



User's Guide

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SynapMod

Introduction

Network Centric Management Using the SynapMod® Structured Communication Network

When any initial inquiry/request is received from either an outside client or an internal department/division, the basic information about the request should be entered into SynapMod (patent pending) and a project manager assigned who will be responsible for the entire effort through to final completion. Basic request information should include a project title and number, preliminary description of the request, the requestor company/group name and contact person for the effort identified.

The initial phase of the effort would generally be the Initial Investigation task. Responsibility for the task may be assigned to the project manager or to another person who will be involved further in the effort. Sub-tasks for the initial investigation would normally include items such as: Assessing the Requirements, Clarifying the Objectives, Developing the Scope of Work, Developing the Conceptual Solution and Developing the Preliminary Timeline and Cost Estimate. As with the investigation task, these sub-tasks would be the responsibility of persons who may eventually be involved in actually doing the work if the request is approved.

When any project or task assignment is entered into SynapMod, the person entering the task supplies a provisional scheduled start date for the work to begin and a provisional scheduled end date for the effort to be completed, along with the name of the person responsible for the effort. The person with responsibility for executing the task will have the assignment appear on his/her dashboard. That person must then supply a promised start date and a promised end date based on his/her personal workload and feedback from any persons who are given lower level task responsibilities. The work plan is not set in SynapMod unless these scheduled and promised dates are in agreement. If there is any conflict, the affected persons must make whatever adjustments are necessary to come to agreement on a plan. This could include adding additional resources or adjusting the dates as necessary. This process establishes a commitment from all persons involved so that when the inevitable events happen that affect the schedule, the persons involved will make every effort necessary to adhere to the initial timeline.

As the work breakdown structure is developed, team members at various levels can identify task dependencies affecting the start or completion of their tasks. SynapMod provides the ability to build communication channels that directly connect those persons holding interrelated responsibilities, so that each affected person will be made aware of any issues that could affect their workflow, and adjustments can be made or negotiated at their level of the work plan, with the objective of minimizing any adverse impacts on the final outcome and the advantage of every issue not being sent directly to the project manager.

Some tasks may encompass a significant milestone event that bears direct monitoring by the project manager. These can be designated in SynapMod as a “project level” milestone. This designation elevates the task to being shown on the project edit screen and to being evaluated in developing the indicators on the project manager dashboard. This gives the project manager immediate visibility of any issues affecting milestone events no matter at what level within the work plan those events are defined.

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Day-To-Day Usage

The normal usage of SynapMod is to provide an up-to-date status of all of a person's responsibilities. This is done through the display of a personal dashboard upon login into the system. Depending on the person's role in the company, one of four different dashboards may be displayed upon entry, and others may be available. If more than one dashboard is available to a person, they can choose which should be displayed first. The dashboards have five indicators shown on each line. The timeline indicator setting is determined by auditing the various dates any time the project or task is displayed. The budget, resources, issues and risks indicators are real and the setting is controlled by the responsible person.

Task Dashboard:

Persons with no project level or higher responsibility will be presented with the display of the task dashboard. It will display a list of all responsibility assignments in order by the promised end date of each task. Any newly assigned tasks having no promised dates will be shown at the top of the list. The list can be sorted into other sequences by clicking on the column heading to change the sort field or the order.

The indicators shown on the task dashboard represent two levels of status. The top of the indicator is set based on the indicators of the task being listed. The bottom of the indicator is set based on a consolidation of the indicators of any sub-tasks and any other tasks for which a dependency has been established. A difference between the top and bottom represents an unresolved discrepancy that should be addressed with the other responsible persons. By clicking on the task name, the edit screen for that task will be displayed and the individual sub-tasks and other tasks for which a dependency has been established can be viewed to determine the specific issue. Clicking on the problem indicator will display the notes entered by the other responsible individual to explain the issue. Communication can then be established between the affected individuals to either resolve the discrepancy or to determine that the higher level indicators need to be changed to move the issue to a higher level for resolution.

The task dashboard also presents the opportunity to view a Gantt chart (color-coded to highlight issues at any level) or a report of the entire project, and to display a Gantt chart (color-coded) or report of the task and its full hierarchy of sub-tasks. The Gantt chart of sub-tasks provides the ability to click on any sub-task name, no matter how many levels down, and directly display that task's edit screen.

Project Manager Dashboard:

Persons with project level responsibility, either project managers (the person having direct responsibility for the completion of the request) or project level team members (any persons with supportive responsibility or with an interest in monitoring the progress of the request), will be presented with the display of the Project Manager dashboard. It will display a list of all projects or strategic activities in which the individual has a project level assignment (either as project manager or as a project level team member). The task dashboard will also be available to these persons to display all responsibility assignments including project level and below.

The indicators shown on the project manager dashboard represent two levels of status. The top of the indicator is set based on the indicators of the project being listed. The bottom of the indicator is set based on a consolidation of the indicators of any next lower level sub-tasks and any other tasks identified as project level milestones (see the section on Setting Milestones). A difference between the top and bottom represents an unresolved discrepancy that should be addressed with the other responsible individuals. By clicking on

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the project name, the edit screen for that project will be displayed and the individual sub-tasks and milestone tasks can be viewed to determine the specific issue. Clicking on the problem indicator will display the notes entered by the other responsible individual to explain the issue. Communication can then be established between the affected individuals to either resolve the discrepancy or to determine that the project level indicators need to be changed to move the issue to the next higher management level for resolution.

The project manager dashboard also presents the opportunity to view a Gantt chart (color-coded to highlight issues at any level) or a report of the entire project. The Gantt chart provides the ability to click on any sub-task name, no matter how many levels down, and directly display that task's edit screen.

Senior Management Dashboard:

Persons with proper authority (as granted on their "user record") to view the senior management dashboard will be presented with that dashboard upon login into the system. It will display a list of all projects or strategic activities with a priority level of 1 through 6 (with 1 being the highest priority level and 10 being the lowest priority level) on which they are assigned a project team role. (There should be oversight or management roles defined in the Team Roles table for this purpose.) By clicking on the project name, the edit screen for that project will be displayed and the individual sub-tasks and milestone tasks can be viewed.

The indicators shown on the senior management dashboard represent the project status as determined by the project manager. Clicking on any problem indicator will display the notes entered by the project manager to explain the issue. Communication can then be established to either clarify or resolve the discrepancy.

The senior management dashboard also presents the opportunity to view a Gantt chart (color-coded to highlight issues at any level) or a report of the entire project. The Gantt chart provides the ability to click on any sub-task name, no matter how many levels down, and directly display that task's edit screen.

CEO Dashboard:

Persons with proper authority (as granted on their "user record") to view the CEO dashboard will be presented with that dashboard upon login into the system. It will display a list of all projects with a priority level of 1 through 3 representing the highest priority projects or strategic activities. By clicking on the project name, the edit screen for that project will be displayed and the individual sub-tasks and milestone tasks can be viewed.

The indicators shown on the CEO dashboard represent the project status as determined by the project manager. Clicking on any problem indicator will display the notes entered by the project manager to explain the issue. Communication can then be established to either clarify or resolve the discrepancy.

The CEO dashboard also presents the opportunity to view a Gantt chart (color-coded to highlight issues at any level) or a report of the entire project. The Gantt chart provides the ability to click on any sub-task, no matter how many levels down, and directly display that task's edit screen.

Indicators:

The timeline indicator setting is determined by the system automatically auditing the various dates each time the project or task is displayed. The budget, resources, issues and risks indicators are real and the responsible person manually changes their setting.

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New Client

Select “Add Client” under the Clients tab. Enter any client (external or in-house) for which work (a project or in-house strategic activity) may be done and progress tracked using the system. Clients can be added at any time and can be designated by status and type as defined previously within the system tables. Address and contact information is for reference purposes, but the contact information serves as default values for each project entered for the client.

New Program

Select “Add Program” under the Programs tab. Programs are optional but are provided as a high-level grouping mechanism for several related projects or strategic activities that may be required to complete a request for a client. Each program should be related to a client (either external or internal) but the contact information can be changed if different from that on the client screen. If used, the program can be entered on each of the projects to create the link between the program and the project.

New Project

Select “Add Project” under the Projects tab. Enter any “project” or strategic activity that should be tracked within the system. This should include any effort to which more than one individual will be assigned responsibility and it should be entered as soon as the request is received from the client. The client (either external or internal) must already have been entered in the system and can be chosen from the list. If this project is part of a program, the program must already have been entered in the system and can be chosen from the list. Designate the project by status and type as defined previously within the administrative tables. The client contact information for the project can be changed if different from that on the client screen. Assignment of the Project Manager will cause the project to appear on that person’s dashboard for further planning and processing.

Creating a Project Plan

Once the project appears on the Project Manager’s dashboard, that person is able to set up the scheduled dates and responsible persons for the next level of breakdown. This can be done by adding tasks to the work plan or through the use of the “Planner” tool that will optionally calculate the dates based on estimated durations.

Using the Planner:

Opening the Planner section of the project or task edit screen gives the ability to add new sub tasks, calculate the start and end dates for each based on duration, apply lead (overlap) or lag (gap) times and to set up responsible persons for the next level. The “Add” button lets you add one task at a time, the “Import” button lets you bring in a set of tasks from another area of the project (or any other project) and the “Refresh” button lets you bring in the set of sub tasks that have already been “Implemented” for revision. Once the work plan is complete, it can be “implemented” (click on the “Implement” button) and will then appear on the dashboards of the next lower level responsible persons. Those persons can then respond with their promised dates, establishing their commitment to the schedule or their issues in meeting the schedule. This process will be repeated by the responsible persons at every level of the project.

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Maintaining Scheduled / Promised / Actual Dates

There are three (3) real sets of dates associated with every task. The scheduled dates are entered by the person who creates the work plan. The promised dates (and actual dates) are entered by the person responsible for the successful completion of a task. These dates are automatically compared each time the task information is displayed and if there is any discrepancy (for example, the promised end date is later than the scheduled end date), the timeline indicator is set to red or yellow (depending on the discrepancy) and a note explaining the condition is available for display by clicking on the indicator. An actual end date cannot be entered unless all sub-tasks have actual end dates entered. Once an actual end date is entered for a task, that task will no longer appear on the responsible person's dashboard. A project will continue to appear on the dashboards for a short period of time (14 days) after being completed.

Indicator Settings / Associated Comments

There are five (5) indicators associated with each task. SynapMod automatically sets the timeline indicator by comparing the scheduled, promised, actual and sub-task dates. The other four (4) indicators can be manually set by the responsible person for each task. Whenever an indicator is set to yellow or red, a comment should be entered to explain the reason for the change (SynapMod will prompt for the comment). That comment will then be available for viewing by other persons on the various dashboards where the task has an impact. The comment will be displayed by clicking on the selected indicator. See the section on Dashboard Timeline Indicator Settings for a more detailed description of the conditions that cause timeline indicators to be set.

Setting Milestones

Any task that is deemed to be important to the completion of the task or the project can be designated as a milestone, either a task level milestone or a project level milestone (open the "Milestones" section of the task edit screen and click on the "Add" button). Task level milestones will be represented at the next higher task level. Project level milestones will be represented on the project dashboards and the project screen. Milestones designate a point in time with a single due date as opposed to a task, which represents a period of time with a start date and an end date. When a milestone is established, the end date of the task will be used as the default due date of the milestone.

Establishing Task Dependencies

Any task can be linked to any other task to create a dependency and set up a communication link between those persons responsible for completing interrelated tasks (open the "Task dependencies" section of the edit screen and click on the "Add" button). Dependencies can be created as finish to start, start to finish, start to start or finish to finish. There can also be lead (overlap) or lag (gap) durations indicated. Once a dependency is established, any indicator settings on the task to which the dependency is established will be represented on the task dashboard and screen from which the dependency was established so that all persons with interrelated tasks can view the status of each.

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Changing Your Password

A personal password can be changed at any time by selecting “My Password” under the My Accounts tab. The requirements for a valid password are that it must be at least six characters in length and contain at least one digit and one letter. The password letters are case sensitive.

Initial Company Setup

The company code and company name are entered into the system upon receipt of the commitment to use SynapMod. A numeric company default password extension is assigned at this time. A single user screen name and password will be provided with full permissions for the person who will be responsible for the following company setup. That person can change the default password provided in order to secure the system. The requirements for a valid password are that it must be at least six characters in length and contain at least one digit and one letter. The password letters are case sensitive.

Add Groups:

If an organizational structure is to be defined and/or people are to be assigned to groups, it is more convenient to enter that group information first. Enter the organizational structure for each department by selecting “Add Group” (under the Groups tab). It’s easiest to start with the highest department so that the “Parent Group” will already have been entered whenever a new department is put in. The “Manager” and “Administrator” cannot be supplied until after the next step (entering users). For external groups such as sub-contractors and/or partner organizations, just the group name can be entered.

Add Users:

Add a user entry (select “Add User” under the Users tab) for each person who will have responsibility (or anyone who should have access to the system). If you’re using an organizational structure, it’s easiest to start with the highest level employees so that the “Supervisor” name will already have been entered whenever a new person is put in. For any persons external to the organization such as sub-contractors and/or members of partner organizations, only the name, contact information and permissions is needed. A default password will be created for each person consisting of the screen name and the company default extension. This can either be e-mailed to the person or communicated by the person making the entries. The first time that a screen name is used with the default password, there will be a request to change the password.

User Permissions:

All users have access to their own responsibilities via the task dashboard and can edit their tasks, set up work plans, go to any sub tasks below their level of responsibility, and view the chart or report of the entire project. They are also able to view each of the administrative tables. Access to other areas is controlled by the permissions granted in the user screen. Permission can be granted to view, add, edit or remove users, groups, clients, programs and/or projects. Administrative rights allow the person to add, edit or remove entries in any of the administrative tables. See the section on Permissions for a more detailed description.

Group Managers and Administrators:

Edit each of the groups previously entered (select “Browse Groups” under the Groups tab) and add the “Manager” name and “Administrator” name where appropriate.

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Initial Administrative Setup

Client Status:

Enter all possible client status values that can be used in the system (select “Client Status” under the Admin tab). There is also space for a full description of the client status. More status values can be added later if necessary, but it’s much easier if they’re already in the system before clients are entered.

Possible client statuses: Active, Inactive, Potential, Existing, Repeat, etc.

Client Types:

Enter all possible client types that can be used in the system (select “Client Types” under the Admin tab). There is also space for a full description of the client type. More client types can be added later if necessary, but it’s much easier if they’re already in the system before clients are entered.

Possible client types: Commercial, Industrial, Internal, etc.

Project Status:

Enter all possible project status values that can be used in the system (select “Project Status” under the Admin tab). There is also space for a full description of the project status. More status values can be added later if necessary, but it’s much easier if they’re already in the system before projects are entered.

Possible project statuses: Opportunity Identified, Proposal Development, Active, Funded, Delayed, Complete, etc.

Project Types:

Enter all possible project types that can be used in the system (select “Project Types” under the Admin tab). There is also space for a full description of the project type. More project types can be added later if necessary, but it’s much easier if they’re already in the system before projects are entered.

Possible project types: Turnkey, Construction, Software Development, Strategic Planning (in-house), etc.

Team Roles:

Enter the team roles that can be used in the system (select “Team Roles” under the Admin tab). There is also space for a full description of each team role. Each role can be designated as project level and/or task level.

Possible team roles: Architectural Consultant, Contract Coordinator, Division Oversight, etc.

Anyone who is assigned a project level team role (either as project manager or as a project level team member) will have access to a Project Manager dashboard showing all the projects in which they have a role or oversight responsibility. They will also have access to all tasks defined in any of those projects but can only view the information unless they are granted further permissions for editing projects. Even then, certain data can only be edited by the person assigned direct responsibility for a project/task.

Anyone who is assigned a task level team role will have that task appear on their Tasks dashboard and will have access to the task and all sub tasks but can only view the information unless they are granted further permissions for editing projects. Even then, certain data can only be edited by the person assigned direct responsibility for a task.

This completes the initial setup of the system. Any of these areas can be edited when necessary by anyone with the appropriate permissions.

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Permissions

Task Edit:

Only the person responsible can edit:

Promised Dates, Actual Dates, Indicators

The person responsible and the person who assigned the task can edit:

Objectives, Milestones, Work Plan / Planner, Task Dependencies, Task Team, Comments

Project Edit:

Only the person responsible can edit:

Scheduled Dates / Promised Dates, Actual Dates, Indicators, Work Plan / Planner

The person responsible or anyone with "Project Edit" permission can edit:

Project Name, Project Number, Project Type, Project Status, Project Ranking, Project Manager, Program, Client, Contact Information, Project Team, Comments

Project:

Anyone with "Project Add" permission can add a new project (only Project Details and Contact Info)

Anyone with "Project Delete" permission can delete a project (tag as inactive to maintain referential integrity)

Anyone with "Project View" permission can view any project and drill down to the tasks

Anyone with "Project Edit" permission can edit any project (but only a limited amount of project data)

Program:

Anyone with "Program Add" permission can add a new program

Anyone with "Program Delete" permission can delete a program (doesn't delete any associated projects)

Anyone with "Program View" permission can view any program and drill down to the projects / tasks

Anyone with "Program Edit" permission can edit any program

Clients:

Anyone with "Client Add" permission can add a new client

Anyone with "Client Delete" permission can delete a client (tag as inactive to maintain referential integrity)

Anyone with "Client View" permission can view any client

Anyone with "Client Edit" permission can edit any client

Users:

Anyone with "User Add" permission can add a new user

Anyone with "User Delete" permission can delete a user (tag as inactive to maintain referential integrity))

Anyone with "User View" permission can view any user

Anyone with "User Edit" permission can edit any user

Groups:

Anyone with "Group Add" permission can add a new group

Anyone with "Group Delete" permission can delete a group (tag as inactive to maintain referential integrity))

Anyone with "Group View" permission can view any group

Anyone with "Group Edit" permission can edit any group

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Administrative Tables: (Client Status / Client Type / Project Status / Project Type / Team Role)

Everyone can view any table entry

Anyone with “Administrative Rights” permission can:

Add any new table entry

Delete any table entry (tag as inactive to maintain referential integrity)

Edit any table entry

Edit Screen Timeline Indicator Settings

Project / Task:

If task promised end > task scheduled end – red

Else if task promised start past & no task actual start – red

Else if task promised end past & no task actual end – red

Else if within 14 days of task scheduled start & no task promised start or end – yellow

Else if task promised start < task actual start – yellow (for 14 days only)

Milestone:

If milestone due date past & no milestone actual date – red

Sub-Task:

If subtask promised end > task promised end – red

Else if subtask promised end > subtask scheduled end – red

Else if subtask promised start past & no subtask actual start – red

Else if subtask promised end past & no subtask actual end – red

Else if within 14 days of subtask scheduled start & no promised subtask start or end – yellow

Else if subtask promised start < subtask actual start – yellow (for 14 days only)

Dependency:

If start to start & task promised start date < dependency promised start date – red

Else if start to finish & task promised start < dependency promised end – red

Else if finish to finish & task promised end > dependency promised end – red

Else if finish to start & task promised end > dependency promised start – red

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Dashboard Timeline Indicator Settings

Task Dashboard Timeline Indicator Settings

- Top: If task promised end > task scheduled end – show red
Else if task promised end past & no task actual end – show red
Else if task promised start past & no task actual start – show yellow
Else if within 14 days of task scheduled start & no task promised start or end – show yellow
Else if task promised start < task actual start – show yellow (for 14 days only?)
- Bottom: scan subtasks
If subtask promised end > task promised end – show red
Else if subtask promised end > subtask scheduled end – show red
Else if subtask promised end past & no subtask actual end – show red
Else if subtask promised start past & no subtask actual start – show yellow
Else if within 14 days of subtask scheduled start & no promised subtask start or end – show yellow
Else if subtask promised start < subtask actual start – show yellow (for 14 days only?)
- scan dependent tasks
If start to finish & task promised start (+/- lead/lag) < dependency promised end – show red
Else if finish to start & task promised end (+/- lead/lag) > dependency promised start – show red
Else if start to start & task promised start date (+/- lead/lag) < dependency promised start date – show yellow
Else if finish to finish & task promised end (+/- lead/lag) > dependency promised end – show yellow

Project Manager Dashboard Timeline Indicator Settings

- Top: If project promised end past & no project actual end – show red
Else if project promised start past & no project actual start – show yellow
Else if within 14 days of project scheduled start & no project promised start or end – show yellow
Else if project promised start < project actual start – show yellow (for 14 days only?)
- Bottom: scan subtasks and project level milestone tasks
If subtask promised end > task promised end – show red
Else if subtask promised end > subtask scheduled end – show red
Else if subtask promised end past & no subtask actual end – show red
Else if subtask promised start past & no subtask actual start – show yellow
Else if within 14 days of subtask scheduled start & no promised subtask start or end – show yellow
Else if subtask promised start < subtask actual start – show yellow (for 14 days only?)

Senior Management Dashboard Timeline Indicator Settings

- Whole: If project promised end past & no project actual end – show red
Else if project promised start past & no project actual start – show yellow
Else if within 14 days of project scheduled start & no project promised start or end – show yellow
Else if project promised start < project actual start – show yellow (for 14 days only?)

CEO Dashboard Timeline Indicator Settings

- Whole: If project promised end past & no project actual end – show red
Else if project promised start past & no project actual start – show yellow
Else if within 14 days of project scheduled start & no project promised start or end – show yellow
Else if project promised start < project actual start – show yellow (for 14 days only?)