

# Manual and Technical Guide

## Forward

Industry Promotion and Communications (IPC) has developed a system to organize, and track its current and completed projects, as well as report to management effectively.

The Active Tracking System (ATS) will be used by all IPC employees. It will be important for all team members to keep it updated. Its main purpose is to store information that can easily be retrieved at any time. It does not contain unnecessary documents and information. Working files and project evaluations are easily found. The ATS replaces the Snapshot report. To read the full system plan, please see [Annex B](#).

## Before We Begin

The ATS is a pilot project, which will consist of two phases. In phase one, some functionalities — such as adding new clients, vendors and employees — will not be accessible. As our group becomes more familiar and comfortable with the system, the administrator will add these functions one by one with an explanation on how they work. This will keep things simple in the beginning. Keep in mind that some system bugs may need to be worked out. Phase two will address any additions or changes that are needed.

## Benefits and Features

- Installation: we recommend that you do not install the software, unless you feel very comfortable in doing so.
- Once it is installed, a shortcut to the ATS will be created on your desktop.
- One-on-one training/coaching sessions will be available if you need it.
- The views are easy to understand.
- You can leave the ATS open, just like any other software.
- Each IPC team member is responsible for filling out his/her own information.
- Automatic backups of the system will be made daily.

## Manual and Technical Guide

- In this Guide, yellow boxes will provide extra technical information.
- Field names, tab names or buttons appear in italics.
- Screens, views, pop-ups, annexes or figures appear in dark blue.
- Only in this Guide will the figures be appearing in red circles. In the system, they will not be red.
- Important notes from the author appear in blue boxes with an exclamation point.

## Active Tracking System Installation

You will not be installing the software unless you are very comfortable doing so. Annex C contains information on how to install the system. Normally, the administrator will come to your office and install the software onto your system to ensure it is properly set up. At that time a shortcut will be created on your desktop and in your Start Programs.

The system will be installed on your computer with a shared backend (on the S:\ drive) that only IPC members will have access to.

Once it is installed, double-click on the shortcut to start the program. The system is set up so multiple users can have it open at the same time. You can leave the program open all day. Anytime the status of a project or a task is modified, the system will show the update. A good practice may be to open the ATS with your Outlook in the morning and view your tasks for that day.

## Navigation Bar

The navigation bar is a green/blue bar located at the top of every window. It will display different options for each screen.

## Print Button

Most screens will have a *Print* button. If you click on it, this will generate a report view and open your print properties window. You can select your printer and press okay. In some instances, the report may print differently than the view you are seeing on your screen. This is normal.



*Even though there are options to print in every view, we encourage you to read everything electronically. If you must, please print double-sided copies.*

## Shortcut Keys

There are keyboard shortcuts for most screens. If you see a button with an underlined character, this means there is a shortcut. For example: Print — instead of clicking on the *Print* button you would simply hold the Alt key down and press “p” on your keyboard. This will do the same as clicking on the *Print* button.

## Deleting a Project or Task

If you start entering a new project and decide you do not want to continue, do not leave it in limbo as an open project. You have two options: 1) you can either start inputting a different project or 2) change the *title* to “Delete” and set the *Status* to “Completed” and the administrator will go into the database and delete the entry. The same goes for an added task that needs to be deleted. Remember: if you think you entered in something and want to change it — just change it — you don’t have to delete a task and re-input it.

## Needs and Suggestions

Everyone's needs and suggestions have been and will continue to be taken into consideration. For practical reasons however, phase one of the system was built with reasonable expectations in mind. If you feel strongly about a function you think should be added into the system, please notify the administrator. For now, you can use the *Task Description* for your own personal notes; for ex., notes about the project's budget. When we implement phase two, the group will explore other options.

Everything can be changed by anyone within the IPC group. However, we ask that each person only edit his/her own projects, tasks and notes. When in doubt, please consult with the system's administrator, Wendy Desnoyers (the administrator).

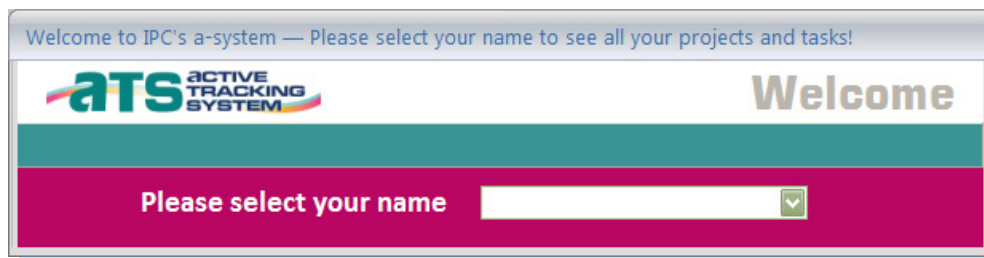


*If you think there is a problem, bug or error within the system, please notify the administrator immediately.*

## Opening the ATS – Welcome Screen and Projects Home

When you open the system you will see the [Welcome](#) screen, see [Figure 1a](#). Select your name in the drop-down menu **or** type your name in the textbox. If your name is not displayed, please see the administrator.

### Figure 1a – Welcome



Once you log in, the [Projects Home](#) page will be displayed (see [Figure 1b](#)). This is your main page. It gives you a quick view of the projects you are currently leading and the tasks you are responsible for on any project. This page will always be available when the ATS is open. To see a summary of another employee's projects and tasks, go to the Navigation Bar, select the drop-down menu beside <sup>h2</sup>*I am* and select the employee's name. Now, let's examine the features on the [Projects Home](#) page.

*To get the whole project and task descriptions, you need to click on the hyperlink of the [Project Name](#) or [Task](#). We will explain these features later in this Guide.*

**Figure 1b – Projects Home**

The screenshot shows the 'Projects Home' interface. At the top, there is a navigation bar with the following elements: a 'New Project' button (h1), a user selection dropdown 'I am: Nicole Vachon' (h2), a 'Reports:' dropdown (h3), and a 'Provide Feedback' button (h4). Below the navigation bar, there are two main sections: 'Open Projects' and 'Open Tasks'. Each section has a 'Print' button and a note: 'Note: You can not edit the information below. You must click on the "Project Name" and edit the information in the pop-up.' (for Open Projects) and 'Note: You can not edit the information below. You must click on the "Task Title" and edit the information in the pop-up.' (for Open Tasks).

**Open Projects Table:**

Project Name	Project Lead	Status	Start	End	# of Tasks
<a href="#">Organizational Chart</a>	Nicole Vachon	In Progress	25-Jun-08	13-Jun-08	2
<a href="#">Publications Registrations</a>	Nicole Vachon	In Progress	21-Oct-08	15-Nov-08	3
<a href="#">osmosIS-Osmose</a>	Nicole Vachon	In Progress	22-Jun-09	29-Oct-09	21
<b>Total</b>					

**Open Tasks Table:**

Task	Assigned To	Due Date	Project Name
<a href="#">Advice, Meetings, Project Management</a>	Nicole Vachon	27-Aug-09	<a href="#">Working Group on Official Languages (OLO)</a>
<b>Total</b>			

### Projects Home – Top Navigation Bar

- In the top navigation bar, you will see a button called <sup>h1</sup>*New Project* button. If you click on it (ALT + n), a blank *Project Details* window will open.
- The next button is called <sup>h2</sup>*I am*. This is a drop-down menu that helps you select the employee.
- The button called <sup>h3</sup>*Reports* will let you see a drop-down list of report options: All IPC Current Projects; Client List — Last 120 days; Completed/On Hold Projects — Last 120 days; e-Portfolio; IPC Employee List; and, Vendor List. In the Reports section of this Guide (see page 14), we will explain these in more detail.
- To provide feedback about the ATS, please use the <sup>h4</sup>*Provide Feedback* button.

### Sections

#### *Open Projects*

In the first section called <sup>h5</sup>*Open Projects*, you will see a *Print* button. When you click on it another screen will pop up with a printer window. Select the printer and press OK. This will print off a summary of all your open projects. See *Annex A – Projects by Assigned To*.

## Open Tasks

The second section called <sup>h6</sup>Open Tasks has the same Print option. This will print a summary of all the tasks that are assigned to you. See Annex A – Tasks by Assigned To.

## Adding and Editing a Project

You can edit the information about a project at any time. However, to keep things tidy, a project should not be added into the system until you have all the mandatory information — usually after the initial meeting or discussion at the beginning of a project.

We recommend that only the project leader add a project or edit an existing one. To do this, click on an existing *Project Name* or click the <sup>h1</sup>New Project button in the **Projects Home** page navigation bar. This will open the **Project Details** window. In the example below, we opened an existing project by clicking on a *Project Name* link in the <sup>h5</sup>Open Projects section (see Figure 2).

**Figure 2 – Project Details**

**Project Details**

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**The Managers' Network** Project ID: 5

Evaluation?

Project Lead: Nancy Slade

Priority: Knowledge Advantage

Status: In Progress

Branch: ADMO

Client(s): Vivian Bierman

Start Date: 28-Jun-08

End Date: 07-Aug-09

Note: The "Project Description" field will be displayed on All IPC Open Projects report, please be brief but list all end products.

Project Description: The Managers' Network cte. Will meet over the summer to plan new activities and promotions for the fall.

Project Tasks: Note: You can NOT add tasks here but you can edit. Use ALT + A to add a task or click on the "Add Task" button at the top.

Task	Assigned To	Start Date	Due Date	Status	% Complete
<a href="#">Graphic Design, Meetings</a>	Michel Kurita	28-Jun-09	30-Jun-09	Not Started	0%
<a href="#">Production Support</a>	Barbara Brocken	28-Jun-09	30-Jun-09	Not Started	0%
<a href="#">French Editing</a>	René Béchar	03-Sep-09	16-Sep-09	In Progress	0%
<a href="#">Web Development</a>	Wendy Desnoyers	22-Sep-09	23-Sep-09	Completed	100%
<a href="#">Advice, Meetings, Project Managem</a>	Nancy Slade	23-Sep-09	24-Sep-09	In Progress	0%
<a href="#">English Editing</a>	Elizabeth Thompson	23-Sep-09	25-Sep-09	Completed	0%
9					

## Project Details — Top Navigation Bar

In this window, the top navigation features are:

*Add Task* — See Adding and Editing a Task on page 8.

*Project Folder* — See Project Folder section on page 8.

*Print* — This button will create a printable report of the project. See [Annex A – Project Details](#).

*Go To* — Beside *Go To*: a drop-down menu allows you to select open projects and view the project information.

*Close* — This closes the current window.

## Fields

Here we look at what information is needed in each field.



*The fields that are bolded below are mandatory to ensure data integrity. The information is not entered automatically. Please provide all the information.*

### <sup>p2</sup> **Project Name**

As default the overall project name appears as “Please insert project name” and the field box is a peach colour with red text. Please keep the title as short as possible and do not add extra information.

*If the Project Name is left as “please insert project name” it will show up in red on reports. This field should never remain blank.*

### <sup>p3</sup> **Project ID**

The Project ID field is filled in automatically. This number is used by the system to keep track of everything related to the project including the name of the project folder. For further details, see section “Project Folder” on page 8.

#### **Evaluation**

At the end of a project, you would put a check mark in the box to indicate you have received an evaluation from the client. You can attach the evaluation inside the *Project Folder*.

### <sup>p4</sup> **Project Lead**

This is usually a project officer or the person who created the initial project entry.

### <sup>p5</sup> **Priority**

This is the Sector’s strategic priority or priorities related to the project.

### <sup>p6</sup> **Status**

This field is very important. It determines whether a project will show up on reports. The status of the overall project should not be set to “Complete” until all tasks have been completed. It is up to the project lead to make sure that the status of the project is correct.

When completing a project or setting the *Status* to “On Hold”, a visual basic script will run in the background to first check that all the tasks are marked “Completed” or “On hold”. If they are not marked “Completed” or “On hold” a pop-up error message will appear saying: “Not all the project tasks are completed, please verify with the person it is assigned to”. It then sets the project *Status* back to “In Progress”.

p7 **Branch**

The Branch names are set. If a Branch name ever changes the list can easily be modified.

p8 **Client(s)**

This indicates who your key contact is within the Branch you are working with. Multiple clients can be selected. If your client’s name is not listed, please see the administrator.

p9 **Start Date**

This is the start date of the overall project. This will automatically be set to the current date when first opening a new project but can be changed if needed.

p10 **End Date**

This is the end date of the overall project. All tasks should end before or the day of this project end date or the task(s) will show in red on all reports. If no *End Date* is entered upon completing the project, the current date will be automatically inserted.

If all the tasks are completed, a code will check for an *End Date*. If none is specified, it will set the *End Date* to today’s date, save the file and close it.

p11 **Project Description**

This very important field provides a brief explanation of what the project is about and the related products. This information will appear on reports and should be ideally a sentence or two in length.

- **Project Notes**

Here the project lead can add complementary notes aside from the tasks — for example, the next steps. This information will not show on any report and can be as long as 65 536 characters.

- **e-Portfolio Descriptions**

There are two fields to be filled out: English and French. Each field should consist of only a sentence or two (max. 375 characters). The project description is usually sufficient. Although this is not mandatory, the project will not be added to the e-portfolio printout unless both English and French descriptions are entered and an image is included. Please ask the administrator to create an image and add it in.

p12 **Project Tasks**

The project tasks area is filled when you click on the *Add Task* button in the top navigation bar.

## Project Folder

At this time, the only documents you can attach are quotes from suppliers. For all other documents, you can use the *Project Folder* button at the top of the **Project Details** window or the **Task Details** window. You can store all your project files, such as marketing/communications plans or final PDFs, except very large graphic files. The graphic designers will handle those files.

When you click on *Project Folder* inside the **Project Details** or **Task Details** window, the system will search to see if a folder has already been created for that project. If so, it will open the folder. If not, it will automatically create one and open it for you. Use this folder to keep project plans, checklists, graphic information or logos, or even the final product if it is a document or a PDF. The folders are automatically made and reside in a restricted folder on the S: Drive at S:\05-PSSB-DGPSS\Restricted\IPC\Admin\Project Files



*The folder name is created with the Project ID number. Please do not rename this folder on the S: Drive or it will not link properly.*

## Adding and Editing a Task

Each project has a task list. Any IPC member (including the project lead) could have one or more tasks assigned to them (see the *Assigned To* section). You can add a task by clicking on <sup>p1</sup>*Add Task* in the **Project Details** screen: a window will pop up (see Figure 3). For the purpose of this Guide, we will open an already existing task.

**Figure 3 – Task Details**

Task Details

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Task Details

Project Folder Print Close

Advice, Graphic Design, Web Development

Project Name osmosIS-Osmose Priority (1) High

Assigned To Wendy Desnoyers Start Date 25-Jun-09

Status In Progress Due Date 20-Aug-09

% Complete 80% Vendor Brian Tomkinson

Quote(s) 0

Task Description

Note: For printer and translation quotes ONLY!  
Please use the "Project Folder" link above to store files. (ALT + F)

Note: You can print this window but the "Task Description" field will NOT be displayed on the snapshot.

This is for your own information on the task. For example, it could be used for a reminder message or next steps.

Example:

- French translation completed and inputted into the brochure.
- Shown to client and awaiting approval.
- Need to send to printers by Friday.

## Task Details — Top Navigation Bar

In this window, the top navigation bar has several features:

*Project Folder* — Please see “Project Folder” section on page 8.

*Print* — This button will create a printable report of the project. See Annex A – Task Details.

*Close* — This button will close the current window.

## Fields

All tasks, even the seemingly insignificant ones, should be recorded for potential reporting purposes. The **Task Details** should be filled in by the person it is <sup>t4</sup>*Assigned To*. This also ensures that each IPC member knows the role he/she has to play in the project. It will then be his/her responsibility to keep it updated.



*The fields that are bolded below are mandatory to ensure data integrity, but please fill in all the information for reporting purposes.*

### <sup>t2</sup> **Task Title**

When you click on the drop-down arrow in the *Task Title* field, a list will be displayed. It includes: Advice; English Editing; French Editing; Graphic Design; Meetings; Multimedia; Production Support; Project Management; Promotional and Communications Planning; Strategic Communications and Marketing Services; Translation; Web Development; and Writing. You can pick any task you feel is appropriate for the project.



*You must click Okay for the tasks to be added. If you do not and click somewhere else on screen, you will have to re-enter your task information.*

### <sup>t3</sup> **Project Name**

This is filled in automatically when a task is added to a project. It can not be changed but you can double-click on it to pull up the overall project information.

### <sup>t4</sup> **Assigned To**

This indicates the employee to whom the task is assigned. Click to see the [Employee Details](#).

### <sup>t5</sup> **Status**

This is an important field because a project can not be closed unless all tasks are completed. It is each assignee’s responsibility to keep their information updated to help the project lead with the overall project status.

### <sup>t6</sup> **% Completed**

Use this function at your own discretion. It can be used to keep track of how much work has been completed so far. This keeps the project lead informed and/or can give you peace of mind on big projects. When a task is marked as “Completed”, this field will automatically change to 100%.

### <sup>t7</sup> **Quote(s)**

This field is used only to store quote attachments (e.g. printer, translation). Attached files should not be larger than 1000 KB.

### <sup>t8</sup> **Task Description**

The task description is for any additional information that the person it is assigned to may have; for example, a reminder message, next-steps or a more detailed description of the task at hand for future reference. This will not show on any reports except for when you click on <sup>t1</sup>*Print* inside the **Task Details** screen.

<sup>t9</sup> *Priority*

This is not the Sector priorities but the priority of the task. This is only to be used and changed by the person it is assigned to. It is for his/her own tracking and printing.

<sup>t10</sup> *Start Date*

This is the start date of the task. It will be entered automatically with the date the task is created but you can change it to a future date if you like. If you set it to a future start date, it will not show on any report.

<sup>t11</sup> *Due Date*

This is the due date of the task at hand — not the overall project. If this date is past it will show in red on all reports. If the date has past, go in and change it to the new due date or an approximate one if there is no set date.

When completing a task, a visual basic script will run in the background and check if there is a *Due Date*. If there is none specified it will set the *Due Date* to today's date. It will also set the *%Completed* to 100%.

<sup>t12</sup> *Vendor*

Use the vendor field only if some task has been outsourced. This includes: English editing; French editing; exhibits; graphic design; printing; promotional items; strategic communications and marketing services; translation; writing. For now, if the vendor or a service you need is not listed, please see the administrator.

## Completing a Project

As the *Project Lead* it is your responsibility to keep track of the tasks at hand. If there are multiple tasks assigned to different people, you can not close the project until all the tasks' *Status* are marked Completed. If they are not completed, follow up with the person the task is *Assigned To*.

Before completing a project, you can add comments about the success of the project, client remarks or any other notes and store them under *Project Notes* or attach documents in the *Project Folder*.

When you want to show the project on the e-Portfolio, please fill in the English and French descriptions, and ensure they are properly edited. Please ask the administrator to take an image of the final product and add it into the database. When the e-Portfolio page is generated, it checks to see that the English and French fields are filled out and that there is an attached image. If one of the three criteria is not met, the project will not be added to the e-Portfolio report. See page 17 for more information on this report.



*A good practice is to fill out the e-Portfolio English and French descriptions before setting the status of the project to "Completed".*

When it is time to close the project, in the *Project Details* set the project *Status* to "Completed". As soon as the window closes, the system will remove the project from the Open Projects and place it into the *Completed/On Hold Projects — Last 120 days* report. See page 17 for more information on this report.

# About People

## Employee Details

Most often, you can double-click on an IPC employee's name to pull up his/her information. The **Employee Details** screen will appear (see in [Figure 5](#)). This information should be only filled out by the employee or the administrator. Please do not change any information on this screen unless it is necessary. You do not have to put in personal information. It is there for you if you want to share the information with other IPC employees.

**Figure 5 – Employee Details**

Employee Details

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Employee Details

<sup>e1</sup> Email Employee Close

<sup>e2</sup> General Projects Tasks

First Name: Wendy  
Last Name: Desnoyers  
Classification: IS-02  
Job Title: Graphic Designer

Work Email: wendy.desnoyers@ic.gc.ca  
Home Email: wendy@whipler.com  
Web Page: <sup>e3</sup> <http://wiki.ic.gc.ca/display/PROFI>

**Phone Numbers**

Business Phone: 613-948-1212  
Home Phone: 613-742-7833  
Mobile Phone: 613-295-1518  
Fax Number: 613-954-3724

**Address**

Street: Room 702D  
235 Queen Street  
City: Ottawa  
State/Province: Ontario  
Zip/Postal Code: K1A 0H5  
Country/Region: Canada

Note: The field below will not be displayed on ANY reports. It is to be used for your own personal notes not pertaining to any projects or task. Please do not write in someone elses notes section.

This is a space where you can store personal notes. Anyone who has access to the system can view these notes.

It could be a place to share your vacation times. For example:  
**HOLIDAYS**  
December 23, 2008 - January 2, 2009

You could have reminders in here. For example:  
**REMINDER**  
1 day volunteer a year (taken)  
1 day personal a year (taken)

Calibri 11

**B I U** <sup>e6</sup>

test

The information in the **Employee Details** will not be shown on any reports. Only the employee name is used. If you need to add a new employee to the list, please see the administrator.

In the navigation bar, when you click on <sup>e1</sup> *Email Employee* it will open a pre-addressed empty Outlook email message to that employee.

Under the <sup>e2</sup> *General* tab in the <sup>e3</sup> *Web Page* field, you can have a link to your wiki profile or a website that relates to you if you do not mind sharing it with others. Please indicate the <http://> at the beginning of the URL to ensure the link works properly.

To add your <sup>e4</sup> photo, you can double-click on the empty box. A pop-up window will come up and you can add a picture. Images must be under 200 KB. Please consult with the administrator before adding an image.

The <sup>e5</sup> Notes box is a space where you can store personal notes. Anyone who has access to the system can view these notes. This would be a great place to mark vacation times, reminders, etc.

Note boxes allow Rich Text, which means that formatting is supported. If you highlight the text and move your mouse slightly above the text and let go of the mouse button the <sup>e6</sup> formatting box will appear.

If you click on the <sup>e2</sup> Projects or Tasks tabs, it will list the projects and tasks that employee is responsible for.

## Client Details

In the Project Details screen or the Client List report, you can double-click on the client and it will pull up the Client Details screen, as seen in Figure 6 below.

Figure 6 – Client Details

The screenshot shows the 'Client Details' screen in the 'ATS ACTIVE TRACKING SYSTEM'. The page title is 'Client Details' and there is a 'Close' button in the top right. The main content area has two tabs: 'General' (selected) and 'Client's Projects'. The 'General' tab contains the following fields:

- Full Name: Vivian Bierman
- Branch: PSSB (dropdown menu)
- Job Title: Information Products Officer
- Email Address: vivian.bierman@ic.gc.ca
- Web Page: (empty field)
- Phone Numbers:
  - Business Phone: 613-957-6541
  - Home Phone: (empty field)
  - Mobile Phone: (empty field)
  - Fax Number: (empty field)
- Business Address:
  - Street: 706A - 235 Queen Street
  - City: Ottawa
  - State/Province: Ontario
  - Zip/Postal Code: K1A 0H5
  - Country/Region: Canada

There is a 'Notes' section on the right side of the form, labeled 'ed4'. It contains a note: 'Note: The field below will not be displayed on ANY reports. It is to be used as your own personal notes on the client. Example: Past projects that a client worked on before changing Branch.' Below the note is a text area with the following text: 'This area can be used for information about the client.' and a bulleted list:

- Past projects
- What they do exactly
- What services they can offer IPC and our clients

The information appearing in the Client Details will not be shown on any reports. The only thing used is the client's full name and branch. If you want to add a new client, please see the administrator.

In the navigation bar, when you click on <sup>cd1</sup>*Email Client*, it will open a pre-addressed empty Outlook email message to that client.

The important information under the <sup>cd2</sup>*General* tab is: the client's *Full Name* and the *Branch* they are involved with. The <sup>cd3</sup>*Web Page* can be used for the clients' group website or their Wiki profile. Please use the <http://> in the website address to ensure the link is active. The <sup>cd4</sup>*Notes* section can be used to store information about the client, for example if there is a re-organization or if you want to keep information about stakeholders they were/are involved with.

If you click on the <sup>cd2</sup>*Client's Projects* tab you can view all the projects the client is involved with. If you need to add a new client, please see the administrator.

## Vendor Details

In the *Task Details* screen or the *Vendor List* report, if you double-click on a vendor it will pull up the screen seen in [Figure 7](#) below. This page is only to be used for external vendors. Example: Printers, translators and editors.

**Figure 7 – Vendor Details**

Vendor Details

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Vendor Details

v1 Email Contact Standing Offer Agreements and Supply Arrangements Close

General

v2 Company Name Gilmore Global v3 Services Printing

Primary Contact

v4 First Name Brian v5 Expertise Print supply-chain solutions

v6 Last Name Tomkinson Email tomkinsonb@gilmore.ca

v7 Job Title Account Executive Web Page [www.gilmore.ca](http://www.gilmore.ca)

Phone Numbers

Business Phone 613-592-2944 Ext. 3243

Mobile Phone 613-868-4320

Fax Number 613-271-1012

Business Address

Street 120 Herzberg Road

City Kanata

State/Province Ontario

Zip/Postal Code K2K 3B7

Country/Region Canada

v8 Notes

Vendor contacts are ONLY used for out of department contacts. Example: Printers, translators, editors

This area can be used for reminder information about this printer company, what they do, what they have, what type of supplier they are...ect.

Other examples would be to use this area to hold printers FTP information to their upload server.

Recommended?

In the navigation bar, when you click on <sup>cd1</sup>*Email Contact* it will open a pre-addressed empty Outlook email message to that vendor. When you click on the button <sup>cd1</sup>*Standing Offer Agreements and Supply Arrangements*, it will bring you to Industry Canada's Communications and Marketing Branch (CMB) website to show all current agreements.

The important information on this screen is the client's <sup>v2</sup>*Company Name*, <sup>v3</sup>*Services* and the representative's <sup>v4</sup>*First Name* and <sup>v6</sup>*Last Name*. If want to add a new vendor, please see the administrator.

Each vendor should have at least one <sup>v3</sup>*Services* selected. If the service they provide is not listed, select "Other" and notify the administrator.

The <sup>v5</sup>*Expertise* field is to specify any expertise they may have; for example, certain translators may have developed an expertise in TRM terminology or a printer is cleared to handle secret documents.

The <sup>v7</sup>*Job Title* field is for the primary contact's job title. This is not mandatory but it may be useful if there are multiple contacts for a company.

The <sup>v8</sup>*Notes* section (which also supports Rich Text), for ex., can be used for:

- additional information about a company (for ex., a printer that can handle secret documents);
- detailed information on their expertise (for ex., a translator who has a background in a specific field and therefore already familiar with a certain terminology);
- printer FTP information to their upload server.

If you used this vendor in the past and you feel we could confidently use its services again, check the *Recommended?* box .

## Reports

The Active Tracking System can generate many different reports that can be viewed on screen or printed out. Anytime you see a print button, you can print a report in 8.5 x 11 format. These reports are usually meant for management but they can also be useful to you.



*Even though every report can be printed, we encourage you to read everything electronically. If you must, please print double-sided copies.*

In the **Projects Home** page (see **Figure 1b** on page 4), the drop-down menu beside <sup>h3</sup>*Reports* gives you six report options:


- All IPC Current Projects
- Client List — Last 120 days
- Completed/On Hold Projects — Last 120 days
- e-Portfolio
- IPC Employee List
- Vendor List

## All IPC Current Projects

The All IPC Current Projects report is used to replace the current Snapshot report. The list is sorted by Branch and will only display projects that have the *Status* “In Progress” or “As Needed”. If a project is “Not Started”, “Completed”, or “On Hold”, it will not be shown.

In this view, the *Project Name*, *Task*, *Project Lead*, *Assigned To* and *Clients* fields are clickable and will pull up the proper fields if you want to modify something.

## Report 1 — Printout — All IPC Current Projects



### IPC Current Projects

Manager: Judy MacDonald  
Industry Promotion and Communications  
Wednesday, September 16, 2009 12:48:15

Project Name	Project Lead	Priority	End Date	Status
dfgfg	Michelle Marok-Cooper	Global Reach	26-Jun-09	In Progress

Client(s)  
Geoff Nimmo  
 Evaluation

Project Folder ID: 11

---

**The Managers' Network**

**Project Description**  
The Managers' Network cte. Will meet over plan new activities and promotions for the

**Task**  
Production Support  
Graphic Design, Meetings  
French Editing  
Web Development  
Advice, Meetings, Project Management  
English Editing

Project Folder ID: 5

**Organizational Chart**

**Project Description**  
Schedule times to take photos with new or and update the organization chart for ADM

**Task**  
Advice, Multimedia

Project Folder ID: 3

Manager: Judy MacDonald  
Industry Promotion and Communications  
Wednesday, September 16, 2009 12:48:22

**Publications Registrations** INDUSTRY SECTOR

Project Description	Project Lead	Priority	End Date	Status
Meeting with Peter Smith to be set up	Nicole Vachon	Knowledge Advantage	15-Nov-08	In Progress

Task	Assigned To	Due Date	Status	Client(s)
Meet with Peter Smith	Rose Hervieux		As Needed	Vivian Bierman
Meet with Peter Smith	Barbara Brocken		In Progress	
Meet with Peter Smith	Nicole Vachon	08-Jun-09	Completed	

Project Folder ID: 16  Evaluation

---

**IPC Services Promotion/Outreach** INDUSTRY SECTOR

Project Description	Project Lead	Priority	End Date	Status
dfg	Nancy Slade	Agility	04-Sep-08	As Needed

Task	Assigned To	Due Date	Status	Client(s)
dfdsfdfs	Michel Kurita	23-Oct-08	Completed	Vivian Bierman
Communication and Promotional Planning, Meetings	Wendy Desnoyers	23-Oct-08	In Progress	
web graphics	Wendy Desnoyers	26-Jun-09	Completed	
whats up	Michelle Marok-Cooper	30-Jun-09	Completed	
Meetings, Production	Judy MacDonald	02-Sep-09	Completed	
meeting	Rose Hervieux	26-Sep-09	Completed	
Project Management	Wendy Desnoyers	23-Oct-09	Completed	

Project Folder ID: 10  Evaluation

---

**Working Group on Official Languages (OLO)** INDUSTRY SECTOR

Project Description	Project Lead	Priority	End Date	Status
Fall event in development: (Bill 41 – 40th anniversary)	Rose Hervieux	Global Reach	24-Sep-09	In Progress

Task	Assigned To	Due Date	Status	Client(s)
Advice, Meetings, Project Management	Nicole Vachon	27-Aug-09	In Progress	Roni Powell
French editing	René Béchard	20-Sep-09	Completed	Vivian Bierman

Project Folder ID: 4  Evaluation

---

r1 Please insert project name here LSIB

Project Description	Project Lead	Priority	End Date	Status
	Michel Kurita	Global Reach		In Progress

Project Folder ID: 26  Evaluation

Total Projects: 9

Page 3 of 3

If the <sup>r1</sup>*Project Name* was never changed or an <sup>r2</sup>*End Date* is past due, it will appear in red. This should be corrected immediately because if you print it as is, this information will appear in red in the report.

## Client List — Last 120 days

The **Client List** report shows all the clients we have used in the last 120 days (quarter) with the option to *Print* in the top navigation bar. This gives you access to an up-to-date list whenever you need it. You can also click on *All Clients* in the top navigation bar to view all clients sorted alphabetically by last name.

## Report 2 — Client List — Last 120 days


Contact Name	Branch	Job Title	Business Phone
<b>B</b>			
<a href="#">Elaine Bambrick</a>	ADMO	Manager	
<a href="#">Vivian Bierman</a>	PSSB	Information Products Officer	613-957-6541
<b>C</b>			
<a href="#">David Chase</a>	SICPB		
<b>G</b>			
<a href="#">Nicola Gall</a>	PSSB		
<b>H</b>			
<a href="#">Charles Hall</a>	SICPB	SCPM Director	
<b>N</b>			
<a href="#">Geoff Nimmo</a>	PSSB		
<b>P</b>			
<a href="#">Dan Paroski</a>	PSSB		
<a href="#">Roni Powell</a>	INDUSTRY SECTOR		
<b>W</b>			
<a href="#">Jeff Waring</a>	PSSB	Senior Advisor	

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## Completed/On Hold Projects — Last 120 days

The **Completed/On Hold Projects** report lists all the projects with a “Completed” or “On Hold” *Status*. If a *Task* has an “In Progress” *Status*, the task will show in red. The default view shows only the projects that were completed in the last 120 days. Storing more than 120 days would result in a very large file that could potentially bog down the system. If yearly reports are needed, please discuss this with the administrator.

## Report 3 — Completed/On Hold Projects — Last 120 days



### Completed and On Hold Projects

---

Manager: Judy MacDonald  
Industry Promotion and Communications
Friday, September 18, 2009
15:05:59

---

**lkjkl** ADMO

Project Description	Project Lead	Priority	End Date	Status
	Wendy Desnoyers	Global Reach	19-Aug-09	On Hold

Project Folder ID: 24  Evaluation

---

**hguhy** ADMO

Project Description	Project Lead	Priority	End Date	Status
	Wendy Desnoyers	Global Reach	19-Aug-09	Completed

Client(s)  
Dan Paroski

Project Folder ID: 23  Evaluation

---

**hjj** ATIB

Project Description	Project Lead	Priority	End Date	Status
	Wendy Desnoyers	Global Reach	19-Aug-09	Completed

Project Folder ID: 22  Evaluation

---

**test** ATIB

Project Description	Project Lead	Priority	End Date	Status
test	Michelle Marok-Cooper	Knowledge Advantage	26-Jun-09	Completed

Client(s)  
Riaz Nathu  
Stephen Long

Project Folder ID: 19  Evaluation

---

**Testing** ATIB

Project Description	Project Lead	Priority	End Date	Status
	Michelle Marok-Cooper	Knowledge Advantage	26-Jun-09	Completed

Client(s)  
Geoff Nimmo

Project Folder ID: 12  Evaluation

---

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## e-Portfolio

The e-Portfolio is automatically generated when all the required information is filled in. This gives you a quick view of all the completed projects. If a row has any missing information, it will have a colored background (see example next page) and the project will not appear in the e-portfolio. If you need to add or change information, click on the *Project Name* to open the **Project Details** window. An attachment can be added by the administrator or one of the graphic designers.



## Report 6 — IPC Employee List

ats ACTIVE TRAINING SYSTEMS		Employee List		
Employee Name	Business Phone	Home Phone	Mobile Phone	
<b>B</b>				
René Bélchard				
Barbara Brocken				
Monik Burchinshaw				
<b>D</b>				
Wendy Desnoyers	613-948-1212	613-742-7833	613-295-1518	
<b>H</b>				
Rose Herveux				
<b>K</b>				
Michel Kurita				
<b>M</b>				
Judy MacDonald				
Michelle Marok-Cooper	613-948-1211			
<b>S</b>				
Nancy Slade				
<b>T</b>				
Elizabeth Thompson				
<b>V</b>				
Nicole Vachon				

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## Vendor List

The **Vendor List** is sorted out by Service category. If a company offers multiple services it may be listed several times. If you click on the vendor, the **Vendor Details** window will open. You can use the *Print* button in the navigation bar or view all vendors alphabetically — with no repeats — by clicking on the button *Alphabetical Vendor List*.

## Report 7 — Vendor List

ats ACTIVE TRAINING SYSTEMS		Vendor List				
Contact Name	Company	Job Title	Expertise	Business Phone	Mobile Phone	Recmd?
<b>Graphic Design</b>						
Charlie Smith	Ryan/Smith Design and Marketing	Sales rep	Graphics	613-241-9711		<input type="checkbox"/>
Christine Lajoie	Kaloom Communications	Sales rep	Graphics	819-772-4621		<input type="checkbox"/>
Christine Lawson	Media Box Communication Inc	Sales rep	Graphics	613-562-3408		<input type="checkbox"/>
Craig Cebyrk	Acart Communications	Sales rep	Graphics	613-230-7944		<input type="checkbox"/>
Elaine Nadeau	Aubut & Nadon	Sales rep	Graphics	613-744-0444		<input type="checkbox"/>
Genevieve Blouin	Alphabet Creative Blouin	Sales rep	Graphics	613-244-0858 x 222		<input type="checkbox"/>
Gilbert Turcotte	d3x Communications	Sales rep	Graphics	819-771-5710		<input type="checkbox"/>
Gord McWilliams	Carison Graphic Design	Sales rep	Graphics	613-235-1065		<input type="checkbox"/>
Johanne Bedard	Kameleon & Cie	Sales rep	Graphics	819-243-0222		<input type="checkbox"/>
Les Stuart	ACR Communications	Sales rep	Graphics	612-235-5357		<input type="checkbox"/>
Stephen Osborne	E&V Design	Sales rep	Graphics	613-722-6036		<input type="checkbox"/>
<b>Printing</b>						
Brian Tomkinson	Gilmore Global	Account Executive	Print supply-chain solutions	613-592-2844 Ext. 3243	613-868-4320	<input checked="" type="checkbox"/>
Dave Phillippe	St. Joseph Print Group	sales rep	Printing	613-740-3338	613-266-9801	<input checked="" type="checkbox"/>
Deborah Lovegrove	Dolco Printing	sales rep	Printing	613-738-9181x491	613-878-1296	<input type="checkbox"/>
Keith Fields	National Printers	sales rep	Printing	613-225-0250	613-795-6666	<input type="checkbox"/>
Nadir Siddiqui	FND Graphics	sales rep	Printing	613-738-1059x215	613-299-1276	<input type="checkbox"/>
Richard Danis	Delta Printing	sales rep	Printing	613-736-777x256	613-292-2937	<input type="checkbox"/>
Steve Bacon	Dolco Printing	sales rep				<input checked="" type="checkbox"/>
<b>Strategic Communications and Marketing Services</b>						
Bernard Gauthier	Delta Media	Sales Rep		613-233-9191		<input type="checkbox"/>
David Rodier	National Public Relations	Sales Rep		613-233-1699		<input type="checkbox"/>
Jeremy Byatt	The Strategic Council	Sales Rep		613-599-1070		<input type="checkbox"/>
Joy Jennison	Hill Knowlton	Sales Rep		613-238-4371		<input type="checkbox"/>

Friday, September 18, 2009 Page 1 of 2



# Annexes

## Printouts – Projects by *Assigned To*

ats ACTIVE TRACKING SYSTEM		Projects by Assigned To			
Project Name	Status	Start Date	End Date	Count of Tasks	
The Managers' Network	In Progress	28-Jun-08	07-Aug-09	5	
IPC Services Promotion/Outreach	In Progress	15-Sep-08	04-Sep-08	6	
Canada's Service Sector Ecosystem	In Progress	20-Aug-09		2	
				3	


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## Printouts – Tasks by *Assigned To*

ats ACTIVE TRACKING SYSTEM		Tasks by Assigned To				
Project Name	Task	Due Date	Priority	Status	% Complete	
<b>Wendy Desnoyers</b>						
osmosIS-Osmose	Update the website with this months articles	20-Aug-09	(1) High	In Progress	100%	
Canada's Service Sector Ecosystem	Create graphical design		(2) Normal	In Progress	98%	
IPC Services Promotion/Outreach	YEY!	23-Oct-08	(2) Normal	In Progress	0%	
Organizational Chart	Take photos / update the org chart	24-Sep-09	(2) Normal	In Progress	100%	
Subtotal			4			

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## Printouts – Project Details



# Project Details

Monday, August 24, 2009 12:51:09

### The Managers' Network ADMO


Project Description	Project Lead	Priority	End Date	Status
The Managers' Network cte. Will meet over the summer to plan new activities and promotions for the fall.	Nancy Slade	Knowledge Advantage	07-Aug-09	In Progress

Project Notes	English Portfolio Description	French Portfolio Description
Meet with Donna & Marie-Helene to discuss plan.		

Task	Assigned To	Due Date	Status	Client(s)
Update the website	Wendy Desnoyers	23-Sep-09	Completed	Vivian Bierman
Provide marketing advice and support as required	Nancy Slade	24-Sep-09	Completed	
Editing material on website	Elizabeth Thompson	25-Sep-09	Completed	

Project Folder ID: 5  Evaluation


# Printouts – Task Details



## Task Details

Monday, August 24, 2009 12:54:36

Update the website with this months articles

<b>Project</b>	osmosIS-Osmose	<b>Task Description</b>
<b>Status</b>	In Progress	<i>This is for your own information on the task. For example, it could be used for a reminder message or next steps.</i>
<b>Priority</b>	(1) High	<b>Example:</b>
<b>Assigned To</b>	Wendy Desnoyers	<ul style="list-style-type: none"><li>• French translation completed and inputted into the brochure.</li><li>• Shown to client and awaiting approval.</li><li>• Need to send to printers by Friday.</li></ul>
<b>% Complete</b>	100%	
<b>Due Date</b>	20-Aug-09	
<b>Start Date</b>	25-Jun-09	
<b>Attachments</b>	 (0)	

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## Challenge

To develop a system aimed at organizing and tracking IPC's current and completed projects, and report to management in an efficient and effective manner.

## Background Information

IPC has been considering adopting a better way of keeping track of its projects. Officers have been asked questions such as who worked on a project, what was done, when it was done, how much it cost, and so on. The tool currently used is the snapshot report — a Word file. We have had difficulties with the template such as when someone has it open and another can't input into it, the layout gets jammed up, or it doesn't get updated as often as we would like. Overall, it doesn't have the function to sort information or add more details to make it more useful and user-friendly.

In the past, we have looked into other options but we could never find a software easy enough to use with the many qualities we were looking for. After the teams' meeting with PSSB's Director General in May 2008, we started looking again and found that Microsoft Access 2007 was very close to what we would need with better features. It was time to create a dynamic interface to better serve our group and to generate reports with ease.

## Solution

The system will be useful for all IPC employees, and it will be important for all to keep it updated. Each team member has different operational needs and wants. However, we will have to keep the system as realistic and uncluttered as possible. The objective is to store information that can easily be pulled up at any time. It need not contain documents and information that are not necessary for reporting, but it should be clear on where to get working files and project evaluations. The process will be the same as for the Snapshot except that more data will now be collected.

### **For the work unit — the system replacing the Snapshot report will:**

- be simple and easy to use;
- give a quick view of what everyone is working on, individually or as a team;
- allow the reader to select a project or task, and view additional details;
- contain all assigned tasks, private notes, deadlines, and the status of tasks within the project;
- include printer specifications, quotes, and vendor information;
- allow team members to backup completed projects and re-open them at any time;
- generate an e-portfolio that is automatically updated.

## **For management — the system will:**

- generate reports (monthly/quarterly/yearly);
- track client satisfaction and feedback.

## **Proposed Strategy**

We propose a phased-in approach to developing and implementing the system.

### **Phase One**

The main purpose for Phase one is to build a fully functional, easy-to-use system to replace the Snapshot report and backup completed projects. This will provide the data needed to generate reports and auto-generate our e-portfolio.

#### **Phase One Development**

Many things need to be done before implementation. In the development stage, a technical plan will be created to keep track of the issues at hand as the system is being built. Wendy Desnoyers will be building the system. Another team member will take Microsoft Access 2007 training as a back-up function for Wendy. Both will be the system's administrators and will perform daily backups.

After the system is built, there will be a testing phase to see how it works. When fully functional, all IPC staff will have Microsoft Access 2007 Runtime loaded on their machine.

Wendy Desnoyers will provide a one-day or half-day training session for all IPC team members to explain and show how the system works. A manual, prepared by Wendy, will be distributed at that time as a reference document. It will contain key information on how the system works, with a full description of the fields and their requirements.

#### **Phase One Implementation**

##### **Replacing the Snapshot and Creating a Backup of Completed Projects**

The front end of the system will have a very basic webpage look and feel that will be user-friendly for the team. Each employee will have 2–3 views to begin with in order to get familiar with the system. Support will be given to each IPC member when they first input into the system to ensure everything has been understood and works well.

There will be ongoing testing to see how the system is handling the information being inputted and to see if everything is updating properly. Any bugs will be worked out as they are being identified. Throughout this phase, the administrators will gather feedback, recommendations and log issues to take into consideration in Phase two.

## Phase Two

In Phase two, all testing would be completed and everyone would be using the system.

### **Phase Two Implementation Expansion and Detailed Reports**

At the start of the second phase, the group will meet to discuss any concerns raised during Phase one. At this time, this plan will be updated to incorporate additional changes and to focus on detailed reporting.

After the Phase two plan is reviewed and all considerations have been addressed, the technical plan will be updated and changes will be made to the system. Once the new system is functioning well, the manual will be updated and distributed. Another training day will be scheduled for the group. Ongoing testing and performance measurement will take place to improve the system.

### **Next Steps (2008–2010)**

- May 2008, development of the Active Tracking System was started.
- From June 23–26, 2008, Wendy Desnoyers attended Access training. Her back-up, will attend training at a later date.
- On June 24, 2009, a viewing of the system was held with Charles Hall to show its capabilities.
- At the request of Charles Hall an additional meeting was held with Gerald Robertson the following day to address any concerns.
- On June 26, 2009, the issue of purchasing software was resolved when the use of the free Microsoft Access 2007 Runtime was tested on another system. Testing commenced after setting up a restricted folder on the s drive. The system worked in the restricted area and updated on the fly on two systems without installing any additional software. Further testing with multiple computers will now be looked into.
- End of September — A discussion will take place with Charles Hall, Gerald Robertson and some of the IPC members about any concerns before continuing the development phase.
- End of October — The administrator will complete developing the manual and set up training days for the team.
- Beginning of November — Completion of the developmental phase and start of Phase one implementation.
- Phase two is expected to start in the Spring 2010.

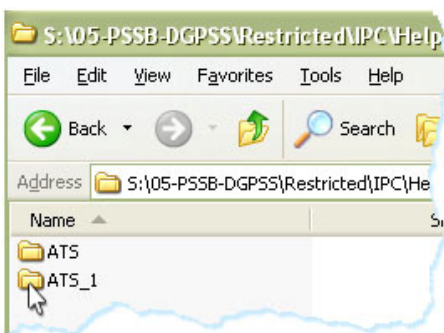


The ATS can be installed very easily. The setup file will install Access Runtime 2007 on your computer as well as the front end of the system. The back end that holds all the data is held on the S drive and can only be accessed by the IPC group. This area is backed up every day so if you are having any issues please see the admin, Wendy.

To install the system please go to the following link:

<S:\05-PSSB-DGPSS\Restricted\IPC\Help Files\ATS Install>

If you do not have access to this area you will need to speak to the admin. This is a restricted area that only members of our group should see.



If there are multiple folders in this area, double-click on the most recent one (the highest number see image).

1. Double-click on setup.exe
2. A window will pop up, wait until the Next button is highlighted, then click Next.



3. The next screen will have name. Just leave it as is and click Next.
4. Click on Typical install and Next.
5. Click Finish.
6. Press Okay and then Okay again.

**Enjoy!**

### To Update or Uninstall

Click on Start > Settings > Control Panel > Add or Remove Programs and wait for the window to load. Near the top of the list you should see the Active Tracking System (ATS). Click on the ATS icon, and select Remove, then press okay.