Decision Tracker
Business Administrator User Guide

User Guide #2 v.2

Table of Contents

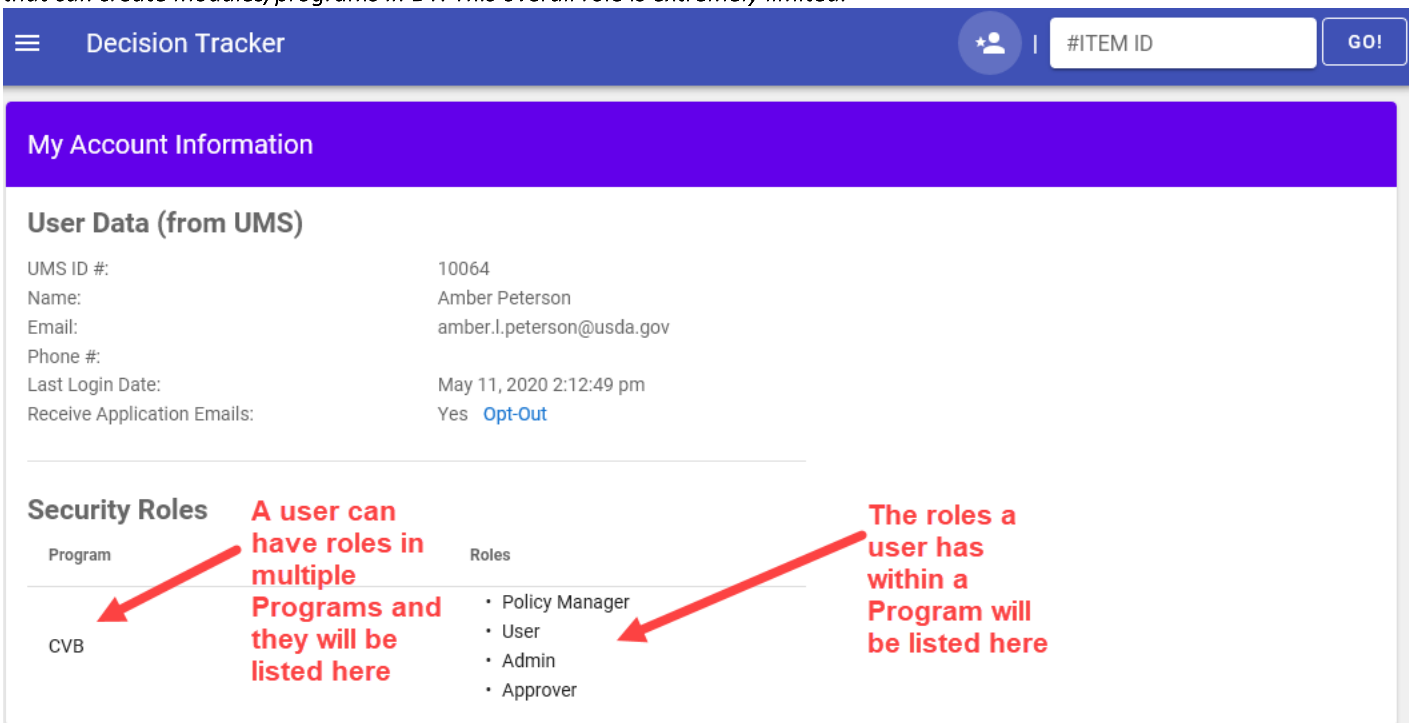
Introduction

Program System Administrators, also known as Business Administrators, play an important role in the Decision Tracker (DT) application as they have the privilege of configuring the application to meet the specific needs of their program. In DT a “program” acts as its own entity as a module within the application that acts independently of other modules within the application. It is not necessarily directly associated with agency programs. An agency may have multiple programs within DT or one program may be used by multiple agencies.

Program System Administrators will play a vital role in configuring the application as well as maintaining and troubleshooting. This role should be given to users with a thorough knowledge of DT as well as the workflows and processes of the program they will be acting on behalf of.

The role for the Program System Administrator is called “Admin” in DT. It is requested for users by their Supervisor and approved or rejected by the DT System Owner via the User Management System (UMS). General account data like name, email address and phone number are populated in DT from UMS. Generally Admins will have other roles as well.

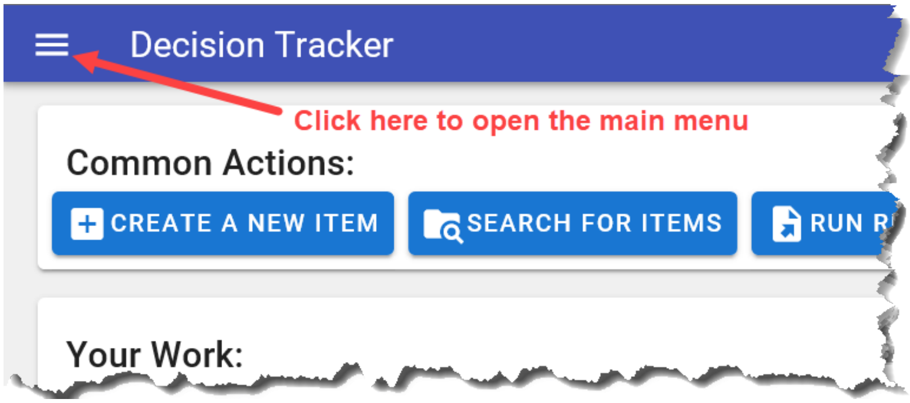
***NOTE** Program System Administrators are different than the overall Decision Tracker Application Administrator which is a role that can create modules/programs in DT. This overall role is extremely limited.*



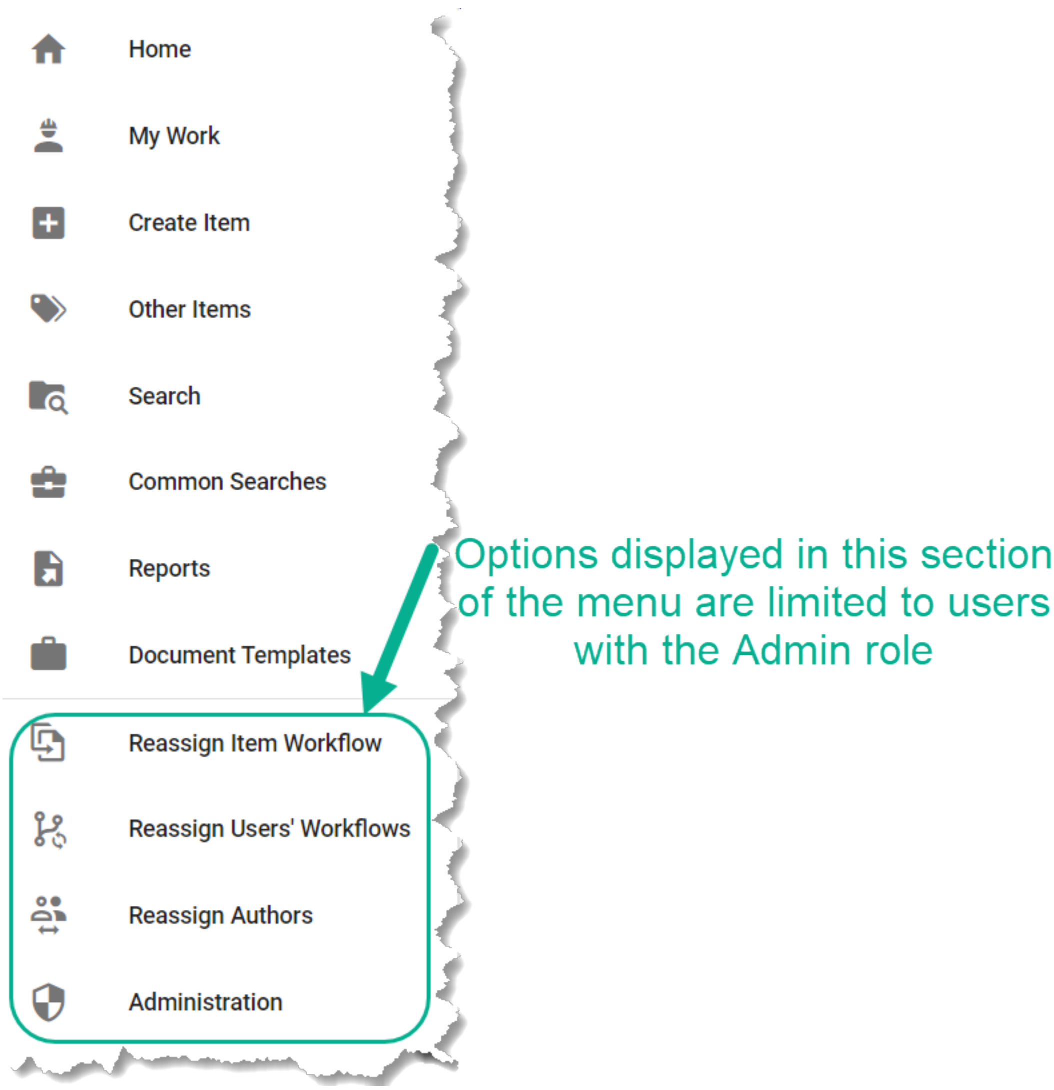
Accessing the Administration Functions

Administration functions are found in the full menu of options accessed by **clicking on the 3 horizontal lines icon in the upper right corner**.

Administration functions are performed by creating and managing a series of lists, each called a List of Values (LOV). These lists are created individually, but are dependent on each other. It’s important to understand the impact of creating and changing values in each of these lists on the other lists and items in DT. Below is a list of the LOVs in DT. There is a section describing each list in detail in this user guide.

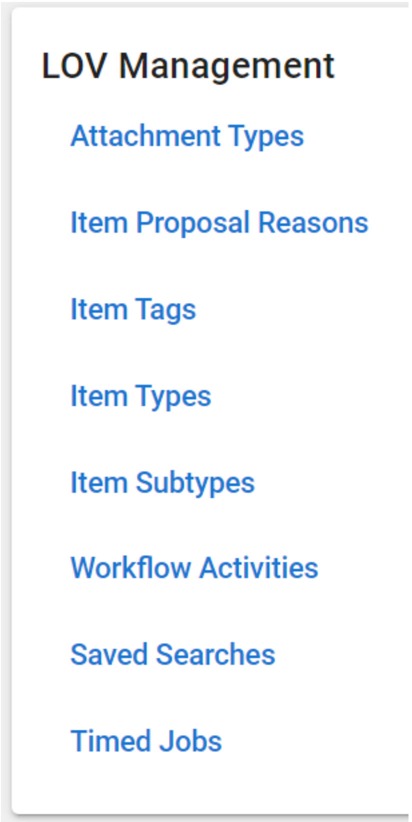


Once in the menu, you will see the additional options if you have the Admin role.



Click on "Administration" to open the screen for administration functions related to configuration of the application.

Once in the Administration section, clicking on any of the options in the list will open that LOV.



Within each LOV there are three standard options shown at the top of the screen (with the exception of the Timed Jobs option):

1. 

CREATE NEW… – This button will allow the Admin to create a new value for the LOV. The following sections in this guide will explain how to do this for each specific LOV.
2. 

RETURN TO LOV ADMIN – This button will take you back to the LOV Management screen.
3. 

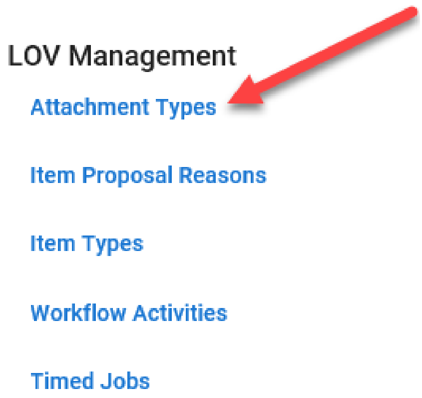
EXPORT TO EXCEL – This button will export the LOV to Excel and show all the selections for each field for every value in the list.

Attachment Types

Attachments are the files and documents that users add to an item; they are found when the Attachments tab is clicked in an open item. These can be PDF files, Word documents, Excel spreadsheets, images, etc. When attaching these files to items, users need to identify them so that the application and other users know what they are and what actions can be done on the item based on what kind of attachments there are. **Attachment Types are specific to each Program** and allow them to determine what kind of attachments can be used at certain points in the lifecycle of an item, which roles can upload certain attachments, and which attachments can be checked out/in.

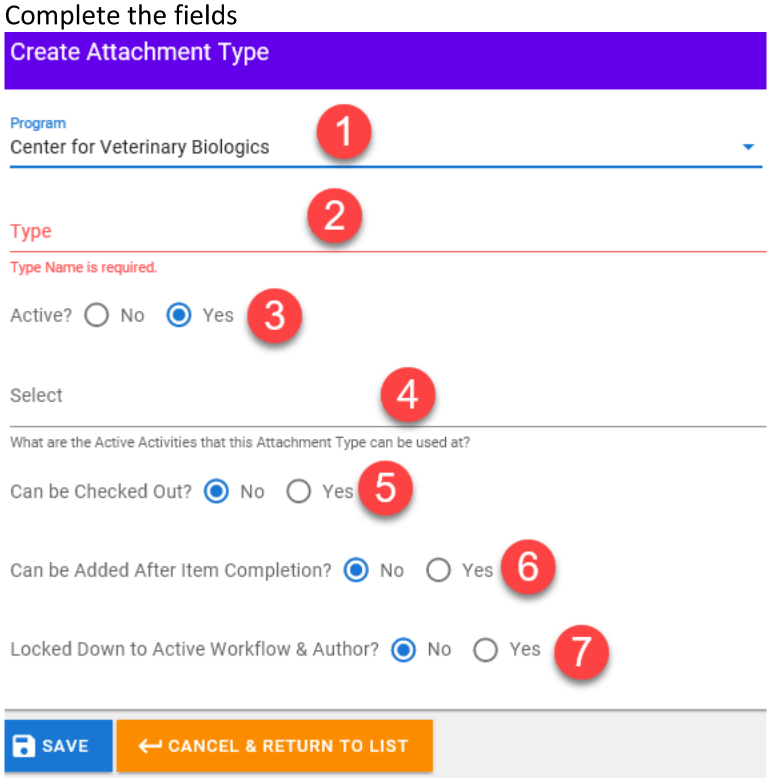
Creating an Attachment Type

1. Click on "Attachment Types" in the LOV Management screen



2. Click on the CREATE NEW ATTACHMENT TYPE button at the top of the screen 

3. Complete the fields



1 Select the program for which you are creating a new attachment type. Only program that you are a Business Admin for will be shown as options in the drop down list.

2 In the Type field, enter the name for this attachment type. Names should be descriptive, but brief. They will be displayed next to the filename in the Attachments tab of items.

3 Choose whether or not the attachment type will be active. Choosing YES means that the attachment type will show as an option in the drop down lists when users attach files to items. Choosing NO means that this type will not show as option for selection. *The attachment type will still show as an option in search fields even if NO is chosen to allow users to search for attachments of any type.*

4 **Click in the SELECT field to select the Active Activities that this new attachment type can be used in**. When you click in the field a list of all the active activities - Main and Sub (also known as child

workflows) will be shown with check boxes by each. **Click in the check box by each activity that you want users to be able to use this attachment type, then click outside of the window that opened to show the list.** The selected activities will now show in the field. This option is included because there may be some attachment types that you only want available at certain points in the workflow of an item.

- Example 1: Program A wants to have a final version of the document attached to the item, but not until the item has been approved by the agency Director so when creating the attachment type for the "Final Version" Program A's business admin only selects the activity "Director Approval". This means that a final version can't be added to the item until it is in the activity Director Approval.
- Example 2: Program B wants their new attachment type to be available at any point in their workflow so their business admin checked all the boxes for activities. This means that from creation to completion of an item this attachment type can be used, no matter what activity it's in.

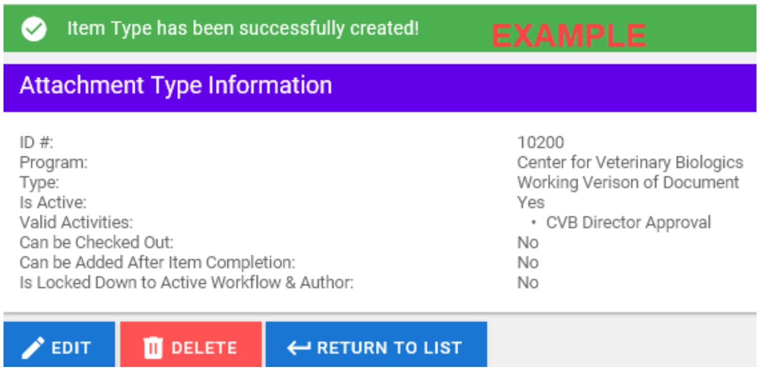
5 Choose whether or not this attachment type can be checked out. Choosing YES would allow other users to check out the attached file, make comments or edits and check it back in. This option is used mainly for agencies that collect peer reviews on documents in Decision Tracker. The default choice is NO which means check out/in options wouldn't be allowed. Leave this option set to NO unless your program has a specific process set up for checking attachments out/in.

6 Choose whether or not the attachment type can be added after item completion. Choosing YES means that users can add this type of attachment when the item has completed its workflow. Choosing NO means that once an item is complete (no longer active) then this attachment type can't be selected by users. Remember that items that are complete do not trigger notifications to other users for attachments added.

7 Choose whether or not the attachment type is locked down to the active workflow and the author only. Choosing YES means that only the author of the item and the user assigned to the workflow the item is currently in (called the active workflow) can view this attachment type. Choosing NO means that all of your program users can see this attachment type at any time.

- Example: Program A deals with documents that contain confidential business information and they don't want all of their program users to be able to view these documents, but they need certain users to be able to view them when they are required to act on them. When the business admin creates this attachment type, they choose YES to lock it down to author and active workflow. An item is created and this attachment type is used, only the author (item creator) can view the attachment until they move it forward. When it is moved forward and a User "Jane Doe" is selected for that activity, then the author and "Jane Doe" can view the attachment, but no one else can. When it is moved forward again and another User "John Doe" is selected, the author and "John Doe" can view the attachment and no one else, not even "Jane Doe", can.

4. Click on the SAVE button to complete the action when all the fields are completed.
    a. If you decide not to complete the creation of a new attachment type at any time click on the CANCEL & RETURN TO LIST button ↩ CANCEL & RETURN TO LIST
5. After clicking on the SAVE button, you will be taken to a screen that shows the information for the Attachment Type that you just created.

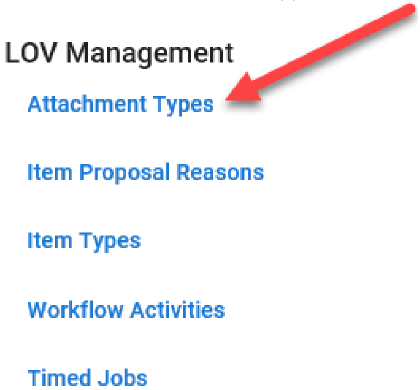


a. If you are satisfied with everything, click on the RETURN TO LIST button
b. If you need to make any changes, click on the EDIT button.
c. If you need to delete, click on the DELETE button

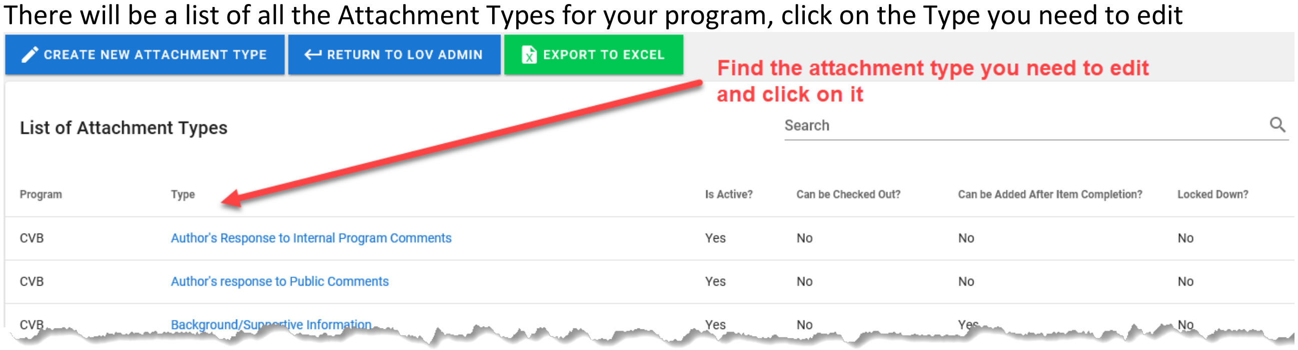
You won't be able to delete the attachment type if it's been used in an item. You could change the status to Not Active to prevent users from selecting it in the future. This is designed this way so that you can still search for items using the attachment type even if it's no longer in use.

Editing an Existing Attachment Type

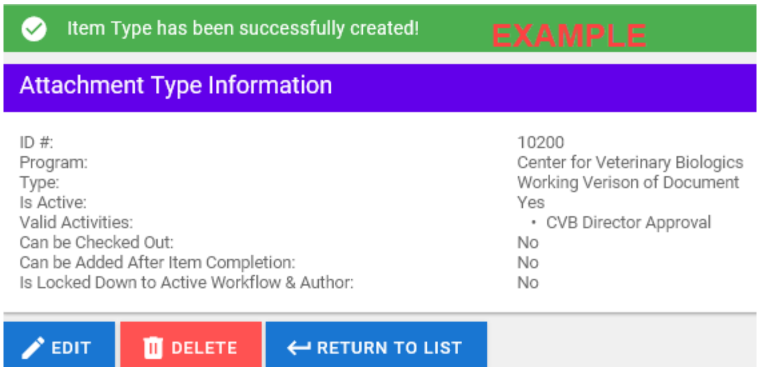
1. Click on "Attachment Types" in the LOV Management screen



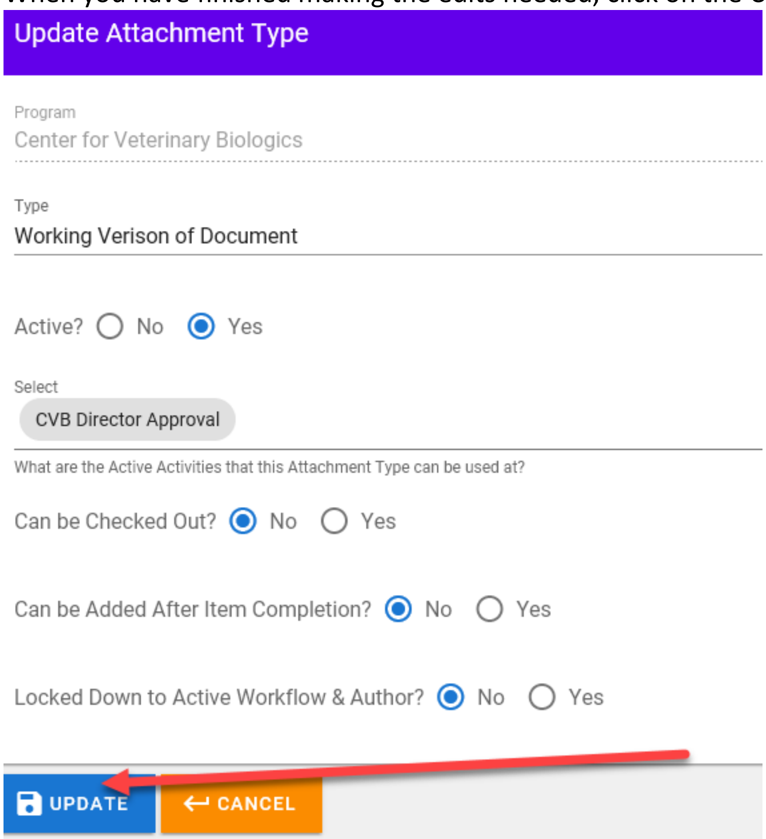
2. There will be a list of all the Attachment Types for your program, click on the Type you need to edit



3. You will be taken to a screen that shows the information for the Attachment Type that you selected. Click on the EDIT button



4. Refer to [step 3 in the Creating an Attachment Type section] for information on how to complete the fields. When you have finished making the edits needed, click on the UPDATE button.



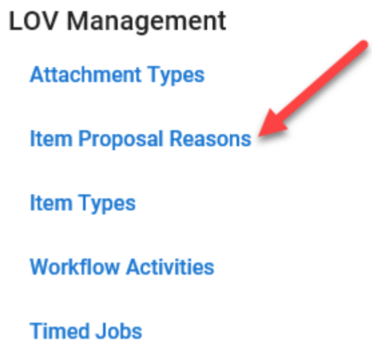
If you determine that no changes need to be made or if you want to start over, click on the CANCEL button.

Item Proposal Reasons

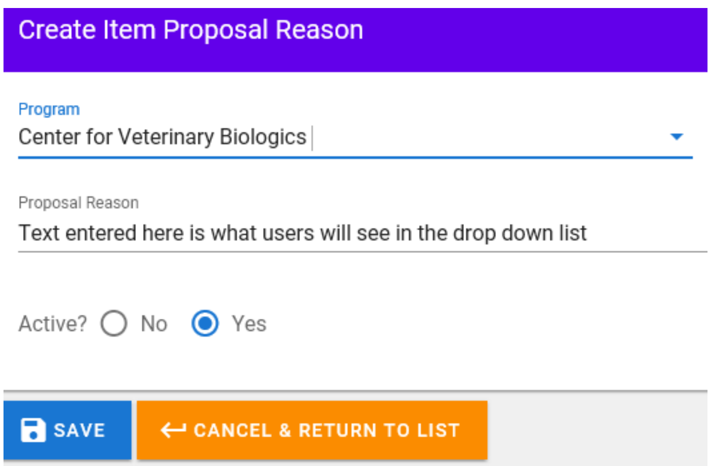
When users create items they will be required to select a reason for proposing a new policy document or a revision/update to an existing policy document. The Item Proposal Reasons list contains the options users can select from to populate this field. By requiring users to select from a specified list the program is creating a criteria to aid in searching for items and creating reports. Once an Item Proposal Reason is created and used in an item, it will not be possible to delete that option from this list as long as an item that it was used in exists in DT.

Creating an Item Proposal Reason

1. Click on Item Proposal Reasons in the LOV Management screen

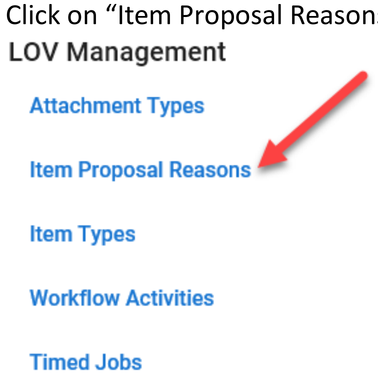


2. Click on the CREATE NEW ITEM PROPOSAL button at the top of the screen
3. Select the Program you are creating the Item Proposal Reason for in the Program field
4. In the Proposal Reason field, enter the text you want to appear in the drop down list that users select from
5. Choose whether or not you want this Item Proposal Reason to be active or not – default choice is YES. Selecting NO means that this value will not show in the drop down list for users to select.
6. Click on the SAVE button to complete the action.
    a. If you decide not to complete the creation of a new item proposal reason at any time click on the CANCEL & RETURN TO LIST button 

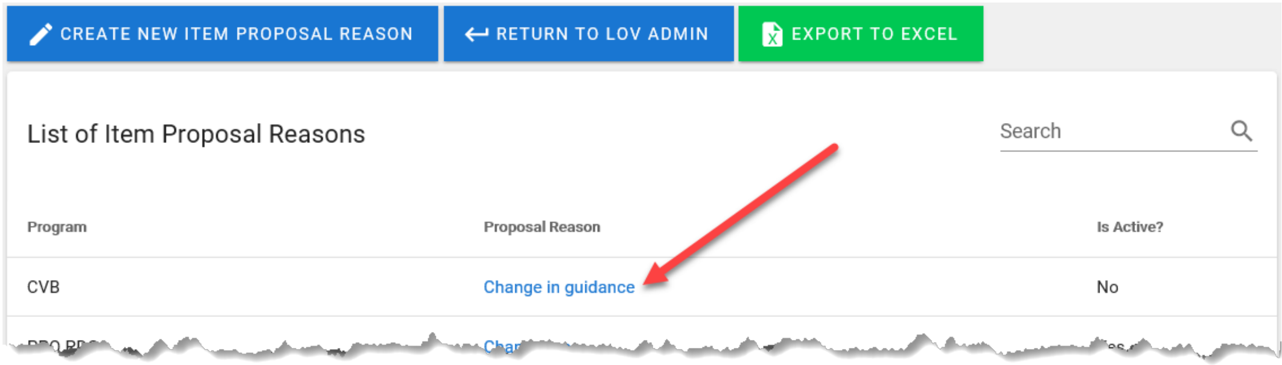


Editing an Existing Item Proposal Reason

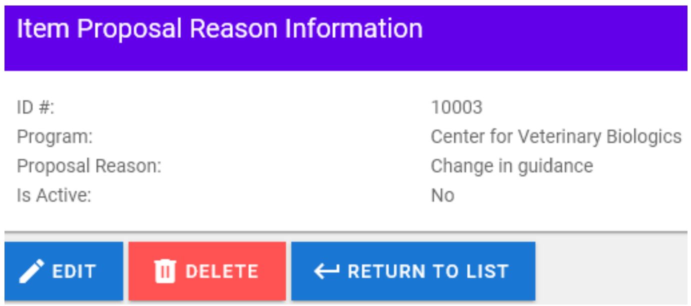
1. Click on “Item Proposal Reasons” in the LOV Management screen



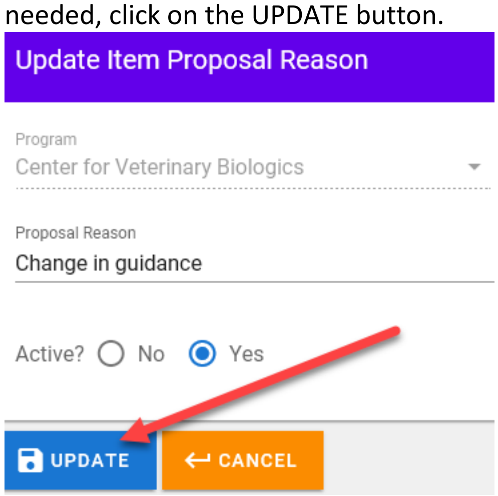
2. There will be a list of all the Item Proposal Reasons for your program, click on the Proposal Reason you need to edit



3. You will be taken to a screen that shows the information for the Proposal Reason that you selected. Click on the EDIT button



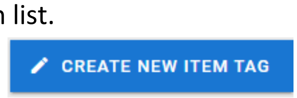
4. Make the changes you need to the fields for the Proposal Reason. When you have finished making the edits needed, click on the UPDATE button.



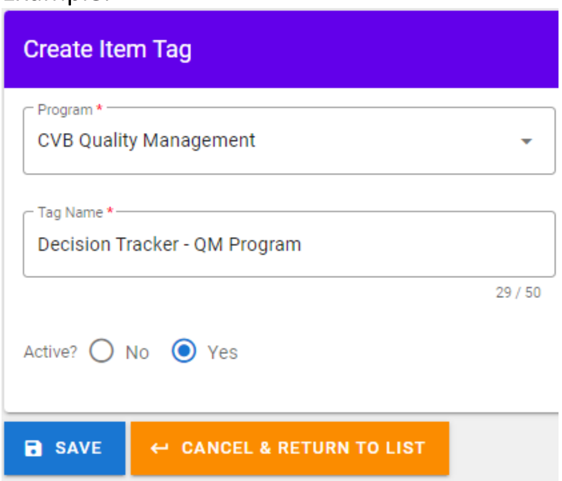
If you determine that no changes need to be made or if you want to start over, click on the CANCEL button.

Item Tags

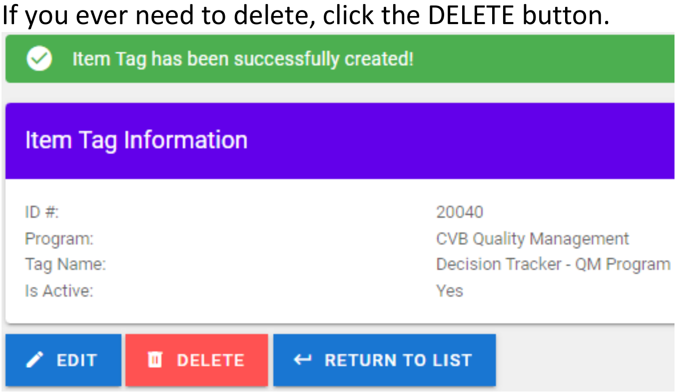
Items Tags are used to group items for easier searching within the application. An item can have one or more tags within the application. Sys Admins may set up Tags when initially configuring a program. If a tag is added after the program has been in use, search results may be skewed as any items created prior to the new tag will not have them and therefore would not meet that search criteria when used. For this reason it is important to consider use of tags carefully.

1. Select 'Item Tags from the Administration list.
2. Click on CREATE A NEW ITEM TAG button 

3. Complete the fields as needed
    a. Be sure to complete the ‘Program’ field if you are a Sys Admin for multiple programs.
    b. Enter a Tag Name that is descriptive and clear enough for general users to understand (i.e. don’t enter a string of acronyms or abbreviations unless you are sure that all users will readily know what they mean)
    c. Select whether or not this Tag is Active or not, this determines if it shows in the Create an Item screen as an option for selection.
        i. If you make a Tag inactive after it has been used, it will still show as an option on the search screen so you can use it to find any items that have that tag from before it was inactivated.
4. Click the SAVE button
   Example:



If you ever need to edit, click the EDIT button.
If you ever need to delete, click the DELETE button.

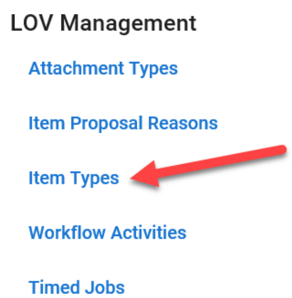


Item Types

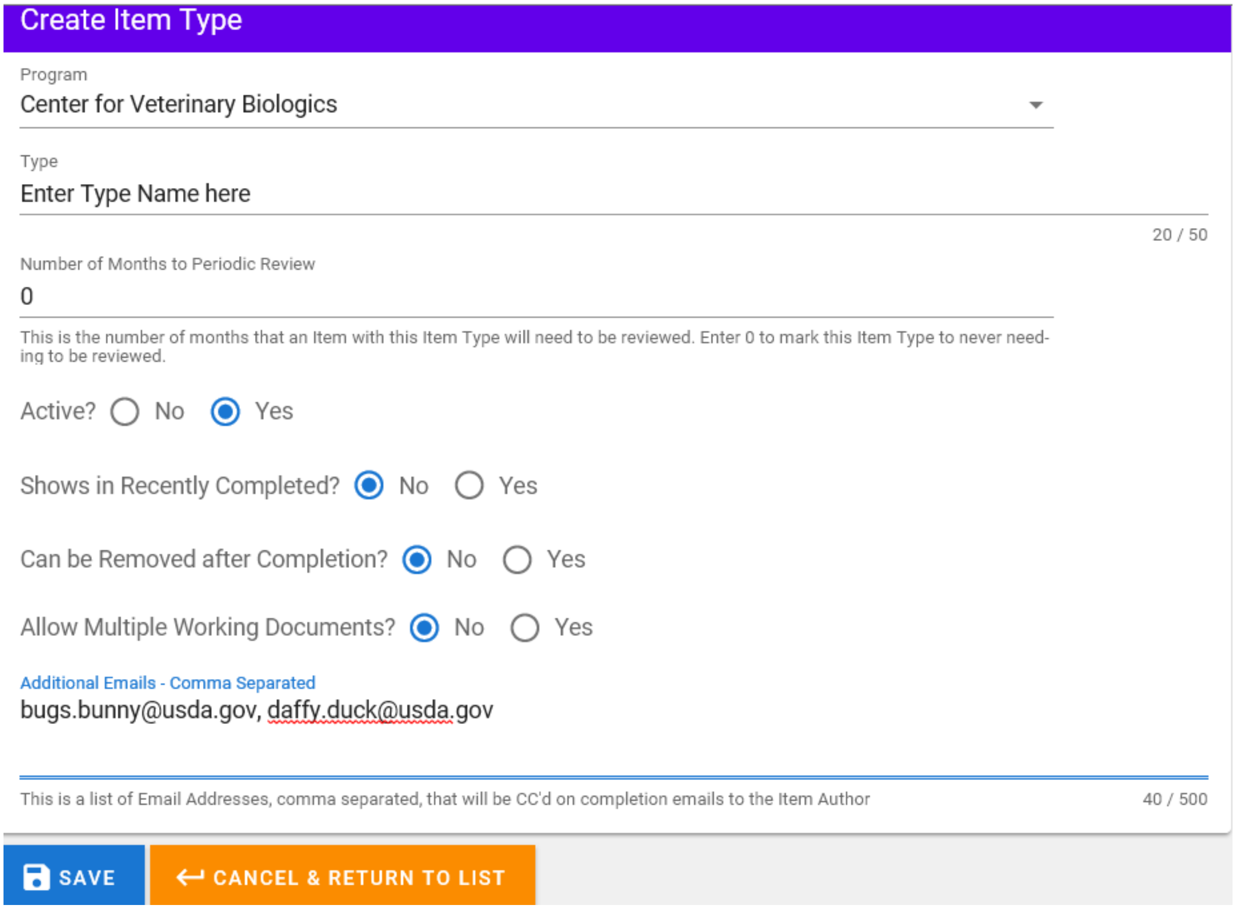
Items are the basis of all the actions in DT. The item is the package that contains all the attachments and descriptive data and is what gets moved through the different activities. **Different item types allow programs to have specific workflows, attachment types, and users to guide the path that items should travel**.

Creating an Item Type

1. Click on “Item Types” in the LOV Management screen

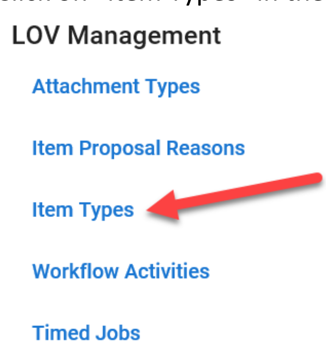


2. Click on the CREATE NEW ITEM TYPE button at the top of the screen
3. Select the Program you are creating the Item Proposal Reason for in the Program field
4. In the Type field, enter the name for the Item you are creating.
5. If this Item Type will require periodic reviews, enter the number of months between reviews in the "Number of Months to Periodic Review" field.
    a. If the Item Type will NOT require periodic reviews, enter a zero "0" in the field.
6. Choose whether or not you want this Item Type to be active or not – default choice is YES. Selecting NO means that this value will not show in the drop down list for users to select.
7. Shows in Recently Completed? – default choice is NO
    a. Selecting YES means that this value will show in the Recently Completed tab found in the Other Items section and will open another field for you to complete that will determine the number of days the item shows in that tab.
8. Can be Removed after Completion? – default choice is NO
    a. Selecting YES means that items of this type will be able to be removed from Decision Tracker after they've been completed.
9. Allow Multiple Working Documents? – default choice is NO
    a. Selecting YES means that this items of this type can have more than one working document attached at a time.
    b. Working documents are treated like drafts that can be worked on by multiple people.
    c. Most situations will require that there be only one working document in an item at a time so that all changes are kept to the same draft, preserving the history. In this situation you would choose NO.
    d. Some situations may require multiple working documents in one item. In this situation you would choose YES.
10. Additional Emails - Comma Separated – this is a list of Email Addresses, separated by commas if more than one, that will be courtesy copied (cc'd) on completion emails to the Item Author
11. Click on the SAVE button to complete the action.
    a. If you decide not to complete the creation of a new item type at any time click on the CANCEL & RETURN TO LIST button 

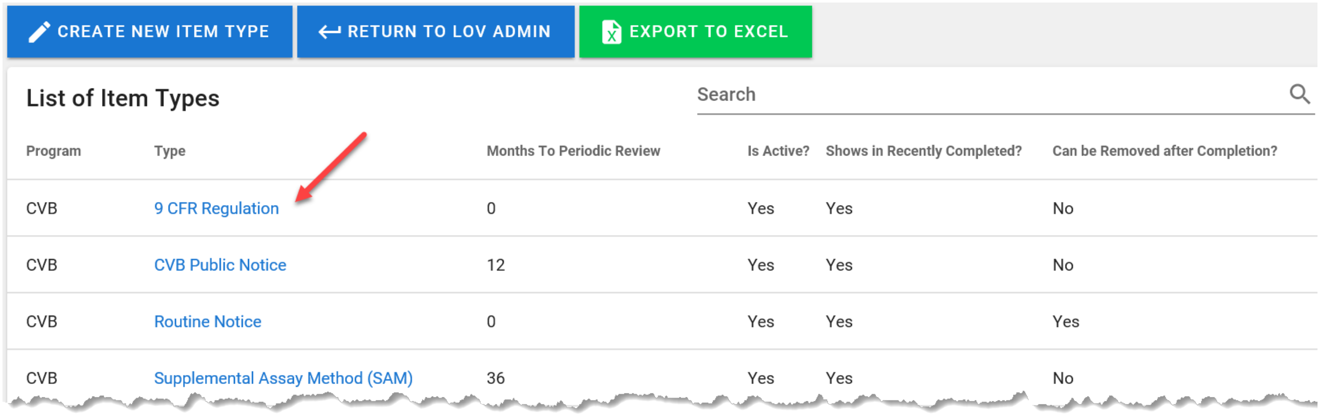


Editing an Existing Item Type

1. Click on "Item Types" in the LOV Management screen

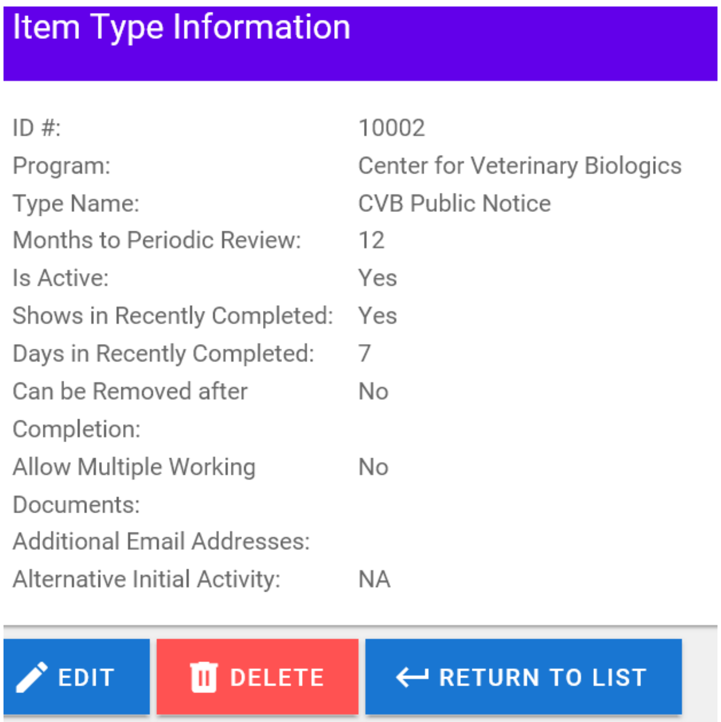


2. There will be a list of all the Item Types for your program, click on the Item Type you need to edit

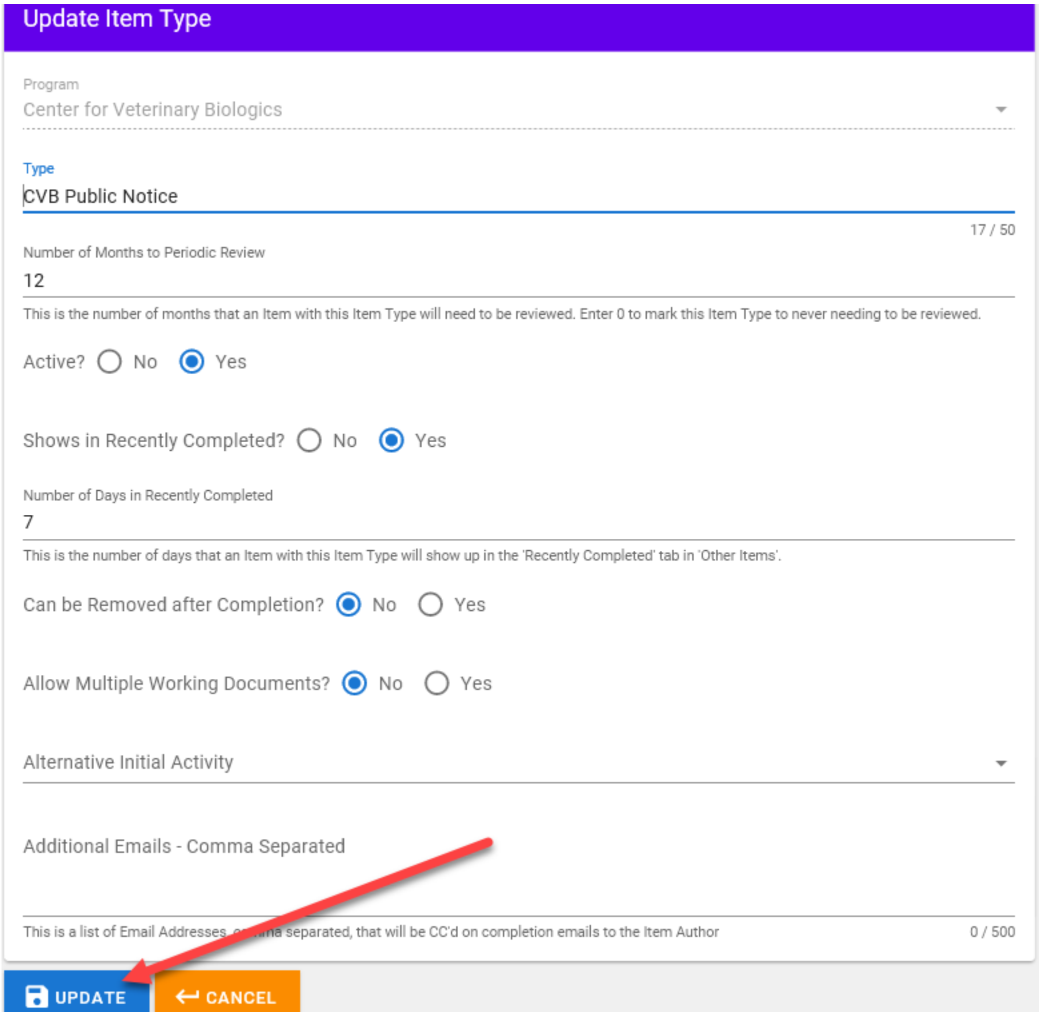


Program	Type	Months To Periodic Review	Is Active?	Shows in Recently Completed?	Can be Removed after Completion?
CVB	9 CFR Regulation	0	Yes	Yes	No
CVB	CVB Public Notice	12	Yes	Yes	No
CVB	Routine Notice	0	Yes	Yes	Yes
CVB	Supplemental Assay Method (SAM)	36	Yes	Yes	No

3. You will be taken to a screen that shows the information for the Item Type that you selected. Click on the EDIT button



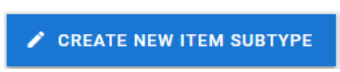
4. Make the changes you need to the fields for the Item Type. When you have finished making the edits needed, click on the UPDATE button. *Go to the CREATING AN ITEM TYPE section of this guide for details on each field.*



If you determine that no changes need to be made or if you want to start over, click on the CANCEL button.

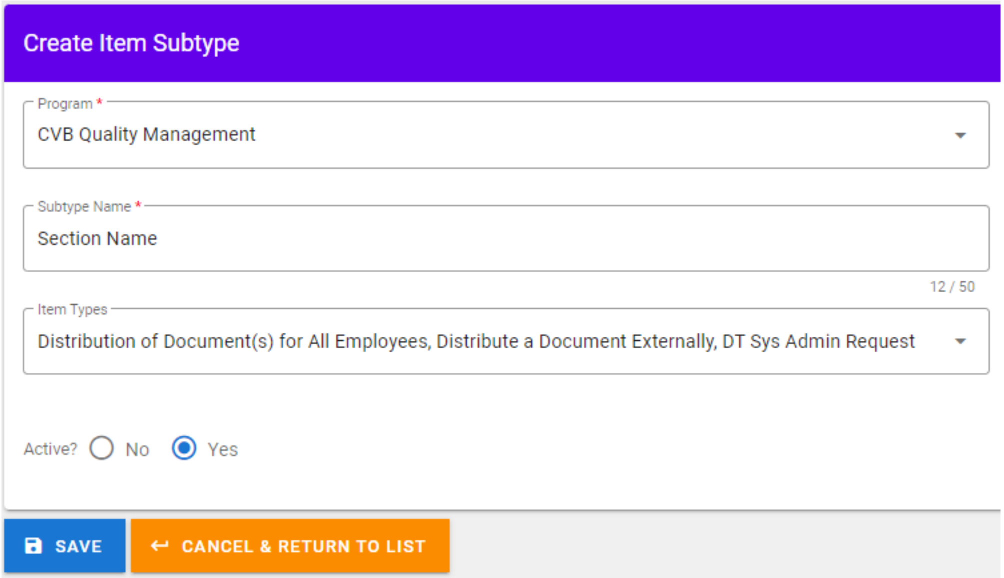
Item Subtypes

Item Subtypes are data fields that can be used to further narrow groups of items when users are searching for them. Sys Admins may set up Subtypes when initially configuring a program. If a subtype is added after the program has been in use, search results may be skewed as any items created prior to the new subtype will not have them and therefore would not meet that search criteria when used. For this reason it is important to consider use of subtypes carefully.

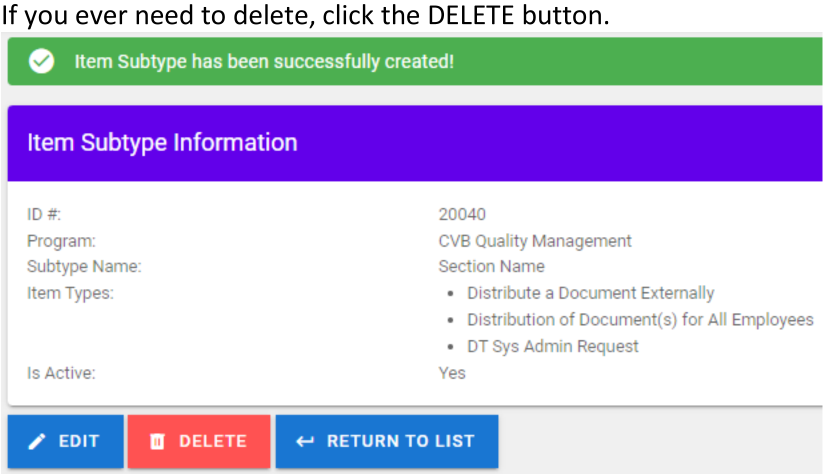
5. Select 'Item Subtypes' from the Administration list.
6. Click on CREATE A NEW ITEM SUBTYPE button 

7. Complete the fields as needed
   a. Be sure to complete the 'Program' field if you are a Sys Admin for multiple programs.
   b. Enter a Subtype Name that is descriptive and clear enough for general users to understand (i.e. don't enter a string of acronyms or abbreviations unless you are sure that all users will readily know what they mean)
   c. In the Item Types field, select the Item Types that this new Subtype can be used with
   d. Select whether or not this Subtype is Active or not, this determines if it shows in the Create an Item screen as an option for selection.
      i. If you make a Subtype inactive after it has been used, it will still show as an option on the search screen so you can use it to find any items that have that subtype from before it was inactivated.

8. Click the SAVE button
   Example:



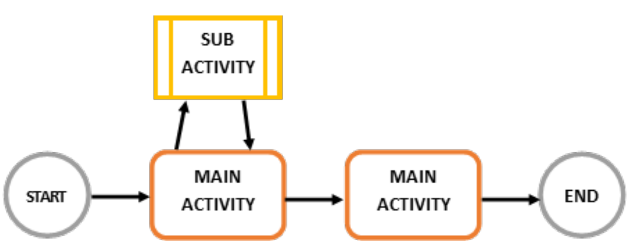
If you ever need to edit, click the EDIT button.
If you ever need to delete, click the DELETE button.



Workflow Activities

Workflow activities are the driving force in DT; they are the functions that move items forward from creation to completion; and all the steps in between. There are two types of activities – main and sub.

- Main activities – move item to another user and complete the former users work
- Sub activities – these are off shoots from a main activity and move the item temporarily to another user or queue, while keeping the item with the owner of the main activity, once the sub activity is completed the item will go back to the owner of the main activity.



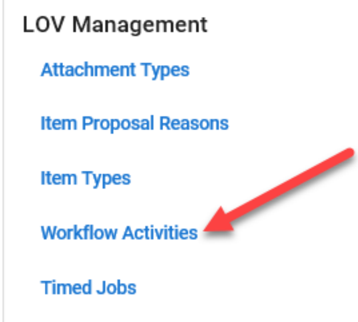
Different workflow activities allow programs to have specific steps that items can or must pass through during their lifecycle from creation to completion. These activities can be specified by item type for each distinct program.

Creating a Workflow Activity

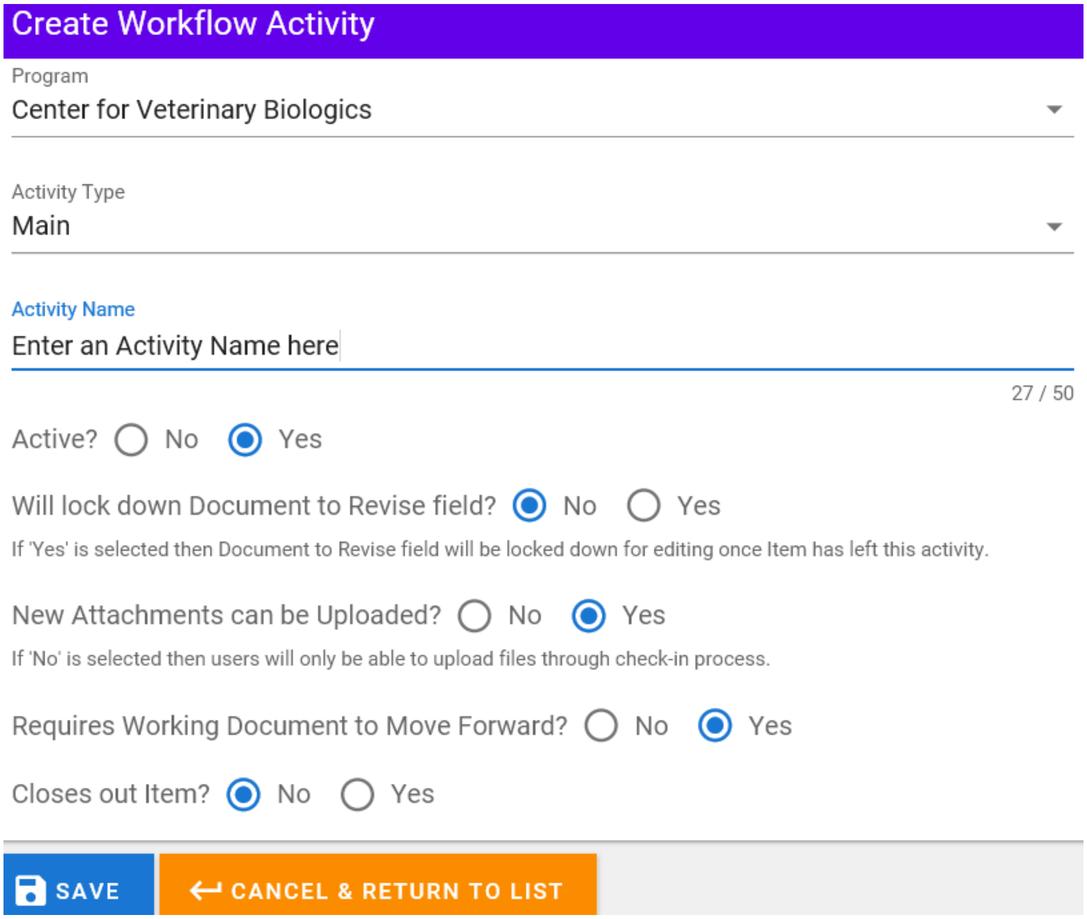
This is a two-step process and both must be completed for the activity to work.

Step 1 of 2

1. Click on "Workflow Activities" in the LOV Management screen

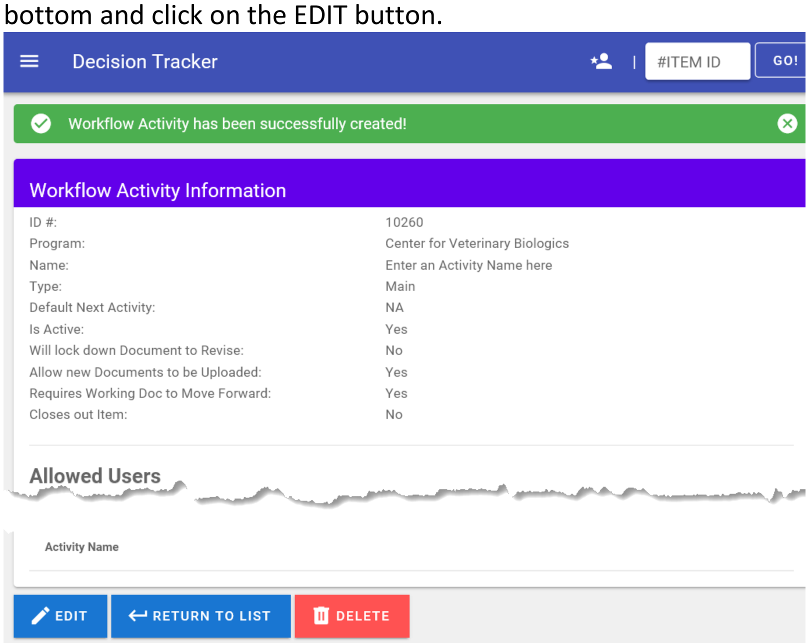


2. Click on the CREATE NEW WORKFLOW ACTIVITY button at the top of the screen
3. Select the Program you are creating the Workflow Activity for in the Program field
4. In the Activity Type field, choose whether the activity will be a MAIN or SUB activity.
5. In the Activity Name field, type the name of the activity you are creating. *Be specific enough that a user will understand the step when selecting it from a drop down menu of options.*
6. Select whether or not the activity will be active.
    a. The default selection is YES which means the activity will be available to users.
    b. If you select NO, users will not see this option in drop down menus and will not be able to select it.
7. Choose whether or not the Document to Revise field will be locked down once an item has left this activity. *The Document to Revise field is used when an item is created for revising or updating a previous item. When initially starting a revision, the document to revise could change as the process progresses, but there may come a point at which a decision has been made that the document to revise should no longer be open to change.*
    a. The default selection is NO which means that the Document to Revise field will be able to be changed when this activity is completed.
    b. If you select YES, once an item leaves this activity the Document to Revise field will no longer be able to be changed.
8. Choose whether new attachments can be uploaded in this activity.
    a. The default selection is YES which means that users can attach new documents while an item is in this activity.
    b. If you select NO, then users will only be able to upload files through the check-in process.
9. Choose whether this activity will require a working document to move forward.
    a. The default selection is YES which means that there must be a document attached with the type of "Working Document" before an item can be moved out of this activity to another **main** activity.
    b. If you select NO, then an item can be moved forward to another main activity without a "Working Document".
10. Choose whether or not this activity will close out an item.
    a. The default selection is NO which means that an item leaving this activity will **not** be closed automatically when this activity is completed.
    b. If you select YES, then the item will be closed automatically when this activity is completed.
11. Click on the SAVE button to complete the action – this will be the end of step 1.
    a. If you decide not to complete the creation of a new workflow activity at any time click on the CANCEL & RETURN TO LIST button

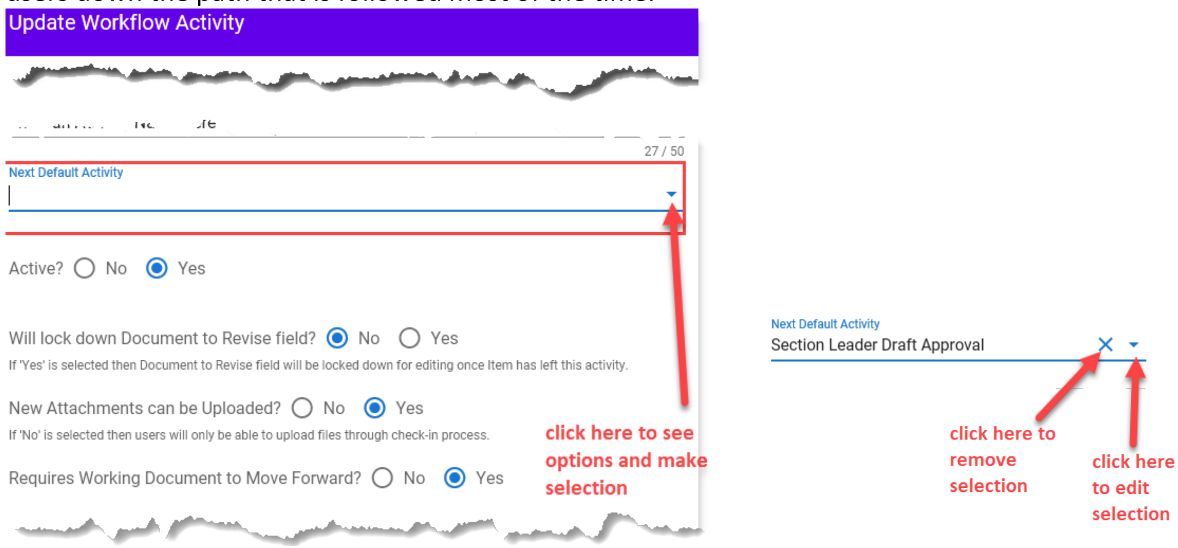


<u>Step 2 of 2</u>

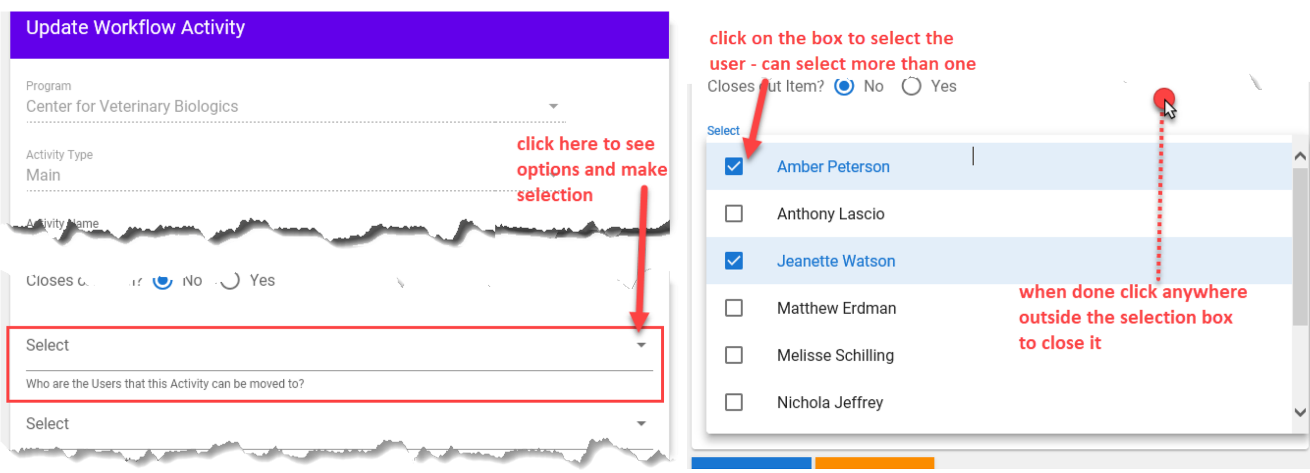
1. After you've clicked on the SAVE button you will be taken to a screen to complete step 2. Scroll to the bottom and click on the EDIT button.

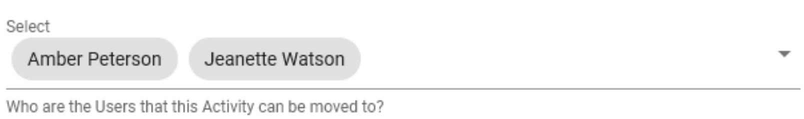


2. You may select a next default activity by clicking on the down arrow and then clicking on the activity you want to choose. Once a selection has been made it can be cleared by clicking on the X or it can be edited by clicking on the down arrow again. Only one activity can be selected as the next default activity
    a. *How your selection will affect use of the activity in the application:* If selected, the activity would be the default option shown when a user moves an item forward from this activity. Users will have the option to select a different activity if they wish. Selecting a next default activity is a way to guide users down the path that is followed most of the time.



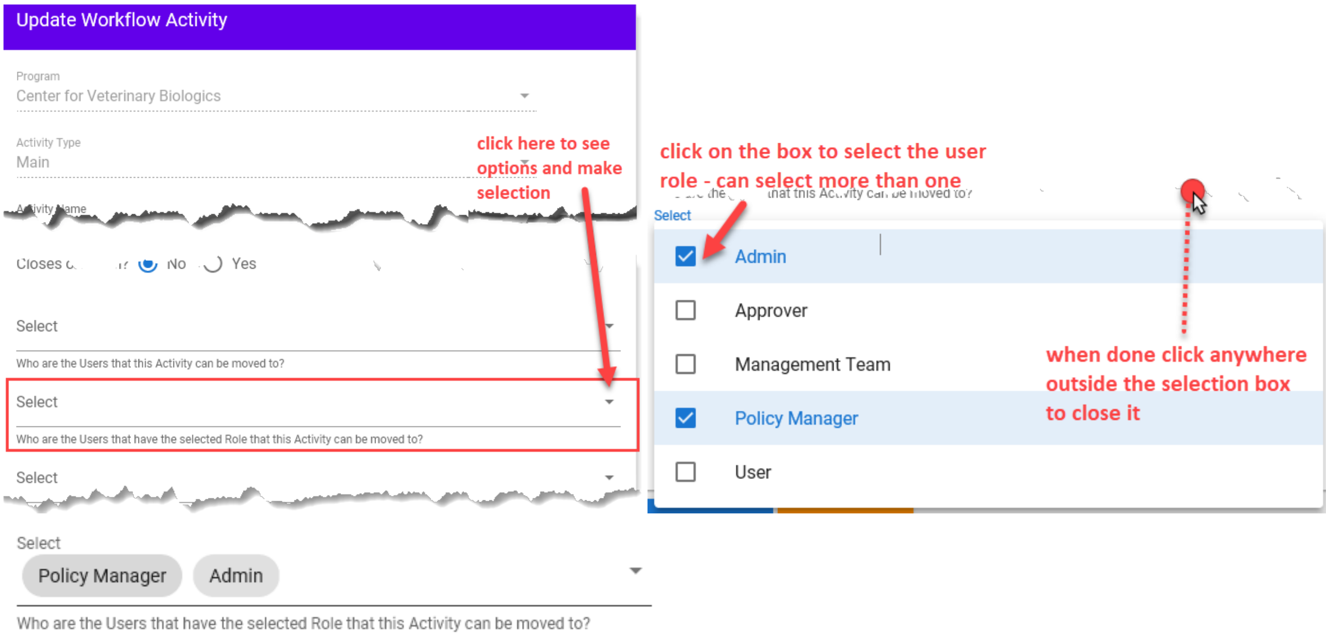
3. OPTIONAL: Select the individual **USERS** that this activity can be moved to by clicking on the down arrow and then clicking in the checkbox next to the name you want to select. One or multiple users can be selected. When you have finished making selections, click anywhere outside the list. Your selections are shown in the field. Click on the down arrow to edit.
    a. *How your selection will affect use of the activity in the application:* Names you select will show in the list of available people to move an item to when a user moves an item forward and selects this activity. These names will show regardless of the roles associated with the user.



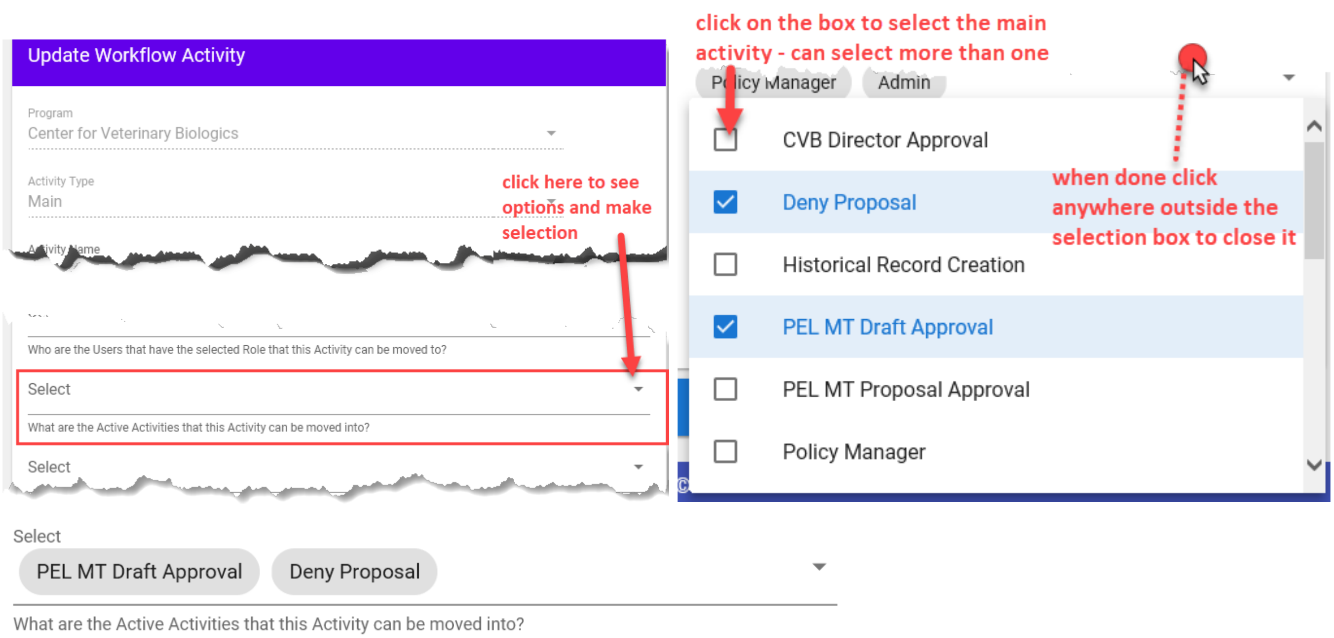


4. OPTIONAL: Select the **USER ROLES** that this activity can be moved to by clicking on the down arrow and then clicking in the checkbox next to the role you want to select. One or multiple roles can be selected. When you have finished making selections, click anywhere outside the list. Your selections are shown in the field. Click on the down arrow to edit.

a. *How your selection will affect use of the activity in the application:* Any person who has any of the user roles you select will show in the list of available people to move an item to when a user moves an item forward and selects this activity.



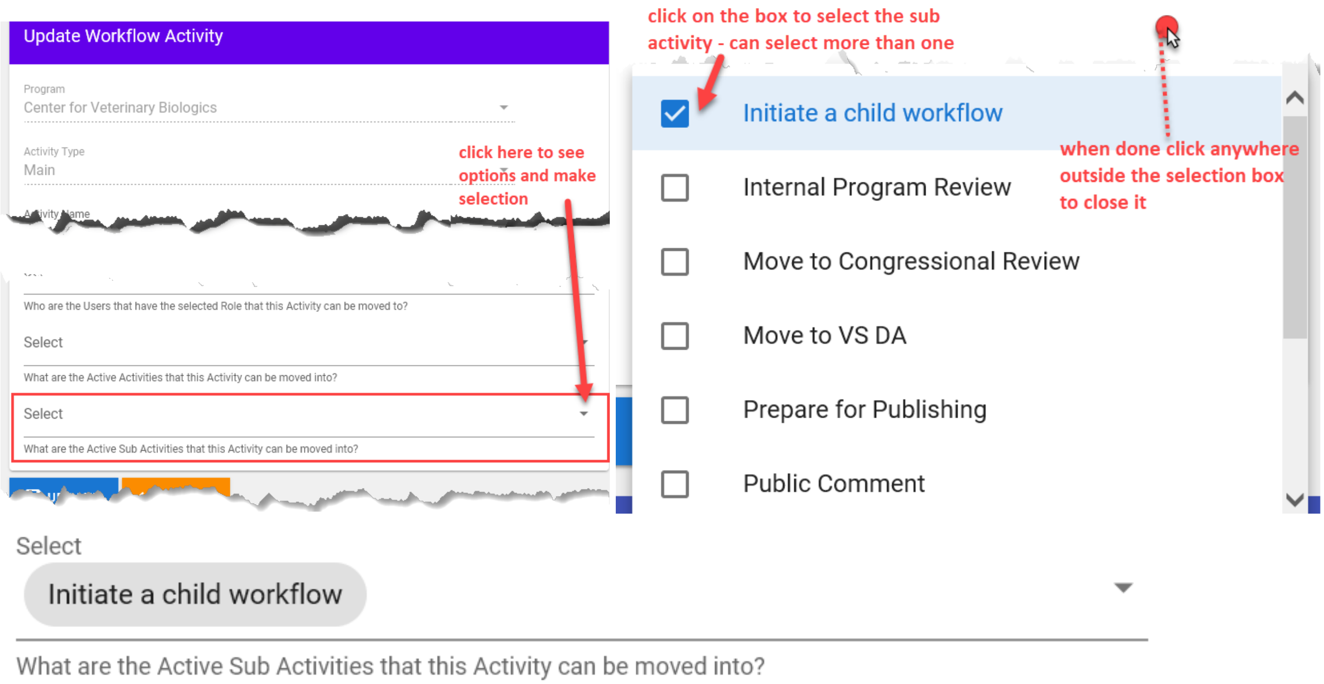
5. OPTIONAL: Select the **MAIN ACTIVITIES** that this activity can be moved into by clicking on the down arrow and then clicking in the checkbox next to the main activities you want to select. One or multiple main activities can be selected. When you have finished making selections, click anywhere outside the list. Your selections are shown in the field. Click on the down arrow to edit.
   a. *How your selection will affect use of the activity in the application:* The main activities you select will show in the list of available activities users see when they choose to move an item forward. If you don't select an activity in this step then users will have no options to move items forward.



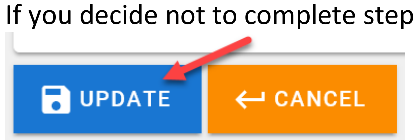
6. OPTIONAL: Select the **SUB ACTIVITIES** that this activity can be moved into by clicking on the down arrow and then clicking in the checkbox next to the main activities you want to select. One or multiple sub activities can

be selected. When you have finished making selections, click anywhere outside the list. Your selections are shown in the field. Click on the down arrow to edit.

   a. *How your selection will affect use of the activity in the application:* The sub activities you select will show in the list of available activities users see when they choose to initiate a child workflow for an item. If you don't select an activity in this step then users will have no options to initiate child workflows.

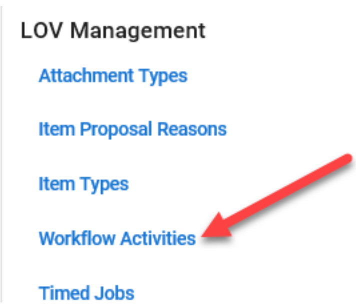


7. When you're done making all your selections, click on the UPDATE button – this is the end of step 2.
   a. If you decide not to complete step 2 at any time click on the CANCEL button



Editing an Existing Workflow Activity

1. Click on "Workflow Activities" in the LOV Management screen

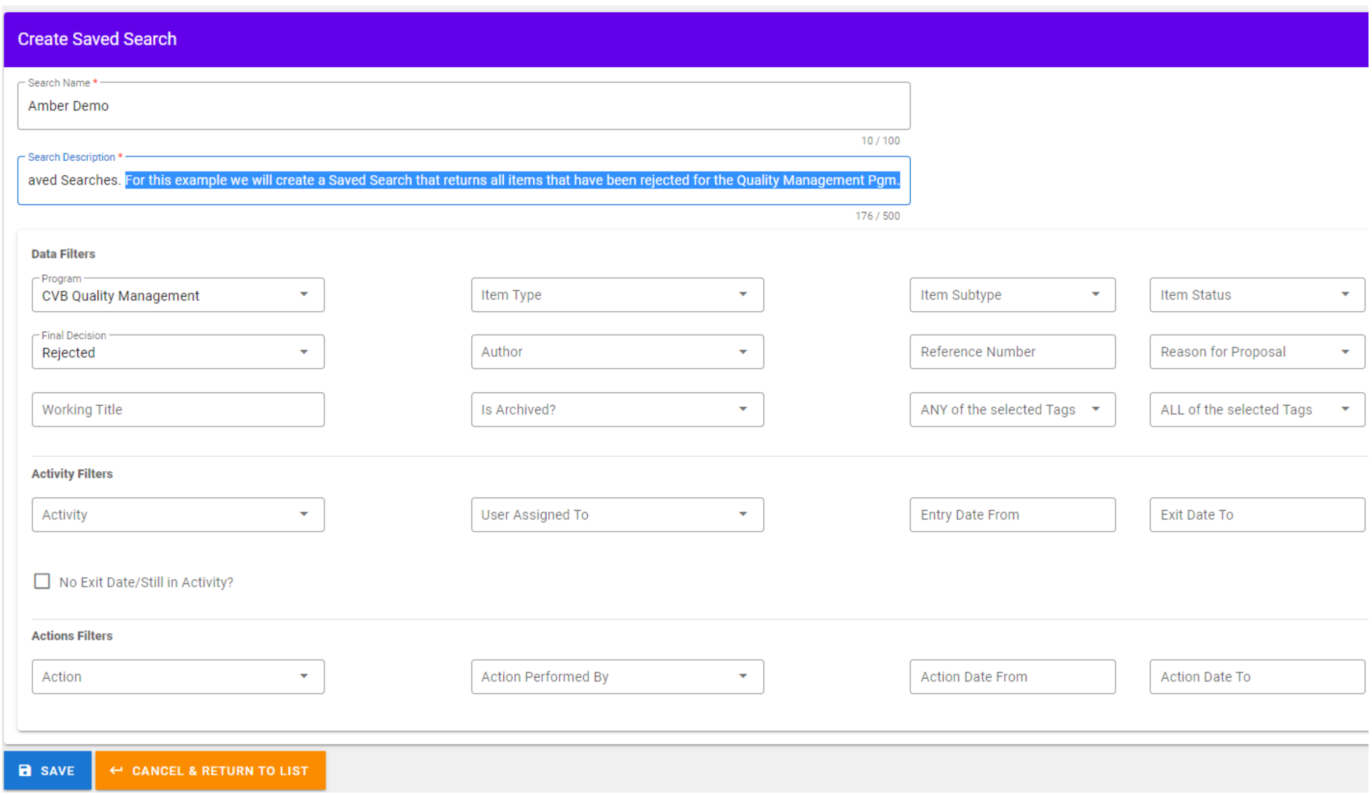


2. There will be a list of all the Workflow Activities for your program, click on the Workflow Activity you need to edit
3. You will be taken to a screen that shows the information for the Workflow Activity that you selected. Click on the EDIT button
4. Follow the steps for creating a workflow activity to edit the options as needed

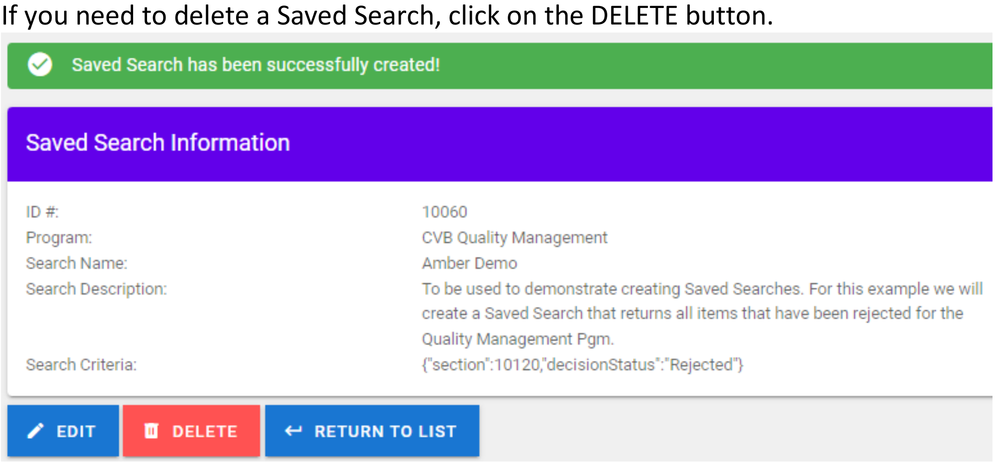
Saved Searches

Saved Searches are how Common Searches are set up. Common searches are saved searches within the application which better help users locate items frequently used. When a user selects a Common Search, certain search fields are auto-populated for them so all they have to do is click on the Search button to get results. System Admins set up these search criteria for each Common Search. Users may request new Common Searches they want to see in the application.

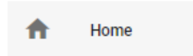
1. Select 'Saved Searches' from the Administration list.
2. Click on CREATE A NEW SAVED SEARCH button
3. Enter a Search Name that is descriptive enough for users to identify the search
4. Enter a description that clearly identifies the type of items that will be returned when the search is used
5. Complete the search fields as needed (or as requested)
    a. Be sure to complete the 'Program' field if you are a Sys Admin for multiple programs.
6. Click the SAVE button



If you need to make any changes, click on the EDIT button.
If you need to delete a Saved Search, click on the DELETE button.

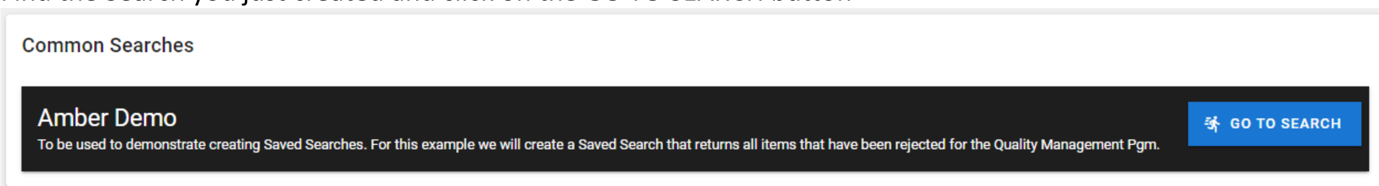


7. Check the Saved Search by going to the Home screen. Click on the More Options icon in the upper left corner, 

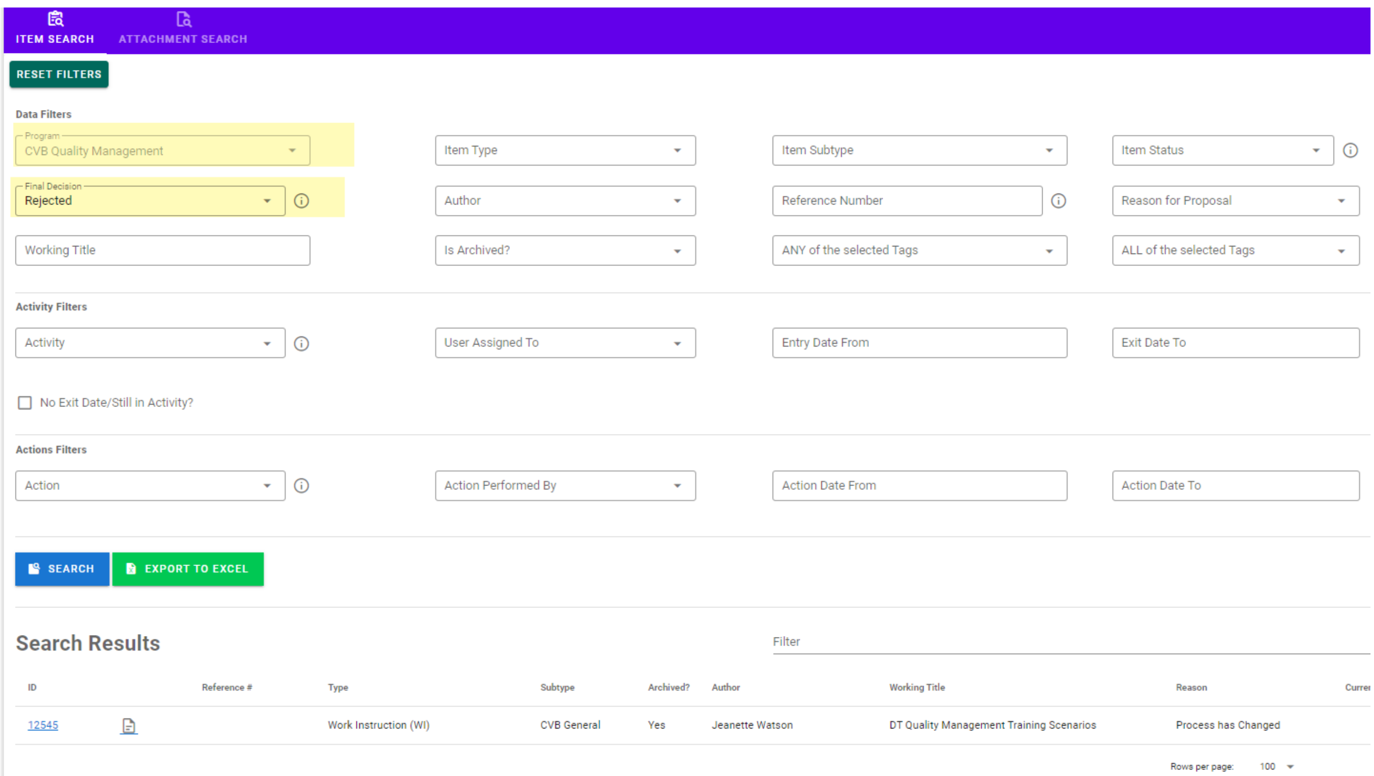
then click on 'Home'. 

8. Click on COMMON SEARCHES button 

9. Find the Search you just created and click on the GO TO SEARCH button



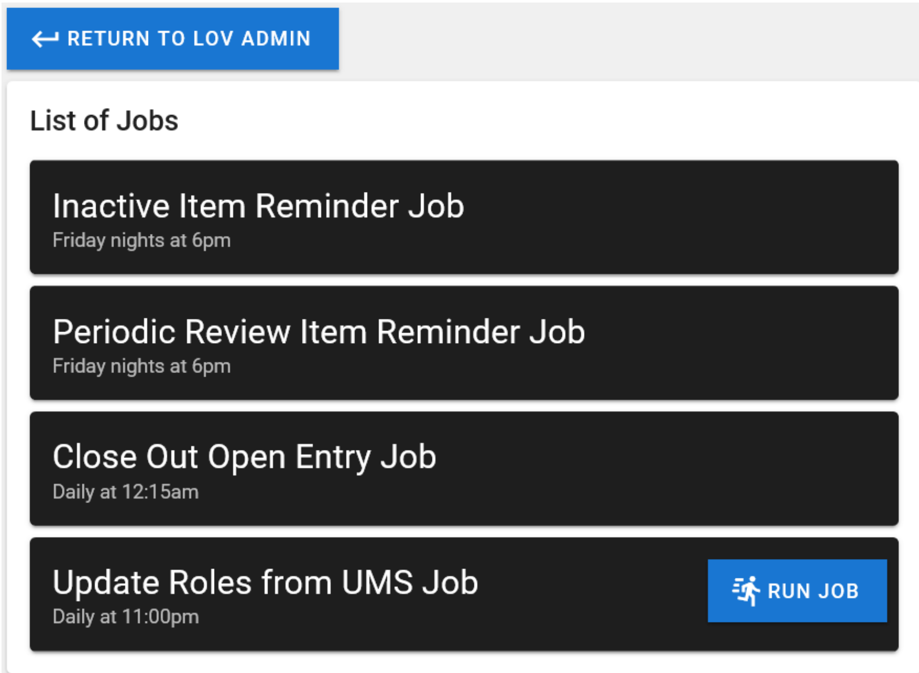
10. Review the search fields to verify that they match what you created and then click the SEARCH button to verify that results are returned as expected.
    a. If this was a user request you may need to go back to the requester to verify that search results are as expected.



Timed Jobs

In the DT application there are number of jobs that are run by the application at specified times. This function displays those jobs and the times they are set to run. If a job can be run manually a "Run Job" button will show in that row.

**All times are Central Standard Time (CST)*



Inactive Item Reminder Job – Runs every Friday at 6 PM. This job searches the application for any active items that have not been updated in the last 180 calendar days or more and sends a reminder email to the person whose active queue the item is in and a courtesy copy (cc) email to the Author.

Periodic Review Item Reminder Job – Runs every Friday at 6 PM. This job searches the application for any completed items that meet the criteria for requiring a periodic review; based on their item type. This criteria is set by the Admin when creating and managing Item Types. An email is generated by the application for those items and is sent to the Author and users with the Policy Manager role.

Close Out Open Entry Job – Runs every day at 12:15 AM. This job closes out the open entry for any items that are checked out. Items are generally checked out when they are put in the child workflow for Internal Program Review. If a user hasn't checked an item back in by the time this job runs, the item is checked back in and that user will lose any comments or edits they had made while they had the item checked out. *Users are warned of this function when they check an item out for review.* This job ensures that open queue entries, like the internal program review process, don't get delayed by users forgetting to check items in.

Update Roles from UMS Job – Runs every day at 11 PM. This job syncs roles and users as assigned in UMS allowing roles in DT to be updated even if the user hasn't logged into DT since roles were assigned or changed in UMS. While this job runs automatically every night at 11:00pm, Admins can run it manually by clicking on the RUN JOB icon. This is important so that items can be moved to users as soon as they are given roles keeping the process moving forward.