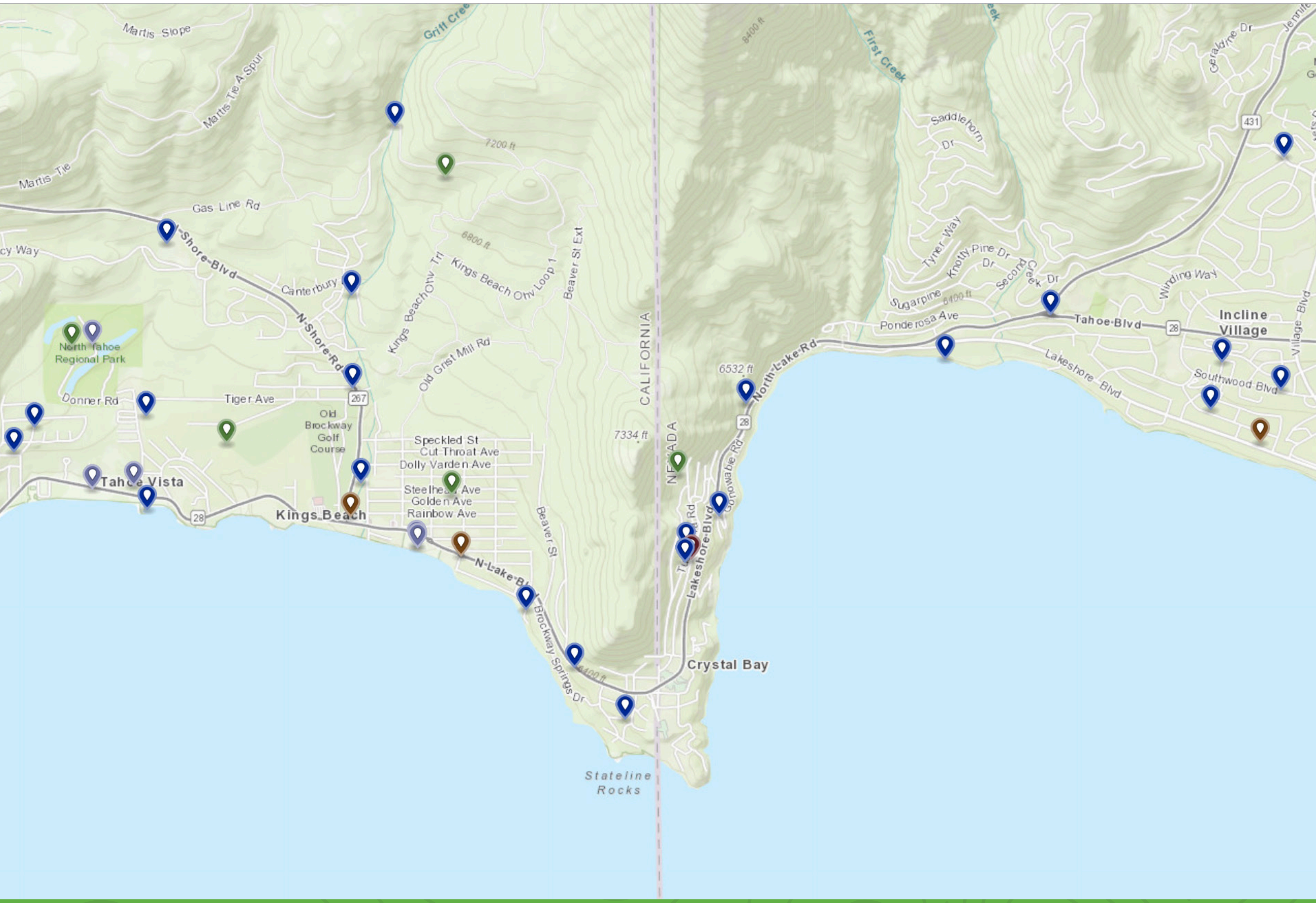
ProjectFirma™



ProjectFirma™ Customization Guide

A guide to the administrative tools and best practices for personalizing your ProjectFirma instance.

sitka® technology group

TABLE OF CONTENTS

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 launching your own instance of the ProjectFirma open-source platform.

PLATFORM FEATURES

While ProjectFirma can be customized and extended to meet specific program requirements, every instance includes the following baseline features:

- **Program Tracking**
  - Program map that shows all projects mapped by environmental outcomes and/or regulations
  - Project proposal workflow for partners and implementers to propose new projects
  - Project reporting workflow for implementing partners to report expenditures and accomplishments
  - Project fact sheets that are auto-generated and ready to print
  - Project mapping through interactive web-GIS or by uploading an ArcGIS geodatabase
  - Project detail page with rich content editors to specify partners, expenditures by funding source, performance measures, before and after photos, and links to regional objectives
- **Hierarchical Project Classification System**
  - Configurable project classification system to identify projects in a flexible way, such as:
    - Conservation targets
    - Regulatory frameworks
    - Program taxonomies
    - Strategic plan goals and objectives
  - Roll up project accomplishments and expenditures for custom reporting based on project classification
- **Funding Source Management**
  - Overview page for each funding source
  - Ability to associate funding sources with organizations and projects
  - Map and tabular display of all projects associated with each funding source

- **Performance Measure Management**
  - Overview page for each performance measure
  - Quantitative tracking of project performance measure impacts
  - Charts and tables showing annual performance measure results
  - Map and tabular display of all projects associated with each performance measure

- **Organization Management**
  - Overview page for each partner organization
  - Map and tabular display of all projects associated with each organization

- **User Account Management**
  - Account management handled using Sitka's Keystone Identity Manager™
  - Users can request accounts and manage passwords without administrator intervention

PLATFORM CONFIGURATION

With ProjectFirma, there are three ways that projects are categorized and quantified. These are:

1. Taxonomy / Hierarchical
2. Themes / Classifications
3. Performance Measures / Quantitatively

The labels and values for each categorization can be customized. A good place to look when defining these parameters are required annual reports and recent grant submittals. Structuring the project categorizations to align with existing reporting needs can facilitate using your ProjectFirma instance to better support ongoing activities.

Taxonomy

A taxonomy is a hierarchical structure used to slot projects into mutually-exclusive categories for reporting and analysis purposes. This approach is useful when "rolling up" reports for expenditures or metrics, as there is no double-counting of projects across the taxonomy. The number of taxonomy tiers is set in the system by Sitka and an administrator can add, edit, and/or remove elements in the tiers through the Manage menu. Some notes and limitations about the taxonomy:

- Can be a 1, 2, or 3-tiered hierarchy
- Can only have one taxonomy in the system
- Each taxonomy element must have a unique name
- Can assign each of the elements at the top-level hierarchy a color that shows on the hierarchy page and on the project map
- Each project should have a primary association with only one item in the lowest level of the hierarchy
- ProjectFirma can also support secondary taxonomy assignments for each project (A Sitka administrator must turn on this functionality before the ProjectFirma instance will support multiple secondary relationships)

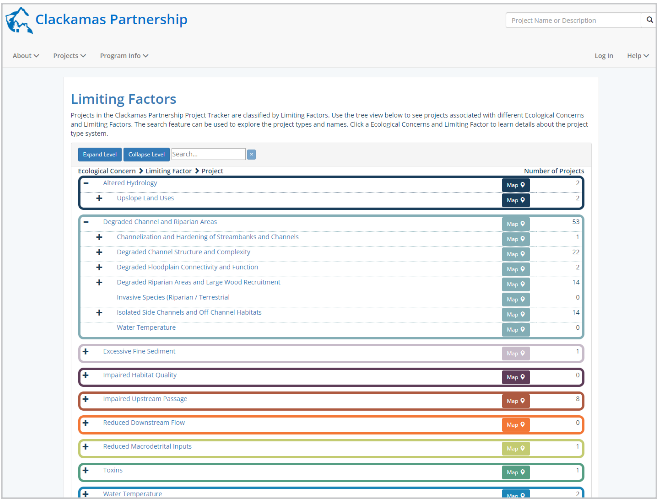


Figure 1: An example of a two-tiered taxonomy of limiting factors and ecological sub-concerns.

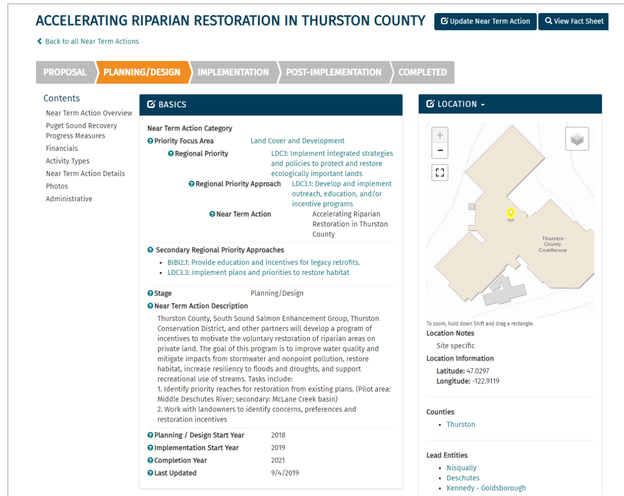


Figure 2: An example of secondary taxonomy assignments.

TWO-TIER TAXONOMY EXAMPLES

- **Lake Tahoe Transportation Tracker**
  Strategy > Objective > Project
  transportation.laketahoeinfo.org/ProgramInfo/TransportationTaxonomy

- **Clackamas Partnership Project Tracker**
  Ecological Concern > Limiting Factor > Project
  www.clackamaspartnership.org/ProgramInfo/Taxonomy

- **California RCD Project Tracker**
  Resource Area > Program > Project
  www.rcdprojects.org/ProgramInfo/Taxonomy

THREE-TIER TAXONOMY EXAMPLES

- **Environmental Improvement Program Project Tracker**
  Focus Area > Program > Action Priority > Project
  eip.laketahoeinfo.org/ProgramInfo/EipTaxonomy

- **Action Agenda for Puget Sound**
  Priority Focus Area > Regional Priority > Regional Priority Approach > Near Term Action
  actionagenda.pugetsoundinfo.wa.gov/ProgramInfo/Taxonomy

KEY DECISIONS

- **How many tiers to use?**
  Fewer is simpler to define and manage, but it allows for less granular reporting.

- **What values to define for each tier?**
  Check out the examples above for inspiration.

Themes / Classifications

Themes and classifications provide the ability to capture the multi-benefit nature of projects. A project can be assigned as many classifications as desired. Up to two distinct and independent classification systems can be defined. The number of classification systems and the name of each system is configured by Sitka, and an administrator can add and/or edit each system through the Manage menu. Some notes and limitations about the classification systems:

- Each classification system is a list of project classifications and each element in the classification system must have a unique name
- Each classification system can be assigned a color and an image
- While there can be multiple classification systems, user experience will be degraded if there are more than two
- Each project can be associated with one or more elements in each classification system

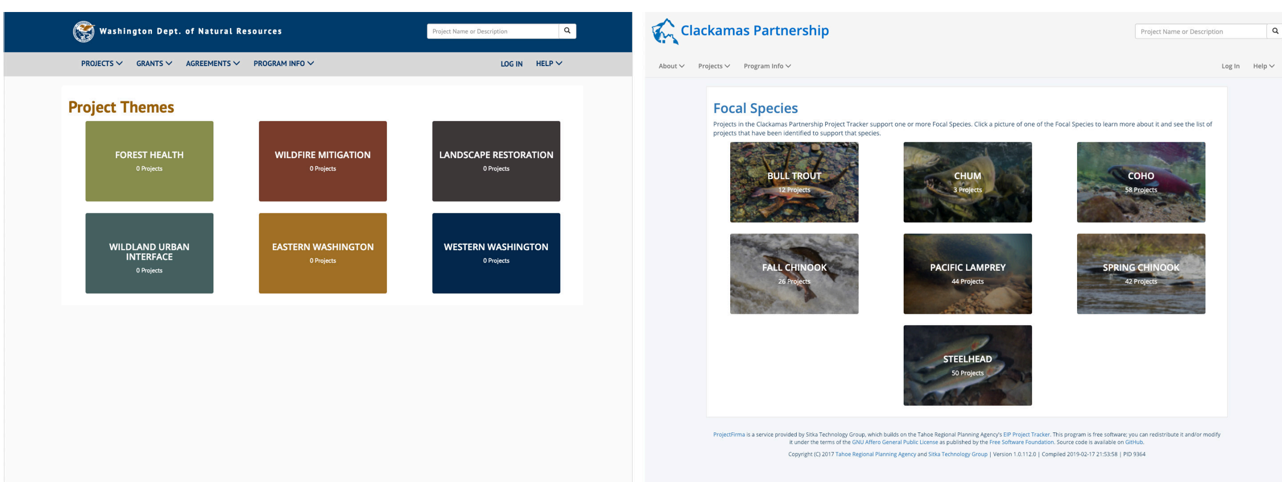


Figure 3: Examples of classification systems with and without images.

THEME AND CLASSIFICATION EXAMPLES

- **California RCD Project Tracker**
  Project Themes
  www.rcdprojects.org/ProgramInfo/ClassificationSystem/2
- **Clackamas Partnership Project Tracker**
  Focal Species
  www.clackamaspartnership.org/ProgramInfo/ClassificationSystem/1
- **Environmental Improvement Program Project Tracker**
  Environmental Threshold Categories
  thresholds.laketahoeinfo.org

KEY DECISIONS

- **What name to use for the classification system?**
- **What values to define for the classification system?**
- **What will be the key images, theme colors, and goal statement for each classification?**

Performance Measures

Performance Measures are used to quantify the project benefits. They are entered for both “Expected” values for planned future projects and “Reported Accomplishment” for projects that are underway or complete. Performance Measures can be reported across multiple dimensions via “subcategories.” For example, if the Performance Measure is “Acres of Forest Fuels Reduction” a subcategory could be “Forest Type” and options would be “Deciduous” or “Evergreen.”

PERFORMANCE MEASURE EXAMPLES

- **Environmental Improvement Program Project Tracker**
  EIP Performance Measures
  eip.laketahoeinfo.org/EIPPerformanceMeasure/Index
- **California RCD Project Tracker**
  RCD Performance Measures
  www.rcdprojects.org/PerformanceMeasure/Index
- **Clackamas Partnership Project Tracker**
  Clackamas Partnership Performance Measures
  www.clackamaspartnership.org/PerformanceMeasure/Index

KEY DECISIONS

- **What label to use for the Performance Measures? (Some prefer the term "Indicator" or "Metric")**
- **What is the appropriate list of Performance Measures?**

SITE CONFIGURATION

The following can be customized by the client's program administrator.

Home Page

ProjectFirma's home page supports an optional image carousel, custom content, and featured projects. Home page images and featured projects can be added through the Manage menu. Custom page content can be edited using the in-page editor.

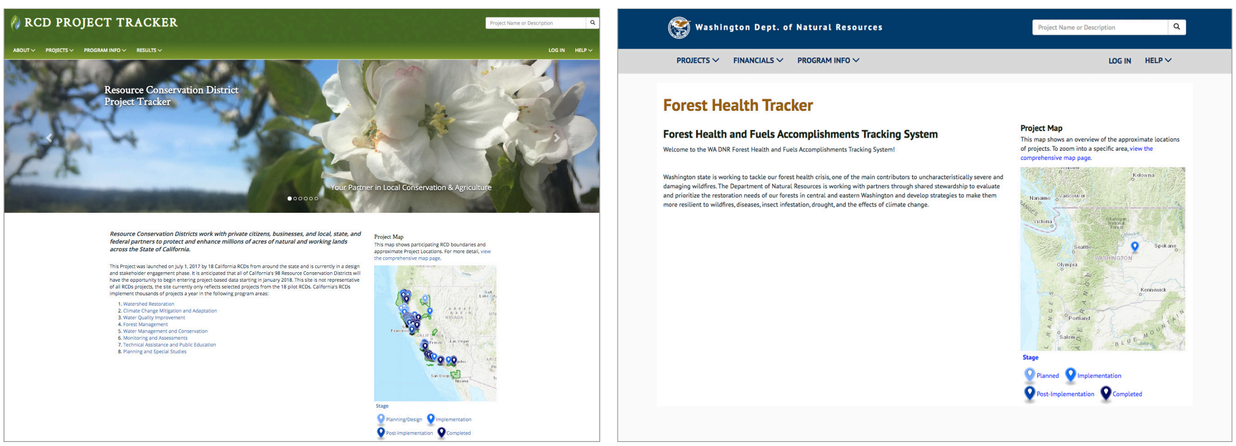


Figure 4: Examples of home pages with and without image carousel and featured projects.

IMAGE CAROUSEL

- Optional
- Optimized for 3-6 images
- Notes on how to select images:
    - Images need to work for a variety of screen resolutions/aspect ratios
    - Preview how the images respond to narrow browser windows; be sure to view on your smartphone and compare portrait and landscape modes
    - If the focal point of interest is in the middle of the image, it tends to work well
    - High resolution images are always better
- Can specify image caption and sort order for all images

CUSTOM CONTENT

- Rich-text editor can be used to layout content that appears to the left of the project map (see the following Custom Page Content for more information)

FEATURED PROJECTS

- Optional
- Optimized for 3-6 projects
- Appears as a carousel if there is more than one featured project

Custom Page Content

Throughout ProjectFirma, there are sections of the pages reserved for optional custom content. When logged in, administrators see a gray box with an "Edit" button in the upper right where custom content can be added. The custom content is usually below the page title at the top of each page. Administrators can add narrative content or rich text (e.g., bulleted lists, links, tables, images) using the in-page editor or access a full list of all pages with optional custom content through the Manage menu.

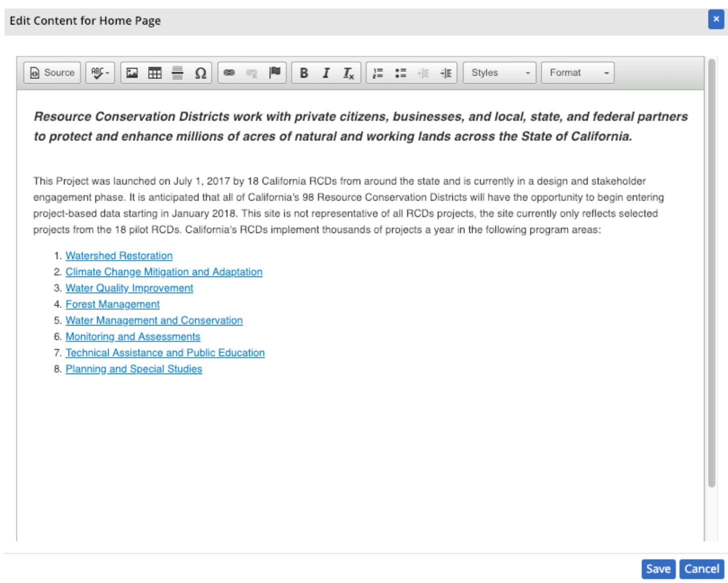


Figure 5: Custom home page content editor.

Custom Pages

ProjectFirma supports one or more free-form pages accessible via any publicly visible menu item. Custom pages added to the About menu will be listed alphabetically, whereas those added under other menus will be listed alphabetically but after the built-in menu items. An administrator can edit the page title, the page content, the menu item the page appears under, and the status of the page. The page status controls who can view the page. Protected pages are only visible to logged-in users and public pages are visible to any site visitor. If a page is disabled, it doesn't appear in the menu. Custom pages can be managed through the Manage menu.

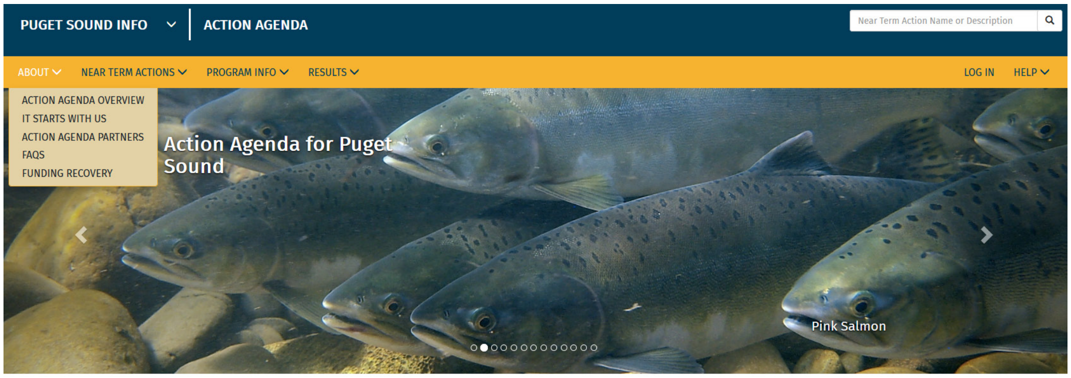


Figure 6: About menu with five public pages.

Document Library

A document library is a collection of documents organized by document category. Document libraries can be managed through the Manage menu. An administrator can edit the document library name, description, selected document categories, and the Custom About page(s) on which the library appears. After creating a document library, an administrator can upload documents to the library on the document library's detail page. Administrators can edit the document title, optional description, and document category. Administrators can also select which user roles can view the document to control visibility (administrators can view all documents). Supported file formats for uploads include pdf, zip, doc, docx, xls, xlsx, ppt, pptx.

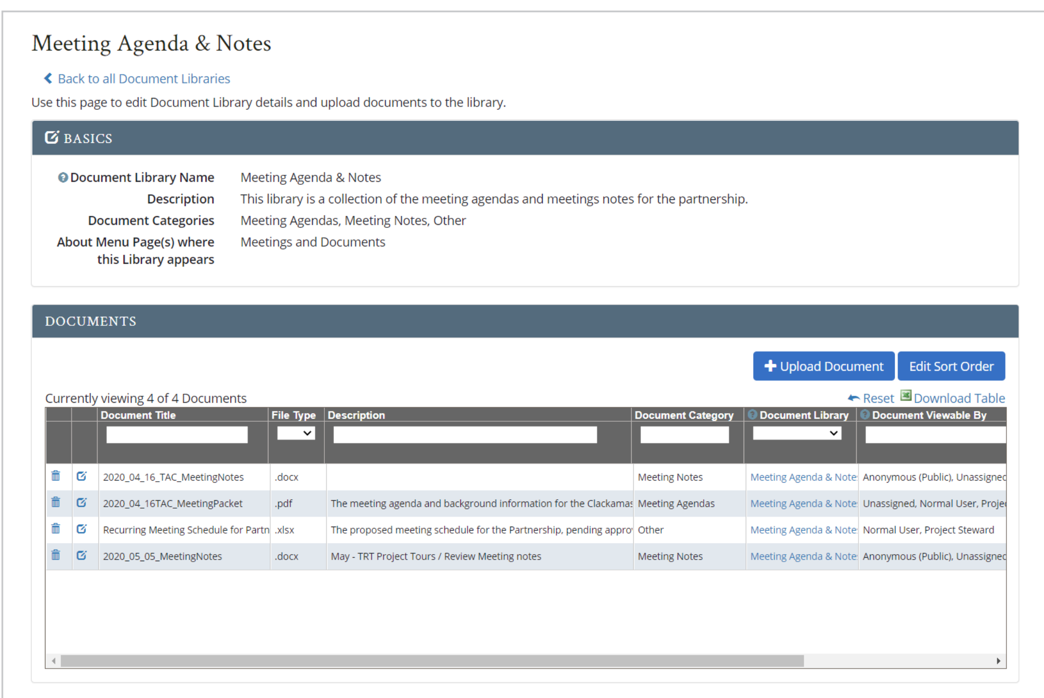


Figure 7: An example of a Document Library called "Meeting Agenda & Notes.

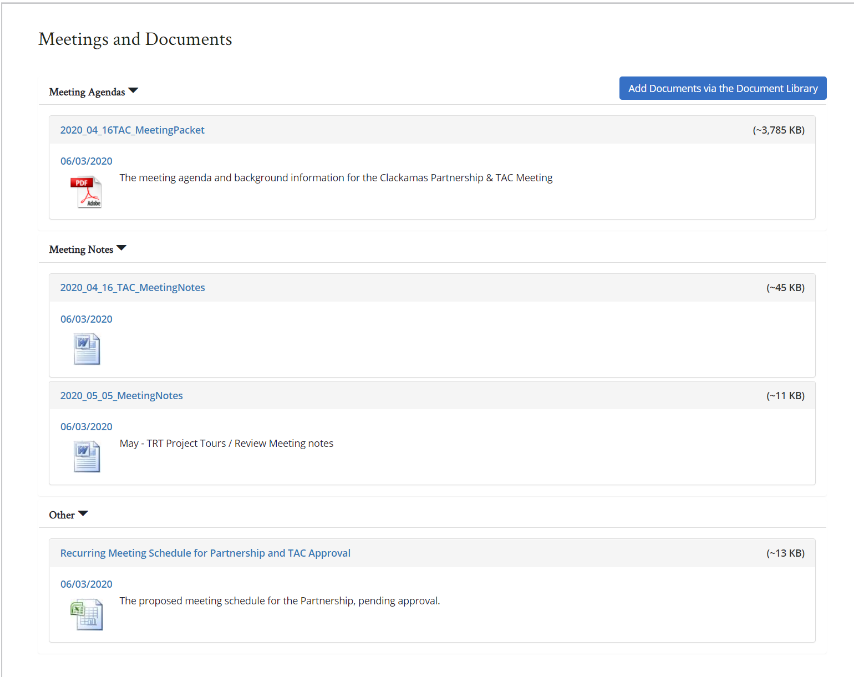


Figure 8: An example of an About page titled "Meetings and Documents" that contains a Document Library called "Meeting Agenda & Notes.

Field Names and Definitions

The terminology of each ProjectFirma instance can be defined by an administrator by setting field names and definitions for terms used throughout the system. There are over 100 fields that can be defined through the Manage menu. These definitions provide guidance or help to users who are viewing or editing information in the system. Definitions are visible to users when viewing a page or editor that lists these fields (e.g., the summary page for a project).

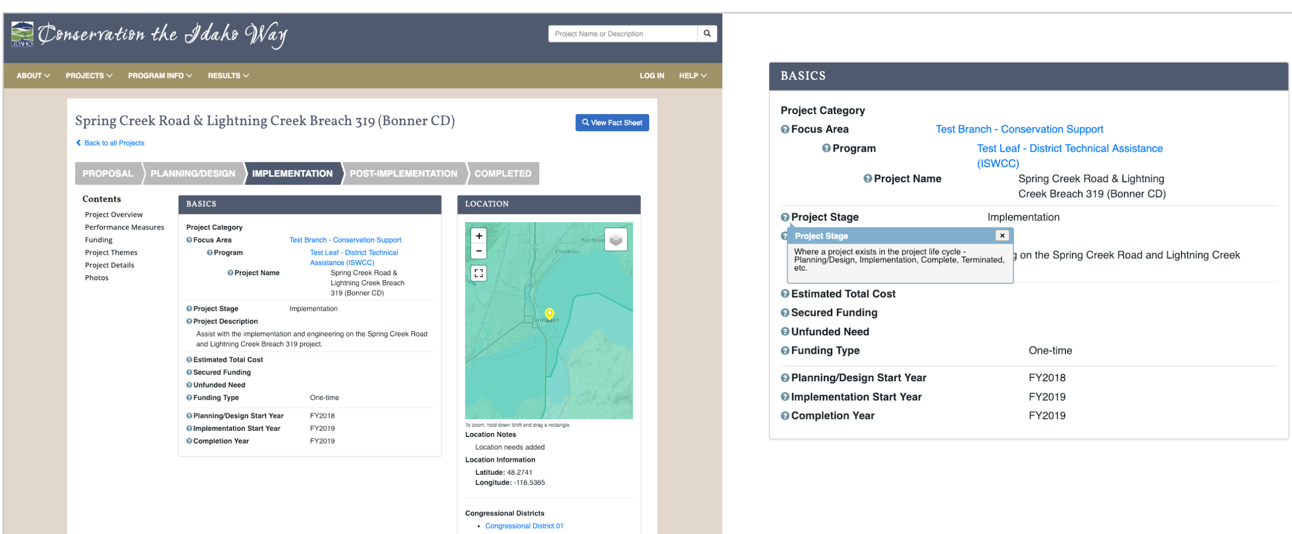


Figure 9: Field definitions are used throughout the site to provide users with guidance for unusual or unknown terms. The definitions are available by clicking the "?" icons next to the terms.

Project Custom Attributes

ProjectFirma includes built-in support for tracking many basic project attributes (e.g., project name, description, start/end dates) and the ability to add additional custom attributes that are program specific. An administrator can define many custom attributes by specifying the name and description of the attribute, the type of data to be collected (e.g., integer value, a single selection from a list of options), and whether the attribute is required for all projects. An administrator can also control the visibility and editability of custom attributes and assign them to Custom Attribute groupings. An administrator can control if the attribute is displayed in the project grid using the Customize Project Grids feature. Custom attributes can be added and edited by an administrator through the Manage menu.

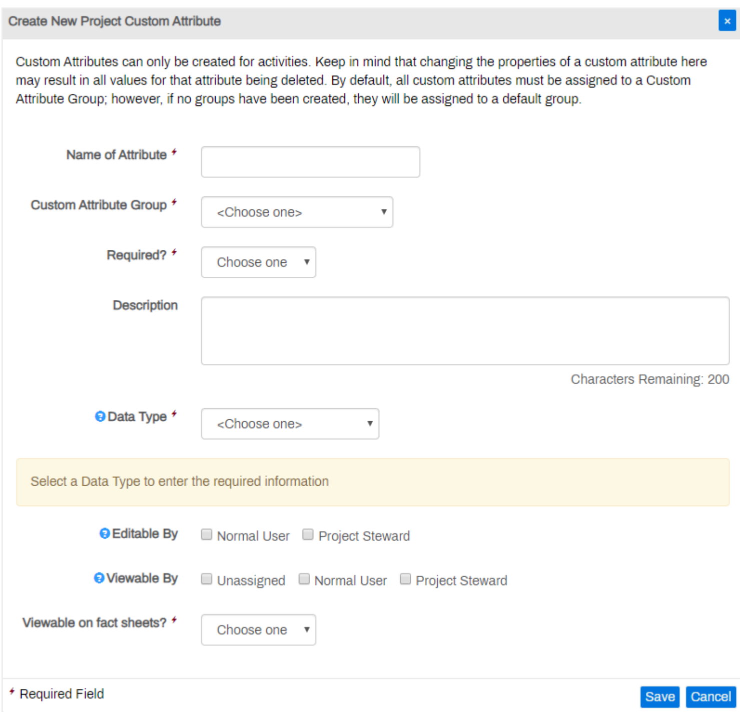


Figure 10: Example of how to add a custom project attribute. Data types include: decimal value, integer value, string, date/time, pick one from a list of options, pick many from a list of options, long string (text box), and true/false.

Funding Source Custom Attributes

ProjectFirma includes built-in support for tracking project financials by funding source. The funding source has several system-defined attributes (e.g., funding source name, description, organization) and the ability to add custom attributes to capture program-specific metadata. An administrator can define many custom attributes by specifying the name and description of the attribute, the type of data to be collected (e.g., integer value, a single selection from a list of options), and whether the attribute is required for all funding sources. Funding source custom attributes can be added and edited by an administrator through the Manage menu.

Project Categories

ProjectFirma can handle two project categories, “normal” projects and “administrative” projects. Users can capture different information for each category using custom attributes that apply to only one, or both, of the project categories. The following image shows a user choosing whether to categorize a new project as “Normal” or “Administrative,” which will modify which custom attributes and custom attribute groups show up on the subsequent “Custom Attributes” step of the workflow.

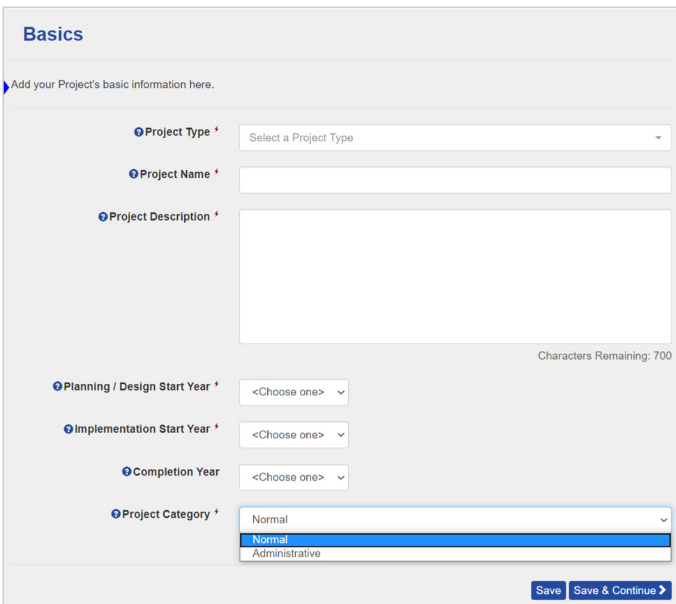


Figure 11: A user can categorize a project as “Normal” or “Administrative” via the Project Category dropdown.

A custom attribute group can be defined and then associated to a Normal project category, an Administrative project category, or both categories. This results in a modification to the project create and update workflows that allows capturing different information by project category.

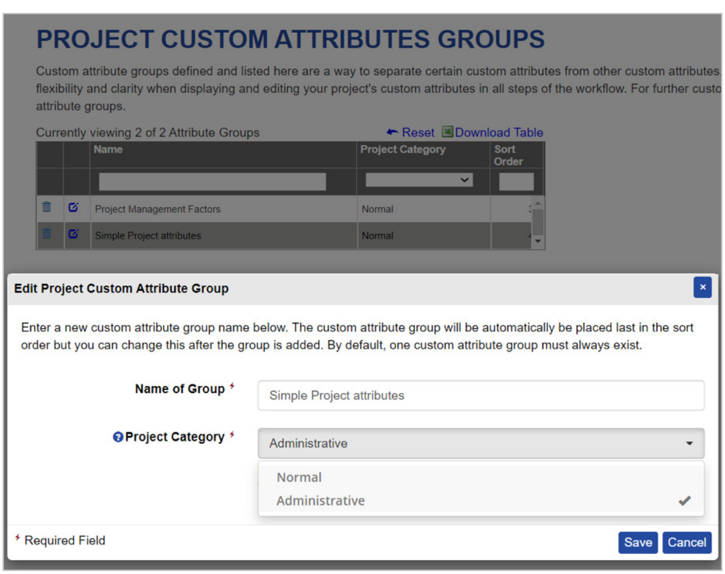
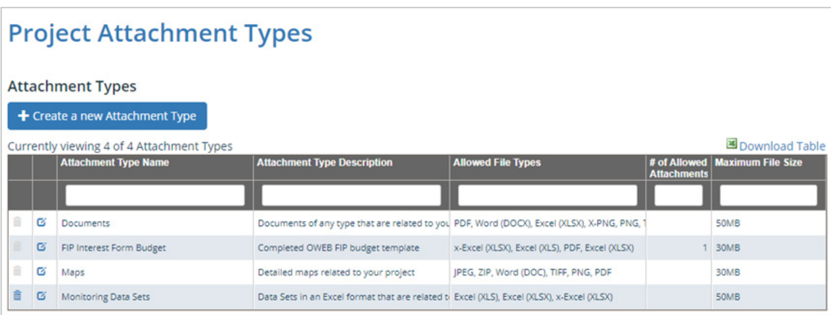


Figure 12: Example of editing a Project Custom Attribute Group.

Project Attachment Types

Project attachments can be organized according to attachment type, which can be defined by program administrators. Attachments are grouped by type on the Project Detail page, and they can be added/viewed/edited/deleted in one place by program administrators in a project attachments grid. Additional controls are available to administrators to set the maximum number of files, maximum file size, and limit the accepted file types for a given attachment type. An administrator can also restrict attachment types by project taxonomy. For ProjectFirma instances who haven't defined custom attachment types, or would prefer not to, all attachments are in a default category called "Documents."



		Attachment Type Name	Attachment Type Description	Allowed File Types	# of Allowed Attachments	Maximum File Size
		Documents	Documents of any type that are related to you	PDF, Word (DOCX), Excel (XLSX), X-PNG, PNG, T		50MB
		FIP Interest Form Budget	Completed OWEB FIP budget template	x-Excel (XLSX), Excel (XLS), PDF, Excel (XLSX)	1	30MB
		Maps	Detailed maps related to your project	JPEG, ZIP, Word (DOC), TIFF, PNG, PDF		30MB
		Monitoring Data Sets	Data Sets in an Excel format that are related t	Excel (XLS), Excel (XLSX), x-Excel (XLSX)		50MB

Figure 13: Attachments types can be added/viewed/edited/deleted in one place by program administrators.

Project Update Schedule and Reminders

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's primary contact(s) with a request to update the project. An administrator can use the Configure Reporting Period and Reminders panel on the Manage Project Updates page to enable project update reminder emails and customize the email content and reminder schedule.

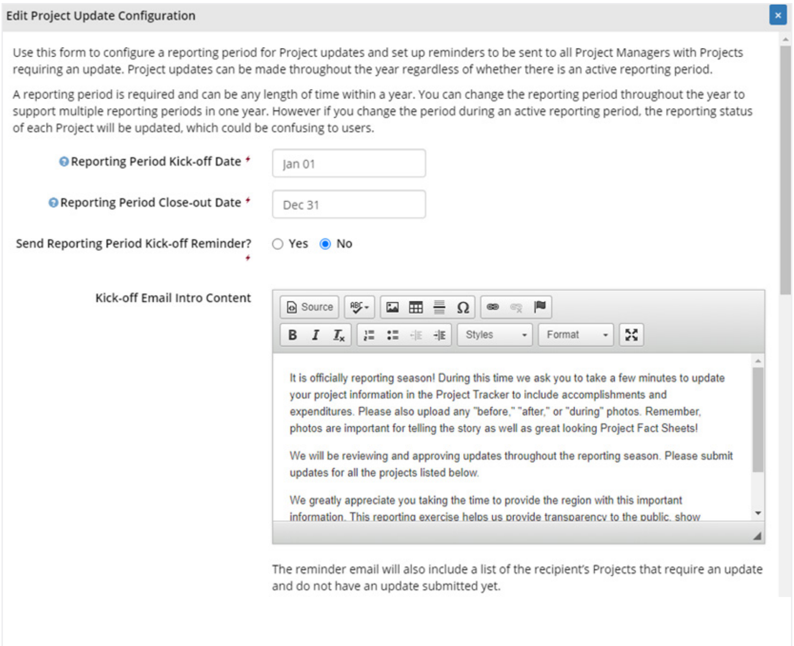


Figure 14: Example of how to enable project update reminders and customize both email content and reminder schedule.

Custom Project Grids

A program administrator can customize the columns that appear in project data grids. From the Manage menu, select "Project Custom Grids." On this page, the administrator can select which columns to show and in what order. There are two configurations currently available, one is for the Full Project Grid and another is for Default grids that appear on many pages throughout the site (e.g., classification, taxonomy).

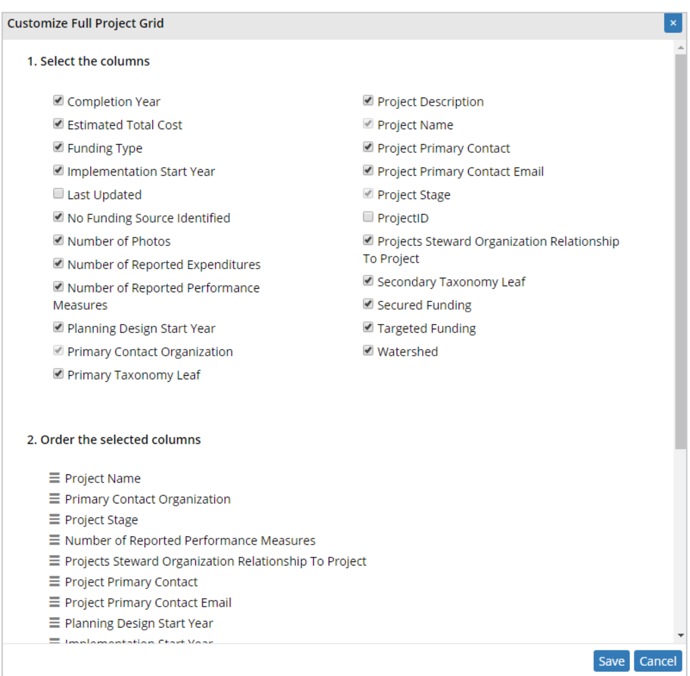


Figure 15: The administrator can select which columns to show and in what order.

Custom Reports

ProjectFirma now supports a report templating system. Within the system, users create Microsoft Word (.docx) templates that can be used to generate reports on Projects within a given ProjectFirma instance. Since each user's goals and reporting needs can be different, the report templating paradigm was chosen because it is flexible and gives users freedom in how and what they report on.

While generating report templates requires some technical expertise, it gives end users more latitude and power to create, modify, and share reports as they choose. The following is an example of a template created in Word, and then used to generate the report immediately below it.

```
<%= Model.ReportTitle %>

<% var projects = Model.ReportModel; %>

Example Report: <%= Model.ReportTitle %>
<% foreach(var project in projects) { %>

<%= project.ProjectName %>
<% var keyPhoto = project.GetProjectKeyPhoto(); %>

<% if(keyPhoto != null) { %>

<% Image(keyPhoto.Image); %>

<% } %>

Description
<%= project.ProjectDescription %>

Contacts
<% var contacts = project.GetProjectContacts(); %>
```

Figure 16: An example of a template created in Word that is used to generate a report.

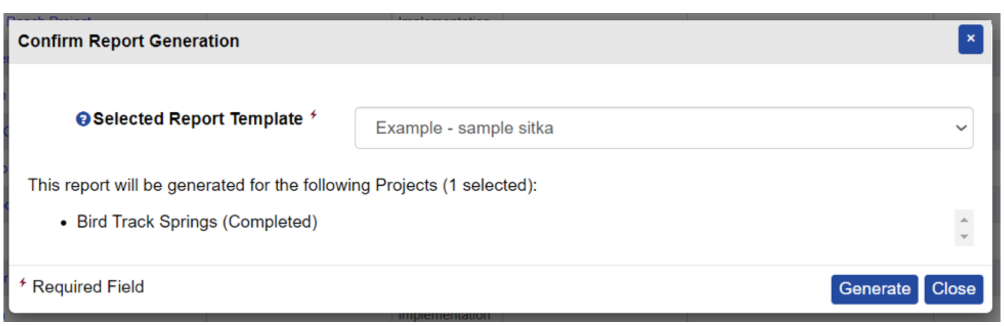


Figure 17: Using the template to generate a report of a single project. A user can select as many projects from the system as they like.

Example

Bird Track Springs (Completed)

Description

The United States Forest Service (USFS) and the Bonneville Power Administration (BPA) are proposing to restore habitat for spring/summer Chinook salmon, Steelhead, and bull trout within a 2-mile reach of the Grande Ronde River (GRR). The Bird Track Springs Fish Enhancement Project (project) would re-establish natural river-floodplain connections and processes. Natural processes within this reach of the GRR include multiple channel networks usually created through forcing mechanisms of large wood, ice, beaver, and rock. These actions are proposed to be implemented on the La Grande Ranger District of the Wallowa-Whitman National Forest (WWNF) and some adjacent private lands.

Contacts

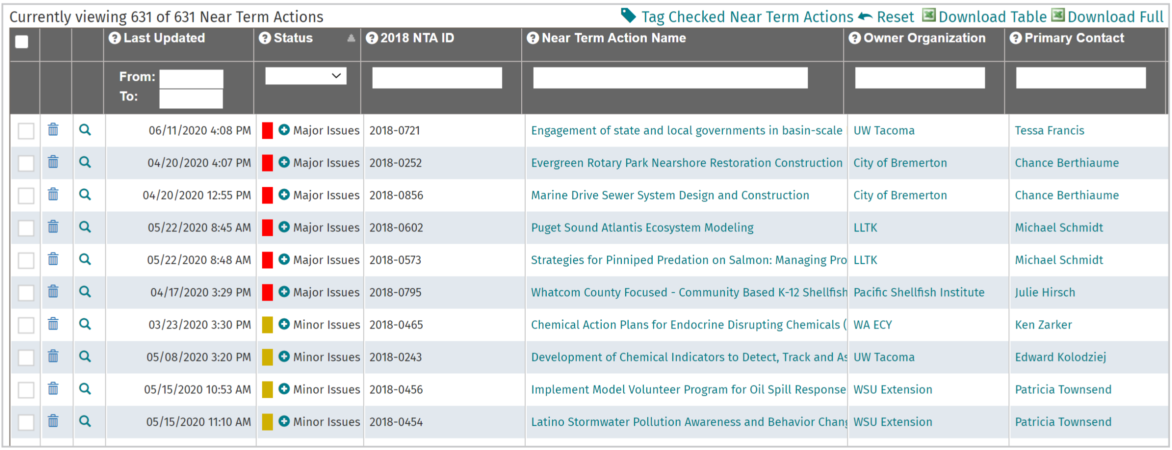
Below are the contacts for this project

Figure 18: An example of a ProjectFirma-generated report. A report can be further modified in Word if necessary.

Project Timeline and Status Updates

Administrators can view a project's update history and status in the form of a timeline to better visualize how a project has changed over time.

Current project status can be viewed and changed from the Full Project List grid, or within an individual project. Additionally, quarters displayed on the timeline can be modified to reflect the ProjectFirma instance's individual calendar or fiscal year cycles.



Currently viewing 631 of 631 Near Term Actions — Tag Checked Near Term Actions · Reset · Download Table · Download Full

			Last Updated	Status	2018 NTA ID	Near Term Action Name	Owner Organization	Primary Contact
			From: To:					
			06/11/2020 4:08 PM	Major Issues	2018-0721	Engagement of state and local governments in basin-scale	UW Tacoma	Tessa Francis
			04/20/2020 4:07 PM	Major Issues	2018-0252	Evergreen Rotary Park Nearshore Restoration Construction	City of Bremerton	Chance Berthiaume
			04/20/2020 12:55 PM	Major Issues	2018-0856	Marine Drive Sewer System Design and Construction	City of Bremerton	Chance Berthiaume
			05/22/2020 8:45 AM	Major Issues	2018-0602	Puget Sound Atlantis Ecosystem Modeling	LLTK	Michael Schmidt
			05/22/2020 8:48 AM	Major Issues	2018-0573	Strategies for Pinniped Predation on Salmon: Managing Pro	LLTK	Michael Schmidt
			04/17/2020 3:29 PM	Major Issues	2018-0795	Whatcom County Focused - Community Based K-12 Shellfish	Pacific Shellfish Institute	Julie Hirsch
			03/23/2020 3:30 PM	Minor Issues	2018-0465	Chemical Action Plans for Endocrine Disrupting Chemicals (	WA ECY	Ken Zarker
			05/08/2020 3:20 PM	Minor Issues	2018-0243	Development of Chemical Indicators to Detect, Track and As	UW Tacoma	Edward Kolodziej
			05/15/2020 10:53 AM	Minor Issues	2018-0456	Implement Model Volunteer Program for Oil Spill Response	WSU Extension	Patricia Townsend
			05/15/2020 11:10 AM	Minor Issues	2018-0454	Latino Stormwater Pollution Awareness and Behavior Chan	WSU Extension	Patricia Townsend

Figure 19: Users with sufficient permissions can quickly view, filter, sort, and update the status of all projects from directly within the Full Project List grid.

When viewing the timeline within a particular project, a more detailed view that shows system changes to a project (such as project updates) on the left of the vertical timeline, and user-provided project status updates on the right side of the timeline is available. This allows users to understand how a project and its risks have changed over its life.

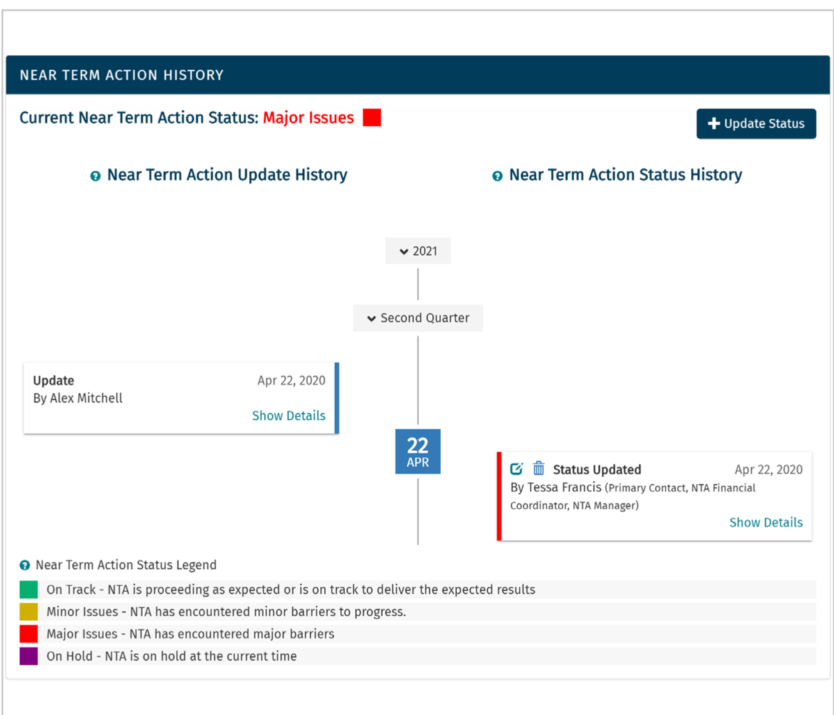


Figure 20: A more detailed view of a project timeline shows system changes to a project on the left and user-provided project status updates on the right.

Showing the details on a status update will display all of the information an instance has configured as relevant for capture as part of project status updates. Colors and descriptions can be modified according to preferences.

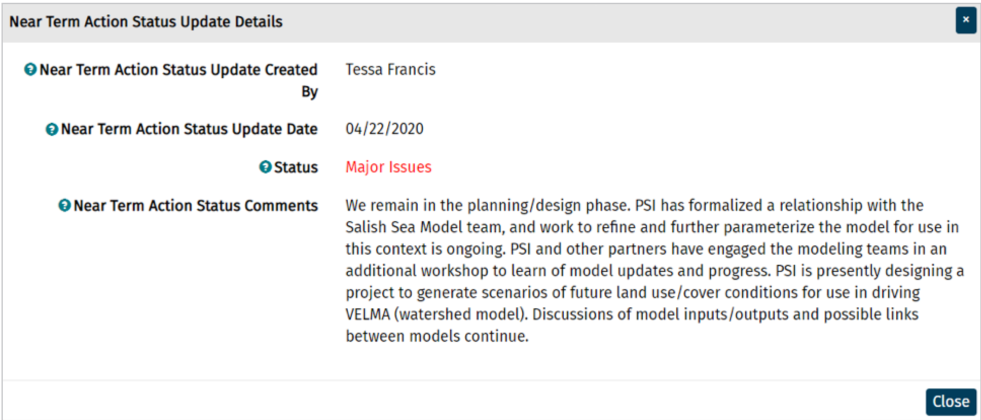


Figure 21: The "Show Details" view on a status update allows users to see comments and rationale for that status.

Sitka-Assisted Customizations

For technical and/or efficiency reasons, there are a number of customizable aspects of ProjectFirma that require Sitka's assistance to implement. Depending on the level of work, urgency of the request, and number of iterations, the customizations may require additional funding to implement.

PROJECTFIRMA TRACKER NAME AND URL

The system name, logo, browser tab short name, browser tab favicon, and URL are customizable by Sitka. We recommend providing these important elements early to limit the change management involved with switching URLs and re-branding the system.

OVERALL STYLE

The overall style of the site is set by a single stylesheet (CSS file) which can be provided or Sitka can create. If no stylesheet is provided, and if Sitka is not budgeted to create a custom "look and feel," ProjectFirma uses a default stylesheet. The styles can be previewed on the Style Guide page accessible through the Manage menu.

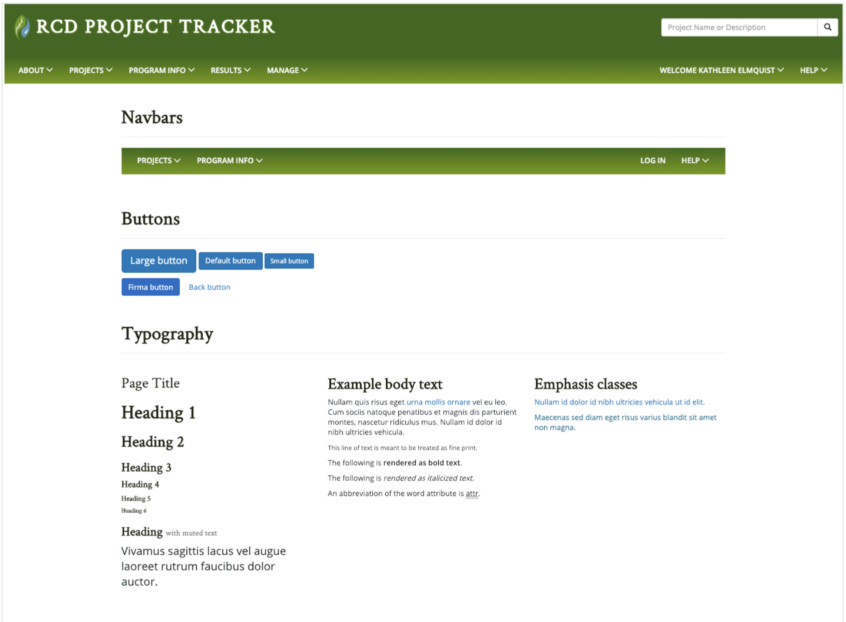


Figure 22: Style Guide page allows an administrator to preview web component styles.

GEOGRAPHIC AREAS

Up to five geospatial areas, such as watersheds, priority areas, and legislative district boundaries, can be included in ProjectFirma. Each geospatial area will have its own page under the Program Info menu, and have its own map layer. We can import your geospatial areas directly to ProjectFirma or configure your ProjectFirma instance to source areas from an external web service. We recommend selecting the external web service configuration if your geospatial areas periodically change. Changes to externally sourced geospatial areas can be synced on-demand by administrators (via “Map Layers” under the Configure menu).

Once the areas are imported or synced from an external web service, the system automatically rolls up associated project accomplishments and expenditures on each geospatial area detail page.

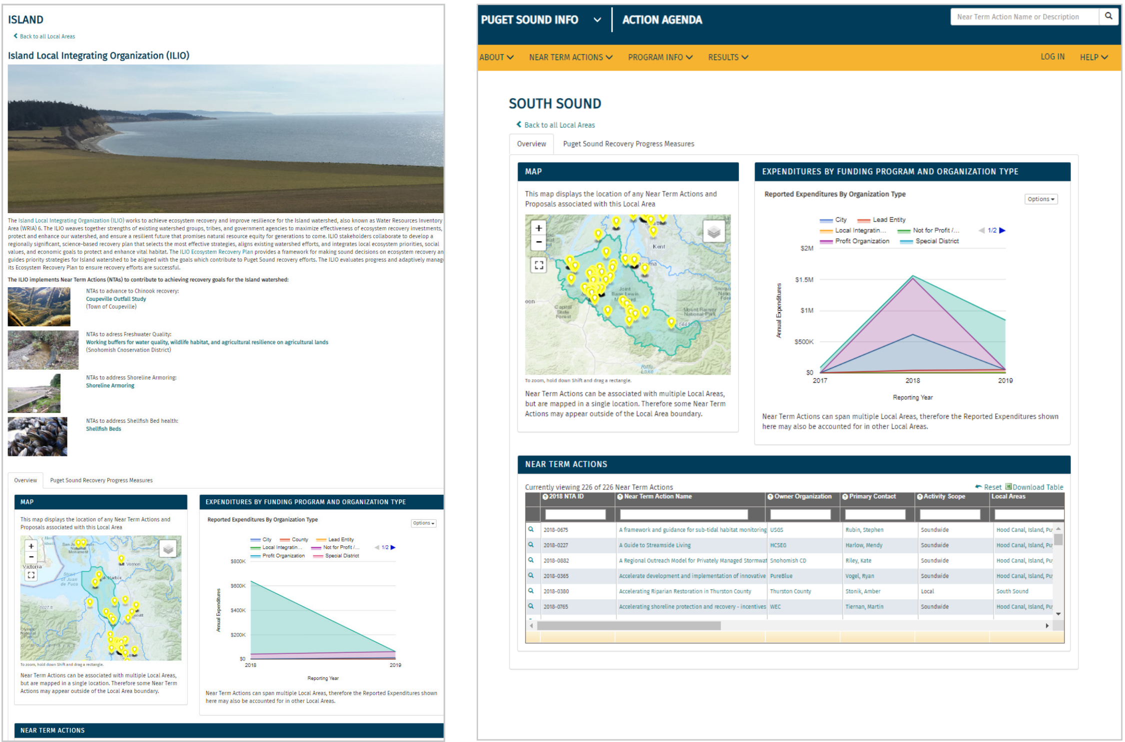


Figure 23: Administrators can customize introduction text and optionally add images at the top of each geospatial area detail page.

ORGANIZATION TYPES

ProjectFirma comes “out-of-the-box” with four organization types: federal, local, private, and state. If the system needs to support more types, they can be added on an as-needed basis by Sitka. We recommend using the system for awhile to determine which additional types are needed. The types of Organization-Project associations (e.g., Partner) can also be customized by Sitka.

CONTACT TYPES

ProjectFirma comes “out-of-the-box” with one contact type, which is the project’s primary contact. If the system needs to support more contact types, they can be added on an as-needed basis by Sitka. The types of Contact-Project associations (e.g., one association or allowing multiple contacts per type) can also be customized by Sitka. Contact types can also be configured to have the same project editing capabilities as primary contacts. A user can be a different contact type on different projects.

BUDGET TYPES

ProjectFirma has two options for budget type configurations: Simple Budget and Annual Budget by Cost Type. The simple budget allows a user to enter a budget by funding source with values for secured and targeted. The annual budget by cost type accommodates more detailed financial reporting. A Sitka administrator must set the configuration and specify the cost type values, and it is recommended to select the appropriate budget type early to limit the need for data migration or change management with partners. If Annual Budget by Cost Type is selected, users will be able to enter expenditures by cost type as well.

PROJECT EDITING AND APPROVAL PERMISSIONS

To ensure data quality, editing projects and approving pending projects, project proposals and updates can only be done by users who are authorized through their role in the system.

Administrators are users who are assigned the role "Administrator" in the system. They can edit all projects, assign other users a role, as well as manage the system (including all customizations mentioned in this document). We recommend limiting the number of system administrators to a few users who understand the tool and need access to add/edit organizations and manage user roles.

Project Stewards are users who are assigned the role "Project Steward" in the system. The field name "Project Steward" can be customized and defined through the Manage menu. (For more information, see the Field Name and Definitions section of this document.) Project Stewards can edit all projects and approve pending projects, project proposals, and updates. An optional customization is to define an attribute of a project that can be used to limit which projects a Project Steward can manage. For example, 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 a region to each Project Steward. The result is that Project Stewards can only manage projects in their assigned region(s).

PUBLIC OR PROTECTED PROPOSALS

The system can be configured to show or hide project proposals from the public. When the public option is set, projects in the pending approval state will be shown on project maps and on the proposal page. When the option is set to protected, no proposals will be visible to anonymous users (i.e., users who are not logged in).

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**

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