



ProjectFirma™ Administrator Quick Guide

A guide to the ProjectFirma administrative tools.



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OVERVIEW

ProjectFirma is an online platform for tracking project performance and expenditures to help managers and other stakeholders analyze program results. Clients use it to track high-level project information for a portfolio of projects. ProjectFirma grew out of the Lake Tahoe Info system, www.LakeTahoeInfo.org, that Sitka designed, built, maintains, and hosts for the Tahoe Regional Planning Agency (TRPA). The online platform is available via an open-source license so that TRPA and other member organizations can benefit from and extend the shared platform functionality. The platform is uniquely suited to track, share, plan, and analyze your organization's projects.

This guide is intended to be a helpful resource for maintaining your ProjectFirma instance after the initial configuration is complete. For a more in-depth guide to the various ProjectFirma customization options, please see the ***ProjectFirma Customization Guide***.

ROLES AND PERMISSIONS

There are five types of users in ProjectFirma, four of which correspond to user roles that can be set by an Administrator. To ensure data quality, only users who are assigned an authorized role in the system can edit existing projects and approve pending projects/project proposals/updates. Below are role descriptions and associated permissions.

Public Users

Public users are web application visitors who do not have user accounts or are not logged in. They can view most summary pages and detailed project pages.

Unassigned Users

Unassigned users have an account but have not been assigned a role by an administrator. These users have the same permissions as public users.

Normal Users

Normal users are assigned the role "Normal" in the ProjectFirma instance. Project primary contacts are typically normal users. They can add and submit updates for projects they are listed as the primary contact or their organization is the lead implementer. A project steward or administrator must approve their update before changes are viewable by the public.

Project Stewards

Project stewards are assigned the role "Project Steward" in the the ProjectFirma application. (Note: the field name "Project Steward" can be customized and defined through the Manage menu, see the ***Labels and Definitions*** section of the ***Customization Guide***). Project stewards can approve or return proposals,

pending project submissions, and project updates. During the customization of the instance, a project attribute can be defined to limit which projects a project steward can manage. For example, the Washington Department of Natural Resources Forest Health Tracker is the project management tool for all six regions throughout Washington State. Each project is associated with a region and an administrator can assign region(s) to each project steward. Project stewards can only manage projects in their assigned region(s). See the **Customization Guide** for more information.

Administrators

Administrators are users of the ProjectFirma application who have an account and are assigned the role “Administrator.” They have access to the Manage and Configure menus in the ProjectFirma instance. Administrators can edit all projects, assign roles to other users, as well as manage the overall system (including all customizations mentioned in this document). We recommend limiting the number of system administrators to a few select users who understand the tool and need access to add/edit organizations and manage user roles.

EMAIL NOTIFICATIONS

Administrators can opt-in to receive email notifications when there is an action to take in the ProjectFirma application, or when a user reaches out for support. Emails are sent from donotreply@projectfirma.com; you should add this email address to your white list or approved senders list.

Support Requests

Administrators provide the first line of support for all users. The Request Support form is located under the Help menu and can be accessed via helpful links throughout the site by public and logged-in users. Common requests are:

- Assign a new user permission to add projects
- Add a new Organization
- Add a new Funding Source
- Request a change to a Project Primary Contact
- Request a change to an Organization Primary Contact
- Edit a Performance Measure (add a new subcategory or option)
- Provide feedback
- Report a bug

At least one Sitka Administrator subscribes to Support Request emails for each tenant and can assist ProjectFirma instance administrators if needed as a second level of support.

Request Support
✕

Name * Kathleen Elmquist

Email Address * kathleen.elmquist@sitkatech.com

Organization (optional)

Phone (optional)

Subject *
 <Choose one>
 <Choose one>
 Can't figure out how to update my Project
 Can't log in (forgot my username or password, account is locked, etc.)
 Need an Organization or Funding Source added to the list
 Provide Feedback on the site
 Ran into a bug or problem with this system
 Request a change to an Organization's name
 Request a change to a Project's Project Manager
 Request permission to add Projects
 Other

Description *

Characters Remaining: 2000

* Required Field

Submit Request
Cancel

Figure 1: The Request Support form and subject options.

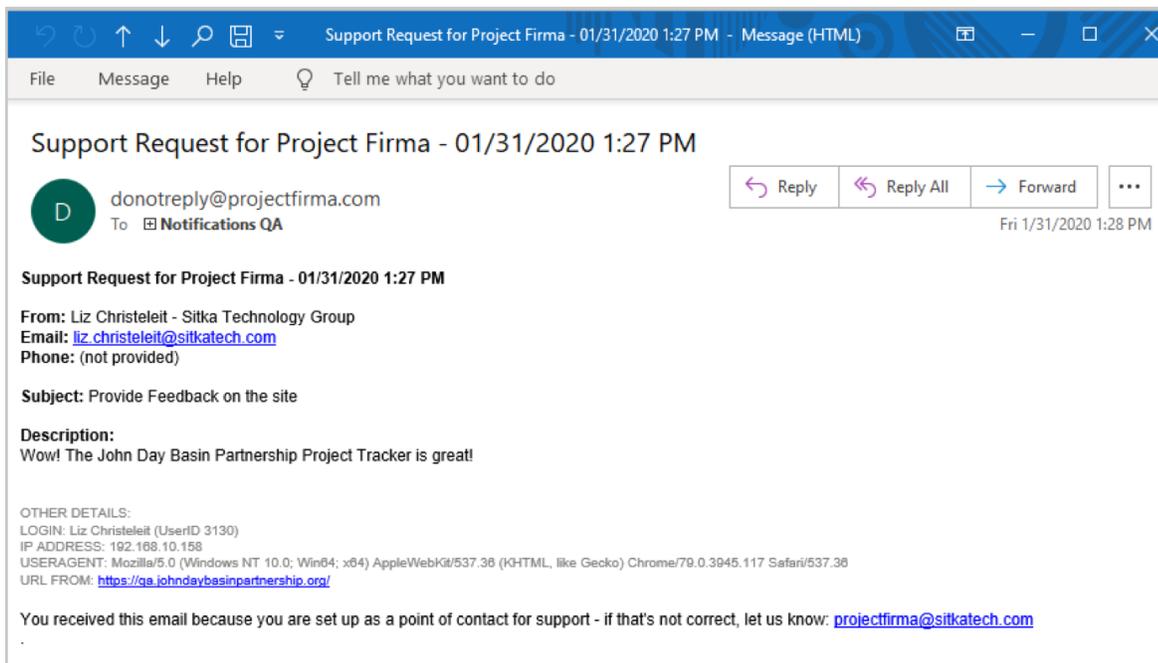


Figure 2: Example of a support request email notification.

New User Added

When a user logs into a ProjectFirma site for the first time, administrators receive an email with the user's name, organization, and email address. If you recognize the user as someone who will need permissions to add or review projects, use the “assign this user roles” link to give the new user a role.

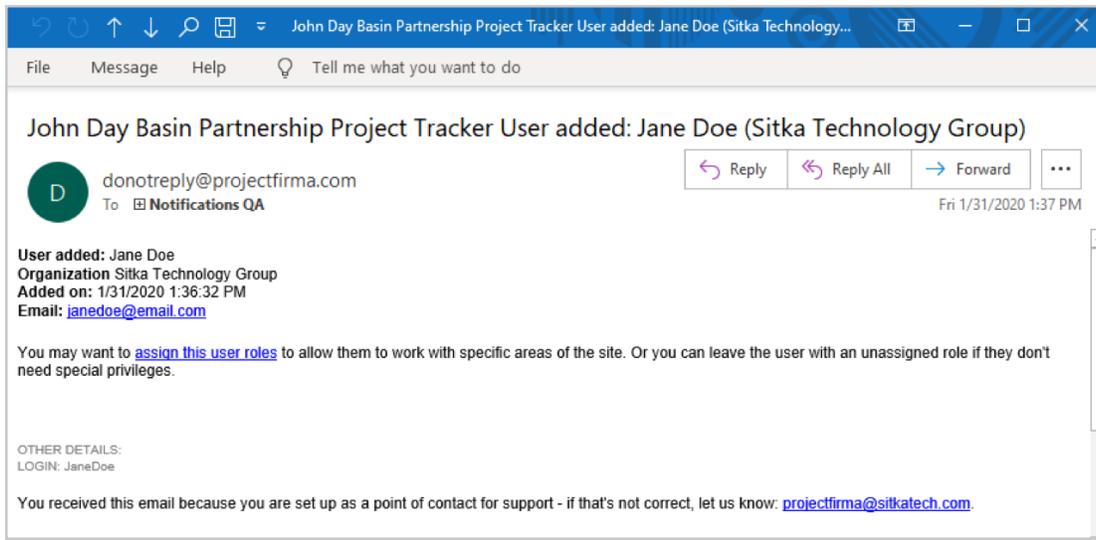


Figure 3: Example of a new user notification.

Project or Proposal Submitted

When a normal user submits a new proposal or project, administrators receive an email with the project name, date submitted, and a link to review the pending project. A project steward or administrator must approve their proposal before the project is viewable to the public (unless the configuration to show proposals to the public is turned on).

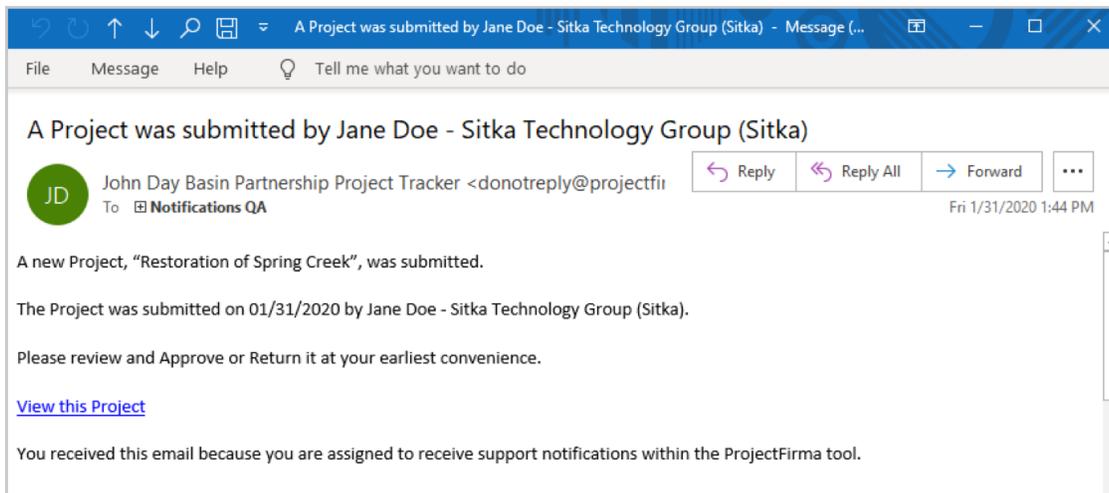


Figure 4: Example of a notification email for a new project submission.

Project Update Submitted

When an update to an existing project is submitted, administrators receive an email with the project name, date the update was submitted, and a link to review the project update. A project steward or administrator must approve the update before changes are viewable by the public.

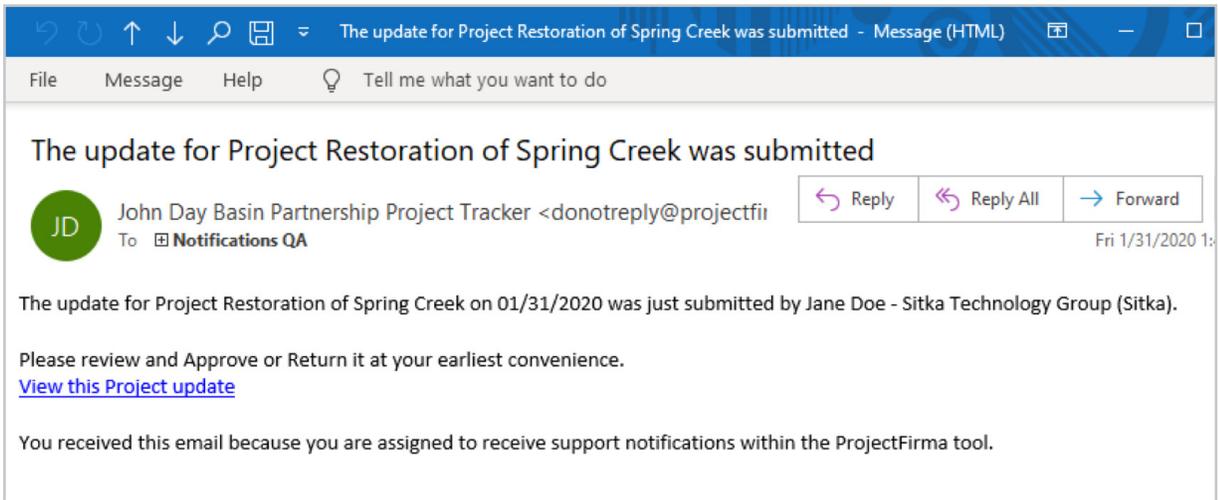


Figure 5: Example of a notification email for a project update submission.

COMMON HOW-TOS

As projects are entered and updated, there are a few actions you may need to take to keep your ProjectFirma instance running smoothly. This section lists the most common tasks you will need to do.

Manage Organizations

From the Program Info menu, select “Organizations.” There are a few actions you can take to manage the organization list:

- Click “Create a new Organization” to add an organization.
- Click the name of an organization in the list to open the detail page. You can edit any detail of an existing organization from the organization’s detail page.
- Click the trash can icon next to the organization name in the list to delete an organization. Be aware you will rarely need to delete an organization, and this can result in data loss.

Normal users (e.g., project primary contacts) cannot add organizations but may use the Request Support form to ask that a missing organization be added to the list. This triggers an email to administrators, who can add the new organization.

Manage Funding Sources

From the Program Info menu, select “Funding Sources.” There are a few actions you can take to manage the list of funding sources:

- Click “Create a new Funding Source” to add a funding source. Note that each funding source must be associated with an organization in the system.
- Click the name of a funding source in the list to open the detail page, you can edit any detail of an existing funding source from the funding source’s detail page.
- Click the trash can icon next to the funding source name in the list to delete it. Be aware you will rarely need to delete a funding source, and this can result in data loss.

Normal users (e.g., project primary contacts) cannot add funding sources but may use the Request Support form to ask that a missing funding source be added to the list. This triggers an email to administrators, who can add the new funding source if necessary. Be sure to review the list of funding sources before adding a new one to confirm it doesn’t already exist under a different name (e.g., US Geological Survey versus United States Geological Survey).

Manage User Accounts

Account creation, password resets, forgotten password assistance, and so on are self-managed by users through Sitka’s Keystone Identity Manager™.

An administrator’s primary responsibility when managing ProjectFirma user accounts is assigning the user role. From the Manage menu, select “Users.” Choose the user’s name from the list to open the user detail page. You can then use the role editor to assign a role and project stewarding areas (if applicable, see the **Customization Guide** for an explanation of project stewarding areas). When new users log in, administrators receive an email notification with a direct link to the new user’s detail page to facilitate user role management. A new user’s role is automatically set to “Unassigned” to ensure they cannot add or edit system data.

Administrators can also “Invite Users” from the User Index page to kickstart a new user’s account by preemptively assigning them a role. Inviting a user triggers an email to the new user with instructions on how to set up their account.

Review Proposals and Pending Projects

When a project implementer starts a draft of a new proposal or pending project, it is not visible to the public. The draft can be saved and edited over multiple days if desired. Once it is submitted, administrators receive an email that there is a proposal or pending project ready for review. Depending on whether the “Show Proposals to the Public” configuration is turned on or off, a submitted proposal may be publicly visible at this point.

To view the status of all proposals and pending projects, from the Projects menu select “Proposals” or “Pending Projects.” These pages contain lists of proposals and pending projects where an administrator or project steward can check project status. If the submittal status is “Pending Approval,” the proposal or project is ready for an administrator to review. To review, open the project and click the “Review” button at the top of the page.

In the review workflow, there are options at the bottom of the screen to approve, return, or reject the proposal or project. Before making a final decision, you may want to review each section of the workflow. You can also make optional changes to any section before approving. Before returning the proposal or project, you can optionally add reviewer comments at the bottom of the relevant pages to request the primary contact make edits. An email notification is automatically sent to the project primary contact when the proposal is returned or approved.

Review Project Updates

Project implementers should periodically update their projects to provide up-to-date expenditures, metric accomplishments, photos, etc. When a user submits a project update, it is not visible to the public. The user can save and edit their draft update over multiple days if desired. When the user finishes the project update and submits their changes for review, administrators and project stewards receive an email notification. To ensure optimal data quality, updates must be approved before the changes are made visible to the public.

Another way to access the review workflow is from the project’s detail page. If a project has an update in progress, that project will have an alert at the top of the page. ***As an administrator, you can directly edit the project record from the detail page, but please note any changes you make here will be overwritten by the update if there is one in progress!***

To review an update, click “Review.” In the review workflow, there are options at the bottom of the page to return or approve the update as well as additional information about who made the update and when it was submitted. To facilitate review, the pages with changes are flagged with a flag icon. Expand all sections on the left to see the flags—you will want to review the flagged pages to ensure the data is correct or complete.

On select pages with updated data or information in the workflow, there is an option to “Show Changes” which gives a visual difference of the before and after. On the “Show Changes” screen, the data that has been changed is highlighted in red or green to indicate a deletion or addition.

When you are ready to approve an update, click “Approve.” Any changes to the project entered in the update will be applied to the project record and the last update date will show the current date. The Project History timeline shows the record of the update. There is also a log in the Project Update History that includes a visual summary of the change made to the project record. The project primary contact receives an email notification when their update is approved.

Manage Project Updates

To view the status of all project updates and to set a notification schedule to remind project owners or implementers to update their project, from the Manage menu select “Project Updates.” The first section contains the automatic notification schedule feature, which currently supports an annual cycle of updates set on either the calendar or fiscal year. The second section allows an administrator to view the notification history and to send ad hoc email communications to targeted project primary contacts.

The third section is independent of the notification schedule. This “Project Update Status” grid contains a list of all projects and their latest update status. If the status is “Submitted,” you will see a link to “Review” the update. This is an easy way to check if any projects are awaiting review in case you missed the email notification.

Manage Project Updates

Projects in the Planning/Design, Implementation, and Post-Implementation stages should be reviewed and updated annually to ensure a complete and accurate project record. Administrators can configure a schedule for the project tracker to email the project primary contacts with a request to update projects.

- Use the **Configure Notifications** panel to enable project update notification emails and customize the email content and schedule.
- Use the **Primary Contacts Receiving Notification** panel to understand which users will be receiving reminders, and the status of their updates for the current reporting year.
- Use the **Project Update Status** panel to see a list of all projects which should receive an annual update.

CONFIGURE NOTIFICATIONS

Enable Project Update Reminders? Yes

Kick-off Date 9/16/2019

Kick-off Email Intro Content [Preview Email](#)

Send Periodic Reminders? Yes

Reminder Interval (days) 7 days

Reminder Email Intro Content [Preview Email](#)

Send Close-out Notification? Yes

Close-out Date 9/27/2019

Close-out Email Notification Intro Content [Preview Email](#)

PRIMARY CONTACTS RECEIVING NOTIFICATION

Currently viewing 30 of 30 People

Primary Contact	Email	Project Reporting Update	Updates Not Started	Updates In Progress	Updates Submitted	Updates Returned	Updates Approved	Reminders Sent	Date of Last Reminder Message
<input type="checkbox"/> Chuck Pentzer (SWCC)	cpentzer@swc.idaho.gov	17	17	0	0	0	0	2	09/27/2019 1:23 AM
<input type="checkbox"/> Jon Beas (SWCC)	jon.beas@swc.idaho.gov	18	8	1	0	1	9	2	09/27/2019 1:23 AM
<input type="checkbox"/> Kerry Christiansen (Central Bingham CD)	cdswcc@da.net	2	2	0	0	0	0	0	
<input type="checkbox"/> George Hitz (SWCC)	george.hitz@swc.idaho.gov	31	17	6	1	0	7	2	09/27/2019 1:23 AM
<input type="checkbox"/> Bill Littlebridge (SWCC)	bill.littlebridge@swc.idaho.gov	8	2	0	1	0	6	1	09/27/2019 1:23 AM
<input type="checkbox"/> Allan Johnson (SWCC)	Allan.Johnson@swc.idaho.gov	12	7	0	0	0	5	0	02/22/2019 1:23 AM
<input type="checkbox"/> Alicia Sanders (James CD)	camasscd@yahoo.com	0	0	0	0	0	0	2	09/27/2019 1:23 AM
<input type="checkbox"/> Stefanie Hays (Osoho County CD)	stefanie.hays@osocd.net	1	1	0	0	0	0	2	09/27/2019 1:23 AM
		194	113	17	2	2	63		

PROJECT UPDATE STATUS

Currently viewing 208 of 208 Projects

Reporting Period Update Status	Project Name	Primary Contact	Project Stage	Planning/Design Start Year	Implementation Start Year	Completion Year	Estimated Total Cost	Secured Funding	Submit	
Begin	Not Started	Big Wood River TMDL Implementat	Chuck Pentzer (SW)	Implementation	FY2019	FY2019	FY2020	\$0	\$0	Not Ready
Begin	Approved	Mid-Snake/Succor Creek TMDL Impl	Jon Beas (SWCC)	Implementation	FY2019	FY2019	FY2020	\$0	\$0	Not Ready
Begin	Not Started	Adult Education (Central Bingham C	Kerry Christiansen	Post-implemen	FY2017	FY2017	FY2017	\$641	\$641	Not Ready
Begin	Not Started	Agricultural Education Grant Applicat	Jon Beas (SWCC)	Implementation	FY2019	FY2019	FY2019	\$0	\$0	Not Ready

Figure 6: Example of a Manage Project Updates page.

Reviewer Comments

When reviewing project proposals, pending projects, and project updates, all workflows allow you to optionally add comments on an individual page by entering your comments directly in the Reviewer Comments box. If the project proposal or update is returned, then your comments will be visible at the bottom of the pages. The reviewer comments are only viewable by the project primary contact; reviewer comments are not editable by the primary contact.

Project Evaluations

Administrators can define evaluation criteria, create an evaluation composed of selected projects and/or proposals, and conduct an evaluation by ranking the projects and/or proposals within it and providing notes regarding the ranking decision.

Project evaluations can be found within the Manage menu, where a new evaluation can be created, associated to specific pre-defined evaluation criteria, and populated with relevant projects and/or proposals.

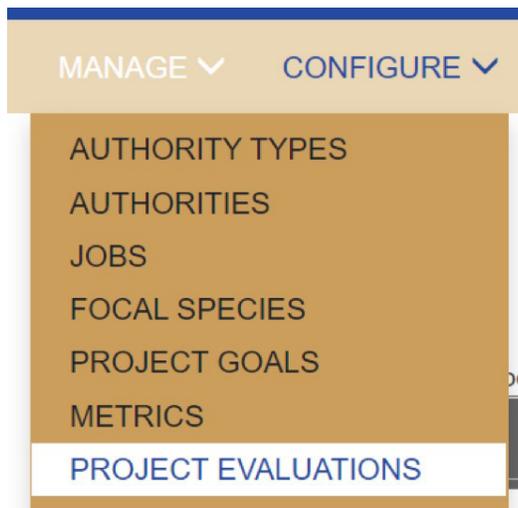


Figure 7: Project Evaluations can be accessed via the Manage menu.

Following is a view of a “Proposal Review 2020” Evaluation that contains one project so far and is awaiting additional projects to be added for review.

PROPOSAL REVIEW 2020

[Back to all Project Evaluations](#)

BASICS

- Evaluation Name:** Proposal Review 2020
- Evaluation Definition:** Review and rank proposals for approve in FY20
- Evaluation Status:** In Progress
- Evaluation Start Date:** 10/01/2019
- Evaluation End Date:** 09/30/2020
- Evaluation Criteria:** Basin Ranking
- Evaluation Visibility:** All Admins

EVALUATION CRITERIA

[+ Create a new Evaluation Criteria](#)

Currently viewing 1 of 1 Evaluations [Reset](#) [Download Table](#)

Name	Definition	Number of Criteria Values
<input checked="" type="checkbox"/> Basin Ranking	Atlas, TRT or UC Team rankings	3

EVALUATION PORTFOLIO

[+ Add Projects to this Evaluation Portfolio](#)

Currently viewing 1 of 1 Evaluation Portfolios [Reset](#) [Download Table](#)

Project Name	Project Stage	Basin Ranking	Comments
<input checked="" type="checkbox"/> Lemhi Beyeler Ranch	Planning/Design	not set	

Figure 8: The Proposal Review screen.

Evaluate Project 'Lemhi Beyeler Ranch'

Basin Ranking Choose One

Comments

1 - High Ranking - Priority Reach and ESU
2 - Med Ranking - Priority Reach and ESU
3 - Low Ranking - Priority Reach and ESU

[Save](#) [Cancel](#)

Figure 9: Example of evaluating an individual project within the “Proposal Review 2020” Evaluation proposal.



GET STARTED

For organizations interested in improving transparency and accountability of their environmental programs with ProjectFirma, please contact us at **1.800.805.6740** or **sales@sitkatech.com**. For more information, please visit: **www.sitkatech.com/ProjectFirma**

