U.S. Department of Agriculture
WorkLenz User Instruction Manual
Version 4.5

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I. Welcome

Welcome to WorkLenz™ for Project Portfolio management!

WorkLenz is fast and user-friendly, allowing you to quickly and efficiently update and manage Project data. Our unique functionality allows you to use past Project data to create estimates for new work - this results in better schedules, better resource allocation and repeatable Projects and processes. You no longer have to start from scratch with each new Project.

This Instruction Guide is designed to provide a foundation from which you will begin to understand the core concepts and practices of the application and learn to use WorkLenz efficiently. We believe, however, that no written document can entirely take the place of human interaction, and we therefore suggest enlisting the services of the WorkLenz training team.

Attention PMI members! Métier's standard WorkLenz training courses for executives, Project managers, users and administrators are recognized as PMI Registered Programs. Métier clients who are both licensed WorkLenz users and PMI members are eligible to earn PDUs through PMI as part of their Project management certification process. Soon after the completion of your WorkLenz training, a certificate of completion will be mailed to you. The certificate will specify either course number 2034-WLPPM1 for four PDUs or course number 2034-WLPPM2 for seven PDUs. Please retain this certificate for PMI as evidence of your participation.

II. General Overview

Access

WorkLenz is a browser-based application. Access to the application is granted only to those with authenticated, unique user ids and passwords. Different access levels are set for various personnel. Depending on your access level, your interface may vary from this guide to better accommodate your work requirements.

Your Métier consultant will provide user ids and initial passwords during training which you will be required to change the first time you login to WorkLenz.

Interface (Figure 1)

The Splash screen is the first screen seen after logging in to WorkLenz. The four major areas of this screen are detailed below:

(A) <u>List Buttons</u>: Graphics displayed vertically along the left side of the screen link to list screens (Portfolio, Program, Project, Phase and Task). You have the option of viewing either all items associated with that particular level, or only those to which you are assigned, via the *mine/all* toggle. Below is a list of the five levels of the WorkLenz hierarchical structure.

- Portfolio level
- Program level
- Project level
- Phase level
- Task level

(B) <u>Functions Menu</u>: Frequently used aspects of the application such as the user-defined home page, preferences, Task list time entry, feedback, help and logging off are easily accessible from this area.

(C) <u>WorkLenz News:</u> This feature provides updates and information about WorkLenz. Click on any of the headlines to display the entire article.

(D) <u>News</u>: Portfolio, Program and Project level headlines are displayed here. Click on any of the headlines to display the entire article.

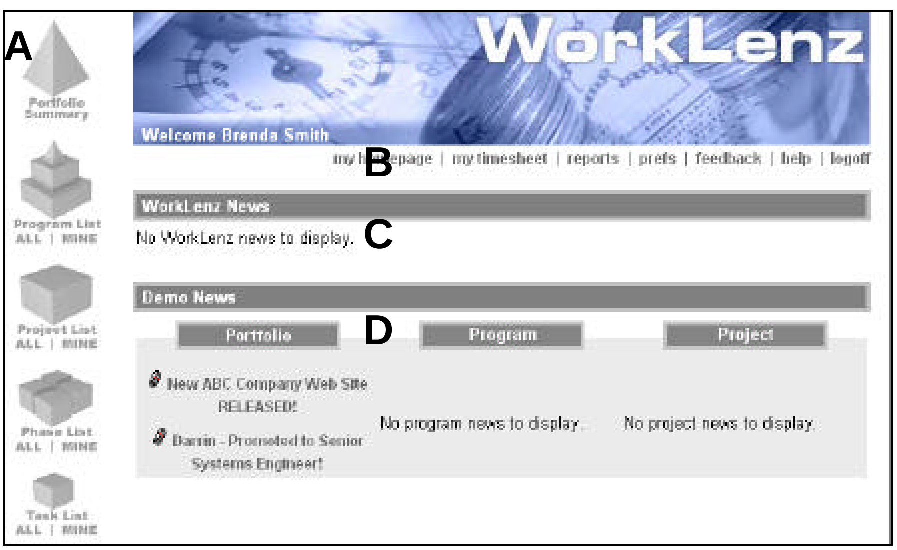


Figure 1

General Features (Figure 2)

The WorkLenz interface is designed to be simple, familiar and easy to use. The following features can be found on most screens:

(A) Title Bar: The name of the user and the current location within the application are displayed for easy reference.

(B) Header Display: Click the down arrows to display all WorkLenz levels relative to your current location. The listings are displayed as hyperlinks to the applicable summary screens.

(C) List Buttons: Graphics displayed horizontally at the top of the page link to list screens (Portfolio, Program, Project, Phase and Task).

(D) Utility Menu: Frequently used aspects of the application such as reports, personal preferences, including the timesheet, application support and logging off are accessible from this section on most screens.

(E) Drill Down: Click on the WorkLenz level to drill down and expand a tree view of the next lowest level.

(F) Select: This section displays a link to the selected level in the tree view. Click on the link to go to the summary screen of the selected level.

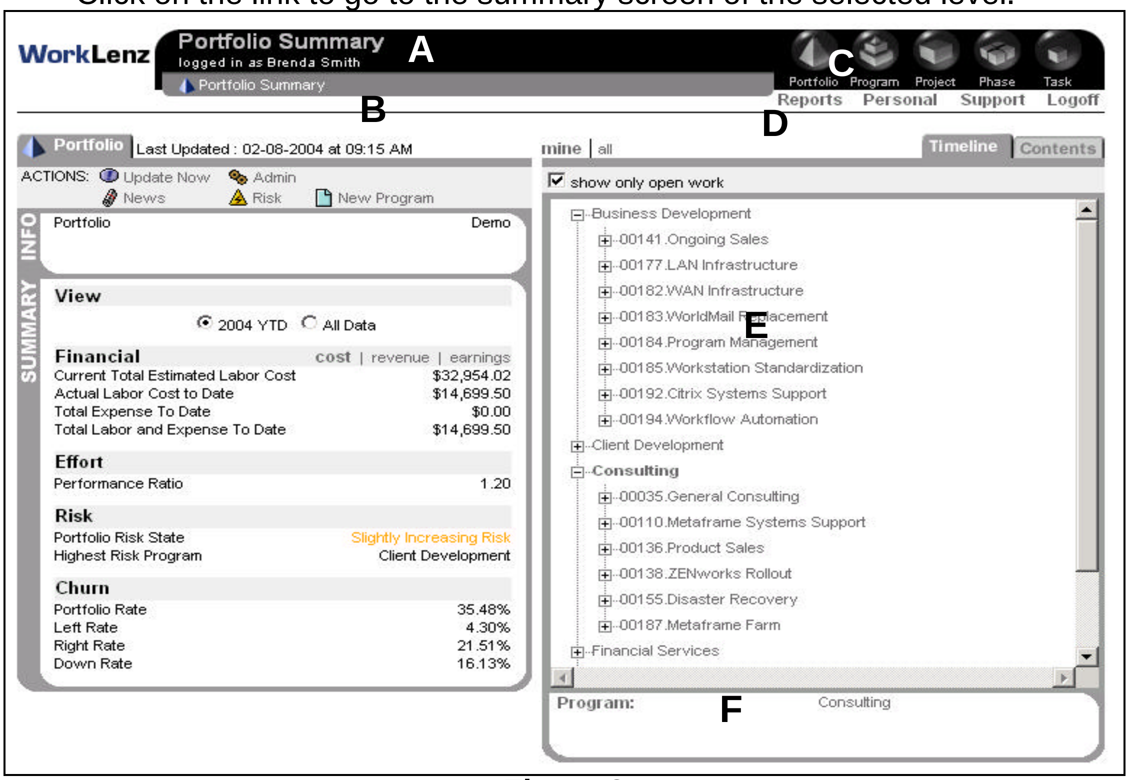


Figure 2

Summary Screens (Figure 4)

Composite information, detailing the status of the Portfolio, Program, Project and Phase levels, is represented on the respective summary screens.

(A) Actions Menu (Figure 3): Buttons located directly below the header display can be used to execute common functions associated with that screen, including:

?? The *Update Now* feature is designed to allow users to update performance statistics on demand. The performance statistics are calculated using OLAP (On-Line Analytical Processing). Normally, calculations are performed nightly but this feature allows them to run on demand.

?? *View, Edit* and *Delete* commands affect the current level. For example, clicking the *Edit* button from the Project summary screen allows you to edit the attributes of that Project.

?? *Risk, Dependencies* and *News* allow you to assign risks and dependencies or view news stories associated with the current summary level. (Dependencies and news can only be accessed from the *Project* summary screen.)

?? *New Phase (Program, Project, Phase* or *Task)* allows you to create a new entry one level down from the current summary.

?? *Admin* allows managers and administrators to modify the configuration of the application.

Figure 3

(B) Summary Data View: The radio buttons located directly below the info data allows users to determine the results of the performance statistics. Depending on which choice is selected, the Portfolio level performance statistics can either represent *Calendar Year* or *All Data* figures. The *Calendar Year* selection includes all data captured in WorkLenz since January 1st of the current year. The *All Data* selection includes all data captured in WorkLenz since its implementation.

(C) Performance Statistics: The left side of each summary screen displays aggregate cost, earned value, effort, risk and churn (deviation from Project schedule) statistics for the levels below. For example, the Portfolio summary screen represents a combined status of all Programs because the Portfolio level is composed of all of the Programs in the Portfolio.

(D) Filters: Users have the option of viewing either all items associated with that particular level or only those to which the user is assigned via the *mine/all* toggle. Along with the *mine/all* filter, the view can be filtered further by the *show only open* check box. This filter controls the view by displaying only open items.

(E) View Tabs: Tabs are located on the right side of each summary screen. The *Timeline* tab displays a simplified Gantt view of the information in each level below the current summary screen. The *Contents* tab displays the entries alphabetized in list form.

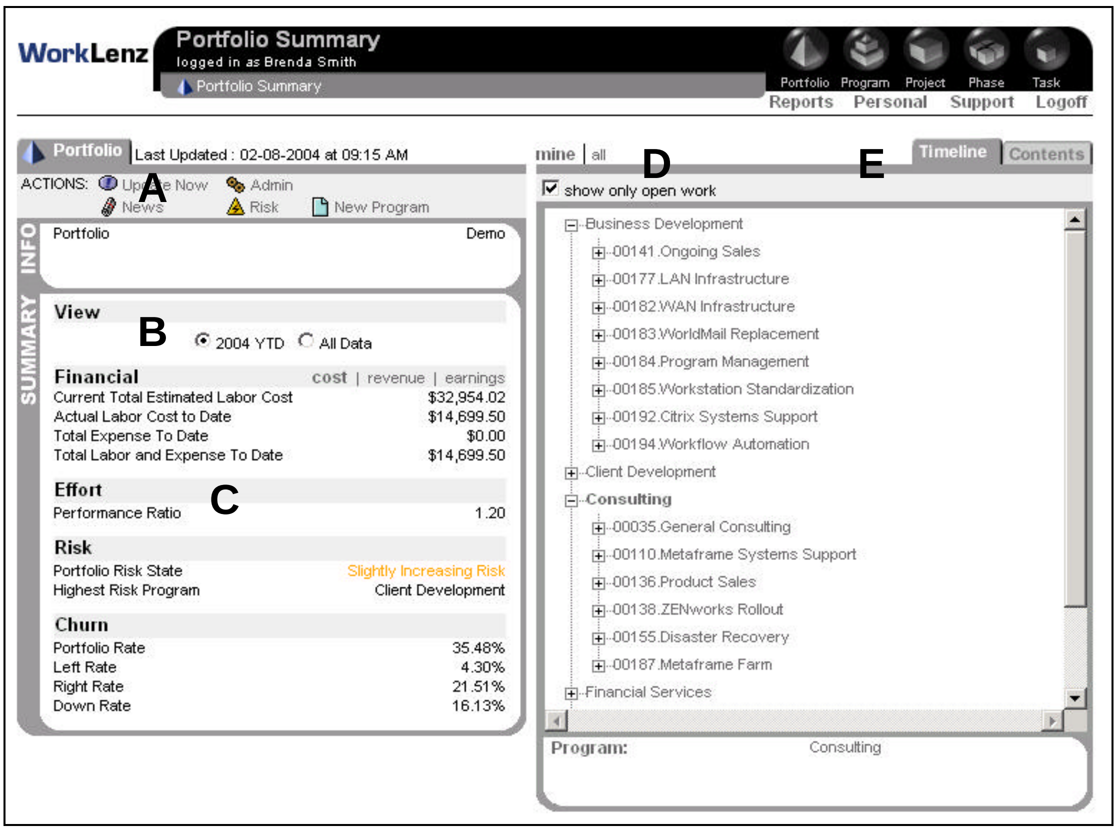


Figure 4

List Screens (Figure 5)

List buttons link to list screens, which display the entries for each level. These lists provide a quick way to navigate to a particular Program, Project, Phase or Task. Select an entry from the list to display the summary screen for that item.

<u>Sorting List Screens</u>:
List screens and most WorkLenz screens can be sorted by clicking any column header.

Lists can also be sorted to either display all items associated with that particular level or only those to which you are assigned Tasks via the *mine/all* toggle. In addition to these filters, the list screens can be filtered further by the *show only open* check box. This filter will display only those items with an open status.

WorkLenz has an advanced filter on each list page (see Figure 5), allowing you to filter according to any combination of criteria, including: Program/Project/Phase/Task title keyword, custom fields, status, type, category, estimated start/complete dates and actual start/complete dates. In addition, the Task list can be sorted further by more attributes, including: assignee, individual/team assigned Tasks, risk, notes, action items, churn, dependencies, expenses, attachments and Tasks with durations.

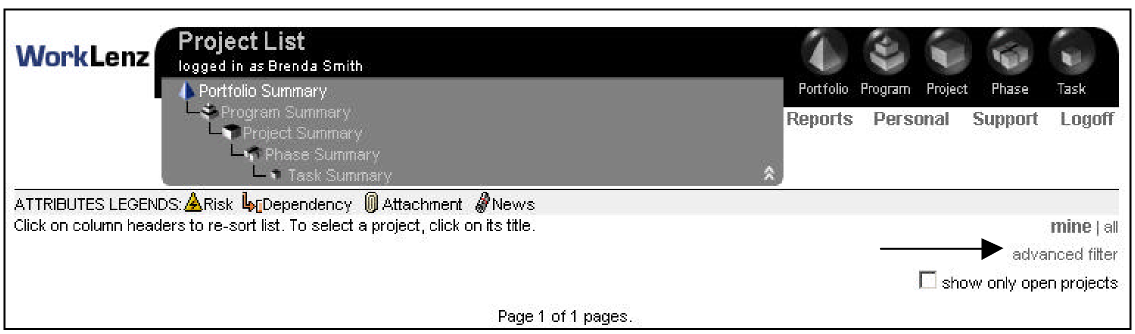


Figure 5

Administration Screens

The analytical and statistical power of WorkLenz lies in the data and parameters entered in the administration areas, including user access levels and organizational levels. This data is used to structure the database, providing the building blocks for Programs, Projects, Phases and Tasks.

It is important to eliminate redundancy between variables. Clear and consistent usage across your organization will lead to a higher integrity of data and increased statistical confidence.

Administration screens must be completed in descending order beginning with the Portfolio level. For example, variables used in WorkLenz must be entered on the Portfolio administration screen before being added at the Program level. A checklist at each administration level identifies the required information.

Portfolio Administration (Figure 6)

WorkLenz provides a checklist in the Portfolio administration section in the order in which the data will be entered on each administration screen. Below is an explanation of each type of data that is required:

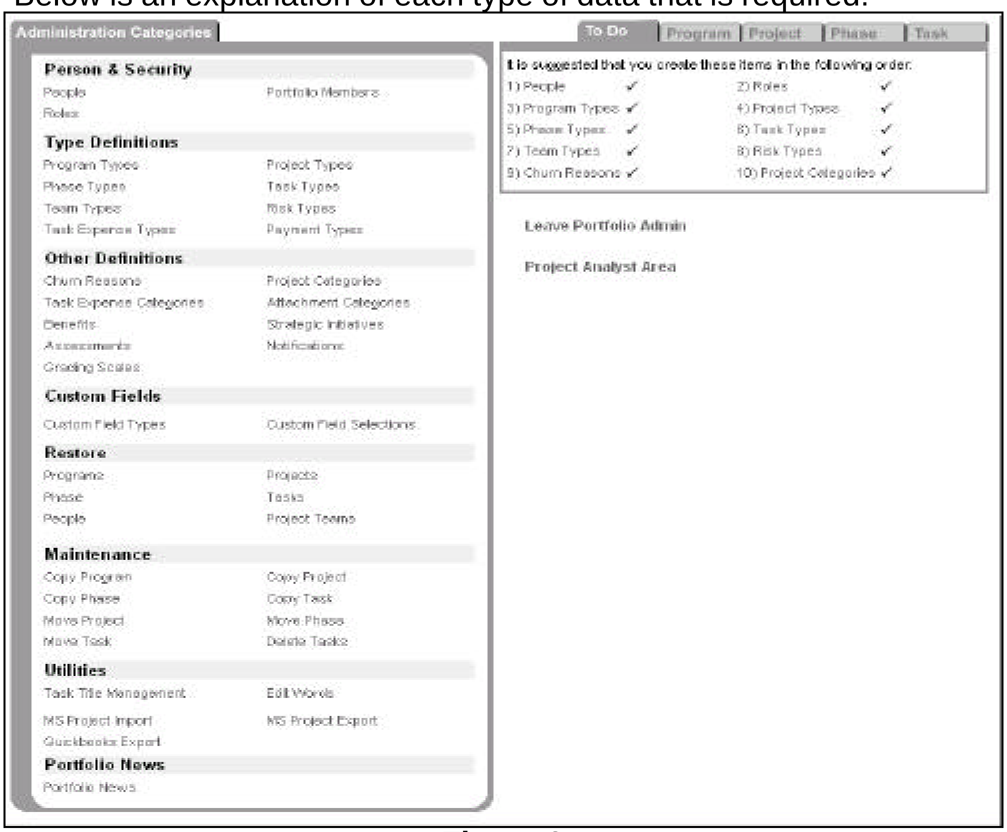


Figure 6

?? People (Figure 7): ‘People’ is a collection of all user information. Only those users identified by the system may access the application. Users can be marked as “deleted” from the person administration screen or set to be inactive. WorkLenz requires the following information of each user: First Name, Last Name, Title, E-mail, Rate, Cost, User ID, Password, Classification and Person Status. To add a new person to WorkLenz, click the *New Person* link in the top left corner of the Portfolio administration *People* menu.

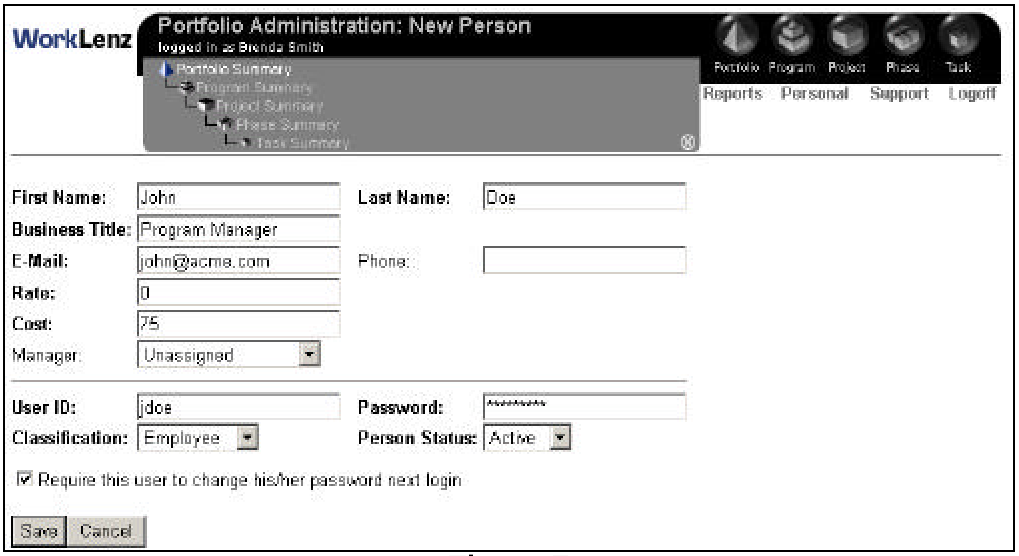
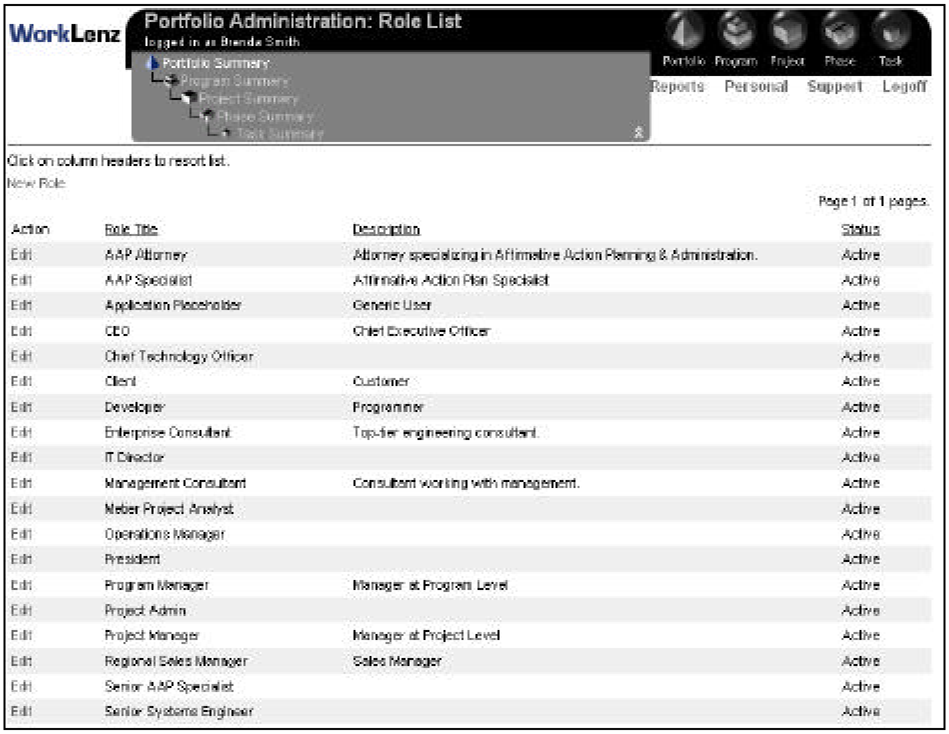


Figure 7

?? Roles (Figure 8): A role defines the specific function a Project member will perform within a Project. Project members can be assigned one or more roles in each Project. For example, a Programmer may be assigned the role of Tester on one Project and Technical Writer on another. This allows for the creation of reports which compare how an individual performs in different roles, as well as how certain roles perform across your organization. To add a new role, click on *New Role* in the top left side of the page.



Action	Role Title	Description	Status
Edit	AAP Attorney	Attorney specializing in Affirmative Action Planning & Administration.	Active
Edit	AAP Specialist	Affirmative Action Plan Specialist	Active
Edit	Application Placeholder	Generic User	Active
Edit	CEO	Chief Executive Officer	Active
Edit	Chief Technology Officer		Active
Edit	Client	Customer	Active
Edit	Developer	Programmer	Active
Edit	Enterprise Consultant	Top-tier engineering consultant.	Active
Edit	IT Director		Active
Edit	Management Consultant	Consultant working with management.	Active
Edit	Metier Project Analyst		Active
Edit	Operations Manager		Active
Edit	President		Active
Edit	Program Manager	Manager at Program Level	Active
Edit	Project Admin		Active
Edit	Project Manager	Manager at Project Level	Active
Edit	Regional Sales Manager	Sales Manager	Active
Edit	Senior AAP Specialist		Active
Edit	Senior Systems Engineer		Active

Figure 8

?? Types (Program, Project, Phase, Task, team, risk, expense, payment) (Figure 9): Types are identifiers used to group similar items together so they can be tracked at yet another level of detail.

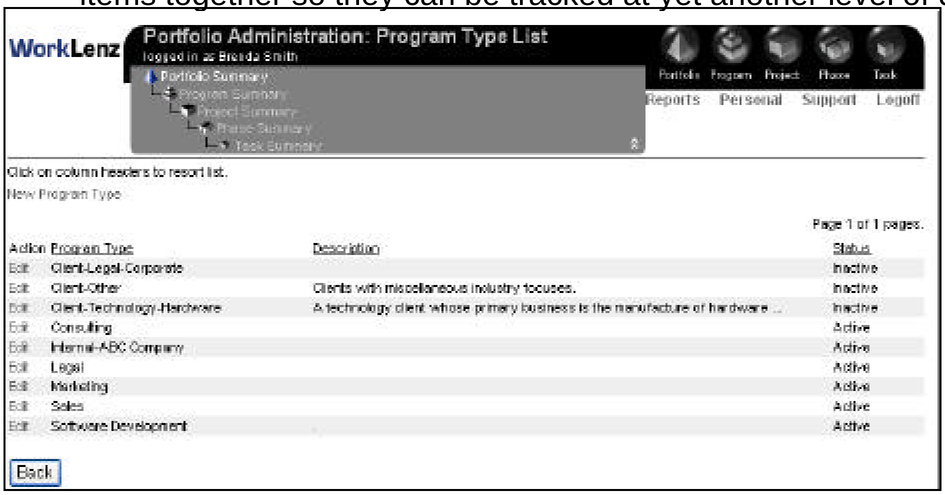
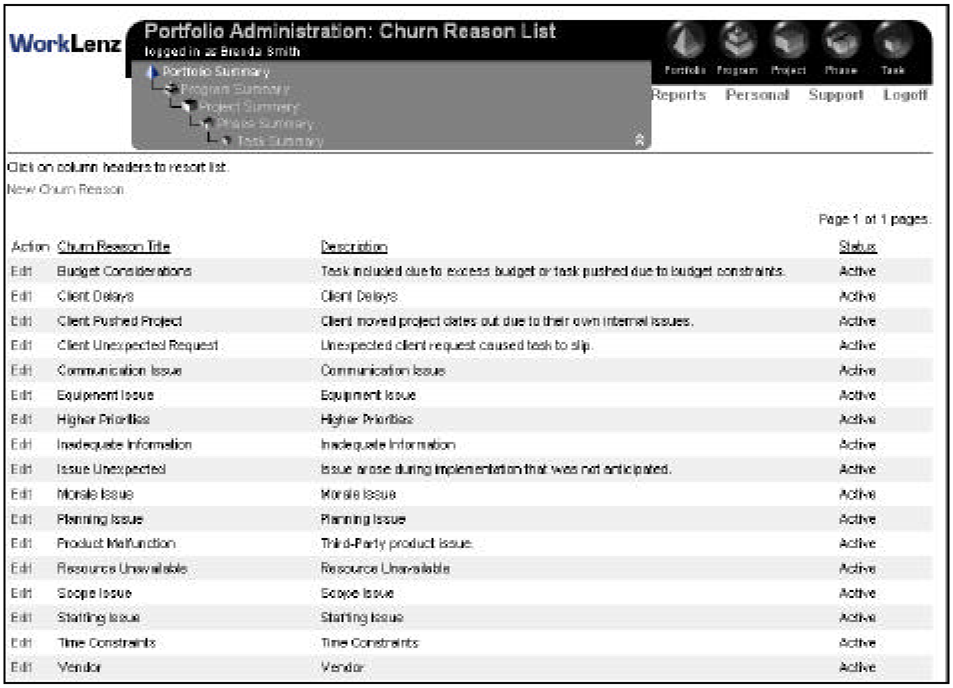


Figure 9

?? Categories (Project, expense, attachment) Categories are a means of grouping similar items together to be tracked and analyzed.

?? Churn Reasons (Figure 10): Churn reasons are explanations of why deviations from a plan occur. If a Task experiences churn, the user initiating the churn event will be prompted to choose the reason for the occurrence from a dropdown box. The WorkLenz database is pre-populated with a series of common churn reasons; however, we suggest that you tailor these reasons to specifically meet your needs.



Action	Churn Reason Title	Description	Status
Edit	Budget Considerations	Task included due to excess budget or task pushed due to budget constraints.	Active
Edit	Client Delays	Client Delays	Active
Edit	Client Pushed Project	Client moved project dates out due to their own internal issues.	Active
Edit	Client Unexpected Request	Unexpected client request caused task to slip.	Active
Edit	Communication Issue	Communication Issue	Active
Edit	Equipment Issue	Equipment Issue	Active
Edit	Higher Priorities	Higher Priorities	Active
Edit	Inadequate Information	Inadequate Information	Active
Edit	Issue Unexpected	Issue arose during implementation that was not anticipated.	Active
Edit	Morale Issue	Morale Issue	Active
Edit	Planning Issue	Planning Issue	Active
Edit	Product Malfunction	Third-Party product issue.	Active
Edit	Resource Unavailable	Resource Unavailable	Active
Edit	Scope Issue	Scope Issue	Active
Edit	Staffing Issue	Staffing Issue	Active
Edit	Time Constraints	Time Constraints	Active
Edit	Vendor	Vendor	Active

Figure 10

?? Benefits WorkLenz benefits function similarly to strategic initiatives. A set of targeted benefits can be configured at the Portfolio level. Each Project can be associated with one or more benefits. For example, "Reduced Costs" might be a benefit for a Program focused on increasing efficiency.

?? Strategic Initiatives This field can be used to align a Project with a strategic goal. More than one strategic initiative can be added to a Project and each can be designated as active or inactive. A Project's alignment with a particular strategic initiative is set at the Program level. This feature is accessed in the Portfolio, Program and Project administration areas. The results are viewed in the *Details* section of the Project summary screen.

?? Task Title Management (Figure 11): This is the administrative interface for active thesaurus. Active thesaurus provides natural language

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processing to make work across the enterprise statistically comparable. The individual words in the Task title are mapped according to their part of speech. For example, the Task title “Install server at client” would be mapped as:

Install/ VB server/ NN at/ IN client/ NN

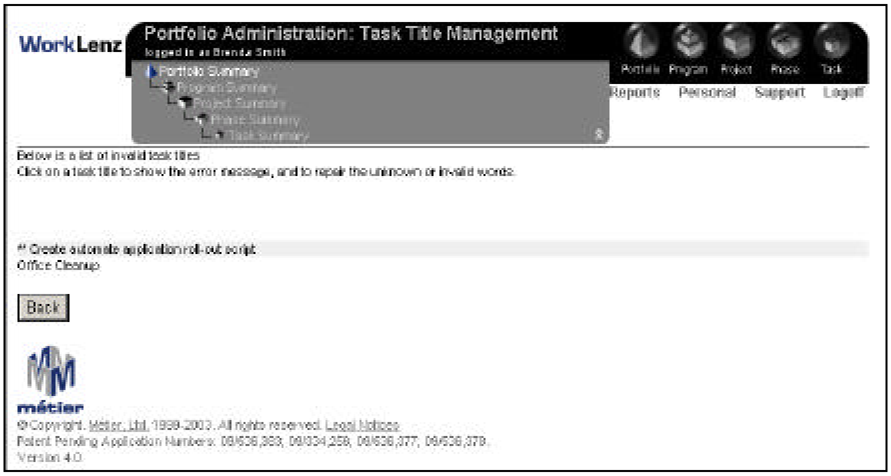


Figure 11

- Active thesaurus is accessed on the Portfolio administration screen by clicking on *Task Title Management*. Any Task title that has not been categorized properly will appear in the list with a link to the Task title. After clicking on the Task you will be directed to the repair Task title screen (Figure 12).

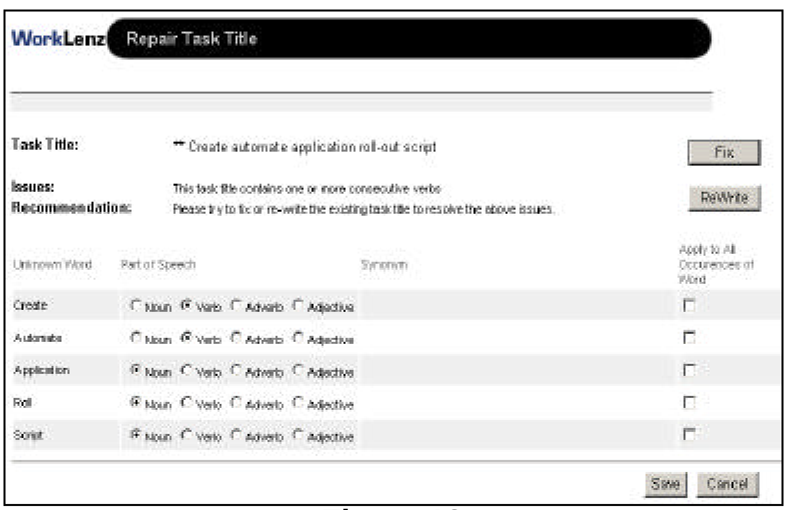


Figure 12

- Active thesaurus can be customized to meet your specific needs. From the administration screen, users can select *Edit Words* (Figure 13). This feature generates a list of words that the system does not recognize.

Any changes made to the way a word is interpreted will be applied for each occurrence of that word.

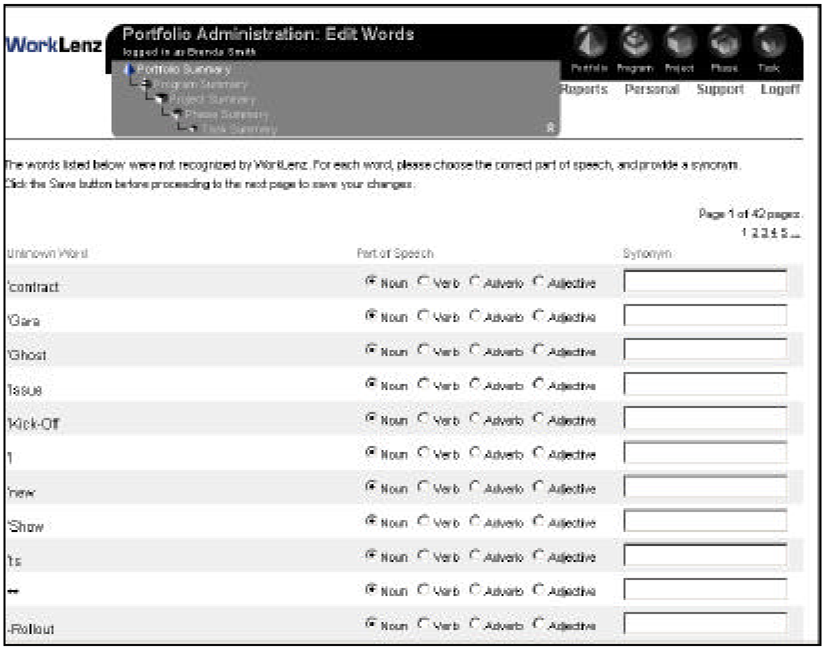


Figure 13

Once the Portfolio administration areas have been configured, WorkLenz is now ready for use. The section on Using WorkLenz will provide important details and tips for using WorkLenz efficiently.

Program Administration (Figure 14)

The Program administration menu allows for additional customization for a specific Program. Settings will affect the designated Program as well as all underlying Projects.

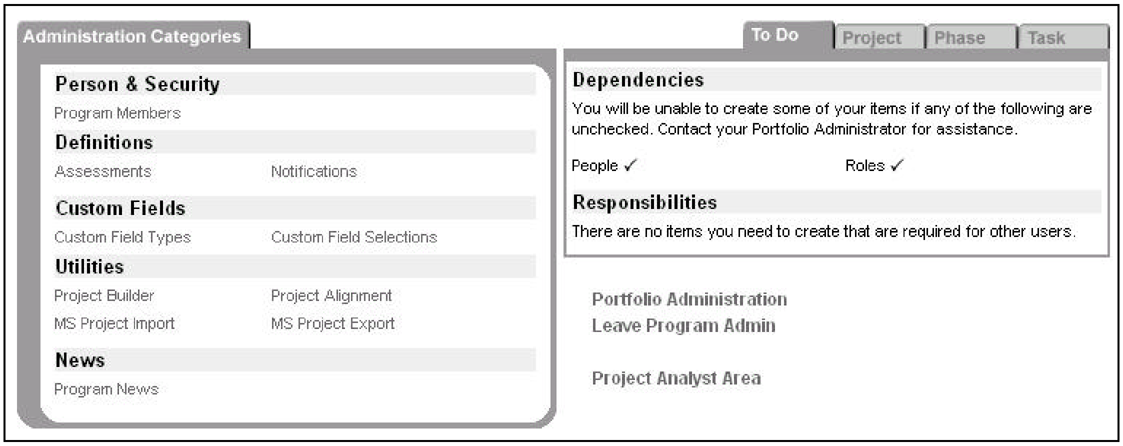


Figure 14

?? Project Alignment (Figure 15): To set Project alignment values for Strategic Initiatives and Benefits, click on the Project name under the *Project Alignment* menu.

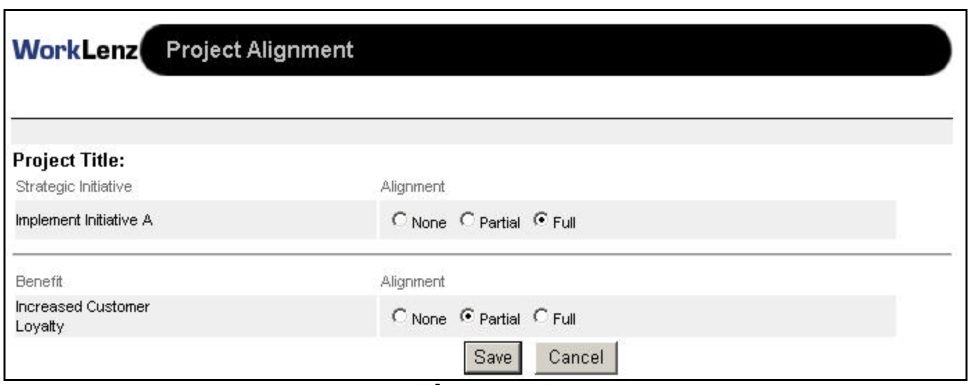


Figure 15

Project Administration (Figure 16)

WorkLenz provides a checklist in the Project administration section in the order in which the data will be entered on each administration screen. Below is an explanation of each type of data that is required:

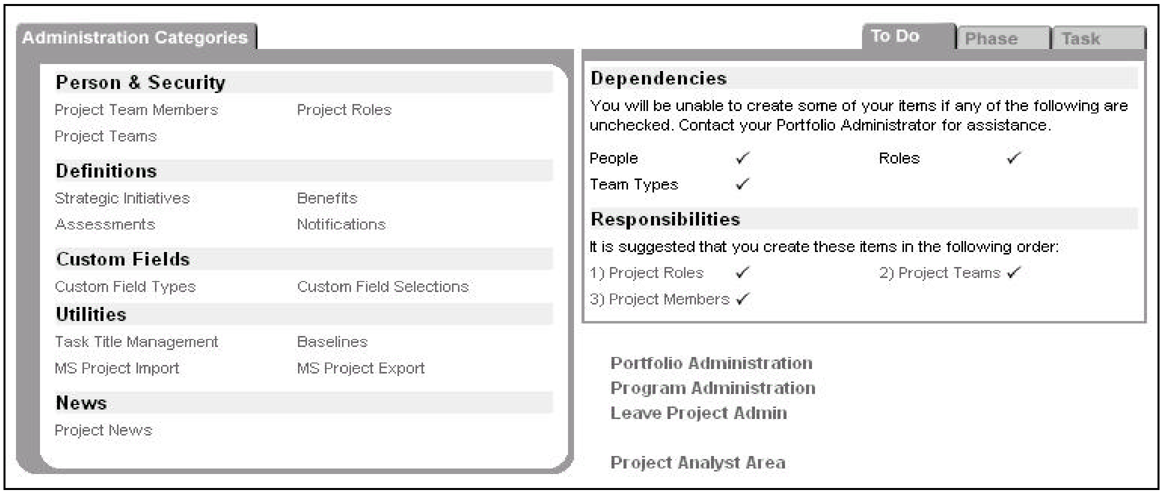


Figure 16

?? Project Roles (Figure 17): Before assigning individuals to a Project, Project roles must be defined. A user's role on a Project is directly tied to the access level within the Project. To add a new Project role, click the *New Project Role* link in the top left on the Project Roles page in Project administration.

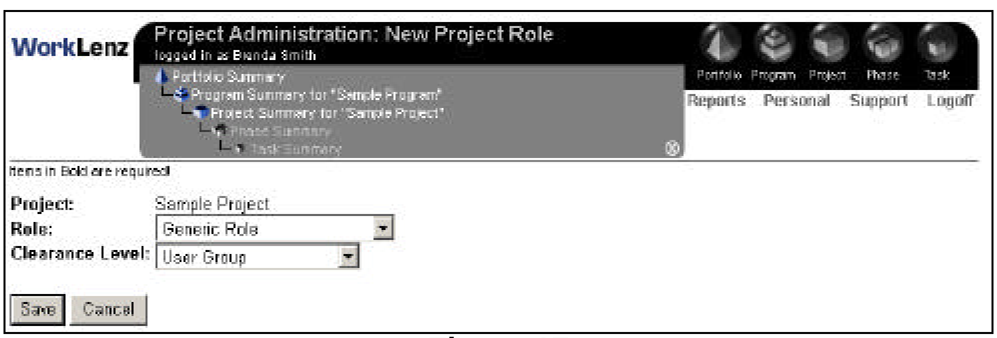


Figure 17

?? Project Teams (Figure 18): Before assigning individuals to a Project, Project teams must be defined. Project teams allow Tasks to be assigned to multiple people within a Project. To add a new Project team, click the *New Project Team* link in the top left on the Project Teams page in Project administration.

Figure 18

?? Project Team Members (Figure 19): Once Project roles and teams have been established, individuals can be assigned to the Project. To add a new person to a Project team, click the *New Project Team Member* link in the top left on the Project Team Members page in Project administration.

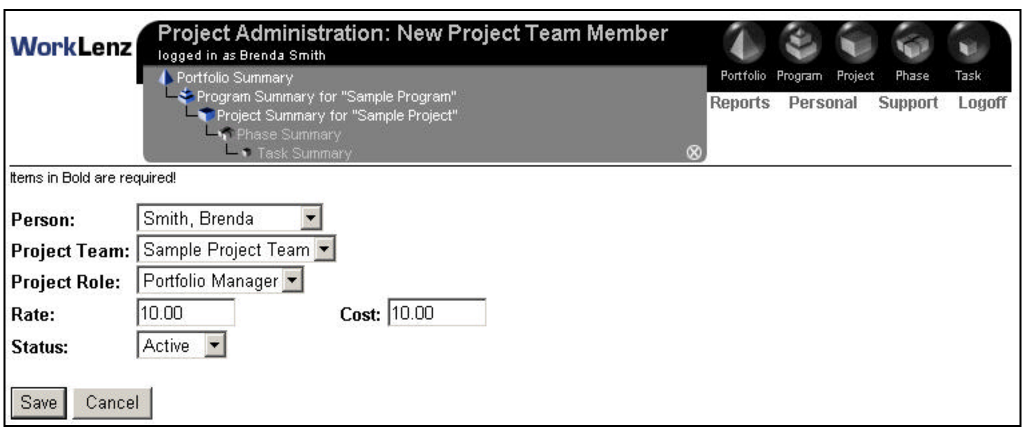
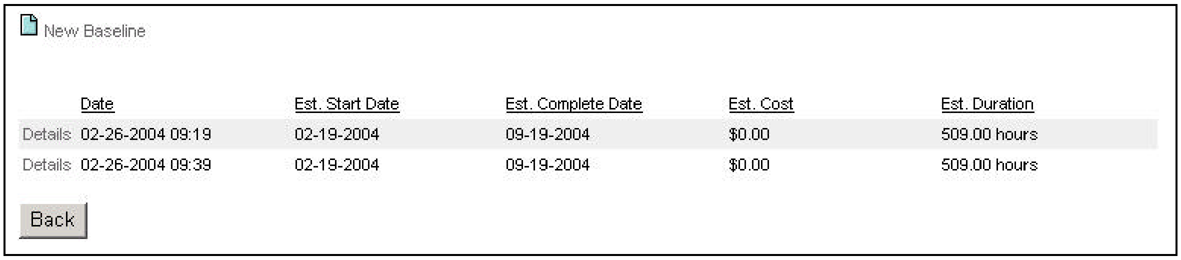


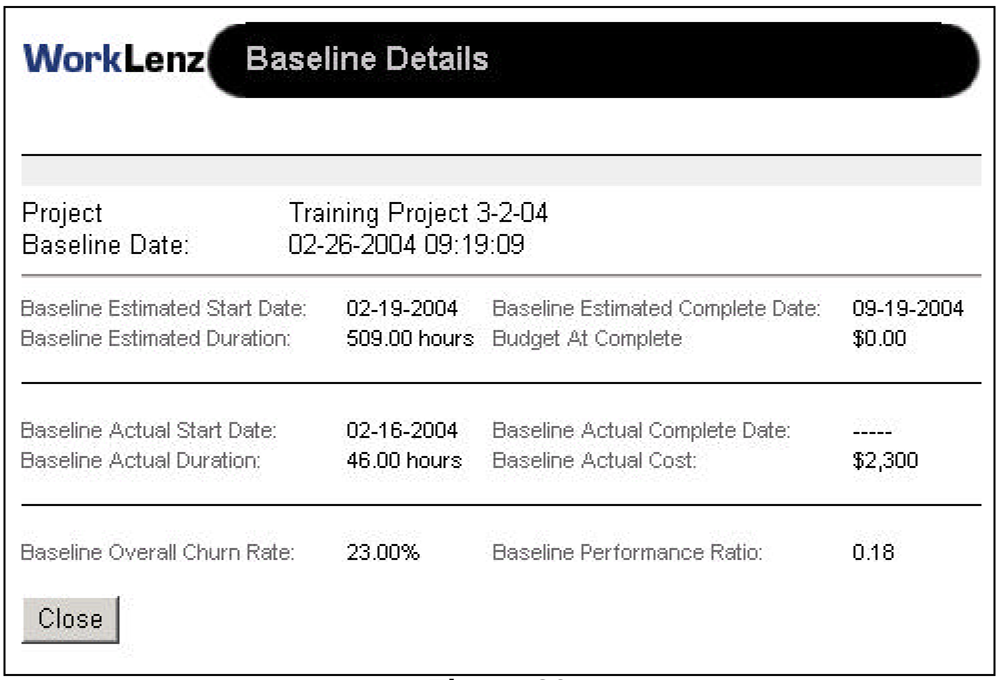
Figure 19

- <u>Baselines</u> (Figure 20): When a Project has reached a maturity level and is ready to be baselined, this utility provides the ability to capture a Project baseline. To add a new baseline, click on the New Baseline link in the top left of the Baseline list page in Project administration. The information about each baseline can be viewed by clicking on the Details link to the right of the baseline.


New Baseline

	Date	Est. Start Date	Est. Complete Date	Est. Cost	Est. Duration
Details	02-26-2004 09:19	02-19-2004	09-19-2004	$0.00	509.00 hours
Details	02-26-2004 09:39	02-19-2004	09-19-2004	$0.00	509.00 hours

Back


WorkLenz Baseline Details

Project	Training Project 3-2-04
Baseline Date:	02-26-2004 09:19:09

Baseline Estimated Start Date:	02-19-2004	Baseline Estimated Complete Date:	09-19-2004
Baseline Estimated Duration:	509.00 hours	Budget At Complete	$0.00
Baseline Actual Start Date:	02-16-2004	Baseline Actual Complete Date:	-----
Baseline Actual Duration:	46.00 hours	Baseline Actual Cost:	$2,300
Baseline Overall Churn Rate:	23.00%	Baseline Performance Ratio:	0.18

Close

Figure 20

III. Using WorkLenz

Step 1: Creating and Editing Projects

General Concepts

- Tasking Horizon: When creating a Project, you are prompted for information regarding the Project's Tasking horizon, which is defined as the longest timeframe within which you can realistically expect to perform Tasks according to plan.

  We encourage creating a plan with milestone dates, while stressing the importance of focusing on the present. We strongly recommend a Tasking horizon of one week.

- Churn (Figure 21): Even when planning in relatively short timeframes, the movement of Tasks, referred to as Churn, is likely to occur.

  Three types of churn are tracked in WorkLenz:

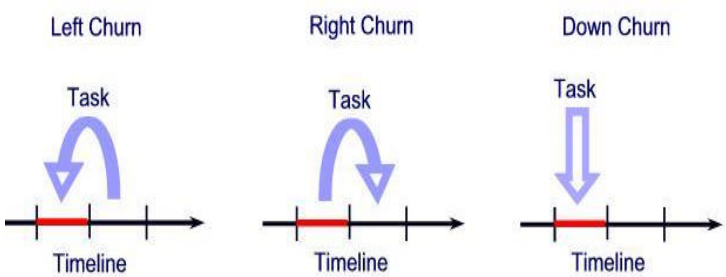


Figure 21

Left Churn: Tasks that are started and/or completed in an earlier Tasking horizon than planned. These Tasks move to the left on the timeline.

Right Churn: Tasks that are started and/or completed in a later Tasking horizon than planned. These Tasks move to the right on the timeline.

Down Churn: Unexpected Tasks that fall into the current Tasking horizon.

Churn is neither good nor bad; the terminology is simply a way of quantifying the dynamics of a Project. Churn reasons can be customized to reflect the language of your internal dynamics.

The analysis of churn, the investigation of why it occurred and the examination of its relationship to individuals, teams and words within a Project identifies how an organization operates and performs in relation to its original plan.

Creating Projects

Projects can be created and edited depending on your access level. Below are different ways to create new Projects in WorkLenz.

1. **New Project Button** (Figure 22): From the Program summary screen, click on *New Project*.

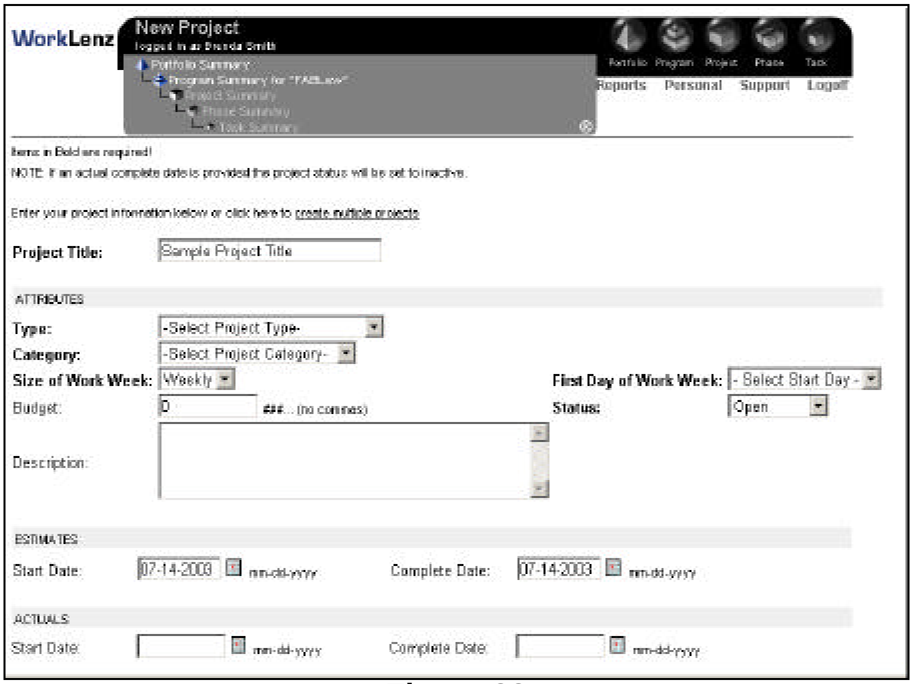


Figure 22

2. **Creating Multiple Projects** (Figure 23): The *Create Multiple Projects* link is optimal for situations in which many Projects need to be created quickly. Up to ten Projects can be created at once from the spreadsheet view.

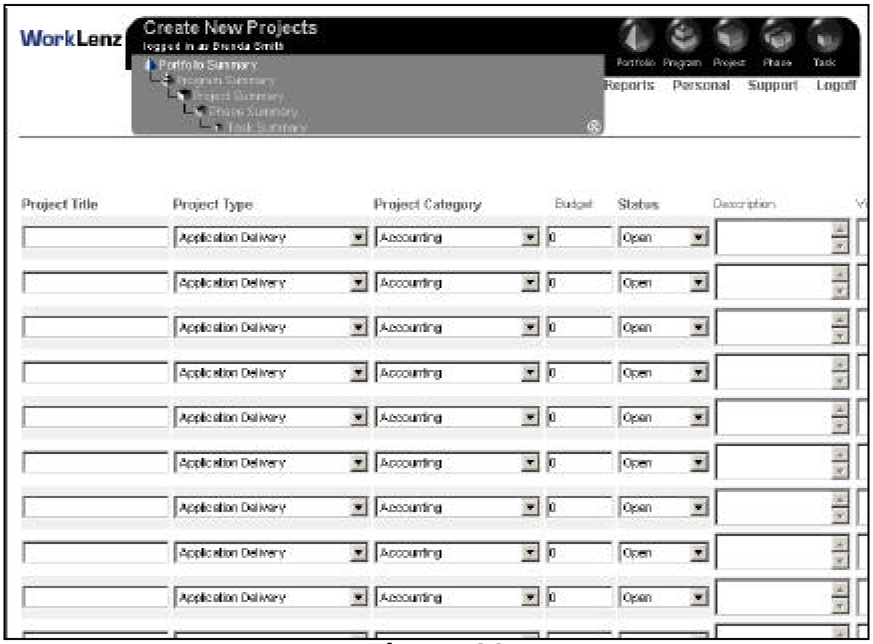


Figure 23

3. **Copy Project** (Figure 24): The copy Project feature in the maintenance area of the Portfolio administration screen allows users to copy existing Projects from WorkLenz. The source Project is copied exactly as it exists within WorkLenz with all of the same attributes.

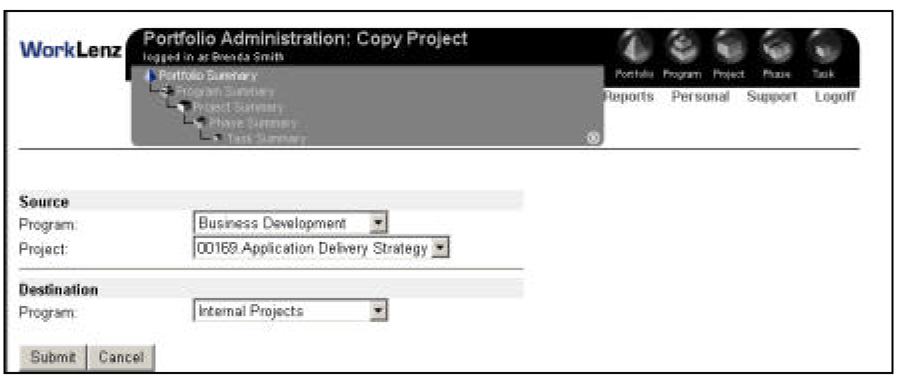


Figure 24

4. **Project Builder** (Figure 25): Project Builder is the most sophisticated, accurate way to copy an existing Project in WorkLenz. Project Builder incorporates past performance history in the form of Task actuals and applies that information to Task estimates in the new Project plan. Project Builder can use templates and Project metrics to build improved plans based on statistical data. Project Builder allows managers to not only choose the source Project and the estimated start date, but also to select the Project, Phase and Task properties to be copied over to the new Project.

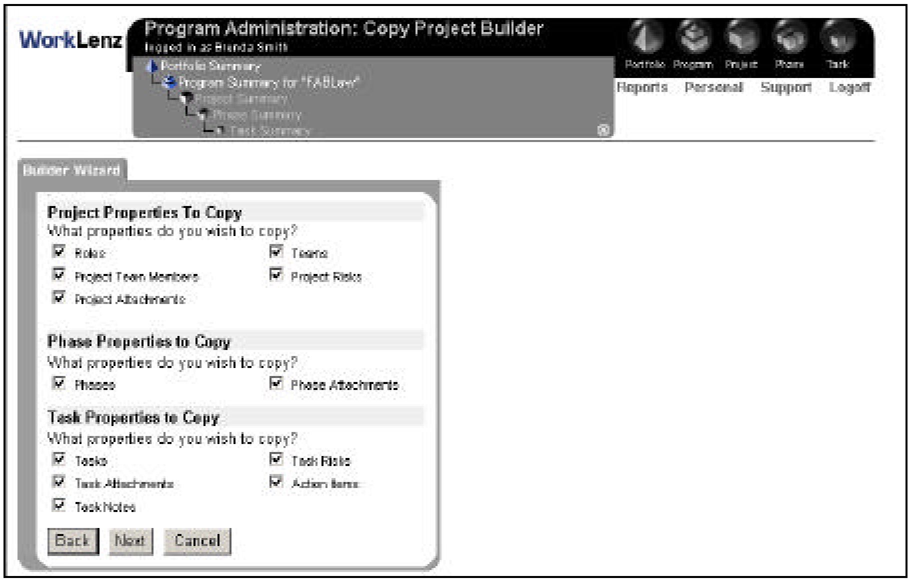


Figure 25

Project Builder then provides staffing options for the new Project – like the source Project, or with generic placeholders. If using a generic placeholder to staff the Project, the Project manager will need to re-assign each Task to an identified user in WorkLenz. Next, a validation screen (Figure 26) detailing the items about to be copied appears allowing the user to decide whether or not to proceed with the copy. The new Project plan is created in a matter of minutes.

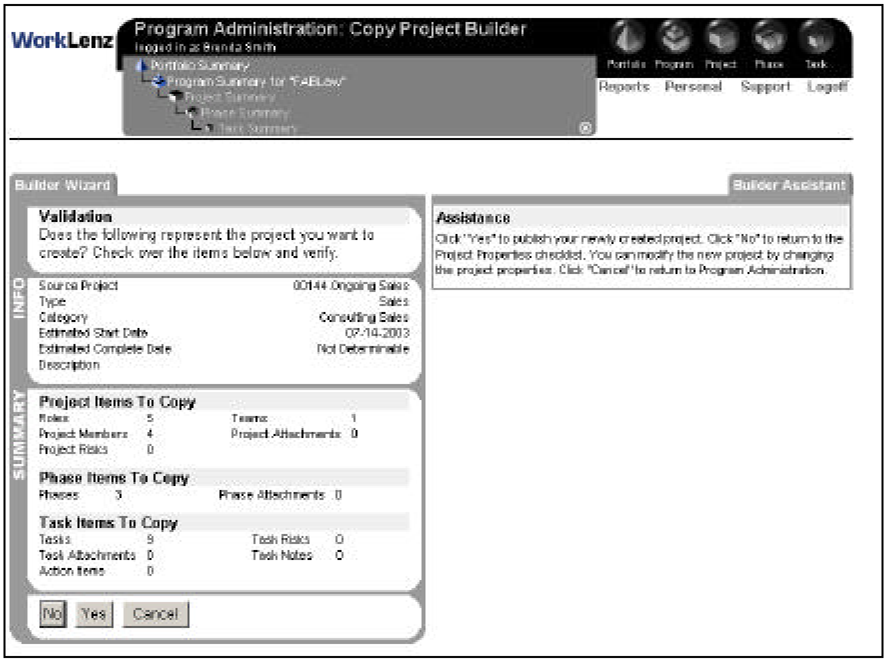


Figure 26

Editing Projects

Attributes of a Project can be edited at any time by clicking *Edit* from the action bar on the Project summary screen, depending upon your access level.

Projects also have mass edit (Figure 27) capabilities from the Project list page. Clicking on the edit Projects button will turn the page into a spreadsheet allowing large quantities of data to be changed simultaneously.

Another feature available in WorkLenz is intelligent date shifting. This feature allows a user to change the estimated start and finish date at the Project level and have the change affect all lower level Phases and Tasks. The date change will affect lower level Tasks that do not have actual start and finish dates entered in.

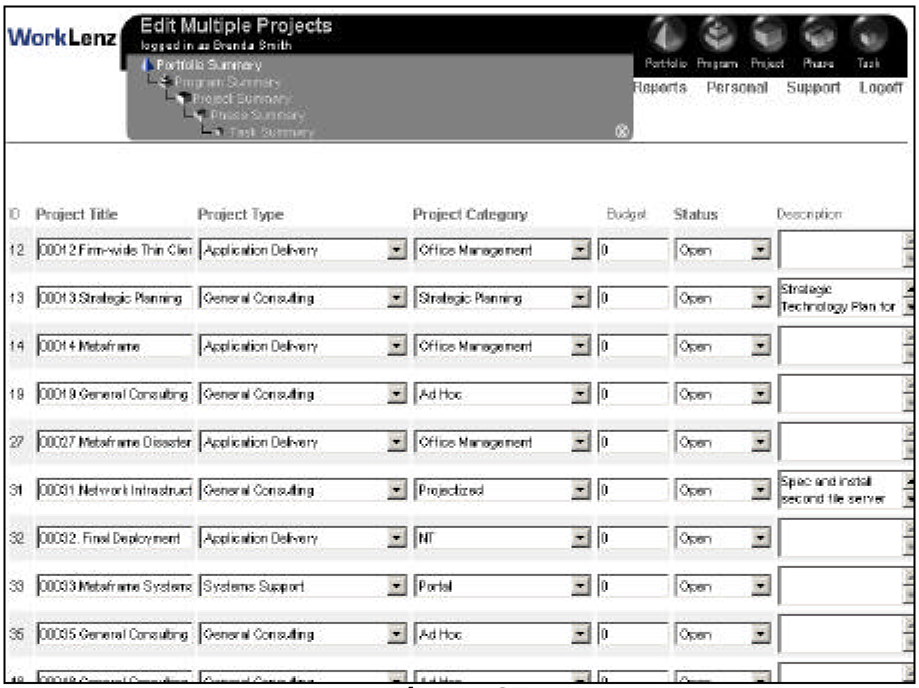


Figure 27

Project Risks and Dependencies (Figure 29)
You can create Project risks and dependencies by clicking *Risk* or *Dependencies* from the Project summary screen (Figure 28).

Figure 28

?? Risk: The likelihood and impact of a risk is assessed on a scale of 1-10, with 10 being the highest. The mathematical product of the probability (likelihood of occurrence) and the consequence (effect if the risk is realized) yields a risk value ranging from 1-100. Default values can be assigned to the probability and consequence fields based on the type of risk being added. For example, all technical risks could have a default consequence of 10 since the impact of a technical failure would be severe.

?? Risks are ranked by priority and are assigned to an owner.
?? A mitigation plan can be added for each risk and is tracked using a target date and an actual date.
?? Risk influences are Program, Project, Phase or Tasks that influence the likelihood of a risk occurring. This concept integrates work being performed to risks. The influence a Task has on a risk can be to increase or decrease it.
?? Risk influences can work upwards through the WorkLenz hierarchy. For example, a Task can influence a risk at the Phase level and a Phase can influence a risk at the Project level.

Tracking risks is an essential component of Project management and WorkLenz is designed to make managing risks as efficient as possible. The risk screen allows managers to review all risks for a Program, Project or Phase. *Risk History* is a view of a risk's past to help managers understand how it developed over time. *Risk Occurrences* displays the number of occurrences of a particular risk.

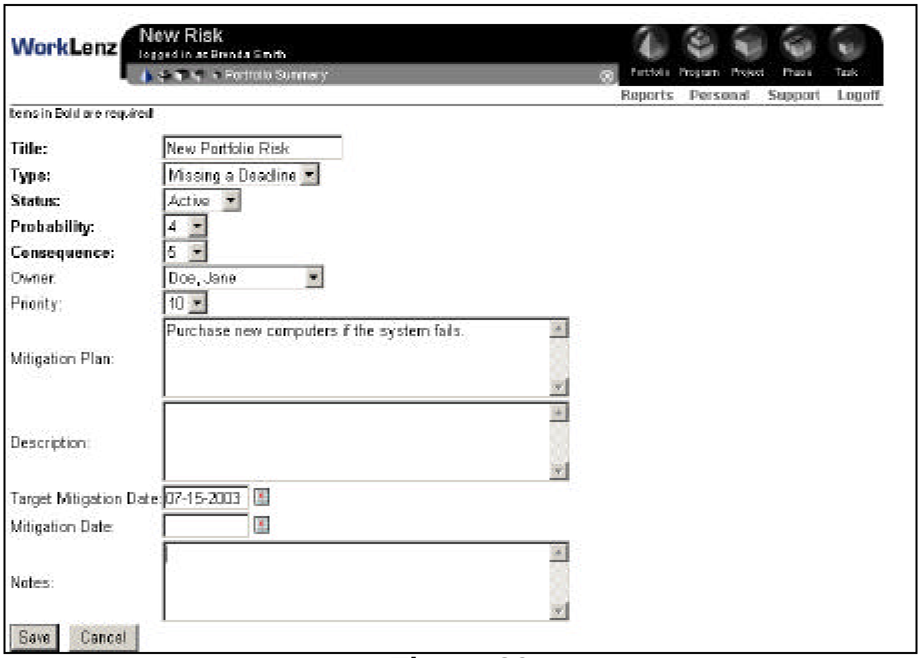


Figure 29

?? <u>Dependency</u>: A Project dependency displays the impact of one Project on another.

Creating a dependency:

✍ From the new Project dependency screen, choose *new Project dependency* and select the Project upon which the current one is dependent.

✍ Choose *new dependent Project* to make another Project dependent on the current one.

Several dependency scenarios are possible, including, start-finish, start-start, finish-finish and finish-start. These are described and defined on the new Project dependency and new dependent Project screens.

Step 2: Creating and Editing Phases

The breakdown of a Project into Phases is generally dependent on your particular work situation and type of work being performed. Phases could include design, development, implementation, etc. Métier can assist in standardizing unstructured processes around distinct, defined Phases or fixed periods of time.

Creating Phases

From the Project summary screen, click on the *New Phase* link. In a similar fashion to the Programs and Projects above the Phases, a *Create Multiple Phases* link exists within the new Phase page. The mass creation (Figure 30) option allows users to create up to ten new Phases at one time, thus making the creation of a Project easier and more efficient.

Figure 30

Editing Phases

Attributes of a Phase can be edited at any time by clicking *Edit* from the action bar on the Phase summary screen.

Multiple Phases can also be edited at the same time through the Phase list page. The *Edit Phases* button in the bottom left-hand corner creates a spreadsheet view for quick edits of the various Phase attributes (Figure 31).

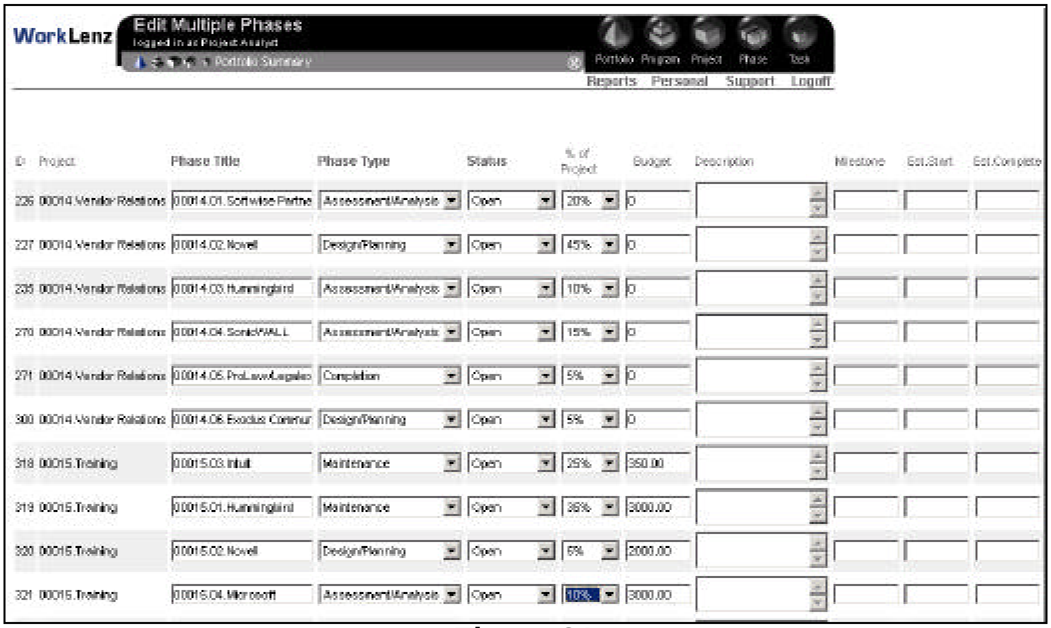


Figure 31

Creating Nested Phases

WorkLenz allows users to create nested Phases, or Phases with a parent-child relationship.

To create a nested Phase within an existing Phase, click on the *New* link and choose *Phase* in the action bar of the Phase summary screen. The *New Phase* link will bring you to the New Phase screen where you can create a single Phase or choose the *Create Multiple Phases* link. Nested Phases are created and edited with the same attributes as other non-nested Phases.

Step 3: Creating and Editing Tasks

The Task summary screen contains some of the most fundamental, specific, and useful information collected by WorkLenz. This data is the building block that WorkLenz is built upon and is used for analysis, reporting, and prediction. You can enter and edit Task data and maintain a running tally of notes, action items and expenses on this screen.

Creating Tasks

Tasks can be created in many different ways in WorkLenz.

1. **New Task Button** (Figure 32): In the action bar of the Phase summary screen, click *New* and select *Task.* The *New Task* button on the Phase summary screen will create a single Task in WorkLenz. All of the bold fields appearing on the new Task screen are required. The Project Phase defaults to the Phase from which you came; however, you can add the new Task to another Phase in the Project by selecting a different Project Phase from the dropdown menu. Once the Task attributes have been selected and added, click *Save* to submit the Task and proceed to the Task summary screen.

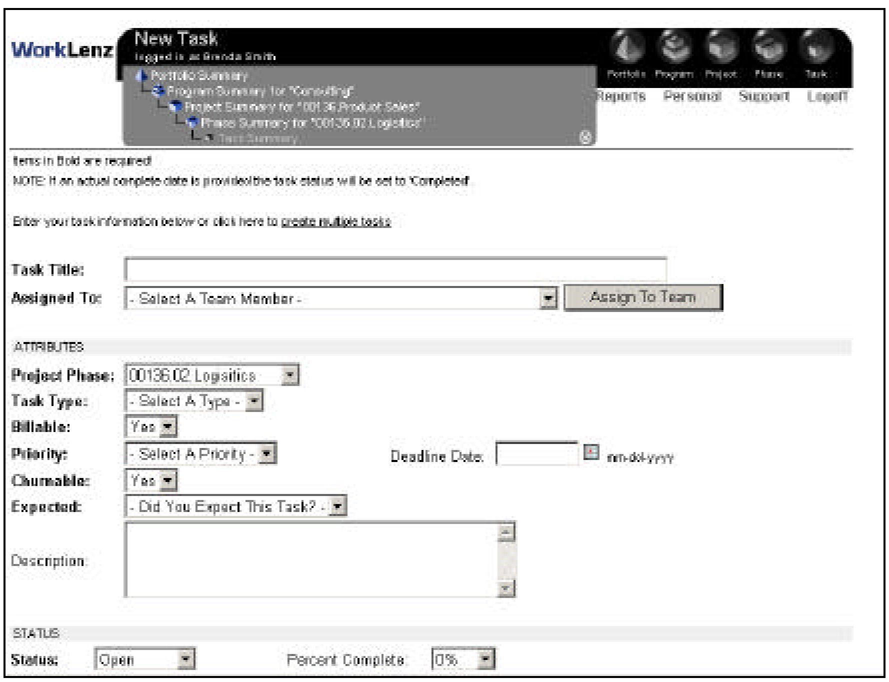


Figure 32

2. **Creating Multiple Tasks** (Figure 33): From the *New Task* button on the Phase summary screen, users can choose to add up to ten Tasks at once by clicking on the *Create Multiple Tasks* link. The spreadsheet view for ten new Tasks with all of the Task attributes will appear. As is the case with a single Task creation, users can designate any of these new Tasks to any Phase within the Project by selecting the Phase in the Project Phase dropdown. Once all of the Task information has been filled out, click on *Create Tasks* to submit them.

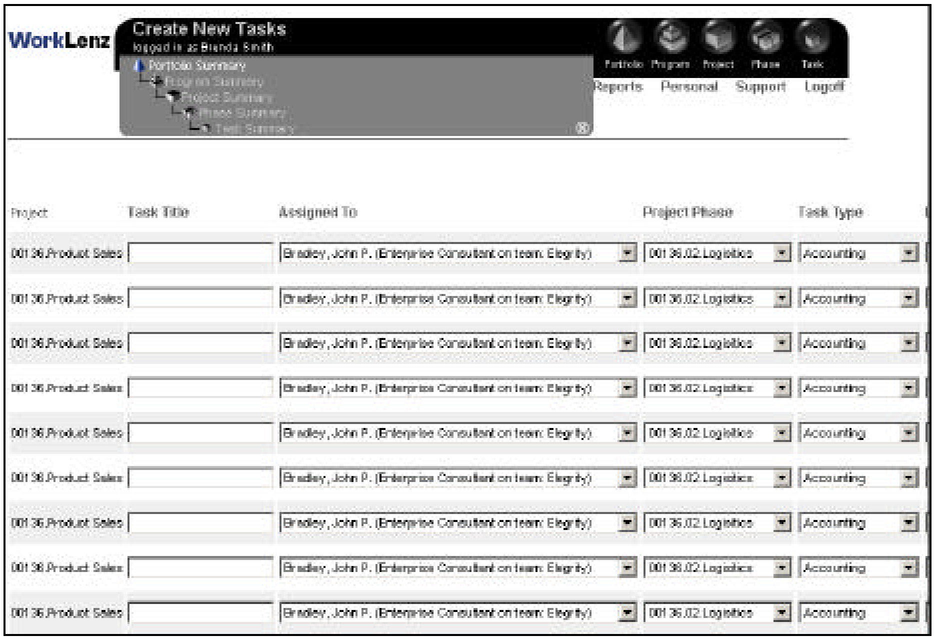


Figure 33

3. **Timesheet** (Figure 34): New Tasks can also be created from the timesheet. To the left of each Project title lies the *New Task* icon. Clicking on this icon will launch the new Task page within the main page of WorkLenz (usually visible behind the timesheet window). Again, users have the option to create a single Task or multiple Tasks within the Project. Once the Tasks have been created, refresh the view (F5 in Internet Explorer) in the timesheet to view and status time against new Tasks.

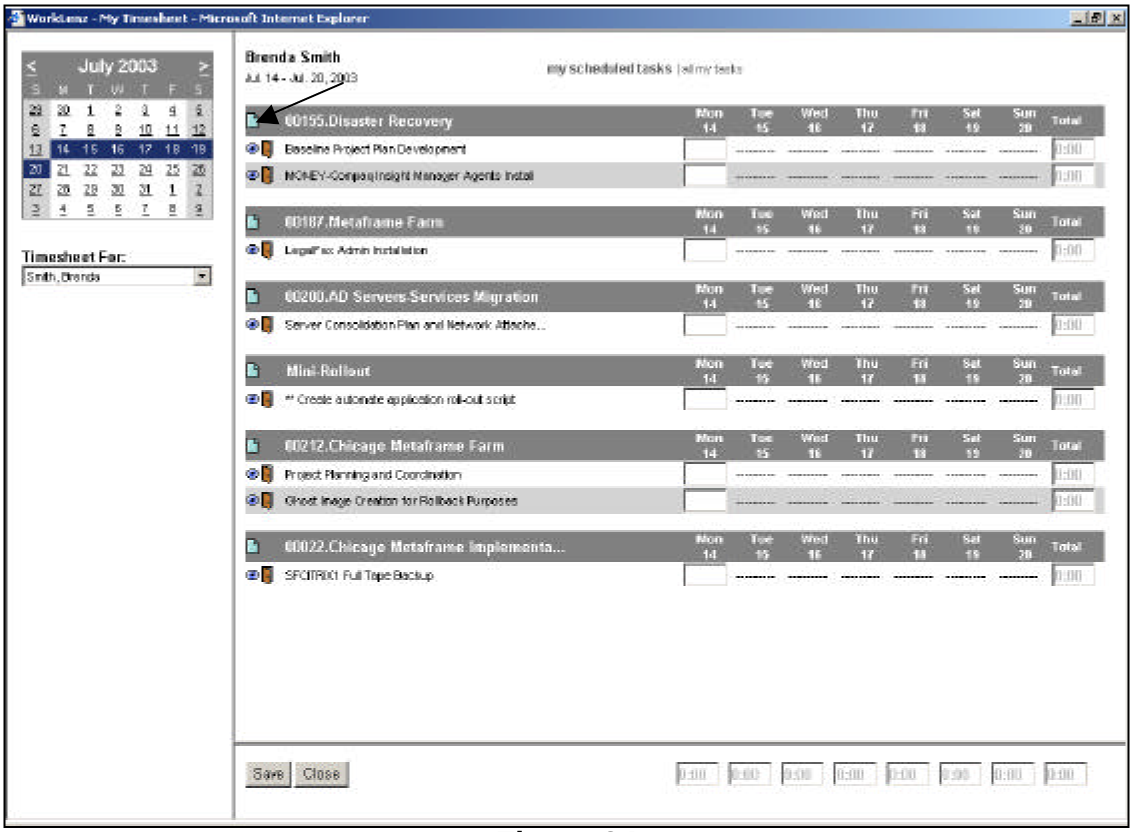


Figure 34

Task Summary Screen (Figure 35)
The Task summary screen is organized according to a file tab system consisting of eight tabs with unique action buttons for each:

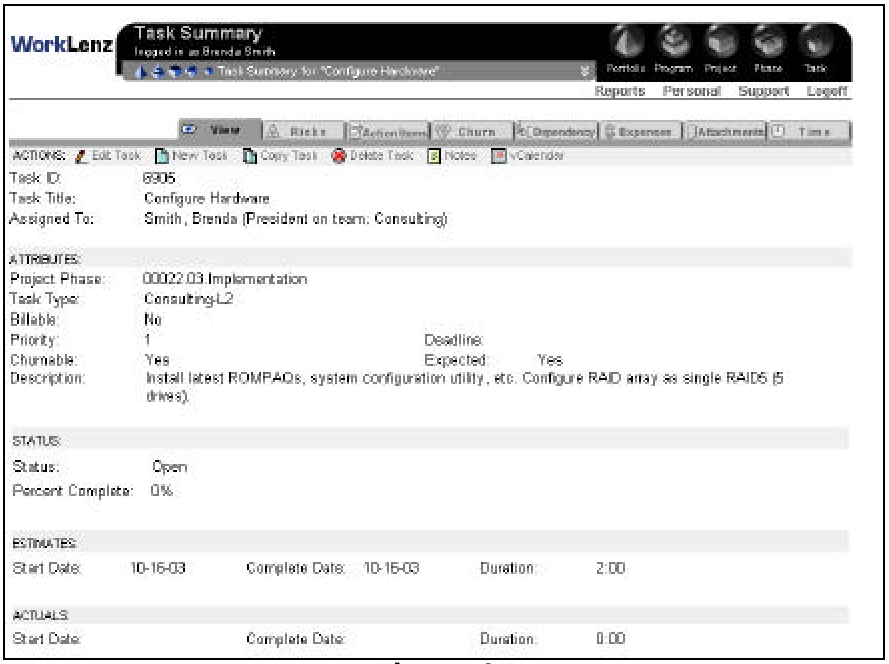


Figure 35

?? View: The view tab displays Task information, which can be modified by clicking *Edit Task*. *Copy Task* creates a new Task that is pre-populated with the same information as the Task copied. Tasks without actual time entries can also be deleted from the Project by clicking *Delete Task*.

?? Risk: The risk tab is used to define a Task's relationship to and impact on various risks. Use the *Task Risk Influence* link to assign the current Task to an active Project risk and indicate the Task's impact on that risk. The description field provides an area to clarify any details about the relationship between the Task and the Project risk.

?? Action Items: The action item tab provides a structure for maintaining to-do lists and sub-Tasks leading up to the completion of a Task.

An action item priority is a subjective value relating to the importance of the action, and the order refers to the chronological sequence in which the action items for a particular Task should be completed.

?? Churn: The churn tab displays a history of churn instances that have occurred since the creation of a Task.

?? Dependency: The dependency tab shows the impact that the start and finish dates of one Task have on the start and finish of another.

Creating a dependency:

- ✍ From the new Task dependency screen, choose *New Task Dependency* and select the Task upon which the current one is dependent.
- ✍ Choose *New Dependent Task* to make another Task dependent on the current one.

Several dependency scenarios are possible, including, start-finish, start-start, finish-finish and finish-start. These are described and defined on the new Task dependency and new dependent Task screens.

?? Expenses: Expenses accrued during the course of completing a Task can be tracked on the expenses tab. All expenses associated with a specific Task appear in chronological order. Employee expense reports can be generated at multiple levels.

?? Attachments: WorkLenz supports attachments at the Project, Phase and Task levels. Files can be attached to Tasks and checked out by users who wish to review and/or modify them from the attachments tab. Users have the option of downloading, editing or checking out an attachment that has been saved, provided it is not checked out by another user.

To attach a new file:

- ✍ Select *New Attachment*
- ✍ Provide the title, category and description
- ✍ Select the *Browse…* button to identify the path to the file
- ✍ Click *Download* and follow the onscreen prompts to view or save the document
- ✍ Select *Edit* to change the name or description of the document

To modify an attachment:

- ✍ Select *Check Out* to reserve the document for editing
- ✍ Save the file
- ✍ Make any changes to the saved version of the document
- ✍ Check the document back in so that others can view it
- ✍ Use the check in notes field to document any changes

When a document is checked out, it is both read and write reserved by the user who checked it out. Others cannot access the document until it is checked back in.

?? Time: This final tab allows you to track the amount of time spent on a Task. Click *New Time Entry* to enter the number of hours spent on the Task each day.

At the summary level, the time feature displays the total number of hours spent on the Task and allows for each time entry to be edited.

Step 4: Statusing Projects

Accurate time records are essential for understanding Project workload, as well as determining the reasons behind any schedule deviation. WorkLenz can track whether Task completion has slipped due to unexpected volume of work or because of time constraints unrelated to that particular Task. WorkLenz uses Task measurements with Project plans to accurately measure current performance and estimate future progress. Once entered into WorkLenz, this data can be linked to other systems so duplicate data entry would not be necessary.

The timesheet interface (Figure 36)

(A) Calendar: Use the calendar menu to select a weekly time range in the past, present or future.

(B) Task View Toggle: Use Task view toggle to select between Tasks with estimated dates within the current selected week and all assigned Tasks.

(C) Task Lists: Tasks that have not been completed are grouped by Project and listed under each Project name (dark bar).

(D) Time Entry: Use the time entry boxes to status work measurements. Times can be entered in *hour:minute* or decimal formats.

(E) Time Totals: After Task actuals have been entered, the time total column and row offer a measurement of the total time per Task and total time per day.

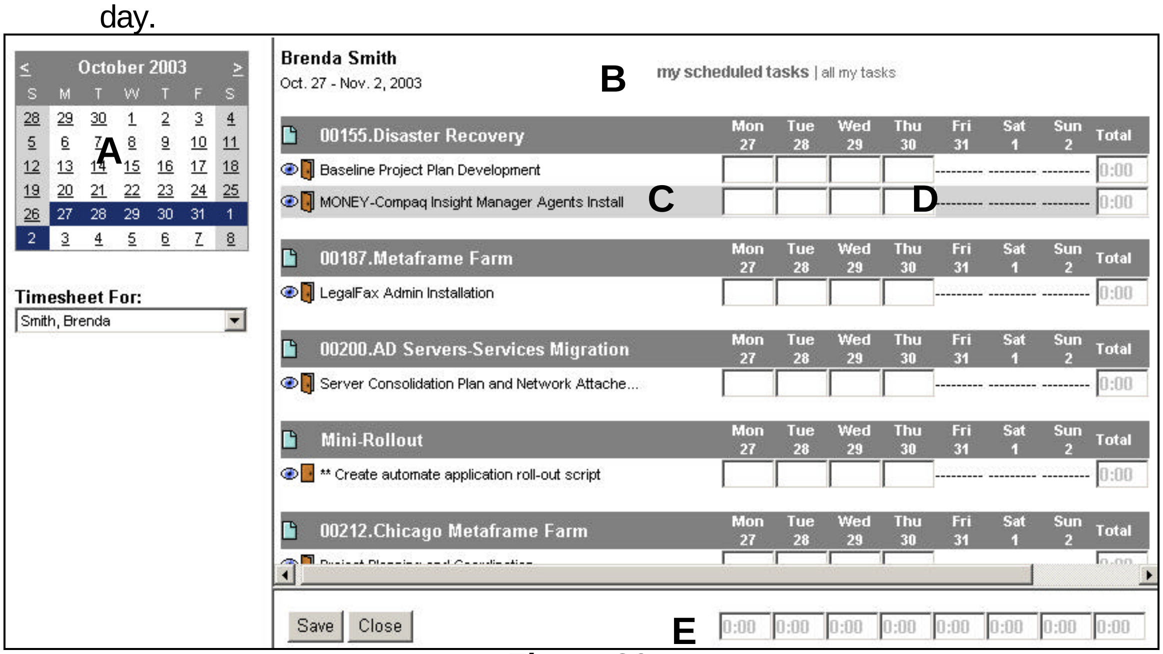


Figure 36

To access the timesheet menu, click *my timesheet* from the splash screen or *My Timesheet* from the *Personal* link in the utility menu. After entering hours for the Tasks and days indicated, click the *Save* button to save your time entries.

Other timesheet features

- View the Task details in WorkLenz by clicking the *eye* icon beside a Task on the timesheet.
- Click the *door* icon to close a Task, if applicable. You must enter time against a Task in the current week in order to close it from the timesheet.
- Create a new Task by clicking the *new* icon beside a Project in the timesheet. This will link you to a new Task entry screen for the selected Project.
- If you have made changes to your Tasks since the timesheet was opened, hit F5 to refresh the timesheet with your new Tasks.
- Double clicking on a cell in the timesheet opens up a detailed view (Figure 37) of a time entry, where users can enter in a Description, Rate and Cost information, as well as any custom fields that may be set.

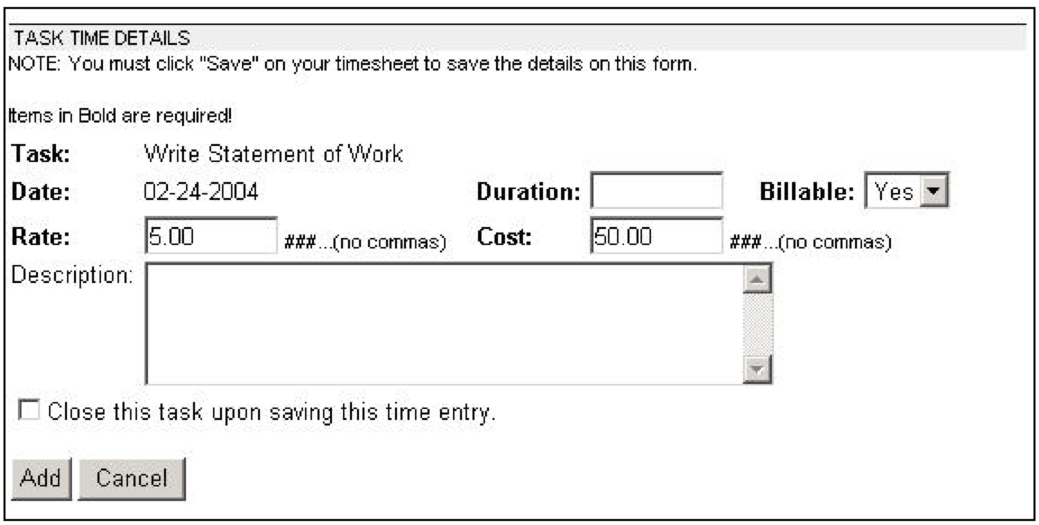


Figure 37

You may change your timesheet settings by clicking on the *prefs* link from the utility menu. Users can select whether timesheet auto calculation is enabled. When enabled, the timesheet will update the *total* column after every time entry. If auto calculation is disabled, you can update the *total* column by clicking the *Calculate* button on the timesheet.

IV. Advanced Features

Portfolio Assessment Engine

The Portfolio Assessment Engine enables users to create assessments, or questionnaires, that can be answered by Project managers at the Program or Project levels. Assessments are a valuable way to gather Project data across the Portfolio. Your WorkLenz consultants can assist you in creating assessments and defining the related scoring criteria.

Selecting an Assessment (Figure 38): To complete a Program or Project assessment, click *Assessments* on the Program or Project Administration screens. On the assessments menu, users can select from the assessments available for that specific Program or Project. Click on the name of the assessment to access the assessment answers screen. The assessments menu also displays assessment grades and the date an assessment was last scored.

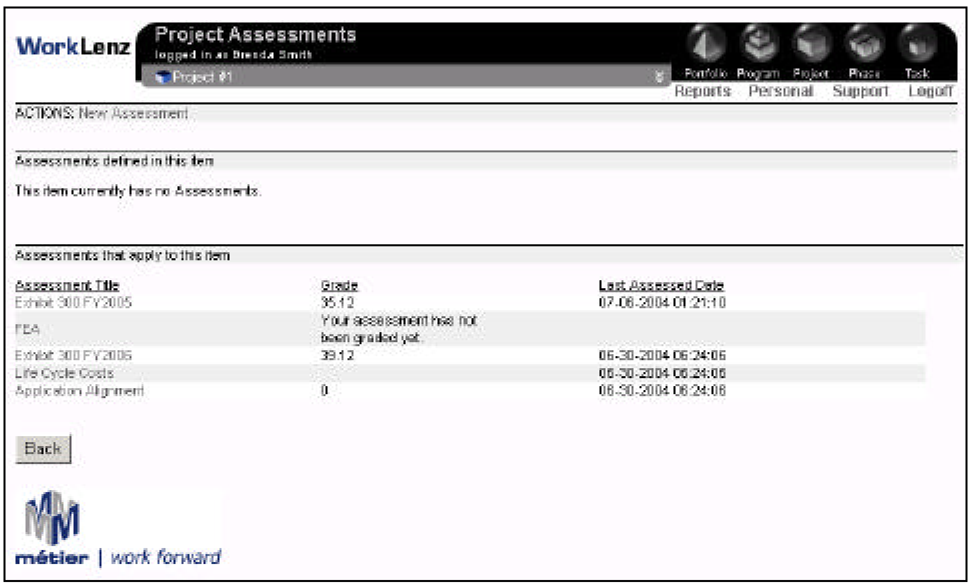


Figure 38

Navigating an Assessment (Figure 39): The assessment answer screen has a toolbar that contains navigation and assessment-related functions, such as save, print and score.

(A) File Menu: The file menu includes Save this Page, Save Entire Assessment and Exit functions.

(B) Tools Menu: The tools menu includes Scoring (Score Now, View Results, Download and Print) and Validate.

(C) Page Drop-Down List: Users can navigate between pages of an assessment using the page drop-down list or the left and right arrows.

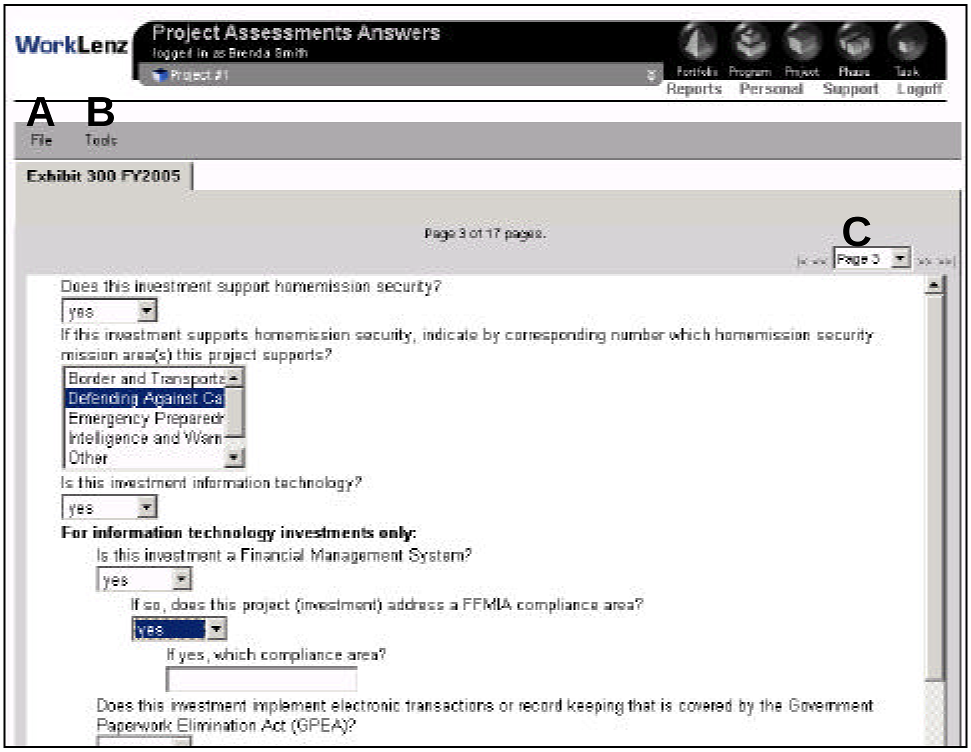


Figure 39

Answering Questions: On the answer screen, users are able to answer questions in the assessment. There are several different types of questions used in assessments. Standard question types in WorkLenz include free text fields, tables, multi-select boxes, drop-down lists and radio buttons. Table fields can be custom sized or in fixed row and/or column dimensions. Use the arrow keys to navigate between cells of a table.

Fields in other assessments may already answer certain questions in some assessments. These answers will appear in italics and may not be changed directly in the selected assessment.

WorkLenz also includes question dependency functionality that enables users to answer specific follow-up questions based on other assessment answers. Questions that are not applicable due to other assessment answers will be grayed out for the assessor.

Saving Answers: Users can save assessment answers either by page or for the whole assessment by selecting *Save this Page* or *Save Entire Assessment* from the *File* menu on the answer screen toolbar.

Validating Answers: WorkLenz allows users to run Validation on assessment answers to determine if answers are correctly formatted to meet data requirements. Select *Validate* on the *Tools* menu of the answer screen toolbar to run the validation. A pop-up window will detail those questions that do not meet data format requirements.

Scoring Assessments: Using a custom objective scoring methodology, assessments can be scored by selecting *Score Now* from the *Tools, Scoring* menu on the answer screen toolbar. Assessment scoring results are also viewable in the WorkLenz Report Center, either using the *Assessment Scoring Report or* via custom scoring reports.

Viewing and Exporting Assessments: Users can view assessment answers in several different formats by selecting *View Results* from the *Tools, Scoring* menu of answer screen toolbar. The assessment will be displayed once an output type such as HTML or XML has been selected. Users can press the *Save* button to save the results of an assessment. Additionally, users can download HTML results to a computer by selecting *Download Results* from the *Tools, Scoring* menu and print HTML results by selecting *Print* from the *File, Scoring* menu.

Notifications

Your WorkLenz consultants can work with executives and managers to create customized notifications on any cross-section of data within WorkLenz. Users subscribe to available notifications, schedule when the notifications are received and provide customized thresholds for value-specific notifications.

<u>Subscribing to Notifications</u> (Figure 40):

Users can subscribe to notifications through the Personal category in the Utility Menu. The notification subscription wizard guides users through the process of selecting a target level (Portfolio, Program, Project, Phase, Task), selecting a notification and customizing data thresholds.

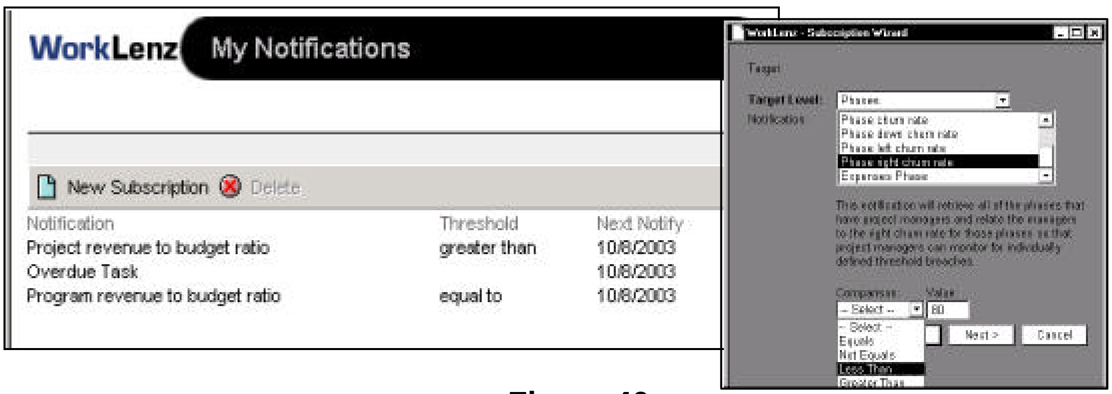


Figure 40

<u>Receiving Notifications</u> (Figure 41):

Notifications are customized to occur at different intervals (Daily, Weekly, Biweekly, Monthly). When notifications are triggered, they are compiled together and are delivered to your email box.

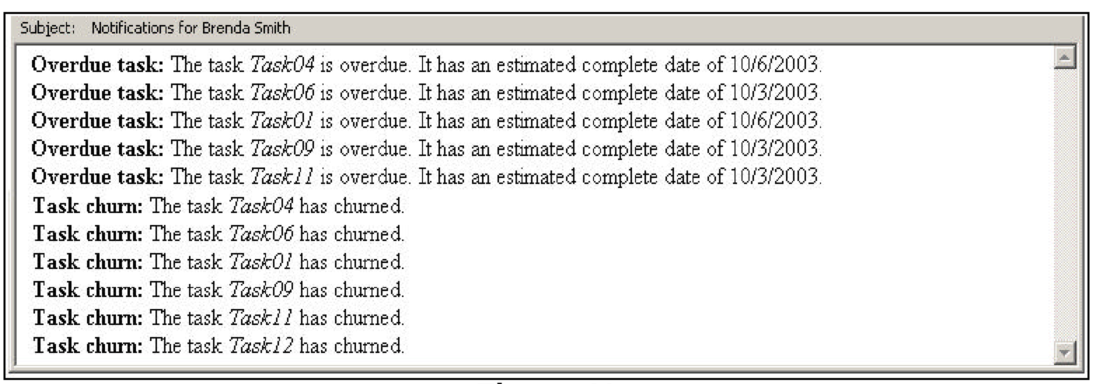


Figure 41

Reports

Reports are available at all levels of WorkLenz: Portfolio, Program, Project, Phase and Task. Standard reports are available at each level including cost, effort and churn. Each report summarizes data based on your access level and the criteria you choose to evaluate. Additional customized reports can be obtained through your WorkLenz consultants.

To access the reports center, click on *Reports* in the utility menu. A listing of available reports is displayed by expanding the plus sign for each category: churn, effort, cost and misc. Choose a report to run by clicking on the report title.

Reports List

Performance

- ✍ *Assessment Scoring Report* and *Assessment Scoring Report Details* (available at Portfolio, Program and Project levels) – This drill-down report displays both overall scoring results for assessments, as well as details of individual assessments.

- ✍ *Earned Value Report* (available at Portfolio, Program, Project and Task levels) – This drill-down report displays the earned value analysis for the Portfolio, Programs, Projects, Phases or Tasks.

- ✍ *Program/Project/Phase Performance* (available at Portfolio, Program and Project levels) - Graph depicts levels by performance ratio and churn with user provided bubble size and color source.

- ✍ *Project Planning* (available at Project level) - Report lists all Phases and Tasks for a specified Project.

- ✍ *Scorecard Report* (available at Portfolio, Program and Project levels) - Stop light report displays variables based on finance, effort, risk and churn weights.

- ✍ *Program/Project/Phase/Task Model* (available at Portfolio level) - Table displays average metrics for the level type compared to all others across the organization.

Custom USDA

- ✍ *Exhibit 300 FY2006 Scoring* (available at Portfolio, Program, and Project levels) – Breakdown of Project(s) score by section and question with comparisons to other Project scores within Agency and all of USDA
- ✍ *Exhibit 53* (available at Portfolio and Program levels) – Provides cost breakdown by Project and generates all information needed to send to OMB (requires MS Excel)

- *Exhibit 300 FY2005 Scoring* (available at Portfolio, Program, and Project levels) - Breakdown of Project(s) score by section and question with comparisons to other Project scores within Agency and all of USDA
- *Life Cycle Costs* (available at Portfolio and Program levels) – Provides cost totals for D/M/E and SS in a table format. This report can be used as the Exhibit 43.

Schedule

- *Builder Report* (available at Portfolio level) - Table displays average metrics for the Task type compared to all Tasks across the organization.

- *Churn Acceleration* (available at Portfolio, Program and Project levels) - Chart depicts the average or aggregate number of days and hours that have been affected by churn.

- *Churn Trend By Month* (available at Portfolio, Program and Project levels) - Graphs depict 11-month historical churn data to forecast churn for following month.

- *Slipperiness Report* (available at Portfolio, Program, Project and Phase levels) - Chart displays slippage by word, person, Task type, team or role.

- *Top Churn* (available at Portfolio, Program and Project levels) - Chart and tables depict top churning variables.

- *Abridged/Comprehensive Task Status* (available at Portfolio, Program and Project levels) - Report provides overview or details, respectively, of Task status for the previous, current and upcoming week.

Resources

- *Full Time Equivalent Utilization* (available at Portfolio, Program and Project levels) - Report shows the number of full time equivalents per month.

- *Resource Availability* (available at Portfolio, Program and Project levels) - Chart displays availability of resources based on user-selected variables.

- *Resource Performance* (available at Portfolio, Program and Project levels) - Graph depicts people by performance ratio and churn with user provided bubble size and color source.

- *Employee Hours* (available at Portfolio, Program, Project, Phase and Task levels)
    a. *Standard Employee Hours* - Chart displays employee actual durations based on user-selected variables.
    b. *Weekly Employee Hours* - Chart displays employee work hours for a date range.

Admin

- *Active Person Report* (available at the Portfolio level) - A list of all of the active users

- *Expense Reimbursement* (available at the Portfolio, Program, Project, Phase and Task levels) - Report creates a standard form for reimbursement of employee expenses.

News (Figure 42)

Managers can add news at the Portfolio, Program and Project levels using the news feature of the administration area. Client news will appear on the WorkLenz splash screen when users log in.

Start and end dates indicate the length of time that the news story will be displayed in WorkLenz.

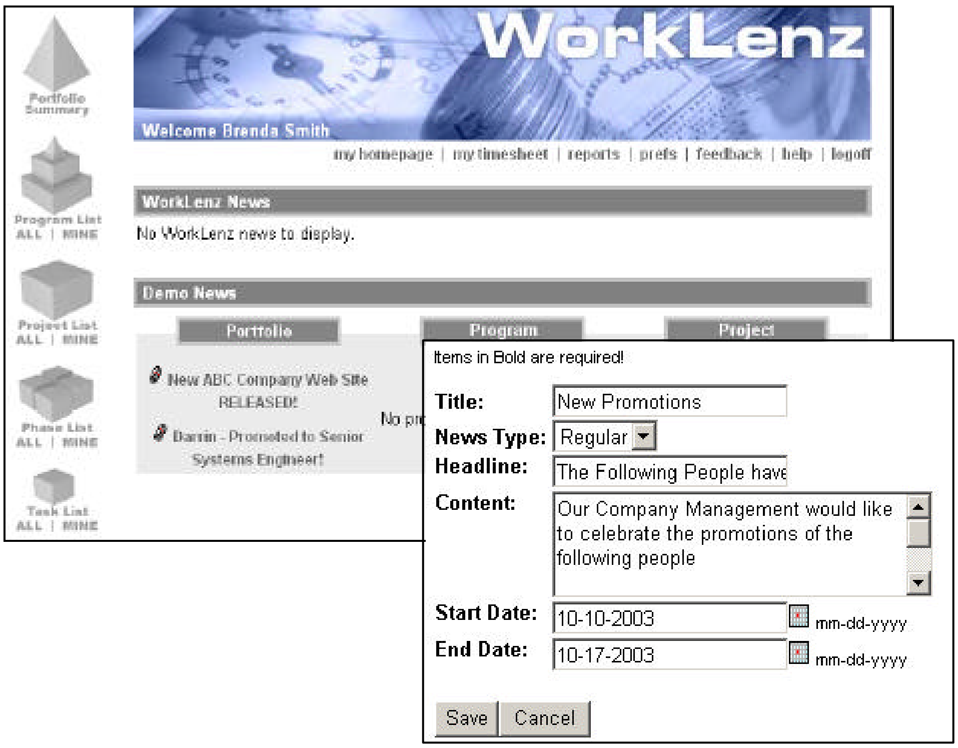


Figure 42

Context Sensitive Custom Fields (Figure 43)

Context Sensitive Custom Fields allow for custom attributes at the individual Task, Phase, Project and Program levels within WorkLenz. Accessed through the administration areas, Custom Fields can be set for any level and allow for versatile customization. Different types of custom fields can be created, including pull-downs, text-boxes or text-areas. The input types - free text, currency, dates and person list - are also customizable for the fields.

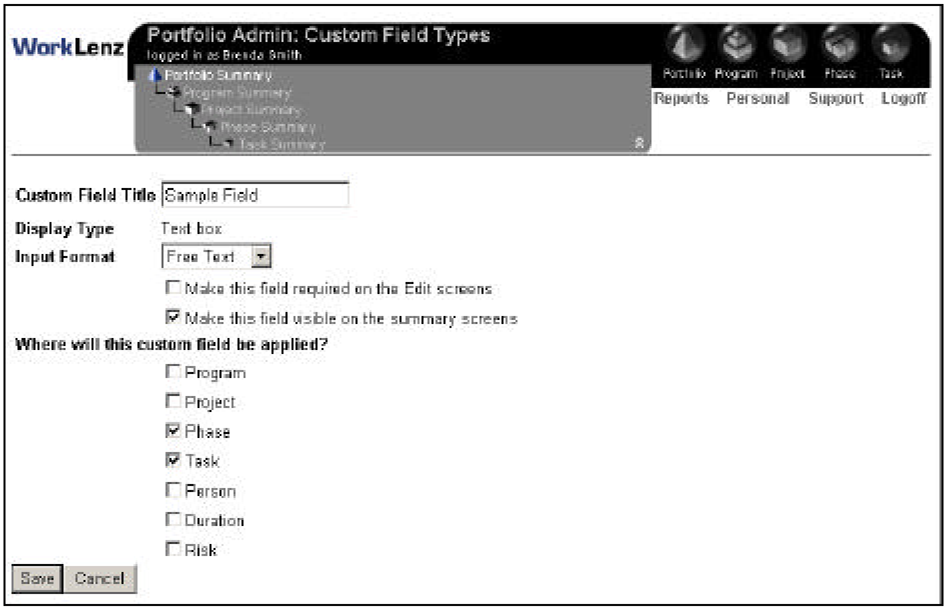


Figure 43

Custom Field Selection (Figure 44)
For the dropdown custom fields, the selections that appear within the dropdown menus can also be customized. Besides serving as descriptive tags, the custom selections also serve as data points from which additional metrics can be created within WorkLenz.

Figure 44

Filterable Custom Fields
A multi-select custom field that applies to multiple levels can now filter between levels. Selections established at a higher level need not be visible to Projects, Phases, and Tasks below unless selected. This functionality provides users with the ability to select values for each Project, Phase, and Task that is applicable to that Project, Phase or Task, and filter out those that do not apply.

Custom Field selections can then be made at the Program, Project, and Phase levels either by editing a current Program, Project or Phase and selecting the values that can be applied at the Phases and Tasks below or by creating a new Program, Project and Phase.

MS Project Import

WorkLenz allows users to import Project plans directly from Microsoft Project 2002 and subsequent versions. Accessed through the admin option in the Actions Menu, MS Project files can be imported at the Portfolio, Program and Project levels and will be created at the next lower level in WorkLenz. For example, an MS Project file imported at the Portfolio level will create a new Program or Programs in WorkLenz.

WorkLenz requires XML format to import an MS Project file. Save the MS Project file for import as type XML Format.

WorkLenz offers an MS Project Import wizard to guide users through the process of importing a file. Length of time to complete this process will vary depending on the size and complexity of your MS Project file. The following section will detail the steps followed in the wizard.

Import and Review (Figure 45)**:** After selecting the *Admin* button on the Summary screen, click the *MS Project Import* button. At the prompt, browse to find the XML-formatted MS Project file and select *Load*. WorkLenz will read the file and present a screen for user review. Click *Continue t*o accept the file as correct.

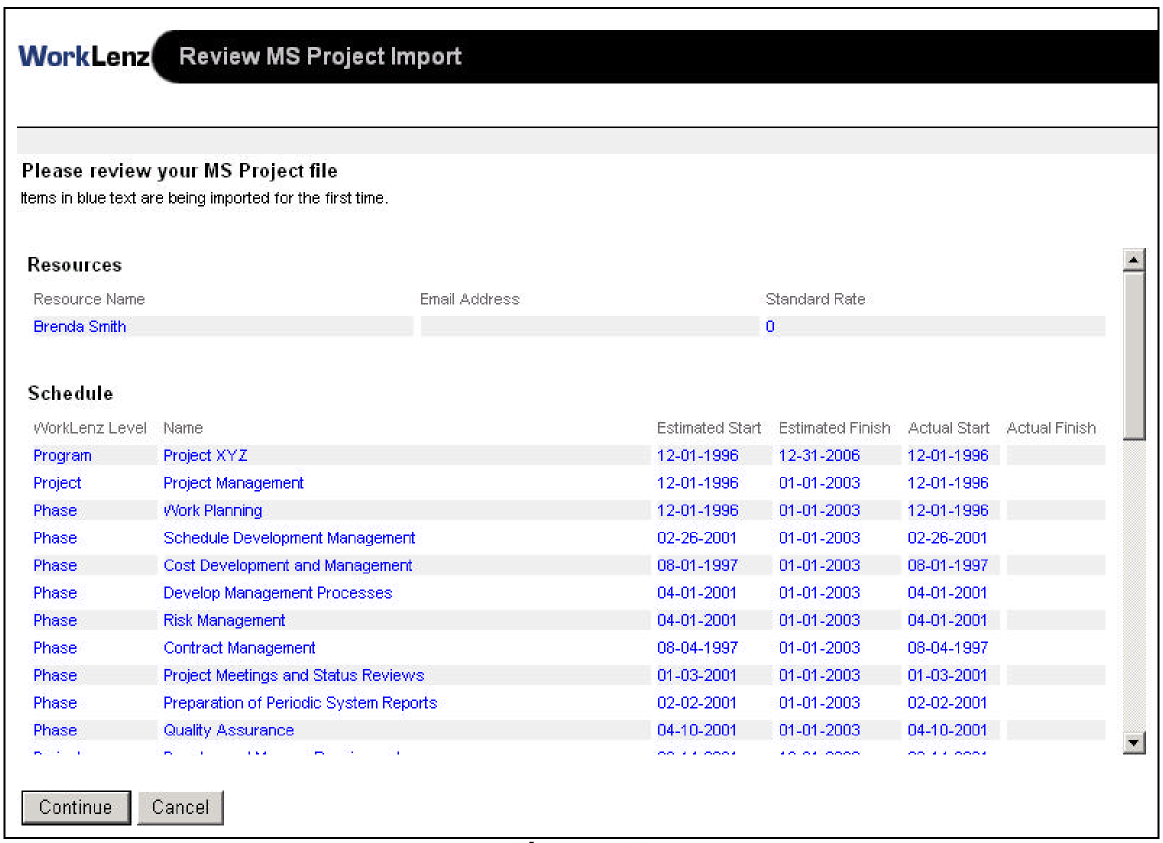


Figure 45

Load Resources (Figure 46)**:** If the MS Project file is resource loaded, WorkLenz will verify if the resources exist in WorkLenz. For resources not in WorkLenz, complete the resource information spreadsheet with User ID, Password, Title, Person Type, Email Address, Rate and Cost (Portfolio level only). If the Project file is not resource loaded, all Tasks will be assigned to the generic user.

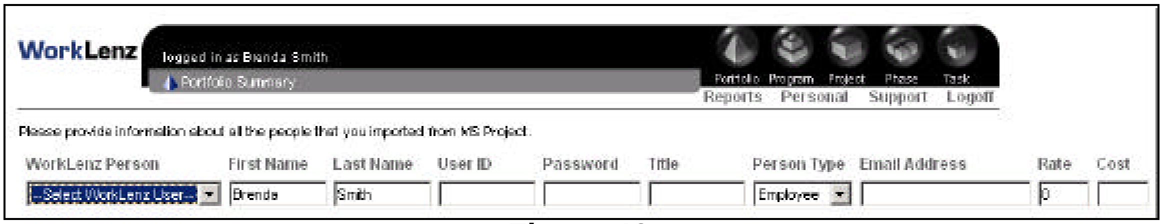


Figure 46

Select Program/Project types and categories (Figure 47)**:** Continue with the wizard to complete, as necessary, Program types and Project types and categories.

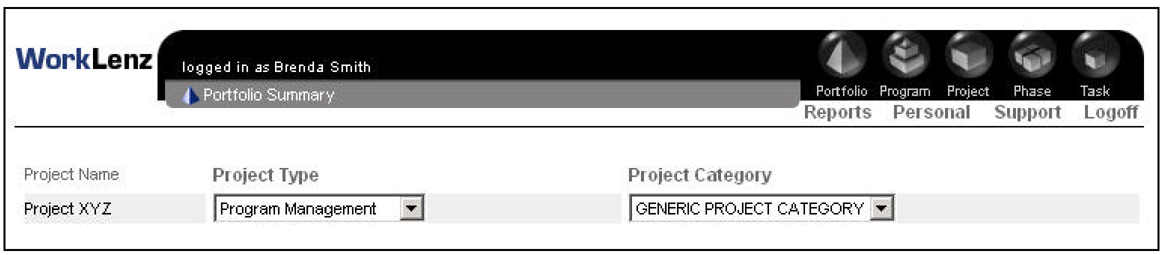


Figure 47

Create Project teams (Figure 48)**:** If your Project file is not resource-loaded, WorkLenz will ask if you want to complete Project team member information. To complete Project team member information, click *Yes.* If Project team member information is not completed, resources will be assigned to generic roles and Project teams. If your Project file is resource-loaded, WorkLenz will prompt for Project team member information. To complete Project team members identify Project roles and teams and associate resources.

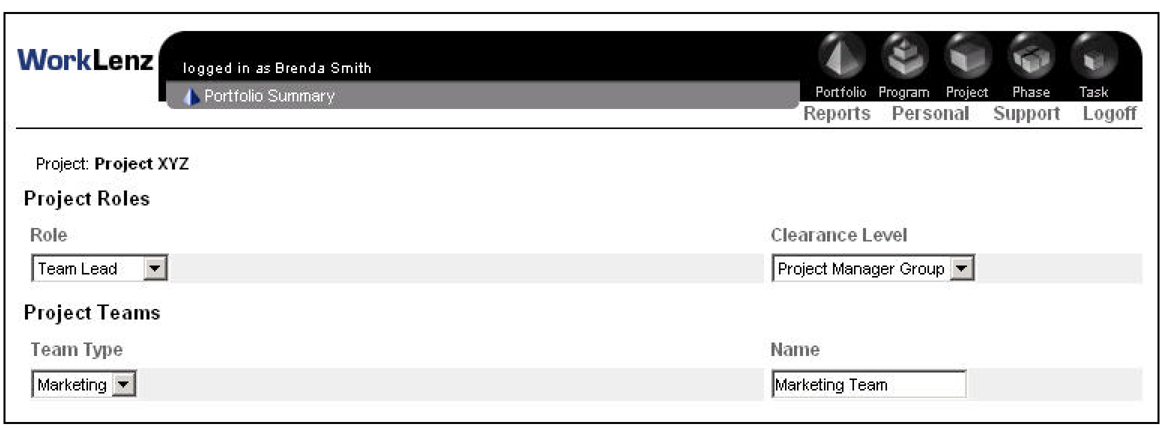
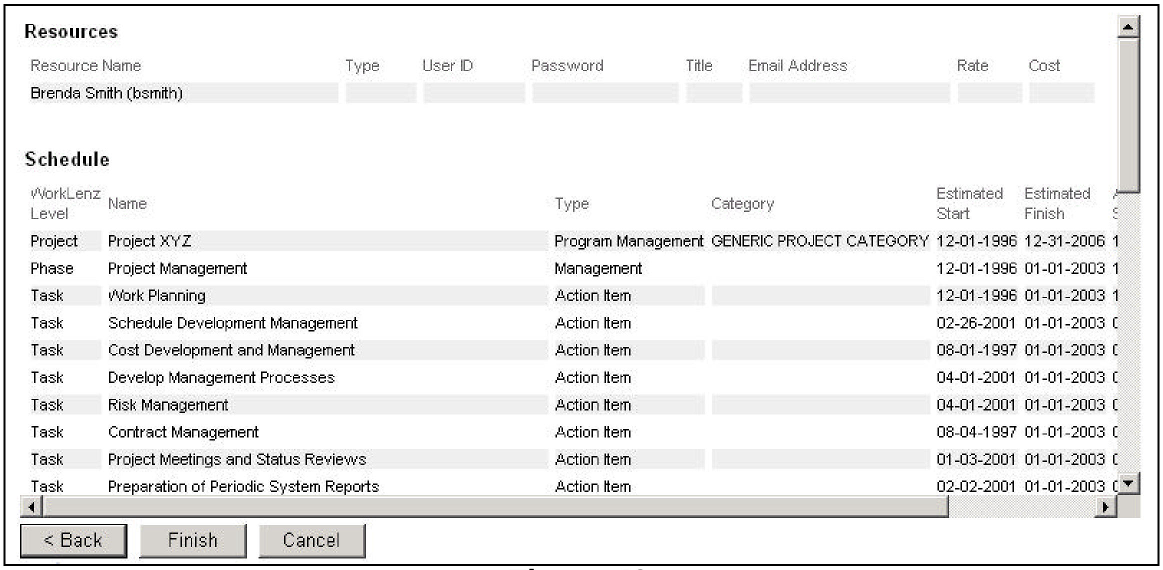


Figure 48

Select Phase/Task types: WorkLenz will prompt to select Phase and Task types for each Phase and Task in the Project file.

Review Import and Finish (Figure 49)**:** As the final step of the MS Project import, WorkLenz summarizes all information to be loaded. Select *Finish* to complete the process.



Resources

Resource Name	Type	User ID	Password	Title	Email Address	Rate	Cost
Brenda Smith (bsmith)							

Schedule

WorkLenz Level	Name	Type	Category	Estimated Start	Estimated Finish
Project	Project XYZ	Program Management	GENERIC PROJECT CATEGORY	12-01-1996	12-31-2006
Phase	Project Management	Management		12-01-1996	01-01-2003
Task	Work Planning	Action Item		12-01-1996	01-01-2003
Task	Schedule Development Management	Action Item		02-26-2001	01-01-2003
Task	Cost Development and Management	Action Item		08-01-1997	01-01-2003
Task	Develop Management Processes	Action Item		04-01-2001	01-01-2003
Task	Risk Management	Action Item		04-01-2001	01-01-2003
Task	Contract Management	Action Item		08-04-1997	01-01-2003
Task	Project Meetings and Status Reviews	Action Item		01-03-2001	01-01-2003
Task	Preparation of Periodic System Reports	Action Item		02-02-2001	01-01-2003

Figure 49

Resave the XML formatted file: WorkLenz will prompt the user to resave the XML file imported to include the WorkLenz-specific fields added during the import process.

MS Project Export

WorkLenz also allows users to export WorkLenz information to XML files for use in MS Project. As with the MS Project Import, MS Project Export is found on the administration menu at the Portfolio, Program and Project levels in WorkLenz. To begin, click on *MS Project Export*. The following section will detail the steps followed in the wizard.

Choose an existing export: To ease the export process, WorkLenz allows users to create and store export criteria. To use an existing export, select *Yes* and the export desired to complete the MS Project export. To utilize other export criteria, select *No* and continue with the wizard.

Choose the level of information to export (Figure 50)**:** WorkLenz allows users to select the depth of information for export. This choice (Program, Project, Phase, Task) will be the lowest level of information exported to your MS Project file. For example, selecting Tasks will create a Project file including all WorkLenz levels down to the Task, while selecting Phases will only detail down to the Phase level of WorkLenz.

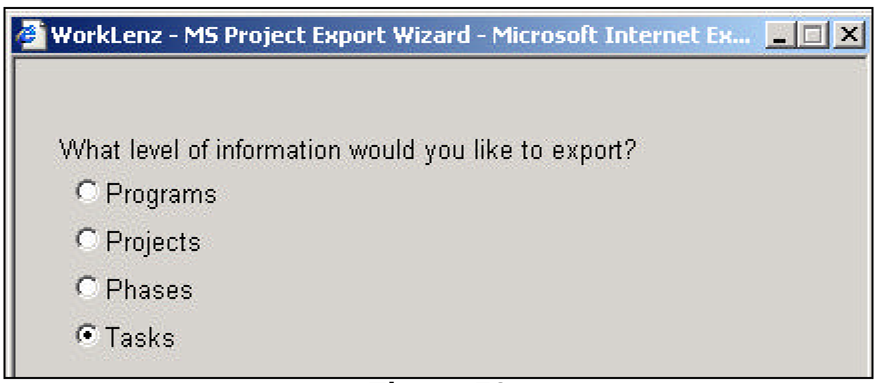


Figure 50

Apply filters (Figure 51)**:** WorkLenz offers the option to filter data for export. These filter options are similar to the advanced filter functionality on the list pages, allowing users to filter according to criteria such as Program/Project/Phase/Task title keyword, custom fields, status, type and category.

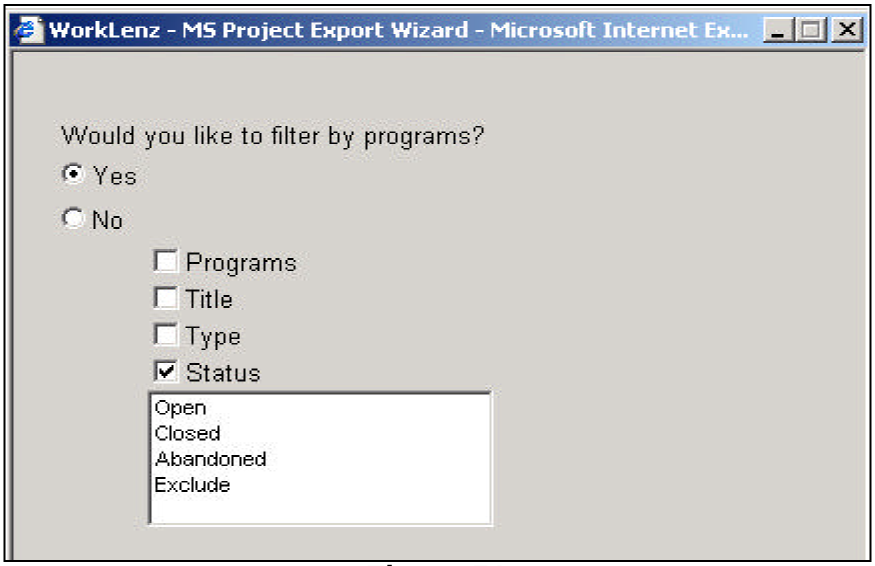


Figure 51

Choose export view (Figure 52)**:** WorkLenz allows you to choose the type of view for your export. Standard View will export all selections at the levels above where your filter has been applied. Rollup View will export only the direct root of filtered data.

Figure 52

To differentiate between Standard and Rollup views, please use the following example. Brenda Smith has the following contents view of a Program in WorkLenz. This Program includes 2 Projects, each with 2 Phases and 3 Tasks (Figure 53).

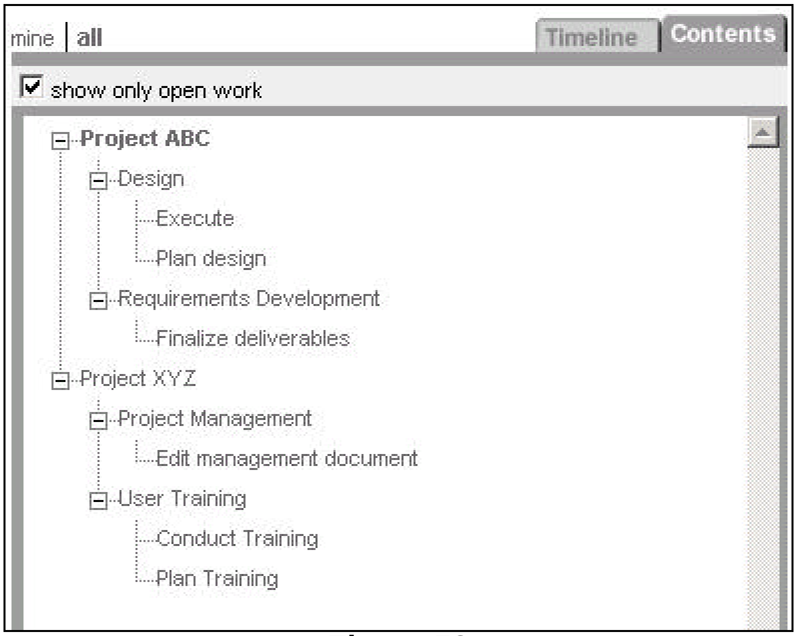
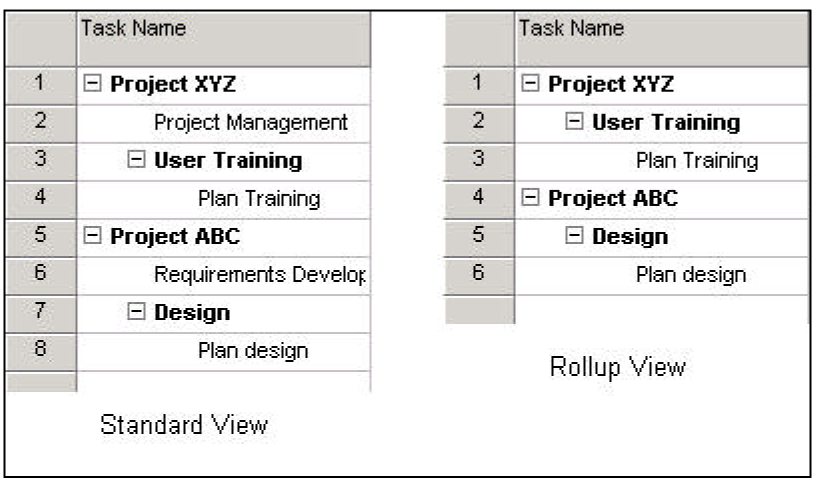


Figure 53

Brenda would like to export this Program to MS Project filtering Tasks with “Plan” in the title. If Brenda selects the Standard View, WorkLenz will export all fields preceding filtered fields, including those Phases that do not have Tasks with “Plan” in their titles. If Brenda selects the Rollup View, WorkLenz will export only the parent fields of filtered data. Figure 54 displays both exports for comparison.



	Task Name
1	**Project XYZ**
2	Project Management
3	**User Training**
4	Plan Training
5	**Project ABC**
6	Requirements Develop
7	**Design**
8	Plan design

Standard View

	Task Name
1	**Project XYZ**
2	**User Training**
3	Plan Training
4	**Project ABC**
5	**Design**
6	Plan design

Rollup View

Figure 54

Choose to export WorkLenz IDs (Figure 55)**:** WorkLenz allows you the option to export WorkLenz IDs in your Project file. This functionality may be desired when creating templates or utilizing your Project file in other software. If you choose not to export WorkLenz IDs, you will not be able re-import the export.

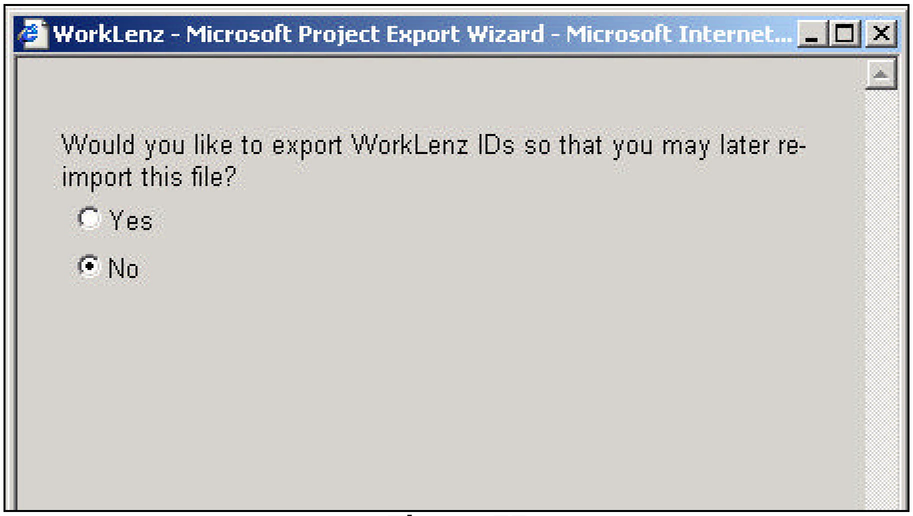


Figure 55

Save export criteria: After choosing to apply filers, WorkLenz presents the option to save export criteria. To save selected criteria, select *Yes* and complete the name and description fields.

Finish: Following a summary screen, select *Finish* to complete the MS Project export. WorkLenz will then prompt users to save the export in XML format for use in MS Project.

V. Conclusion

Thank you for choosing Métier as your Portfolio management solution.

Please do not hesitate to contact your WorkLenz consultants with any questions regarding the information contained in this training guide, or information you would like included in future versions.

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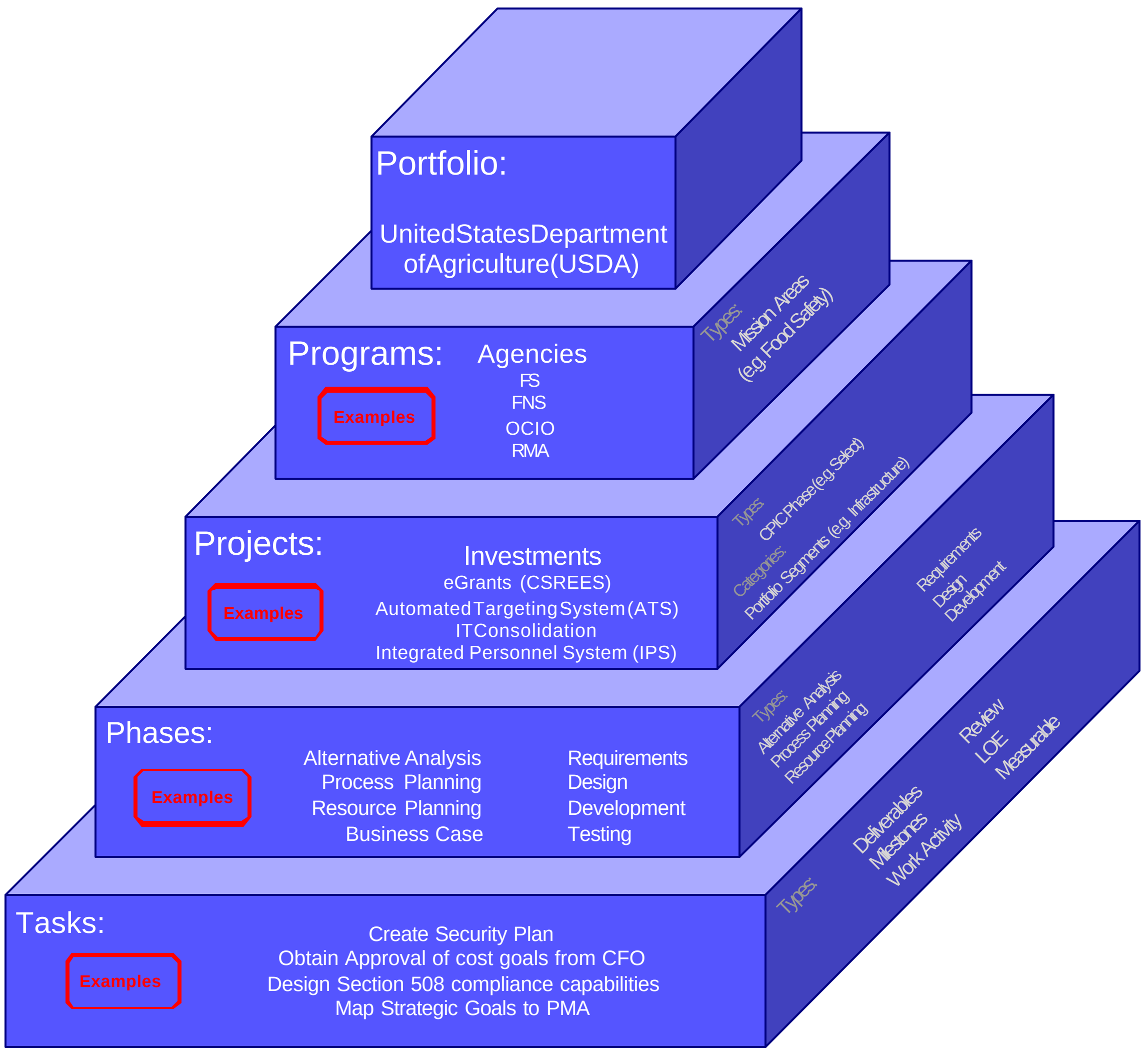
VI. Appendix

A. USDA Taxonomy Structure



3.1. Portfolio

U. S. Department of Agriculture (USDA), providing visibility into the entire Portfolio.

3.1.1. People

People are defined at the Portfolio level and can be associated with any level in the application. For the Initial Operating Capability, 200 USDA users have been created into WorkLenz and given appropriate roles. As rollouts continue to the appropriate agencies, additional users will be assigned to the corresponding investments.

3.1.2. Risks

Risks are also defined at the Portfolio level and can be associated with any level in the application. Risks have been created based on the 11 risk assessments from the OMB 300 that all investments must address. The additional 8 risk categories for the IT investments will be tracked as risk metadata. In addition, the 11 risks have been categorized by risk types to allow for analysis and reporting. Once Portfolio risks have been established, the influence that particular Tasks have on that risk can be measured and addressed.

The Portfolio is composed of Programs, which are…

3.2. Programs

The 29 Agencies and Staff Offices that comprise USDA:

- ?? Farm Service Agency
- ?? Foreign Agricultural Service
- ?? Risk Management
- ?? Food and Nutrition Service
- ?? Center for Nutrition Policy and Promotion
- ?? Food Safety and Inspection Service
- ?? Agricultural Marketing Service
- ?? Animal and Plant Health Inspection Service
- ?? Grain Inspection, Packers and Stockyards Administration
- ?? Forest Service
- ?? Natural Resources Conservation Service
- ?? Agricultural Research Service
- ?? Economic Research Service
- ?? Cooperative State Research, Education,
- ?? Rural Business – Cooperative Service
- ?? Rural Housing Service
- ?? Rural Utilities Service
- ?? Office of Chief Financial Officer
- ?? Office of Chief Information Officer
- ?? Office of Communications
- ?? Office of Congressional Relations
- ?? Office of Chief Economist
- ?? Office of Budget and Program Analysis
- ?? Office of Executive Secretariat
- ?? National Appeals Division
- ?? General Counsel
- ?? Office of Inspector General
- ?? Office of Civil Rights

- and Extension Service
- National Agricultural Statistics Service

3.2.1. Program Type

The 8 Mission Areas within USDA:

- Farm and Foreign Agricultural Services
- Food, Nutrition, and Consumer Services
- Food Safety
- Marketing and Regulatory Programs
- Natural Resources and Environment
- Research, Education and Economics
- Rural Development
- Departmental Administration/Staff Offices

Each Program is composed of Projects, which are…

3.3. Projects

The 55 major IT investments collected during the data gathering. Going forward, the Project level can also be utilized for import of non-major and non-IT investments within USDA.

3.3.1. Project Type

The 5 CPIC Phases for Major and Non-Major Investments:

- Major Pre-Select
- Major Select
- Major Control
- Major Evaluate
- Major Steady-State
- Non-Major Pre-Select
- Non-Major Select
- Non-Major Control
- Non-Major Evaluate
- Non-Major Steady-State

3.3.2. Project Category

The 6 Portfolio Segments:

- ?? Grants
- ?? Legislative Mandates
- ?? Growth
- ?? Infrastructure
- ?? Enhancements
- ?? Innovation

3.3.3. Project Metadata Fields

1) The 5 Service Areas:

- ?? Administrative Services
- ?? Application Services
- ?? Infrastructure Services
- ?? Core Services
- ?? Component Services

The following examples define the various service areas:

- ?? Administrative Services – HR, Program Management, Enterprise Architecture
- ?? Core Services – Risk Mgt., Cost Mgt., Resource Mgt.
- ?? Application Services – Web, Portal, Media
- ?? Component Services – Databases, System Performance, Automation
- ?? Infrastructure Services – LAN/WAN, Platforms, Mainframes

2) The sponsoring agencies are listed as an additional metadata field to account for investments that have multiple agencies and mission areas. A lead agency is identified at the Program level and additional agencies overseeing a particular investment are available as multi-select drop down. These agencies are mapped to the appropriate mission areas, giving agencies the insight to review all of the investments in which they are involved.

Each Project is composed of Phases, which are…

3.4. Phases
The Phases of the proposed Project plan templates, allowing for functional grouping.

Examples of typical Phases:

- Process Planning
- Alternative Analysis
- Requirements
- Design
- Development
- Testing

3.4.1. Phase Type
A one-to-one mapping of the Phase type to the Phase name enables USDA to compare Phases across investments and agencies.

Phases are composed of Tasks, which are…

3.5. Tasks
The Tasks of the proposed Project plan templates.

Example of typical Tasks:

- Hold Section 508 Compliance Review
- Submit cost goals to CFO for review

The initial Tasks in WorkLenz will be generated from the Project plan templates, which are contained in the WorkLenz template center. Métier referenced the PMBOK, CPIC and OMB Exhibit 300 submissions to create Project plans for each of the five CPIC Phases. These templates include Tasks that map directly to the OMB Exhibit 300 requirements. Investments that utilize these templates will automatically have objective evidence that they are meeting several of the OMB Exhibit 300 requirements.

3.5.1 Task Type
Entities of work:

- Internal Work Product
- External Deliverable
- Milestone
- Work Activity
- Review