>Non-staff expenses ($)</td>
<td>10,000</td>
<td>15,000 achieved</td>
</tr>
<tr>
<td>Other</td>
<td>other execution goes here</td>
<td>other implementation goes here</td>
</tr>
<tr>
<td>Utilisation</td>
<td>Add info for Utilisation executed</td>
<td>Add info for Utilisation outcomes</td>
</tr>
</tbody>
</table>

### ISSUES AND SOLUTIONS

<table>
<thead>
<tr>
<th>#</th>
<th>Issue</th>
<th>Resolution Mechanism</th>
<th>Source of Solution</th>
<th>Means of Verification</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Issue Name goes here</td>
<td>Enter in what the resolution mechanism is here</td>
<td>Put the source of solution here</td>
<td>Enter in the means of verification here</td>
</tr>
</tbody>
</table>

### UPDATE NOTES

These are my detailed update notes

### FINAL OUTCOMES

09/07/2009
5. Minimum Monthly Reporting Requirements

5.1 Level 1 Reports need the following updated:
Project Status updates should be completed by dates in Section 1.4 as they directly appear in the Level 1 report for the University Senate. Project Status updates (see section 5.5 below) consist of key factors:
- Update Notes
- Project Health
- Project State/Phase
- Status Complete %
These data fields are all presented in the Project Status data group.

5.2 Level 2 Reports need the following updated:
- Update Notes
In addition consider whether the following requires updating:
- Changes to Project Budget and Funds Requested (section 3.1)
- Changes to Project Financials (section 3.2)

5.3 Level 3 Reports need the following updated:
- New tasks or milestones reached (section 4.2)
In addition consider whether the following requires updating:
- Changes in Work Plan Verification data fields (section 4.3)
- Status of current or new issues (section 4.4)

5.4 All Report Levels - Project Profile Items:
Users can read but cannot update this data, however if you would like an aspect changed, please contact the Work Slate project management office on x12317.
5.5 Update Notes

5.5.1 Overview

Project Update displays under the project status and comprises of your Update Notes as well as changing information about the:

- **Health** of the project (In trouble/Needs Attention/On Plan) and;
- **Project State** (Not started/In Progress/On Hold/Complete/Cancelled)
- **Phase** of the project (Planning/executed/closure/no-option), and;

The **Schedule % complete** also displays which represents the overall project % complete

<table>
<thead>
<tr>
<th>Your Project Status</th>
<th>State</th>
<th>Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Not Started</td>
<td>Any</td>
</tr>
<tr>
<td>Planning</td>
<td>In progress</td>
<td>Planning</td>
</tr>
<tr>
<td>Commenced</td>
<td>In progress</td>
<td>Execution</td>
</tr>
<tr>
<td></td>
<td></td>
<td>On Hold</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Any</td>
</tr>
<tr>
<td></td>
<td>In progress</td>
<td>Closure</td>
</tr>
<tr>
<td>Complete</td>
<td>Completed</td>
<td>Any</td>
</tr>
</tbody>
</table>

These are the preferable combinations of project states and phases.

*If your project is Commenced, but on hold* – please change the “health” field to “Needs Attention”
- See below for how (section 5.5.3)
5.5.2 Update Notes

To enter Update Notes:

1. Click on Work Slate Project Overview
2. Select Update Status

Update Project Status View

The last status update information is displayed at the top of the screen.

To Update Status:

1. Enter detailed Update Notes

Note: Any information you enter will overwrite the previous update note. If you are adding detail ensure that you copy the text from the previous update note and enter it into your amended update note.
5.5.3 Project Health/State/Phase
*please use the above combinations (see 5.5.1)*

**Update Project Status View**

To Change Health/Phase:

1. Select **Health** from the drop down menu (On Plan/Needs Attention/In trouble)
2. Select **Project State** from the drop down menu (Not started/In progress/On hold/Completed/Cancelled)
3. Select **Phase** from the drop down menu (Planning/Execution/Closure)

---

5.5.4 Status Complete (%)

**Update Project Status View**

To Change Status Complete (%):

1. Enter an integer for **Status Complete (%)** field

While this field doesn’t show on a report it showed within many views in Daptiv and is important to be updated regularly

When all changes have been made click **Save** and the updates will be changed and all previous updates overwritten.
6. Generating Reports

6.1 Generating Single and Multiple Reports

To generate reports:

1. Click on the **Reports** tab that is viewable from any window.

   *Note: If you cannot see the Reports tab, on the far right there should be a tab called **see all**. By clicking this tab it will give you access to any tabs that may be hidden.*

2. Click on Work Slate Reports

3. Click on Production

4. Click on either report you want generated.

   By selecting your report this will open a new pop-up window.

5. Click on the name of the report you want to generate.

   *Note: You can generate multiple reports that will be consolidated into the one file by holding down the CTRL key and clicking other report names.*

   Projects highlighted in blue will have their reports generated.

6. Click **Finish**
Your reports should now be displayed in HTML format. The best thing to do is to click **Report Settings** and from the drop down select **View as PDF**. This will then display the report as a PDF file which can be saved.

Alternatively you can chose to export the report into Excel formats if need be.

### 6.2 Emailing Reports Automatically

You can chose to have reports emailed to yourself, or to another person.

*On the report selection screen:*

1. Select the drop down arrow and click **Run Report With Options**

2. You can select to either email the report **now** or at a certain **date & time**.

3. Click on **Email Report** and fill in the remaining fields.

4. You can also select the format of the email attachment. It is recommended to use **PDF** format.

5. Check the **Override default Values** box

6. Click **Set** when the option appears. This will allow you to select the project to generate the emailed report.

7. Click **Run Report** and the report will be sent via email.
7. Troubleshooting

ICT Helpdesk is available to assist on any problems you may have at x16000. They can help with application usage, training, and resolving any technical issues.

You can contact the PMO on x12317 for any business related use of Daptiv that is not specifically related to technical issues.

In addition, there is an inbuilt help and support feature that outlines a number of topics. Help and Support option is available in any window in the top right hand corner.

General

Q. My milestones not showing up on Report:
A. You need to ensure that you have set the task duration to 0 days by setting the scheduled start and finish date to the same day.

Additionally the milestone can only be set to 0 and 100% complete and will display as either ‘complete’ or ‘incomplete’ on the report.

Refer to sections 4.2

Q. My L2 report won’t show when run:
You need to ensure that the Project Data Review and Project Reflection are correctly filled in as the report will not run without this data. Please add an entry with the date under the List Item View menu.

Refer to sections 3.1 and 3.3

Q. I get &amp; symbols displaying on my L2 report when generated:
This is a result of not deleting the text in the Project Reflection box prior to entering data. Please ensure that the <brackets> are removed prior to entering text.

Refer to sections 3.3

Q. Can I stop my task notifications from being emailed to me.
A. Yes – You can manage this using email notifications. It is recommended you do not do this or setup a consolidated weekly email.

Q. I don’t have the same views as other users available.
A. This may be correct as the system is Role based and different users will have different views assigned to them – Please check with your system Administrator for assistance.

Q. How do you get the ‘Actual’ column on a L3 Project Phases table to be date other than when you mark the milestone complete
A. The actual field is under the Task Section. So go to Task>Action>Update Task and update the Actual Finish field.
Schedules

Q. My project schedule is not appearing on the Project Plan Report, Why?
A. Check to make sure that the milestone tasks are given a 0 duration. The report is set up to only show milestone tasks.

Q. I have added a baseline to my schedule by mistake – How do I remove this?
A. To remove a baseline, you need to select the Baseline View – The Action menu provides an option to delete selected Baseline(s).

Q. The planned Start date and Planned Finish dates do not get changed automatically if I add tasks to my schedule.
A. Correct – These fields are Project Profile fields and cannot be altered (unless you are provided with appropriate access rights).

Q. I cannot see all the projects I am a member of – why?
A. Check you have the correct Project view selected, if you still do not see the project, it may be the projects status has been changed (Archived) – Please contact your Administrator for further assistance.

Q. The Status % Complete does not appear to be changing even when I update my tasks?
A. This is a Project status field that was set up to allow the Project Managers the capability of manually indicating the % complete (needed where only a simple / no schedule has been set up)

Q. I cannot delete a task from my schedule?
A. Please check the following:
   o The Schedule is ‘checked out’ – You cannot change a schedule until it is ‘checked in’
   o The task has related items attached to it – You need to remove all related items before being able to delete a task.
   o The task has actual work assigned to it – You cannot delete tasks that have actual work assigned to a task.

Q. I cannot assign resources to tasks in my schedule – they are not available for selection.
A. Only resources which are members of the project can be seen – Contact your administrator for assistance in setting these up.

Project Transit

Q. I cannot see the project I want to synchronize with
A. Check the Daptiv PPM Project plan is not checked out – Only projects that are checked in will be shown.

Q. How do I update my schedule so that changes applied to my project plan are also seen in the Daptiv PPM?
A. Once you have synchronized a MS Project plan with Daptiv PPM, you simply re-select the Project Transit menu option again - This skips onto the next stage of the wizard to synchronizing the schedule.

Q. Can I still update the schedule in Daptiv if a MS Project plan is synchronized with Daptiv?
A. Yes - You can use Daptiv to update the task in regards to the status of a task (ie: 50% Completed / No hours worked)