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THE UWI-TRINIDAD AND TOBAGO RESEARCH AND DEVELOPMENT IMPACT FUND

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Project Management Portal
User Manual

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RDI Fund Project Management Portal Technical Design Team

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Introduction

SharePoint 2010 is the business collaboration platform of choice for the enterprise and the Internet. For every business scenario in which people need to interact with other people, with content and information, or with line-of-business data, the SharePoint 2010 platform includes a rich set of integrated capabilities that are ready to be used out-of-the-box. This new SharePoint site, the RDI Fund Project Management Portal, has been customized to meet the specific operational and project management needs of The UWI- Trinidad and Tobago Research and Development Impact Fund (RDI Fund) and its grantees.

The Fund encourages grantees to collaborate in new and ingenious ways across their disciplines within academia but also by engaging with external, often non-traditional, collaborators and partners. The model we have developed focuses on stakeholder engagement, research applicability and visibility, and knowledge uptake and mobilization. Researchers are expected to produce high quality academic outputs, but it is equally important that they go beyond the academic, to focus on how their research activities can bring about real impact in the lives of people in our country and region, strengthening the synergy between scholarship and development impact. The Fund also brings a new element to academic research by incorporating project management, monitoring and evaluation, impact assessment, knowledge management and strategic communication in our management strategy to ensure that projects progress in reasonable time and remain committed to achieving real impacts in the lives of citizens of Trinidad and Tobago.

This new tool will assist projects to keep track of all these moving parts in a more efficient manner, improve project documentation, and enable the Fund to better monitor project activity between reporting periods. Use of this tool will benefit grantees by aiding project management and administration, making project reporting and sharing of project information with team members, partners and collaborators easier as well as increasing accountability. This user manual is an introductory guide for project leaders and administrators of RDI Fund projects for use of the Project Management Portal. Should any issues arise while using this system, contact the RDI Fund Secretariat at rdifund@sta.uwi.edu.

Getting Started

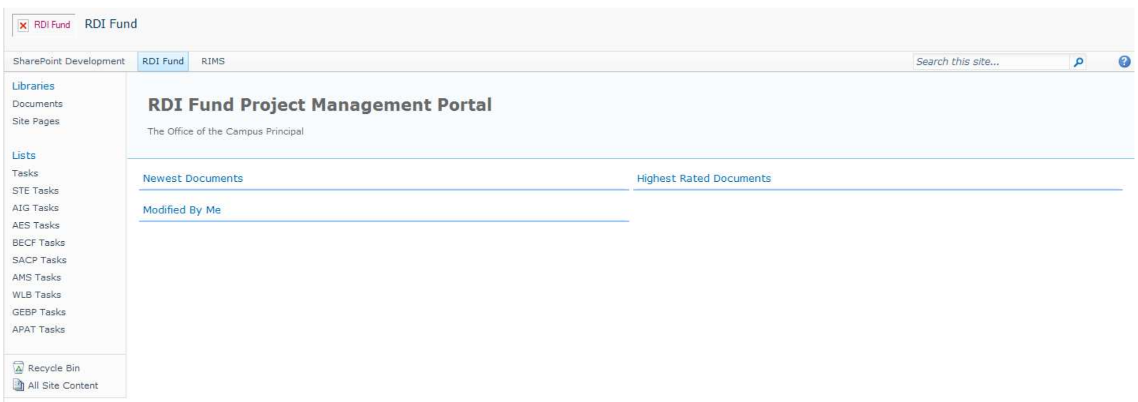
Logging in

To access the system you will need a valid UWI Domain account. Every employee that has a ".sta.uwi.edu" email address has a domain account. Similarly, the credentials that are used to access your UWI provided computer, or the Campus intranet will allow you to access the site.

To log in head over to the URL: https://intranet.sta.uwi.edu/rdifund/

You will then be prompted to enter your access credentials. Enter your username and password.

After successfully logging into the site, you will be greeted by this interface.

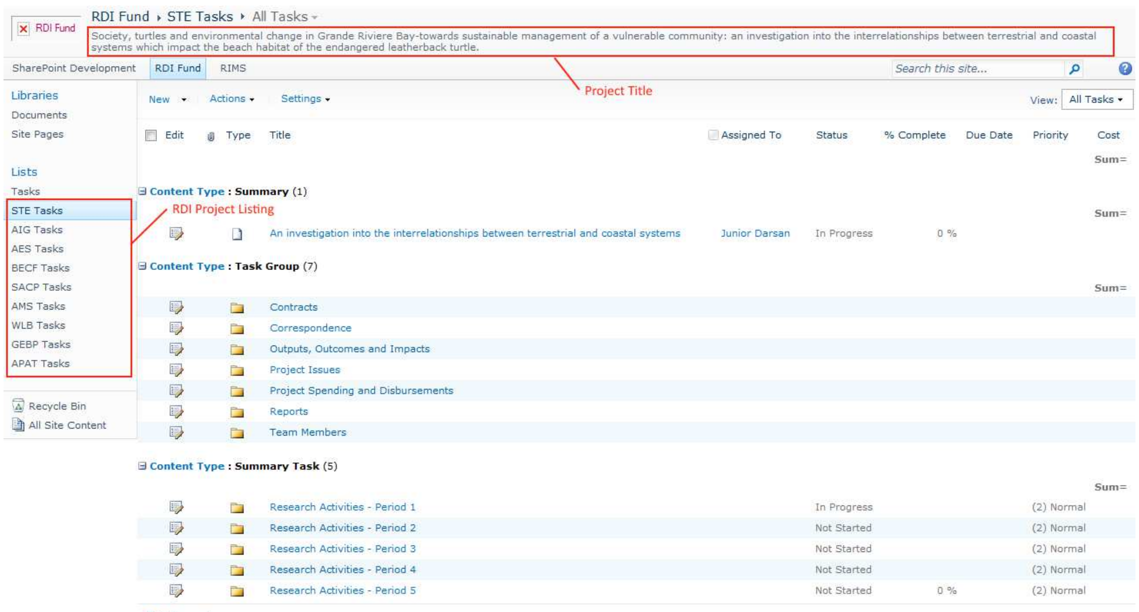


This screen may contain a summary of your recent tasks, or notes from the RDI Fund Administrators.

Project leads and their approved designates will only be able to access and edit their own project task folder. In order to approve access to your project folder by a designate (e.g. your project manager), contact the RDI Fund secretariat at rdifund@sta.uwi.edu.

Project Tasks

To get started editing your project's tasks, you will first have to locate the acronym for your project in the left column. Contact the RDI Fund Secretariat at rdifund@sta.uwi.edu if you are unable to locate your project's task folder. To verify that you have selected the correct project, you will see the title visibly displayed at the top of the site.



After selecting the correct project, you can proceed to make changes to the content. (If you have not selected the correct project, you will not be allowed to view or edit the project's content).

Content Types

To help standardize the way that information is collected and stored we have provided a number of content types and content folders that allow users to get started quickly. Additionally, these content types will help guide users on the type of data being collected.

There are two main categories of content types that can be added to the site:

1. Folders
2. Tasks

There are two main types of folders that can be created within the site:

1. Task Group
2. Summary Task

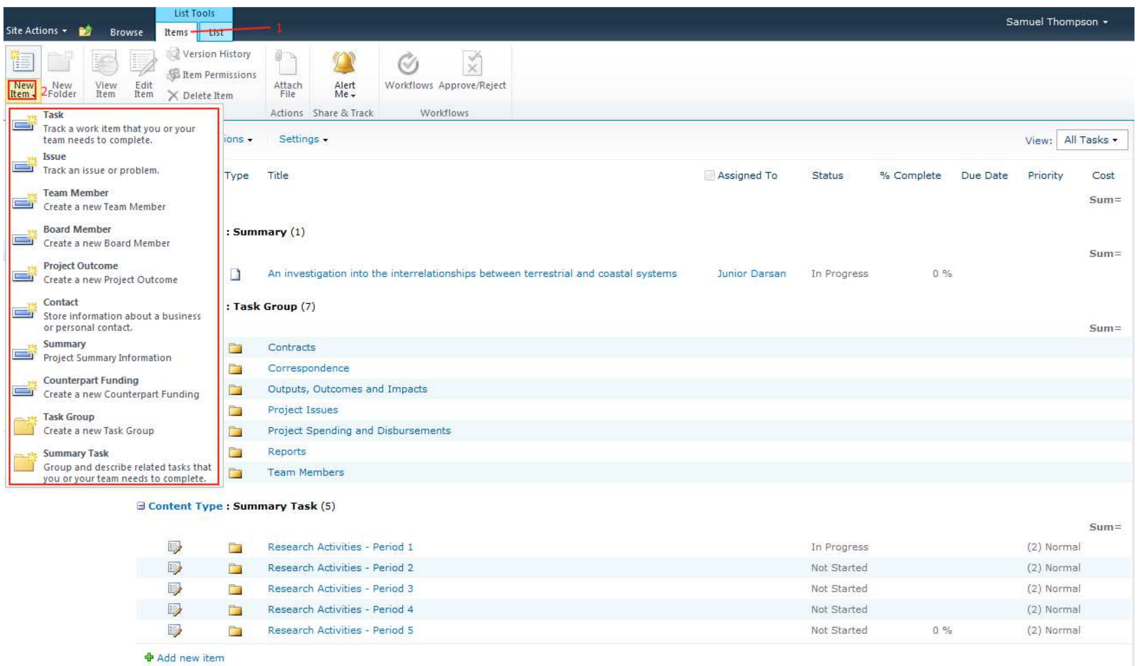
A number of pre-designed content types are provided for convenience. These include:

1. Task

2. Issue
3. Team Member
4. Board Member
5. Project Outcome
6. Contact
7. Summary
8. Counterpart Funding

To access the full list of available content types:

1. in the Top Navigation Bar, click “Items”
2. In the Bar below look for the new item button
3. Click new item.



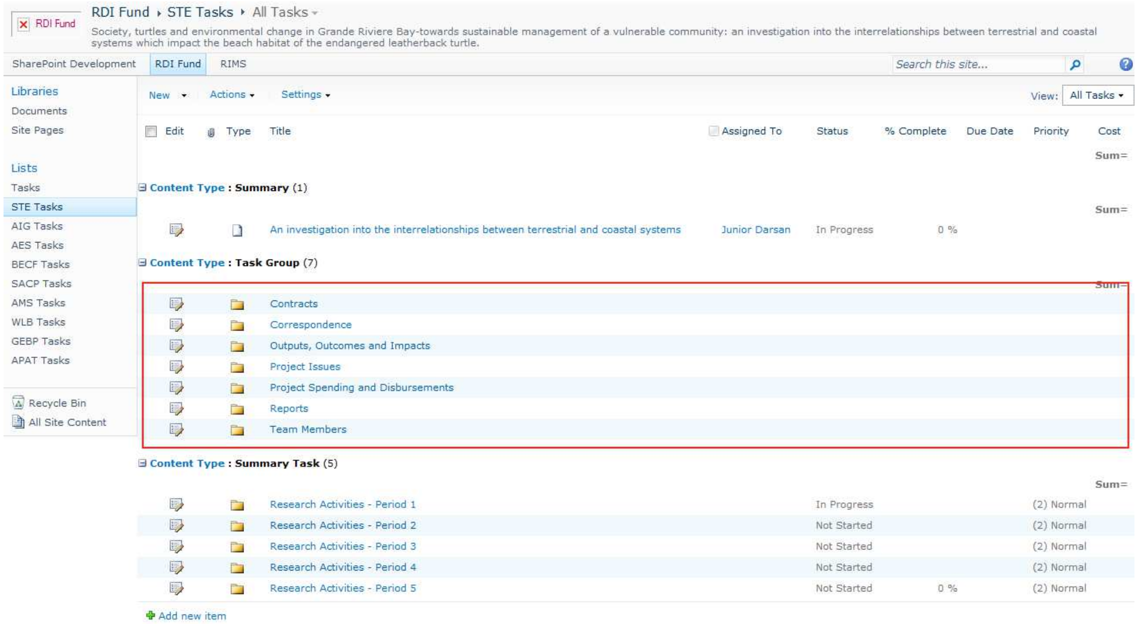
Folder Types

Task Group

A Task Group is a folder that is simply used to group a number of task items. We will discuss task items later in this document. Any number of folders can be created.

A folder can be created inside of another folder or inside of a Summary Task. Clicking on a folder will take you into the folder. To edit the name of a Folder or Summary Task click the edit icon in the leftmost column on the page.

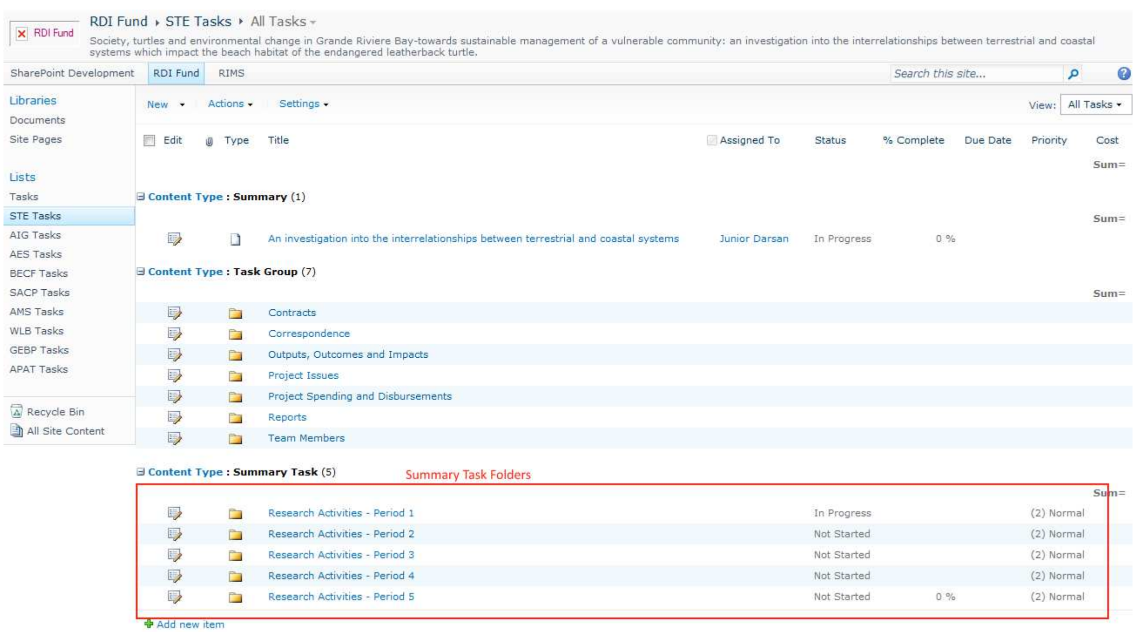
A list of folders has already been created inside your project in order to provide some guidance, and help ensure some level of commonality in information storage between the different projects.



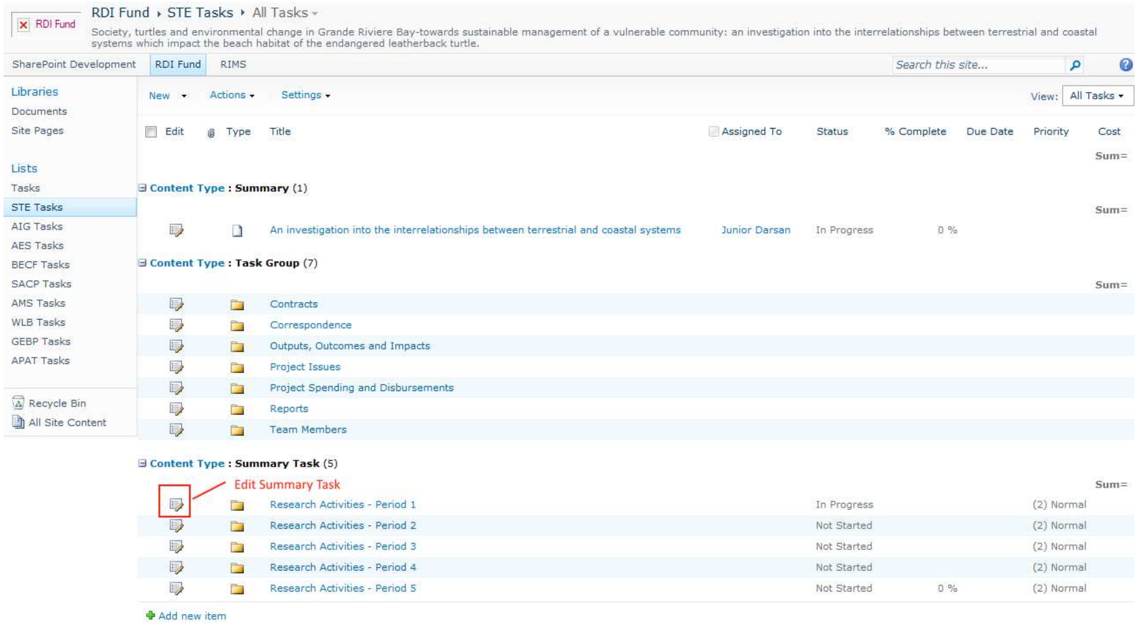
Summary Task

A Summary Task is a Folder which contains a number of additional fields that will be helpful in keeping track of sub activities, and financial information. A number of Summary Folders have been created for you. These Summary Folders have been provided so that each group of activities can be matched to a reporting period.

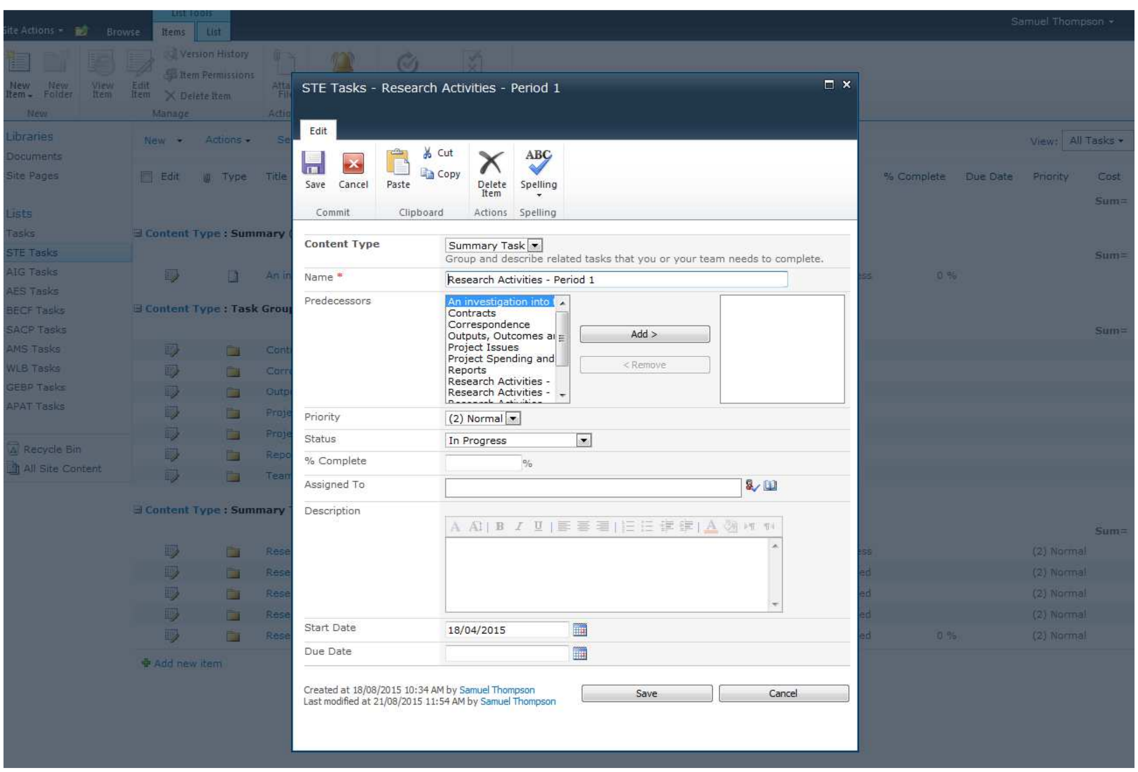
Summary Tasks are useful when viewing the project using the Gantt View or when viewing the project in Microsoft Project. Tasks that are entered under Summary Tasks are logically grouped together making it easier to do reporting, and track project progress.



To edit a Summary Task click on the edit icon located in the left most column.



A dialog will appear which will allow you to edit information associated with that summary task.



Summary Task Fields

Name: The name is a simple title that is used to identify the task

Predecessors: This field lists other task in the project and allows you to set one or more of the tasks as a predecessor. A predecessor is a task on which the new task or activity being executed is dependent.

For example; a project may be required to complete the task of getting ethics approval before moving on to several other tasks related to research activities. Therefore research activity tasks are dependent on the predecessor task of acquiring ethics approval.

Priority: Simply state the priority of the task. At the start of the new stage or reporting period, filing for the disbursement of funds will take a higher priority than other tasks currently being executed.

Status: This field is used to determine the completeness of a task. This information is also used in Microsoft Office Project, and Microsoft Outlook for identifying the state of the task. (More on this integration later).

% Complete: is a self-determined figure of the completeness of the task. This is similar to the % Complete found in Microsoft Outlook tasks, and Microsoft Project

Assigned To: This field can be filled with the name of group or individual (found in the global directory) who is responsible for the completion of a task.

Description: A description of the group of tasks or activities.

Start Date / End Date: Enter the start date of the task and the scheduled (updated with actual once complete) end date.

Tasks

Here we will discuss non-folder content types.

Note that folders and other items cannot be moved. You should only create the items in the respectively folder or summary task in which you expect to keep them. A good practise to keep in mind while using the system: You must navigate to the folder that you want the item to appear in before creating the item.

Task Item

In using this application, the most time will be spent creating and managing task items. Task items are the central focus of this application.

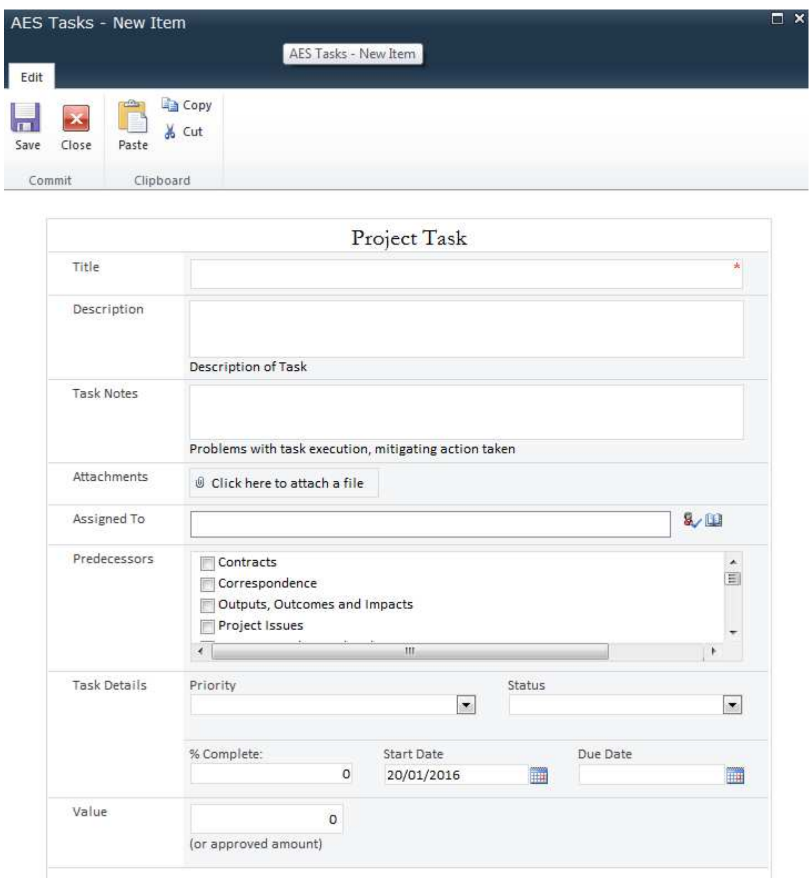
What is a Task?

A task can be thought of as a unit of work. Any activity or process that consumes resources can be considered a task. This action, or demand for resources or time should be captured. Documenting tasks and assigning resources can help to expose potential resource gaps, or sequencing problems that may make it difficult to efficiently and effectively implement a project.

Project Tasks can also act as useful reminders. Tasks created in this RDI Fund Project Management Site can be synced into Microsoft Outlook. These tasks will then show up in your Outlook folders allowing you to view and update the tasks (and associated actions) as needed.

Each task dialog that appears will contain a box that allows project managers to enter a value for the task item. If you are unsure about the value of a particular task, you may put an estimated value that will be spent executing the task. This can be issued in terms of man hours that will be required to execute the task, costs of equipment involved, Transportation costs etc. For some tasks however, such as a task associated with preparing a report for instance may not have a value, in which case you can leave the value of the task item at $0.00.

When creating or editing a task or other content type; you can save the changes by locating the save button at the top of the form, and hitting save. Alternatively you can click the Cancel button to close the dialog without saving changes. You can also click the (x) located at the top right hand of the dialog.



Issue
An issue can be thought of as a problem that occurs that seriously affects the effective operation of the project and completion of tasks. Major problems that arise during the project should be documented under the project issues using this dedicated form. This will allow the RDI Fund Administrators to view the issues, and work with the projects, and other 3rd parties to resolve them.

Team Member
Team member is a self-descriptive form that allows you to document your project team.

Board Member
A board member is a special type of team member that may sit on a special committee for your project (e.g. an advisory board or statutory committee), or contribute at a decision making level.

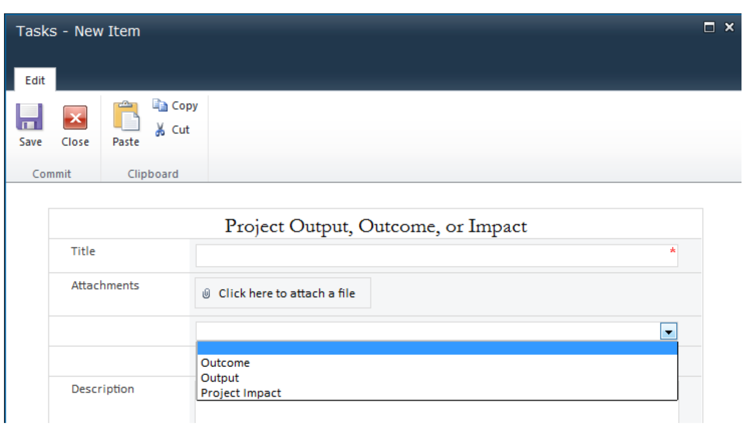
Contact
The contact form allows users to document important contacts (e.g. stakeholders, collaborators, partners, end users) relevant to the project.

Summary
A summary is a general overview of the state of the project including disbursed funds, the stage of completion, and some general information about the project.

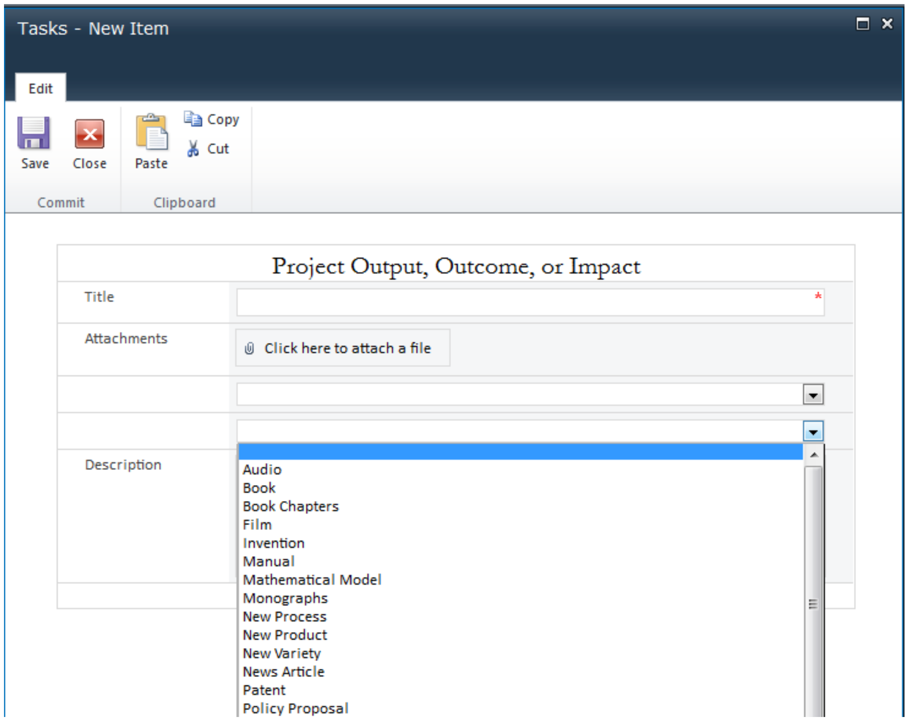
Counterpart Funding
The counterpart funding form allows project managers and RDI Fund administrators to effectively track 3rd party contributions to the project.

Project Output, Outcome or Impact
The project outcome form allows project managers the ability to separately from their tasks highlight project Outputs, Outcomes, and Impacts and include relevant details on them.

The first drop down menu in this window will allow you to select whether the result you want to record is an output outcome or impact.



The second drop down allows you to select a specific type of output, outcome or impact e.g. theses, presentations, patents or policy papers, which will facilitate ease of tracking these results within and across projects in the RDI Fund portfolio. If more categories are needed these can be added.



This Project Output, Outcome and Impact task item is an important field to help projects better capture the outputs, outcomes and impacts that accrue as the project progresses and post completion. It will also help to document the linkages between the research activities conducted and the resultant outputs, outcomes and impacts, both anticipated and unanticipated. It is important that the following working definitions are noted:

Activity: Actions taken or work performed through which inputs, such as funds, technical expertise and other types of resources are mobilized to produce specific outputs.

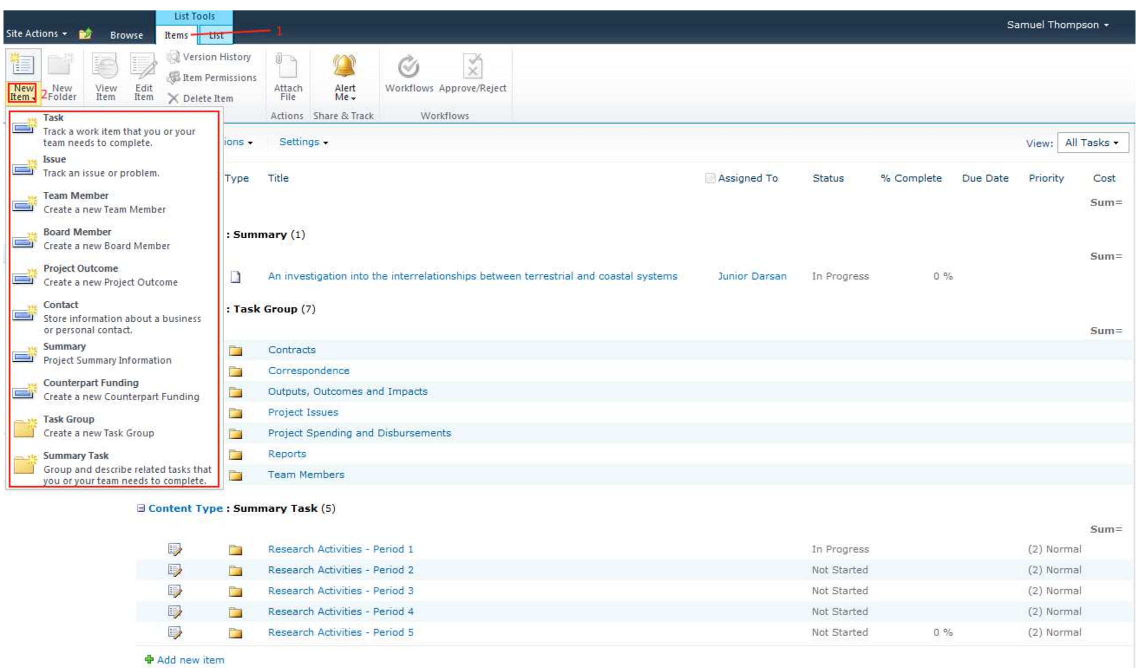
Output: The products, capital goods and services which result from an activity.

Outcome: The observable short-term and medium-term effects of the outputs on beneficiaries.

Impact: The evident academic, technology, economic, cultural, health, environmental, societal, policy, organizational, teaching/ training and reputational benefits to specific groups in society emanating from research activity. The results of a project which affect the big picture issues, problems, or challenges that it was designed to ameliorate and which are attributable to its activities. Impacts may be positive and negative, primary and secondary long-term effects produced directly or indirectly, intended or unintended. Examples of specific impacts include:

- New or improved product(s), processes and/or service(s)
- The use of a project's output by a commercial or industrial enterprise or other stakeholder group
- The award of a patent
- A resultant change in public sector policy
- The solution of a problem of economic, social, political or cultural significance
- Generation of new knowledge for research
- Strengthening communities of practice
- Helping a stakeholder community to become more organized and engaged
- A recognized contribution to intellectual discourse
- Attracting additional external funding to support a cause

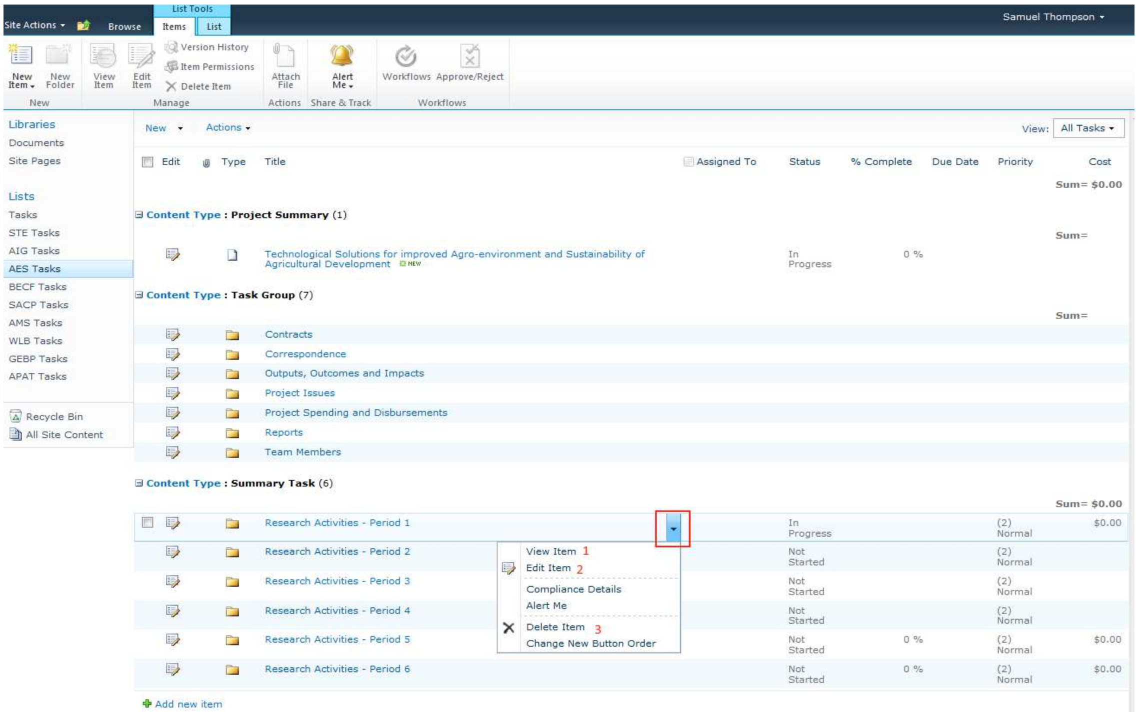
To add a new task, navigate to the items tab, and click on new item.



Select the type of new item that you will like to add. A dialog will appear that will allow you to enter the relevant information associated with that content type.

Editing Content Types

To edit an item or folder simply click the edit button located in the leftmost column on the page. Alternatively, you can hover over an item until a blue down arrow appears, click on the arrow to reveal a dropdown menu with new options about the item.



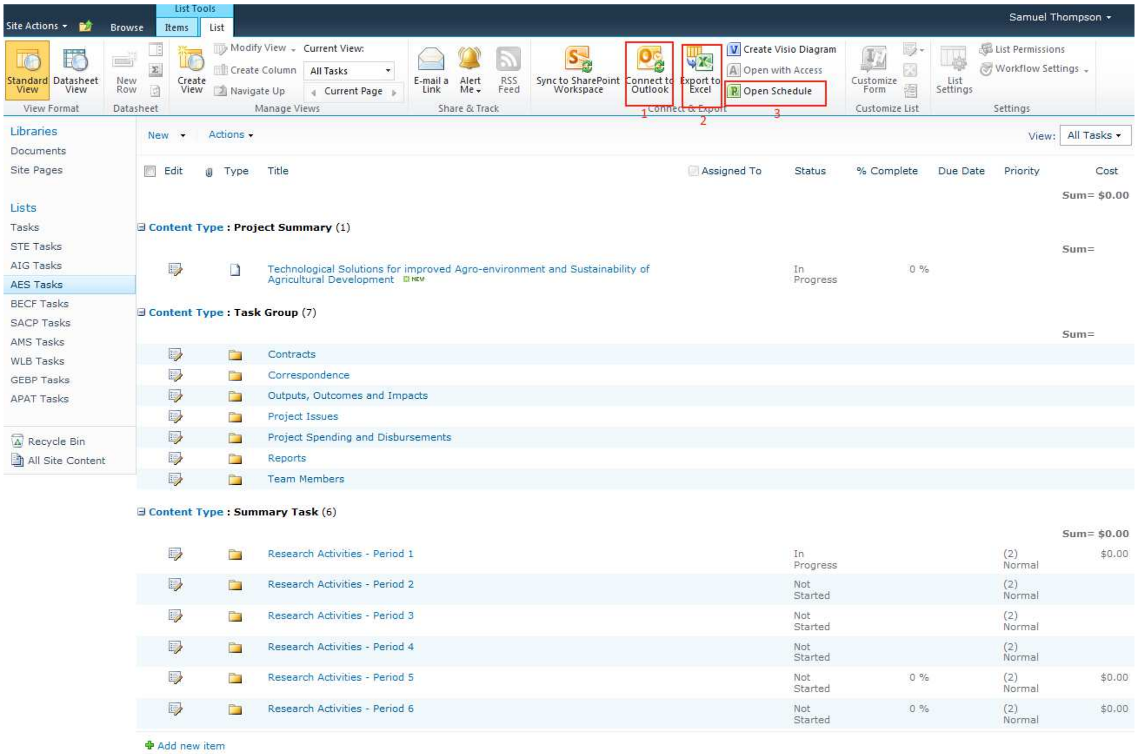
Linking to other Software Programs

Information contained within this site can be easily and seamlessly integrated into a number of other applications including:

1. Microsoft Excel
2. Microsoft Outlook
3. Microsoft Project

To connect these software/services on your computer/device you can follow the simple process outlined below. Before getting started ensure that you have a compatible version of Microsoft Office on your computer, Office Versions 2010, 2013, and 2016 are supported.

In the top navigation bar, click on the list tab…



Click on the item labelled 1 to connect the site to your Microsoft Outlook

Click on the item labelled 2 to export the information into Microsoft Excel

Click on the item labelled 3 to open the project information in Microsoft Project.

Once you click on the button you will be prompted to enter your credentials. Please enter the credentials that were used to logon to this site or the credentials that you use to log into your UWI issued computer.

Once you have successfully authenticated, the appropriate data will be loaded into the software.

Security

The RDI Fund Project Management Portal is currently restricted to on-campus use only. Only preapproved users are able to access the portal, these include RDI Fund administrators, project leaders of approved RDI Fund projects and their approved designates.

Project leaders are only able to access their own project tasks and are not able to view or edit tasks related to other RDI Fund projects. Fund administrators can view and edit all content in the Portal. Project leaders who wish to allow a designate to access their project content on the Portal must write to the Fund identifying the designate and their role on the project team and request that they be given access to view and edit portal content in their project folder.

All individuals accessing the Portal are required to login to the Sharepoint application using their personal UWI credentials before they can view or edit content. All logins are recorded. Each time a change is made, the user ID of the person logged in and the changes made are recorded, allowing for the tracking of all changes to information added to the Sharepoint site, important as changes can be made by the project lead, their designate or Fund administrators. All communications with the Portal are encrypted.