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<u>Accessing Connections Online From a Client Computer</u>

The Connections Online application will be run from the client's (computer's) web browser. You can use IE 8 (or higher), or Mozilla Firefox 3 (or higher), or the latest Chrome and Safari browsers.

Your Connections Online Sign In:

URL: https://beta.connectionsonline.net
User name: Typically your company email address
Password: [assigned by Connections Online or your company]

<u>At The Sign In Screen</u>

(Ask the Connections Online Coordinator for your Sign In information)

- User Name: Typically your company email address
- Password: [assigned by Connections Online or your company] - Change at People page, click pencil icon next to your name to open edit screen – find the password field and type in the password (repeat in next field) you want to use.
- Click Sign In
- Remember me on this computer: if you check this option, after login, and set the URL as https://col.connectionsonline.net , you will always be logged in automatically (unless you sign out)
- Forget Your Password: The "Forget Your Password" option will send you an e-mail message which includes a link to automatically log you in to Connections Online allowing the User to log in to Connections
-

Connections Online Basics

If you are new to Connections Online, see the explanations below for Sign In, Navigation, and General Screen Layouts, as well as Adding, Editing and Deleting data.

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Sign In

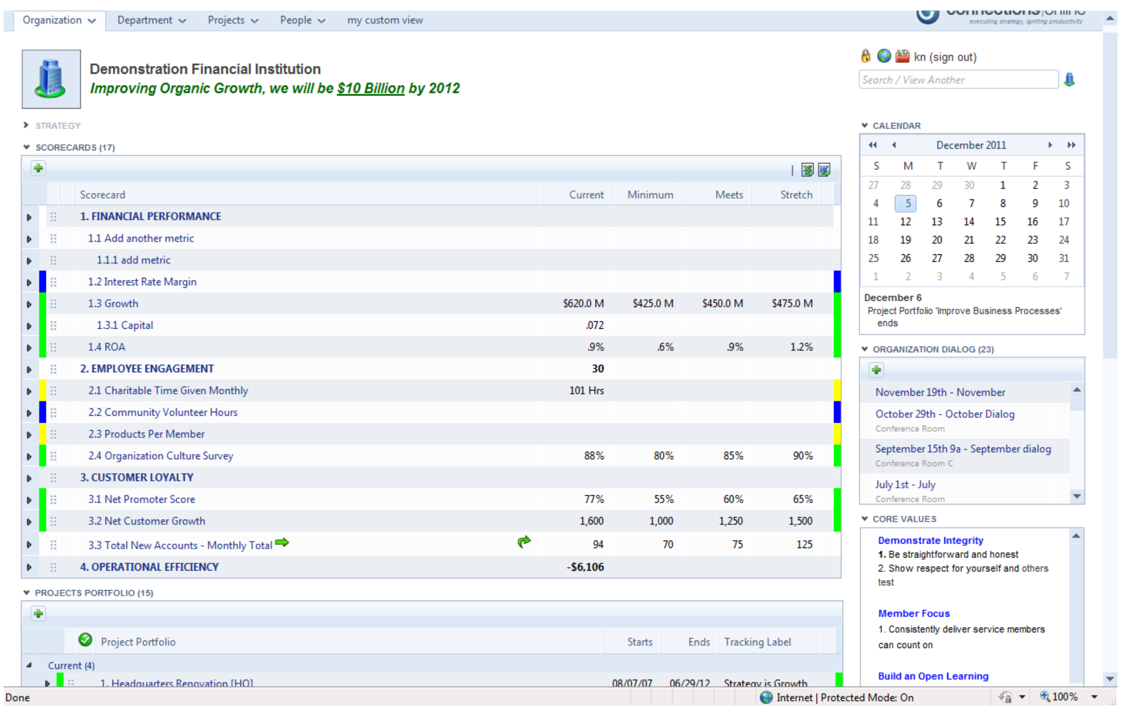
The Connections Online application will be run from the client's web browser. To access the application, open Internet Explorer 8.# or greater (or other specified browsers) and type in the Connections Online address.

Type the User Name (your company email address). Type the password assigned to the User. Click Sign In.

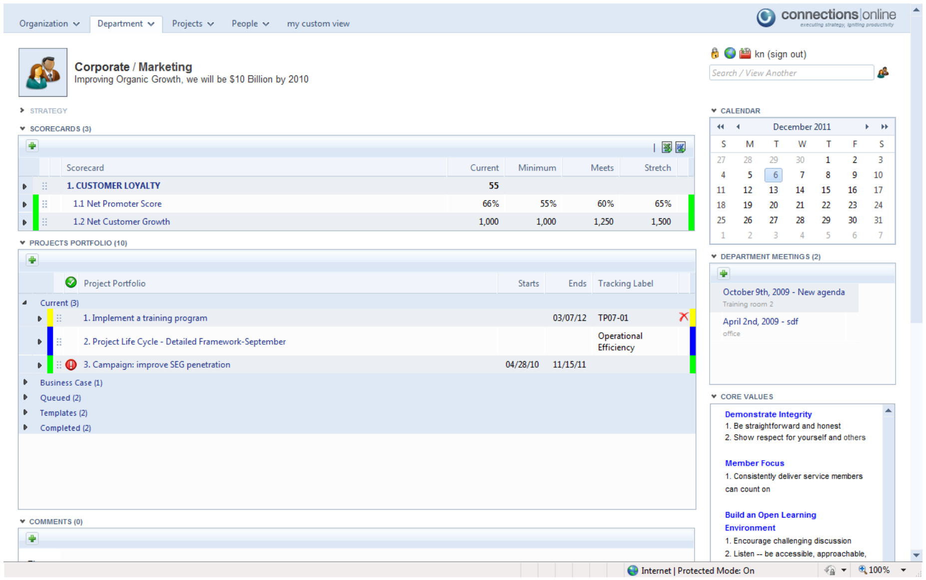
Navigation

In order to navigate through Connections Online, click on one of the five tabs at the top of the application.

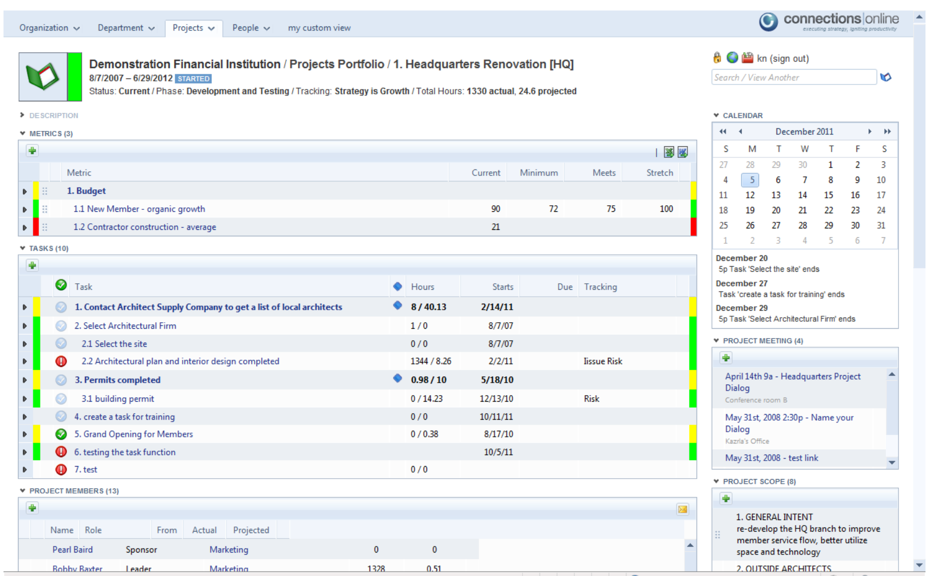
- **Organization Connection Tab**: this page can be customized to show information that provides a clear focus for the enterprise's strategy.



- **Department Connection Tab**: this page can be customized to show information that provides a clear focus for the Department's strategy.



- **Project Connection Tab**: this page provides for effectively leading cross-discipline teams to complete Organizational and Department projects.



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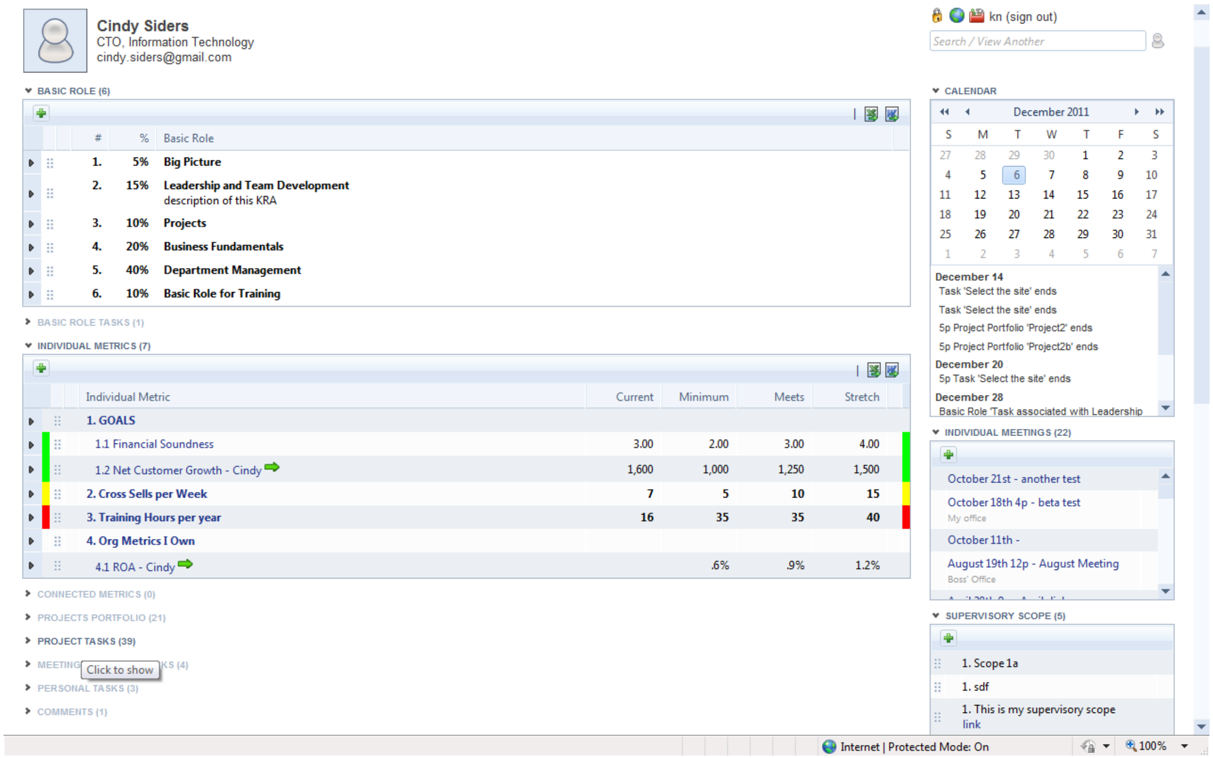
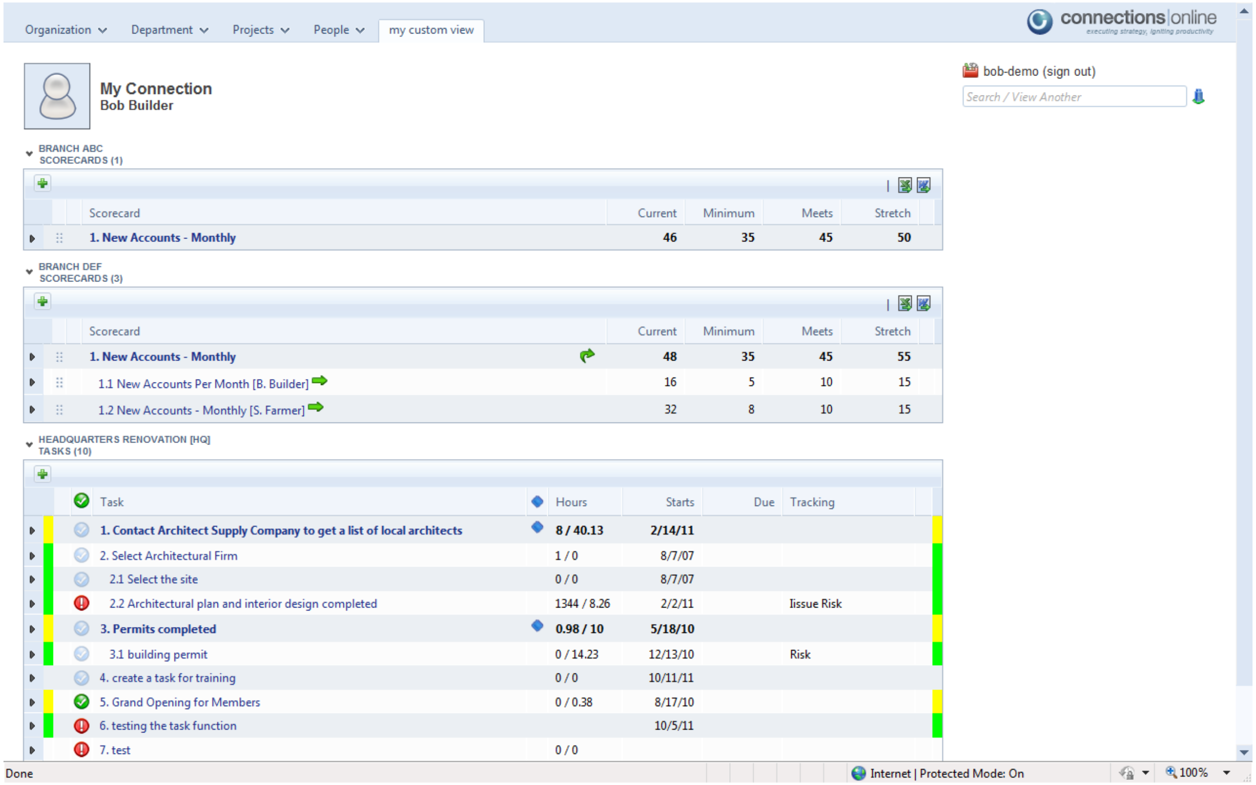
People Connection Tab: this page provides a clear focus for the resources controlled by an individual. It aligns individual results to organizational and departmental outcomes. It is used as an important guide for prioritizing the allocation of resources, recognizing performance, coaching, and for updating targeted outcomes throughout the year.



- **My Connection Tab**: this page can be customized to include specific data modules from Organization, Department, Project, and People Connections to show just the information (data modules) a User wants to see.

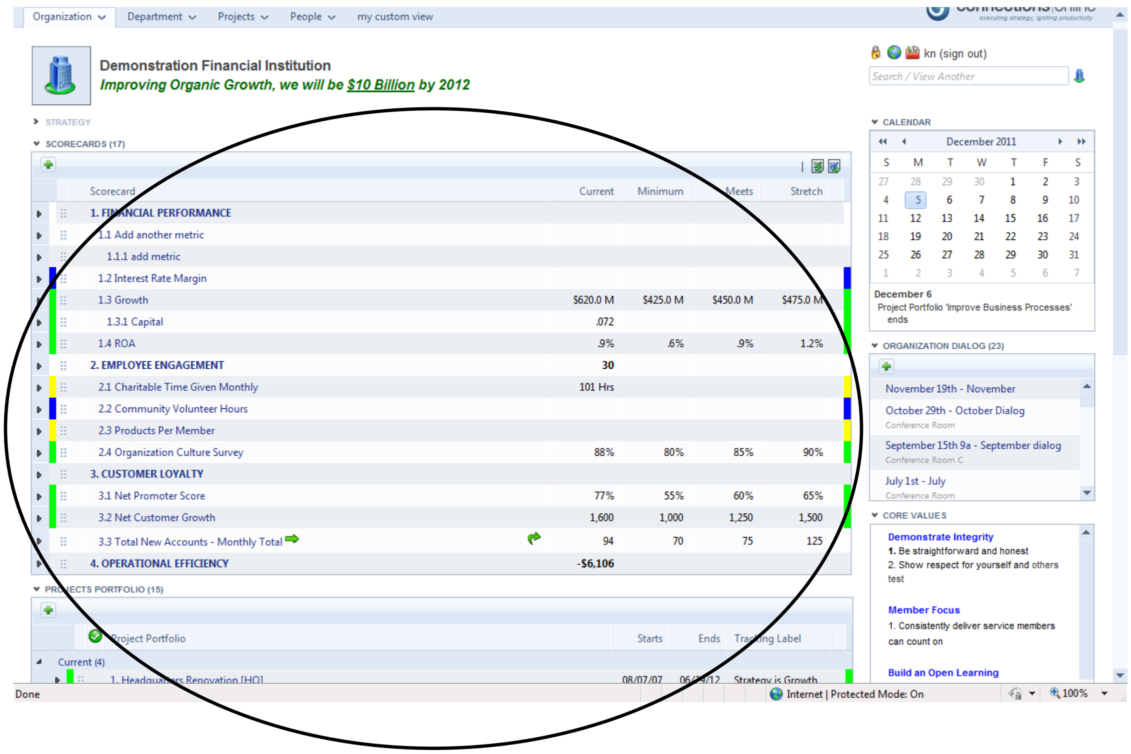


- **Site Administration**: this page will only be available if an individual has administrator security. It allows the Administrator for the Connections Online application to set up the database. This includes the organizations and departments, employee information for Users in each organization, as well as other select organization information.

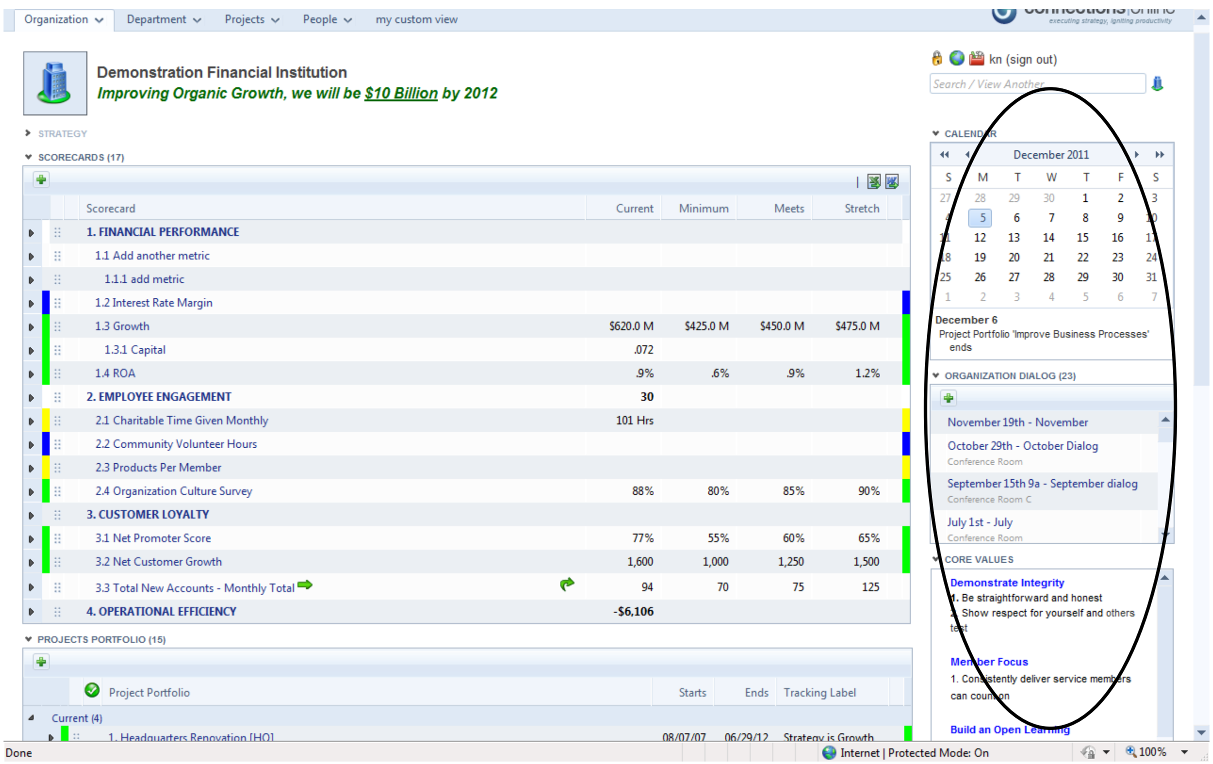
Default General Screen Layouts

All the tab pages have the same general default layout.

- **Main Column**: There is a Main Column down the center of the page. In the Main Column, every Tab except the My Connection Tab has a metric/scorecard module plus modules reflecting other information relevant to the specific Tab.

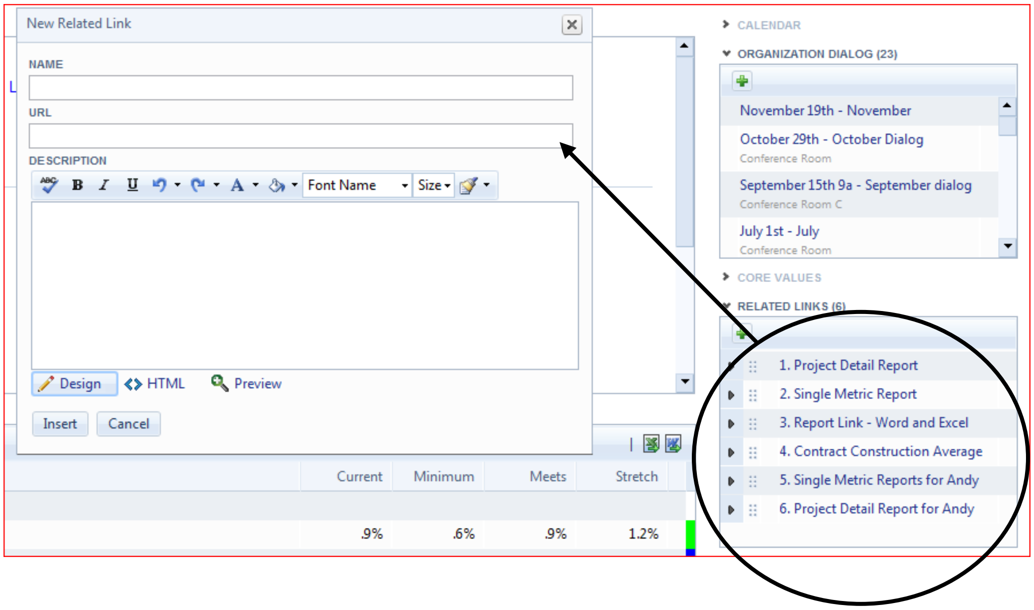


- **Sidebar**: The Sidebar column is down the right-hand side of the page. Within this sidebar column, each page will have several of the same default modules. These modules include:
    - Upcoming Events (showing due dates from items on the page)
    - Dialogs (meeting agendas and minutes)
    - Related Links (organizing and linking content for the page)
    - Comments (users with the correct security access are able to make Comments, which are read by others, and may be responded to by others. The Comments are date stamped and show the comment author's ID)



Reports (simple reports for each tab can be printed using the print icon in IE8 or File/print in FireFox. Dialog reports are printed from the open Dialog edit window. Using the print function, select "landscape" before printing Tab reports. Other reports will be added as needed.)

Related Links: allows the User to organize information associated with the data within Connections by setting links and link descriptions for additional informational views from an address anywhere on the networked system or web. The User will find Related Link functionality throughout the application to easily organize information on the network.



Uploading documents to Related Links

By popular demand, file uploads directly into Connections Online related links are now possible with Connections Online. The security for the page for which the related links are stored will be the same for the links. So, if a User has no security to see a page, that User will not be able to see the link. If you want to secure the document, you must add a password to the documents just as you would without creating a link to Connections. Just have your administrator "turn it on" for the site on the Admin Tab.

<u>Sharing Files for Related Links Option</u>

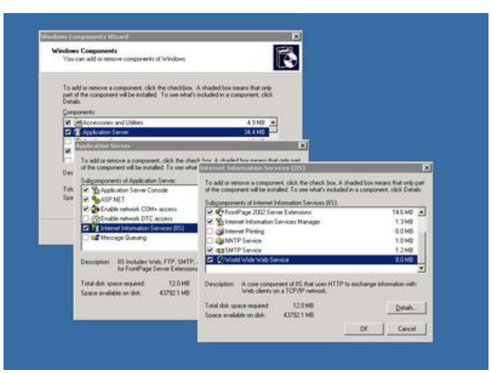
Web Sharing on Windows Server 2003 - In Connections Online, we have a feature called Related Links where we allow you to link to files that that are related to the information stored in our application. These links can be to files out on the Internet or to files shared on your local network.

In the past, these related links were mostly used for files shared on local networks. They would link to files with locations that looked like *M:\Shared\file.doc* or *\\servername\share\file.doc*. These links made it easy for users to point to files that were already shared on their internal networks even when those files were not normally opened from Web browsers.

In the last few years, however, the Web browsers have realized that allowing links to local network files is a security risk, and they have gradually removed the ability to use those types of links in favor of using Web-safe links only. Some examples of Web-safe links are *http://servername/share/file.doc*, *https://servername/share/file.doc*, and *ftp://servername/share/file.doc*. Even if your current browser still allows the old links, it is a good idea to go ahead and update all of your links to use the newer, safer format.

For internal file servers that are running Windows Server 2003 and sharing files with the *\\servername\share* or mapped network drive format, this is an easy update and does not require that the files are moved or that the current network shares are removed. I'm going to use Windows Server 2003 in this article, but the steps are very similar in Windows Server 2000, Windows Server 2008, and even in Windows XP Professional.

First off, make sure that Internet Information Services (IIS) is installed on the server. It is a Windows Component that is included with Windows Server 2003 but may not have been installed. If it is not installed, you can install it by going to *Control Panel, Add or Remove Programs, Add/Remove Windows Components*. In the Components list, select *Application Server*, then select *Internet Information Services (IIS)*, and finally *World Wide Web Service*. Press OK to close all of the option windows and continue with the installation. You may need to have your original Windows Server 2003 installation media to complete the installation.



Once it is installed and running, you should be able to get to a welcome page by going to *http://servername* in a Web browser. If it isn't working, check Microsoft's site for more help.

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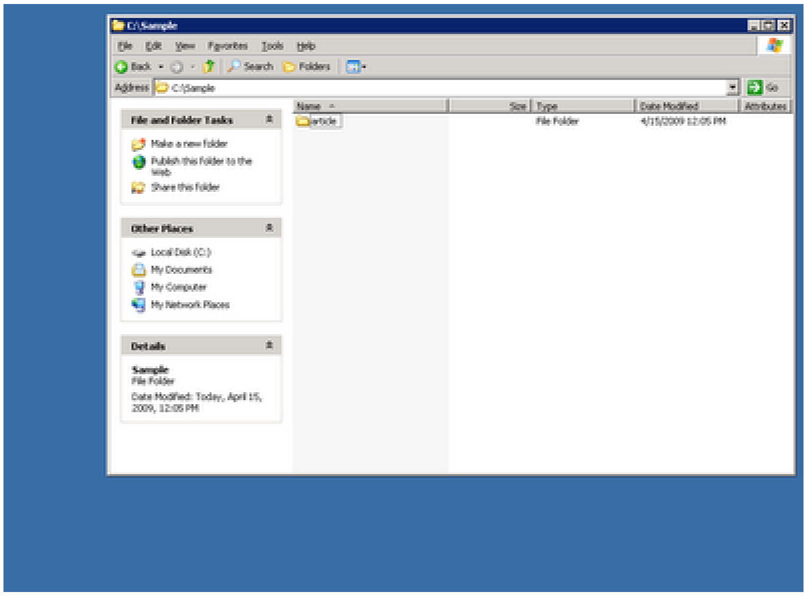
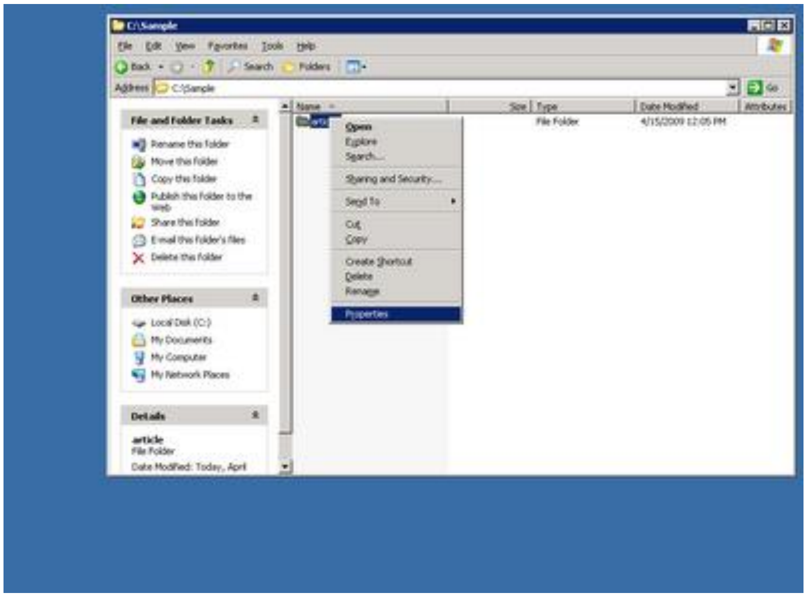
Now, you're ready to share your files with web folders. In Windows Explorer, browse to the location where your files are located.



Right-click on the folder you wish to share and click *Properties* or *Sharing and Security...* from the menu. Both options open up the properties window.



In the properties window, select the *Web Sharing* tab, and click on the *Share this folder* option. On this window, you could also choose to share your files in a location other that the *Default Web Site* on your server, but to keep it simple, I'm just going to use the default option.

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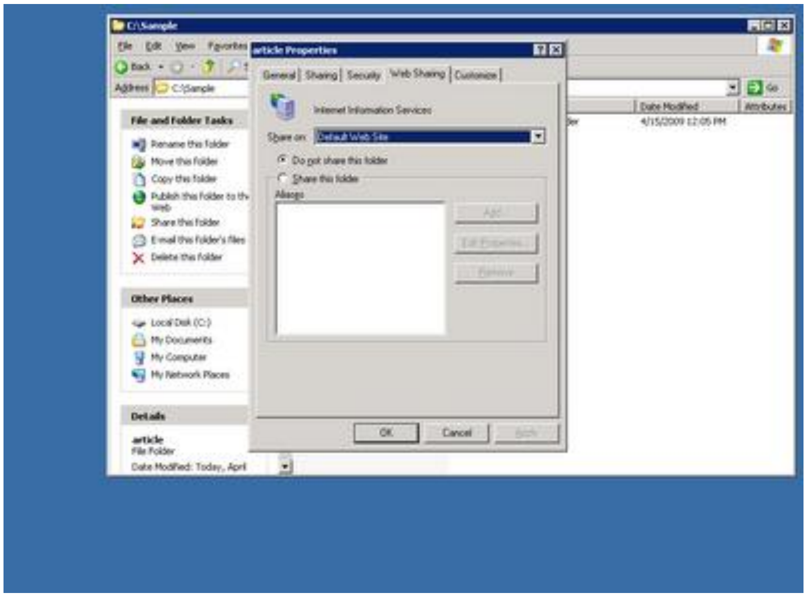
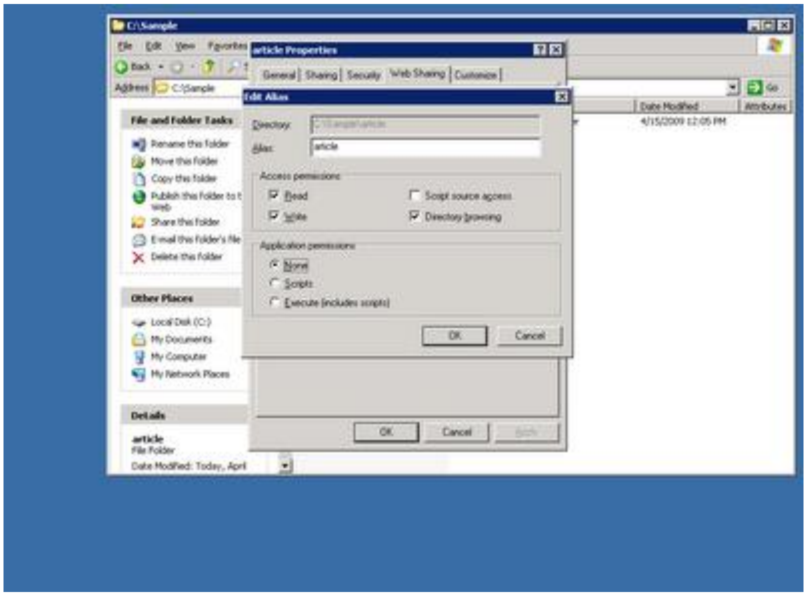
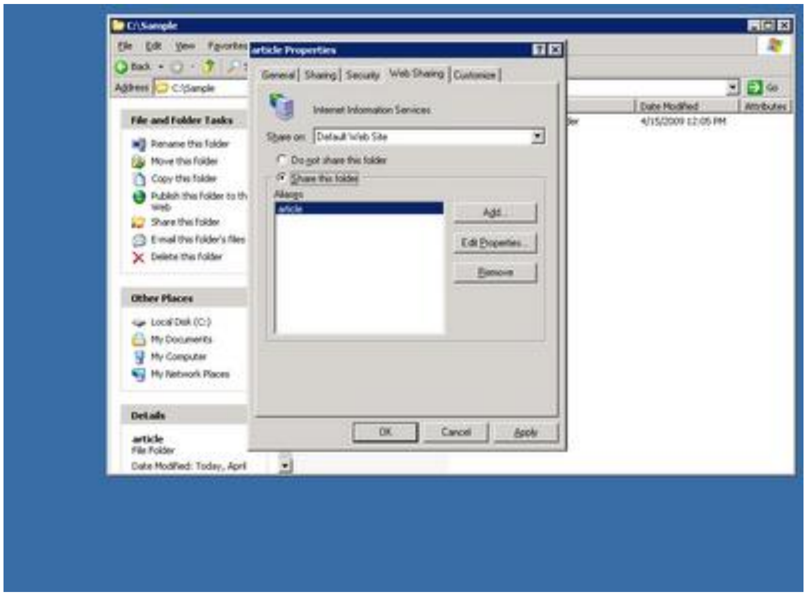


Choose an alias for the folder to be used on the Web share. You can just use the default alias which matches the directory name on the server, but if the directory name has spaces or other non-alpha-numeric characters in it (or if it is a long name) you may want to use a shorter alias. Later on, this alias will be part of the file location: *http://servername/**alias**/file.doc*.

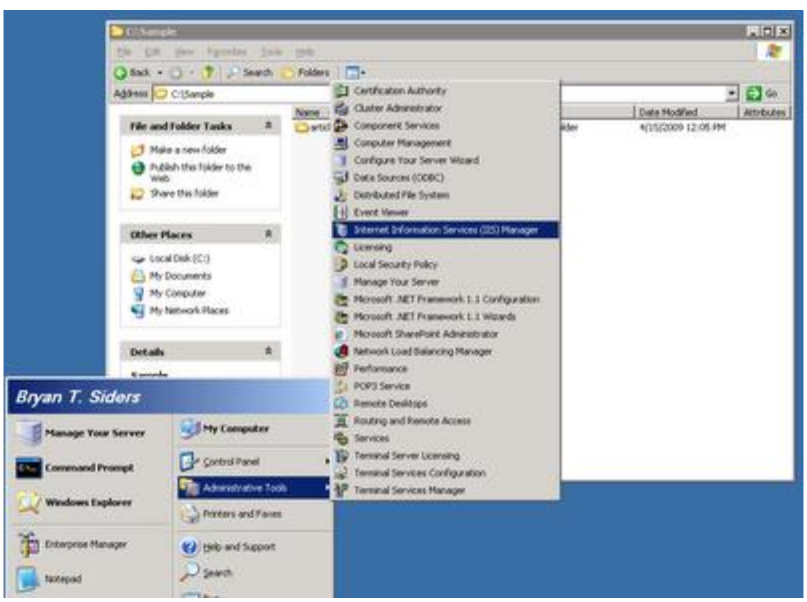
In the *Access permissions* section, only the *Read* option is required for the Related Links to work, but the *Directory browsing* option makes using the shared folder a bit easier, and the *Write* option allows the files to be updated through WebDAV connections to the folder. I'm going to use the directory browsing option later in this example, so if you're following along, you may want to do the same.



When you close the *Alias* window, the new alias will show up in the *Properties* window. Press OK a couple of times and close all of the open dialog windows.



Now, you can check your IIS settings to see that the new web folder is being shared. Open the *Internet Information Services (IIS) Manager* in *Administrative Tools*. Administrative Tools may not show up on your Start Menu in the same spot it does for me, but it should be in there somewhere.



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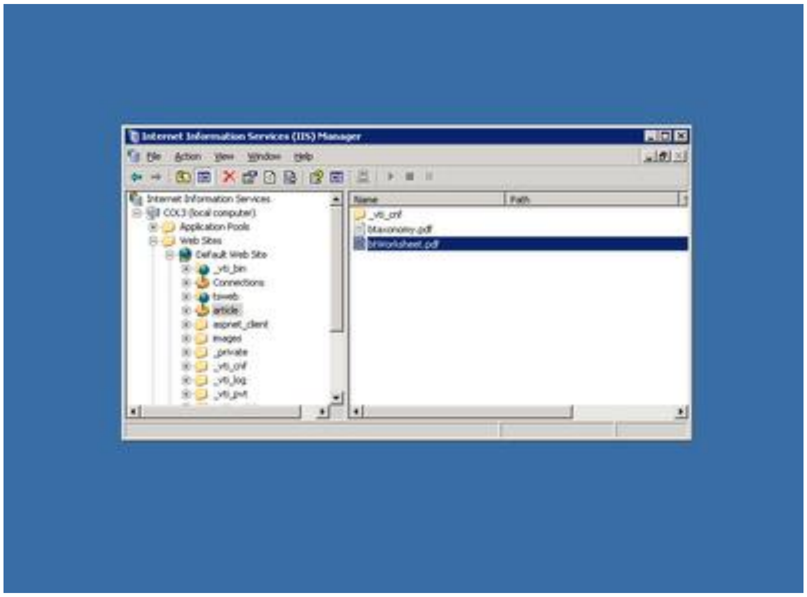
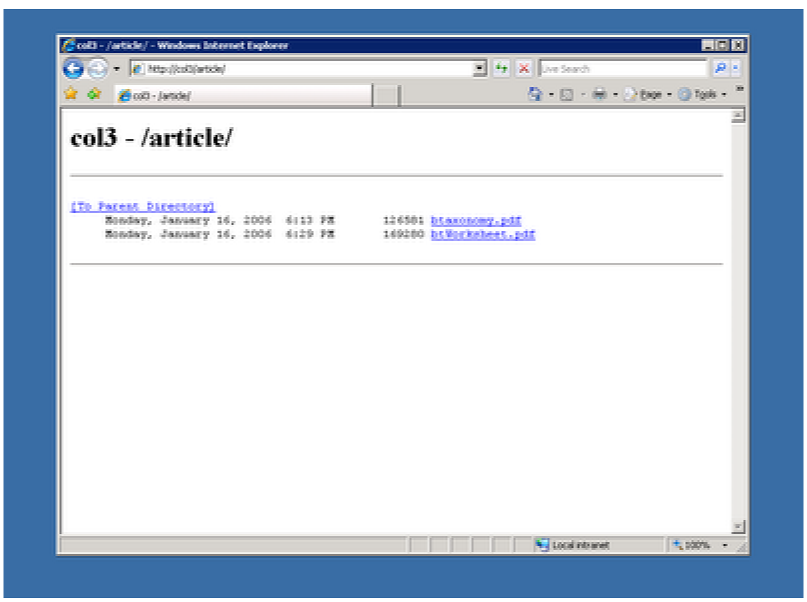
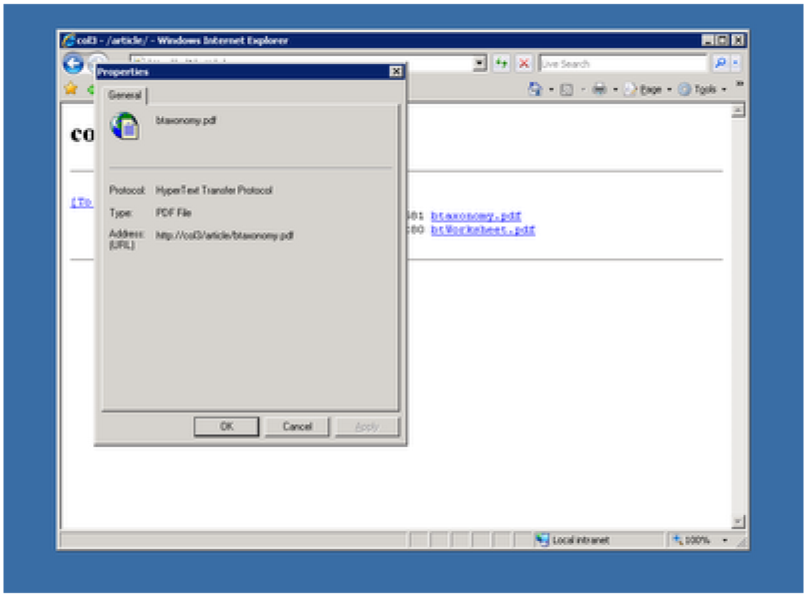
In the IIS Manager, expand the tree on the left side so you can see the Web Sites on your server. Under the *Default Web Site*, you should see a folder or cog icon that matches the alias you set for the shared folder. Select that alias and the shared files and sub-folders should show up in the right side of the window.



If everything is showing up in IIS Manager, it's time to try to open the links in Internet Explorer. Open Internet Explorer and type in the link *http://servername/alias* where *servername* is the machine name (mine was COL3) and *alias* is your web folder name (mine was *article*). Since we enabled directory browsing, this link opens up a directory view of the files available.

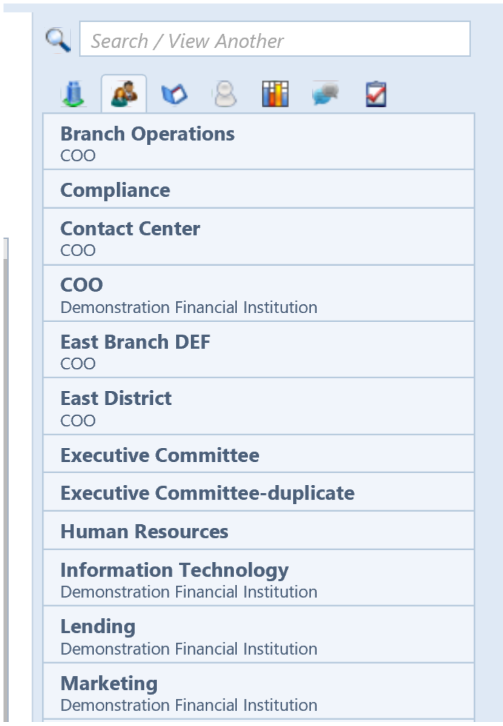


Right-click on one of the file links and choose Properties. This will show you the new Web address (URL) for the file. In my example, the link is *http://col3/article/btaxonomy.pdf*. You now have the new link that you can use in Connections Online.



That's it! Once you begin using these new links, they should become more and more familiar and easy to use, your Connections Online site will be more secure, and you will no longer have to worry about supporting the older link formats or older, less secure Web browsers

Navigating to other pages within the same tab hierarchy, or to other tabs:
Users will be able to change the page view within the same category. For example, to see the Organization Connection page for a different Organization, the User would click on the symbol for organization and the search engine will display all the organizations for that site. Follow the same procedure for departments, projects and people. If you know the name of the department or project or person, just type that in the search field and click the symbol to search for (org, dept, project or people) and the search will result in the link to what you are looking for. Then click on the link and that page will open.



Adding, Editing, or Deleting Data

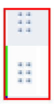
Each data module (Main Column or Sidebar) for each page uses the following edit symbols, which the User (with proper security) will use to add, edit, or delete data.

Colored Text Link: These links can open an item to edit, or navigate to an item in a different tab. The User can use the cursor to hover over the data item – it will "turn blue" to show that it is a hyperlink. If the User clicks on the link, the item will open in a new tab for more detail. Or it will open the item's edit screen – whichever is appropriate.

 **Pencil Symbol:** Click this symbol to **EDIT** the element next to it.

 **The Add Symbol:** Click this symbol to **ADD** new data. The User can move the cursor over this symbol and left click to open a data input screen for that particular data module.

 **The Delete Symbol:** Click this symbol to **DELETE** an item and the item will delete.

 **Drag and Drop:** Users can adjust the order of the information by grabbing the drag/drop symbol and move the item up or down, in or out. When you drag the red line shows where it will be inserted (under the red line).

- Drag over the bottom half of 4 to drop as 5
- Drag over 4 and hold SHIFT to drop as 4.1, or drag over the top half of 4.1 to drop as 4.1
- Drag over the bottom half of 4.1 to drop as 4.2
- Drag over 4.1 and hold SHIFT to drop as 4.1.1
- Since you are dragging 4.2 in the example, dropping on 4.2 does nothing

 **Archive:** A User can view archived metrics or projects by clicking the archive symbol on the title bar for metrics or projects module.

 **Copy Projects or Metrics**: User can copy metrics and projects within an organization or department and people pages – or copy one metric or project to another organization, department, or people tab.

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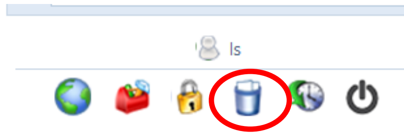
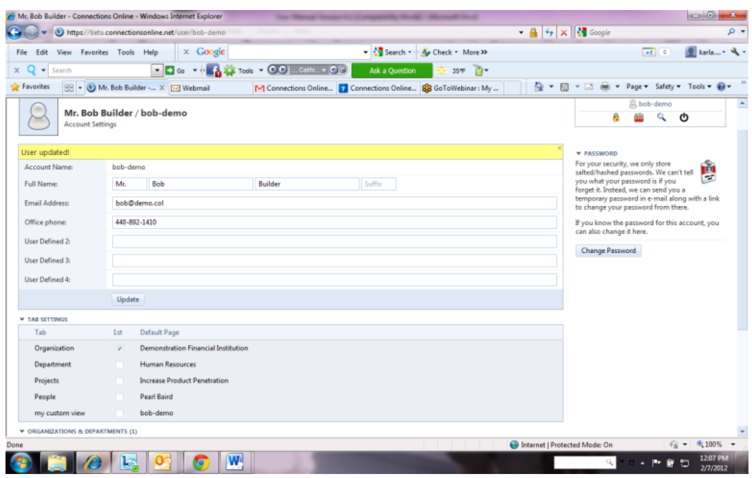
 **Undelete Symbol:** Click this symbol, found at the upper right of the page, and you will open an "Undelete" page. Deleted items will be listed on this page. Roll over the item you want to undelete and click on the undelete symbol to the left of the item. Navigate back to the original page and the item will be restored.



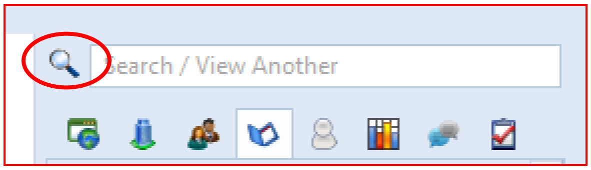
Expanding and minimizing modules is done by clicking the name of the module (the module will show you the number items i.e. projects (15). Open and close just by clicking the name above the module ribbon.

Setting Login Page: A User can set a preferred login page (e. g., the User logs in and every time the application will open to the User's People Connection Tab). To set a preferred page, the User can locate and click on his/her login name at the top right of the page. The User Account edit window will open; set the preferred login page, then save.



Search Feature

A search icon (magnifying glass) can be found at the top right side of the page. Click on the search icon (magnifying glass) and the search box will appear. You can search names of organizations, departments, metrics, projects, and people (but not tasks). For example, to see the Organization Connection page for a different Organization, the User would click on the symbol for organization and the search engine will display all the organizations for that site. Follow the same procedure for departments, projects and people. If you know the name of the department or project or person, just type that in the search field and click the symbol to search for (org, dept, project or people) and the search will result in the link to what you are looking for. Then click on the link and that page will open.



Expand/Collapse Item Feature

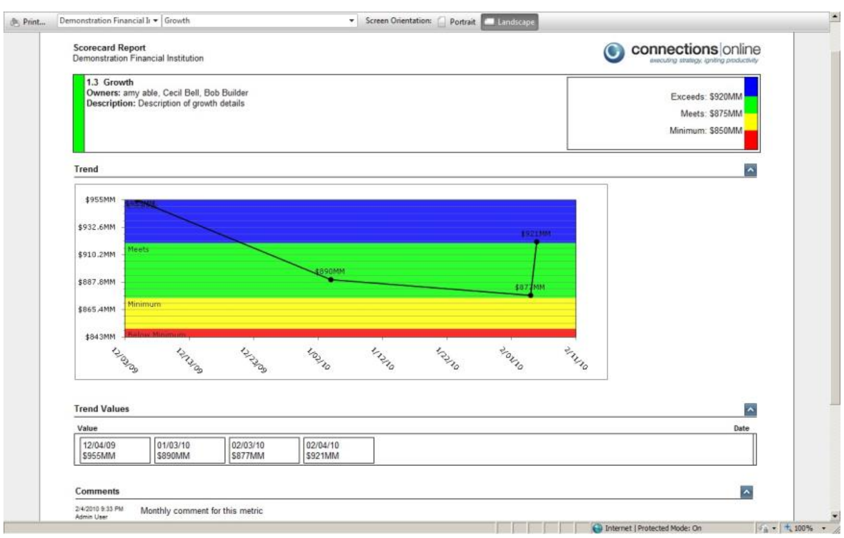
To expand or collapse additional detail for an item on the main columns of each tab (critical measures, projects, tasks, basic role, basic role tasks, personal tasks, and follow-up tasks), you will see a symbol (to the left of the select box) pointing right to expand and the symbol pointing down to collapse.

The list boxes on the right side bar for main tabs are working as they did before – select the expand symbol and the item expands.

<u>Printing Reports</u>: The User can print the specific Tab view report by clicking on the link in the Reports module on the Organization, Department, Project or People Tabs. The navigation to other like views will be either at the top of the report or on the left side navigation tree.

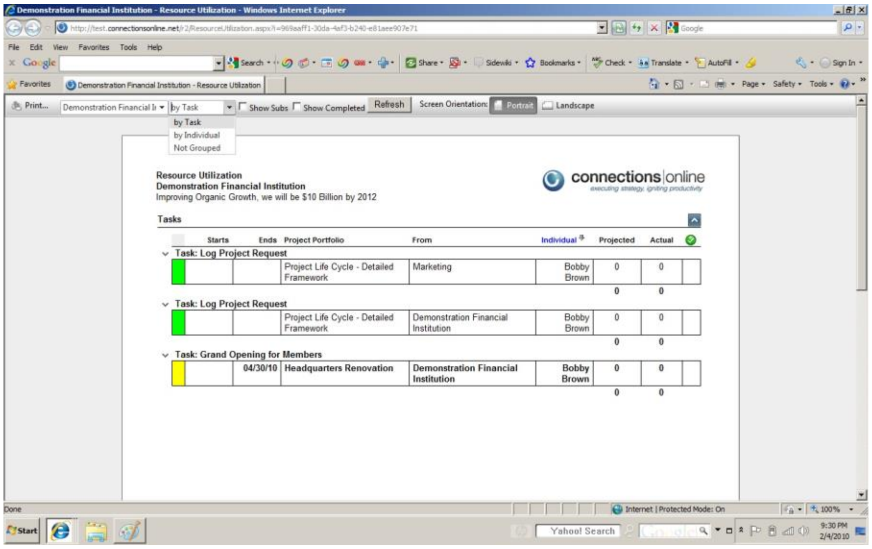
Reports (Reports for 4.1 are currently being redone and should be ready shortly):

<u>Critical Measure Report:</u> The metric report allows for a report to be printed for any single metric from any metric module (Organization, Department, Project, or People tab). The report is found on the right in the Reports Module.

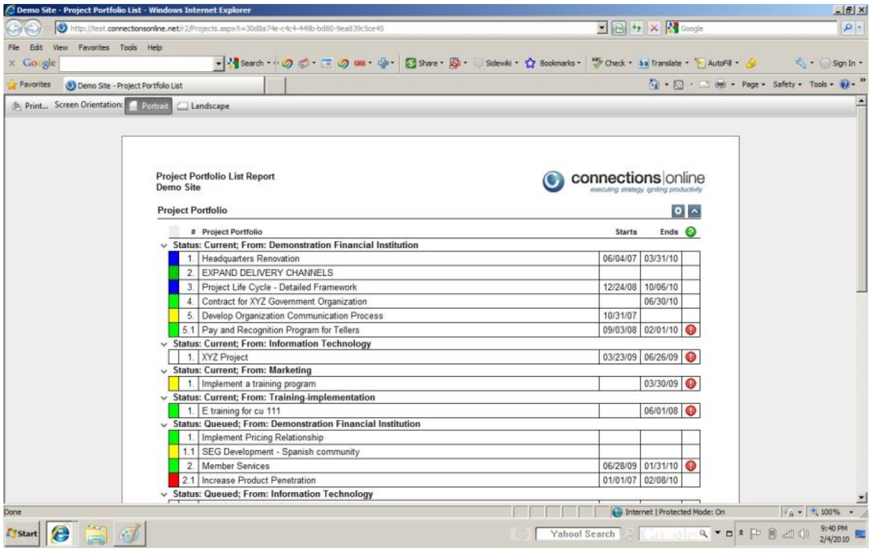


Resource Utilization Report

Go to the org/dept page, click on the resource utilization report, then click on the org, select Not Grouped, check show subs, click refresh and all the tasks for all projects show up. Click the column header that says Projects (and the projects will resort by project name alpha) the header turns blue when done – this may take a few seconds to resort, then click Individual header (this will take a second too-when it is done sorting the header turns blue). Now you have the projects in alpha order so you can scroll to see all the tasks associated with an org and all the names of people who have tasks assigned to them are also in alpha order so you can see by all the tasks owned by team members. Also, you can click on the end date column header – it takes a few seconds – the tasks are sorted by due date/by task owner/by org.



All Projects Report: In this report, there is a list of all projects from all departments listed. The projects are grouped by status – i.e. all projects "current", all projects "queued", etc.



Color Printing of Reports

You need to enable background printing for the color boxes on the connection reports to print in color.

Instructions for IE8:
- Open Internet Explorer browser and go to Tools
- Choose Internet Options
- Choose the Advanced Tab
- Scroll down to Printing and check the box – Print Background Colors and Images
- Click OK

Instructions using Firefox:
- Open Firefox browser and choose File
- Choose Page Set-up
- Choose Format and Options
- Under Options, check the box – Print Background Colors and Images
- Click OK

If the above does not work, it could be an issue with settings on your printer, or other setting in IE8. Below are some sample solutions for the printer issues:

IE 8
- Make sure background colors are selected in Tools/Options/advanced
- Click File in IE8
- Select Page Set up
- Check print background colors and images

Firefox
- If background colors setting in Firefox (click file/page setup/check background color) are set, but it is still not printing background colors
- Select report
- Click the print button on report, select color printer, click preferences, click “color tab”, select “manual”, select OK, select print and the report will print the background colors

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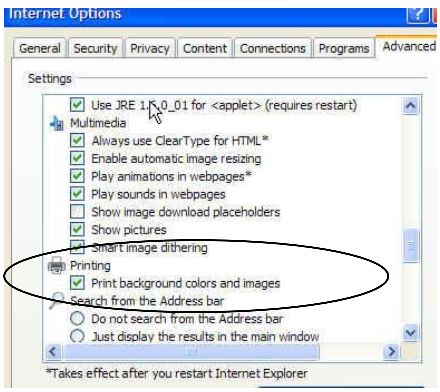
Printing a Connections Tab

A Connection Tab page can be quickly printed by using the print function on the browser. The User can select the view to be printed by selecting the page, opening or closing modules that the User wants represented on the printed page report, checking boxes next to line items to see more detail of a line item, etc.

A User can set the print mode so that the specific colors on the Scorecard and Projects print as seen on the web page. By using the browser toolbar, the User can go to Tools/Options/Advanced, scroll down to Printing, and check "print background colors and images".



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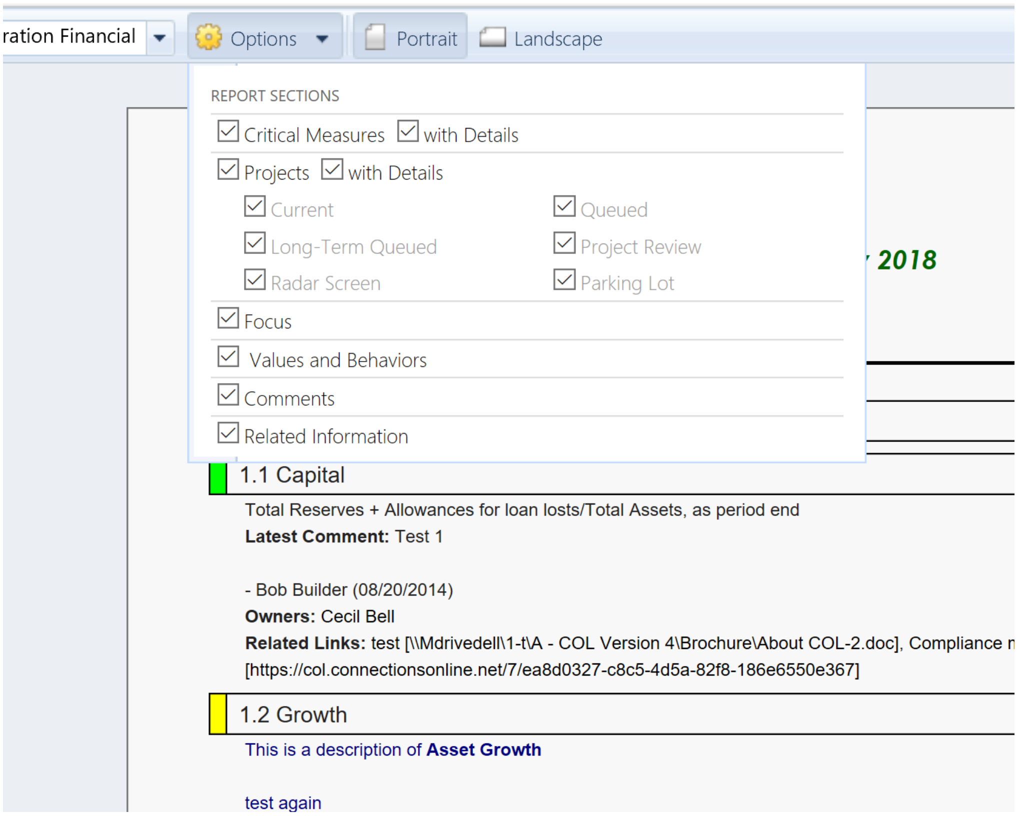
The tab reports include the Organization Report, Department Report, the Project Report, and the People Report and can be launched using the Reports module on the right column of the four main tabs. On each report, the User will be able to open or close modules, expand modules for all details, close module detail, drag and drop modules around the report page, and print report in portrait or landscape. User can sort headers in each of the modules.



Click on the Options drop down at the top of the page and check the items you want to appear on the report. You can also choose Portrait or Landscape. On the far right, at the top of the page you can also toggle between the specific tabs – i.e. you can select any org or dept and the page with refresh with the corresponding org or dept information.

In the Main Column of Tabs, the User will find default data "modules" reflecting the key imperatives for successfully running the business as it relates to the Organization, Department, Projects, and People. The data viewed for each Tab is listed below.

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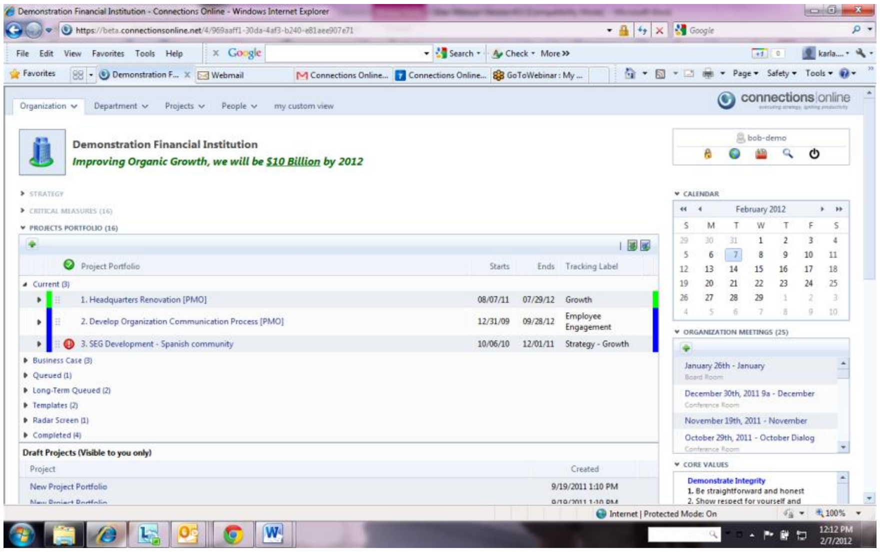
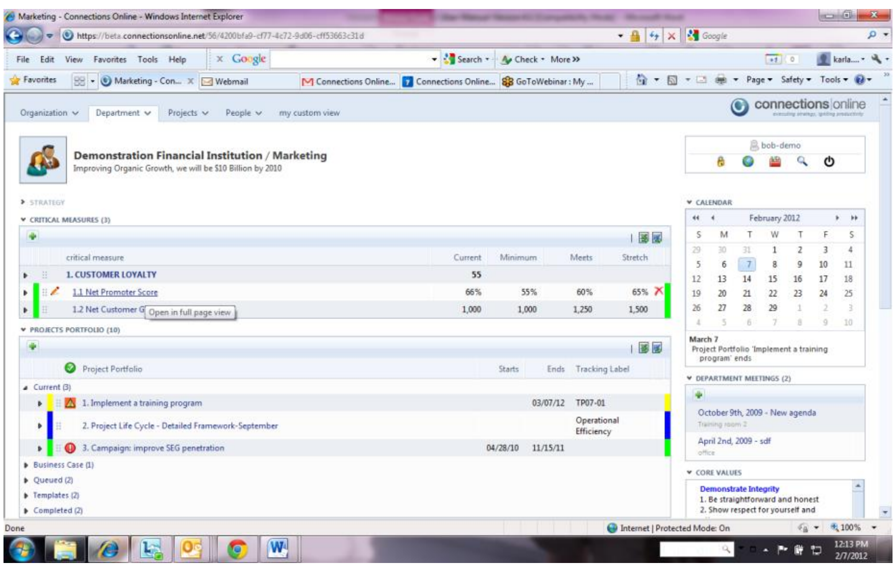
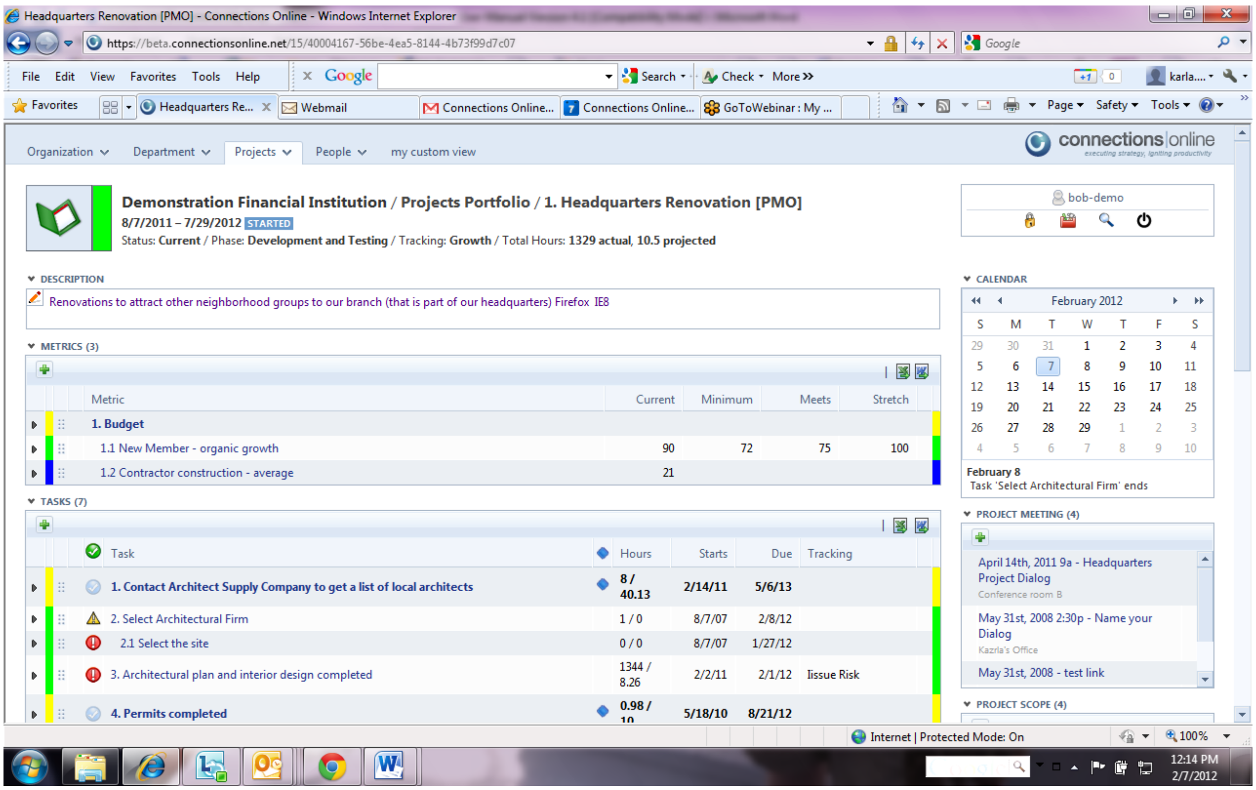
Organization Connection and Department Connection: the User can view Emotional Goal and Values, and (with proper security also be able to add/edit/delete) view the data for Focus, Critical Measures, and Projects associated with this tab.

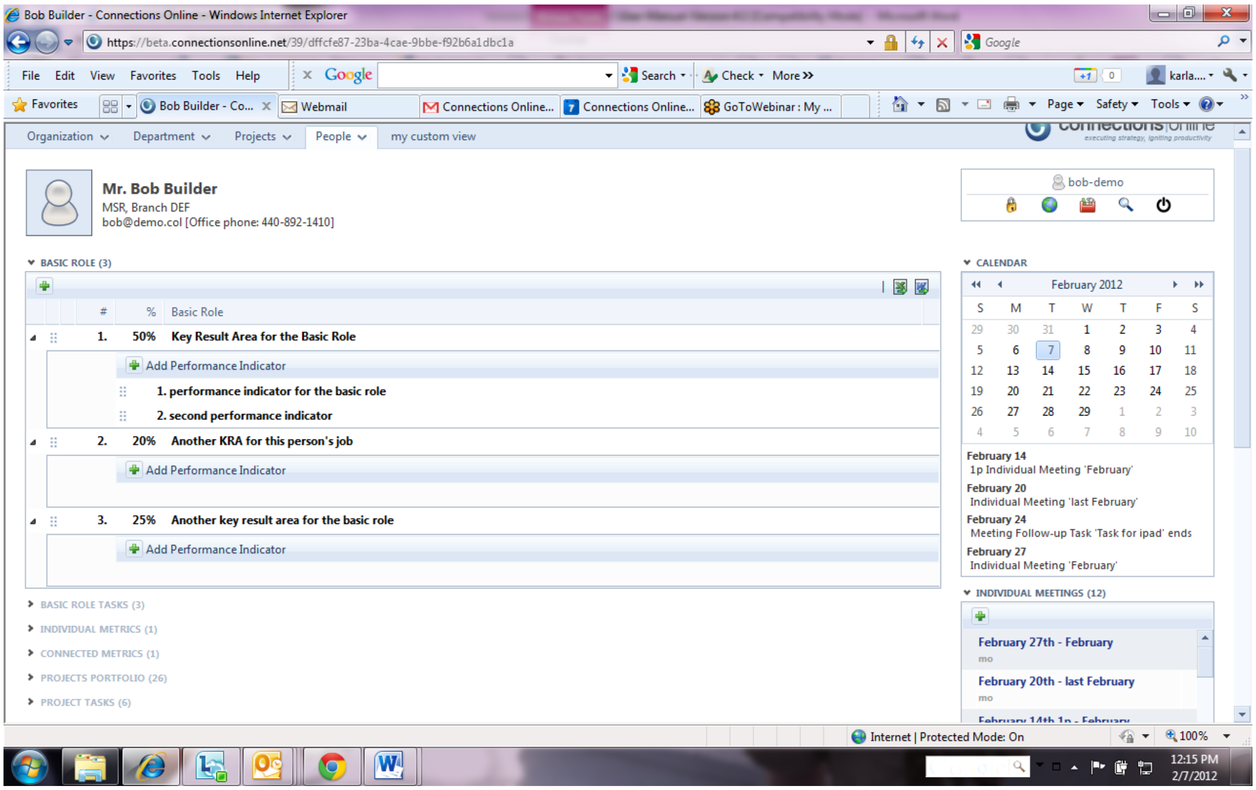




Project Connection: the User can view (and with proper security, also be able to add/edit/delete) data regarding the Project's Scope, Evaluation Criteria, Metrics, Team Members, Tasks (and associated deliverable Tasks).



People Connection: the User can view (and with proper security add/edit/delete) data for the Basic Role and Basic Role Tasks, Individual Metrics, Project Tasks, Dialog Follow-up Tasks, Accountability, Supervisory Scope, current project Individual Tasks, Dialogs, Dialog Tasks, and Personal Tasks.



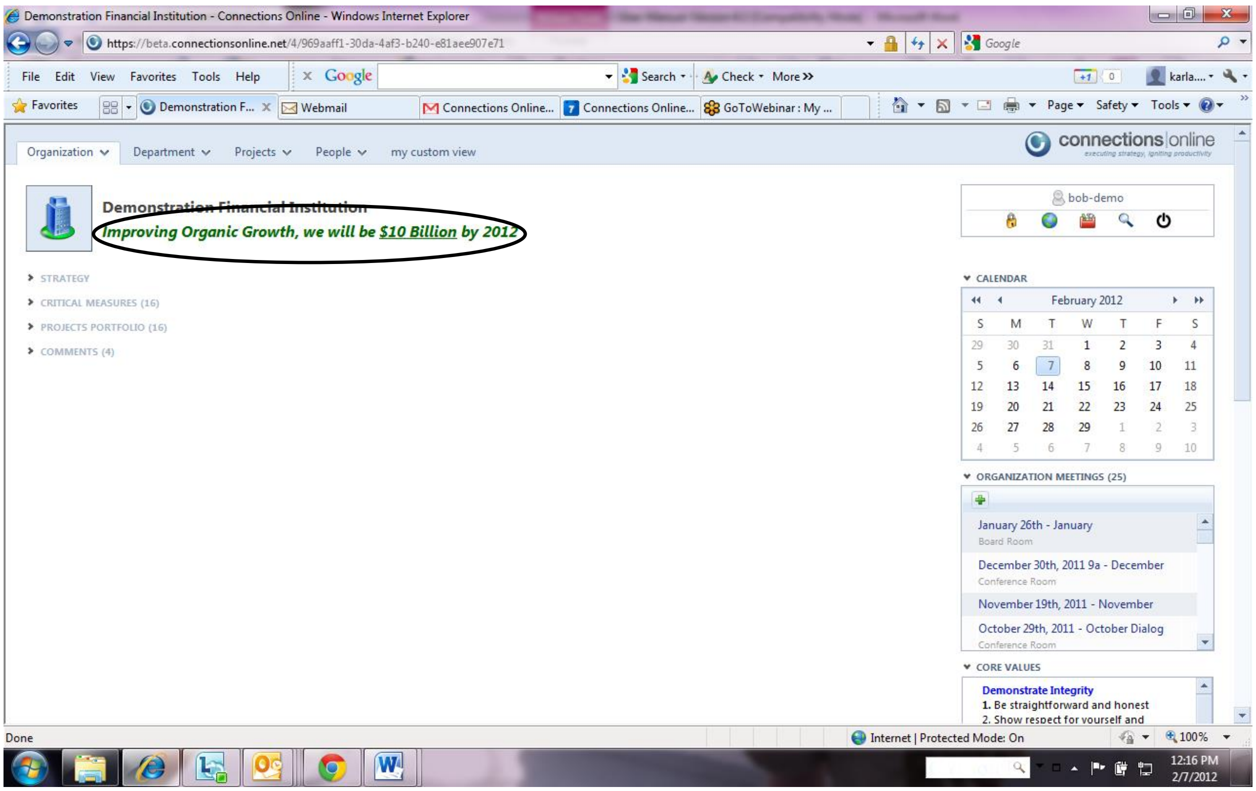
My Connection: based on User needs, the User can view any data module that can be seen in any of the Connection Tabs.

Organization/Department Connection

The Organization/Department Connection provides a clear focus for the organization's / department's strategy. This has five key imperatives. They are Emotional Goal, Core Values, Focus, Critical Measures/Scorecard, and Projects.

Emotional Goal/BHAG

This information is added at the Organization and Department Tabs. This is a short, measurable "emotional" statement (or Big Hairy Audacious Goal) that creates a common perspective throughout the organization about "what we are trying to do as a business."   To edit this, click the pencil next to the name of the picture icon for organization (blue building) – and edit the Emotional Goal.



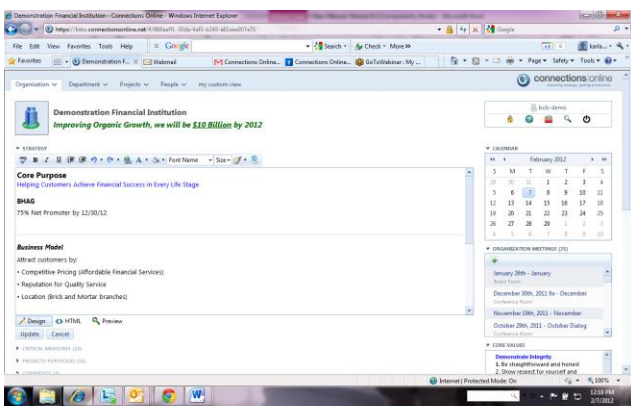
Focus

This is a summary outline of the business purpose and strategy. This is a “site” that can be used to create “stickiness” around an organization’s/department’s focus. Information can be posted that employees want to view daily or weekly. To create a special "look" of the focus data, the User may use the WYSIWYG edit text box to make font changes in color or typeface, as well as to create functional links. Users can also view in html to make additional interface looks.

Adding a Picture to the Focus Module

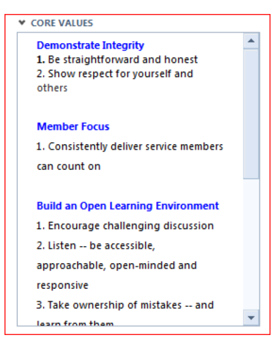
Using web editor functionality in the application, the user has the ability to add an image viewable within the Focus Module (in both the Organization and Department tabs) using html code. Please see this link for the instructions: http://www.tizag.com/htmlT/images.php. This link shows how to write the html code to point to a picture so it appears on the Focus module. The picture should reside on the customer’s network – the user might need to ask IT to save the image on their network/web folder, etc. so the user can point to it.

To edit the Focus module, click on the pencil under Focus. An edit box will appear. On the lower left side of the edit box, click on the ‘HTML’ button (to the right of the ‘Design’ button).



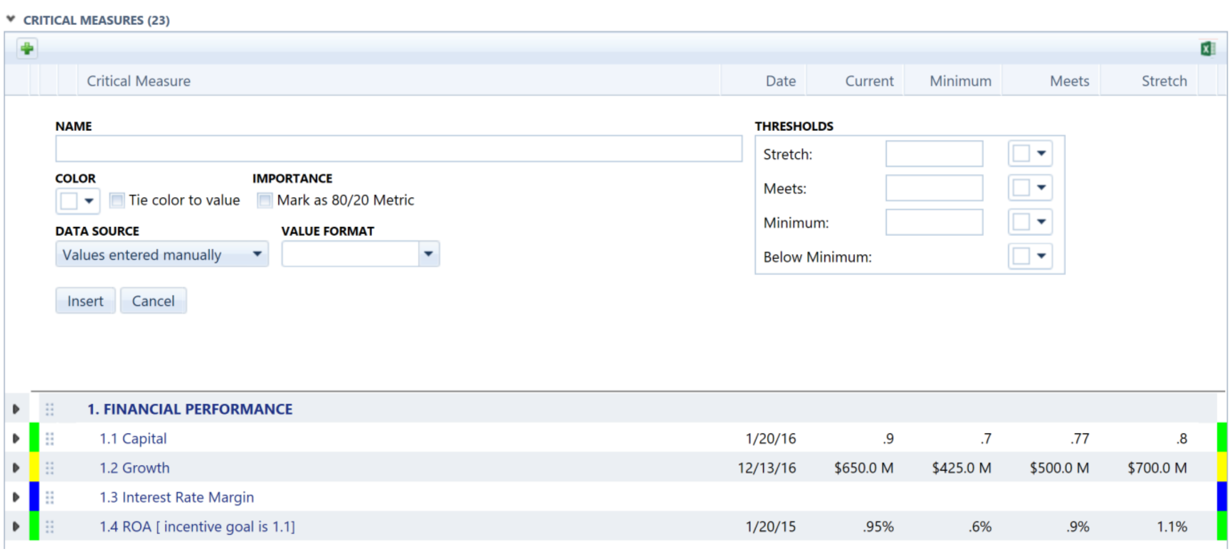
Core Values

This information is added at the Core Values module found on the right sidebar. This is a team consensus on "how the business will be run." These are the behaviors that the organization will "live" by and "be fired" by. Use the pencil edit symbol to open, edit and save the changes.



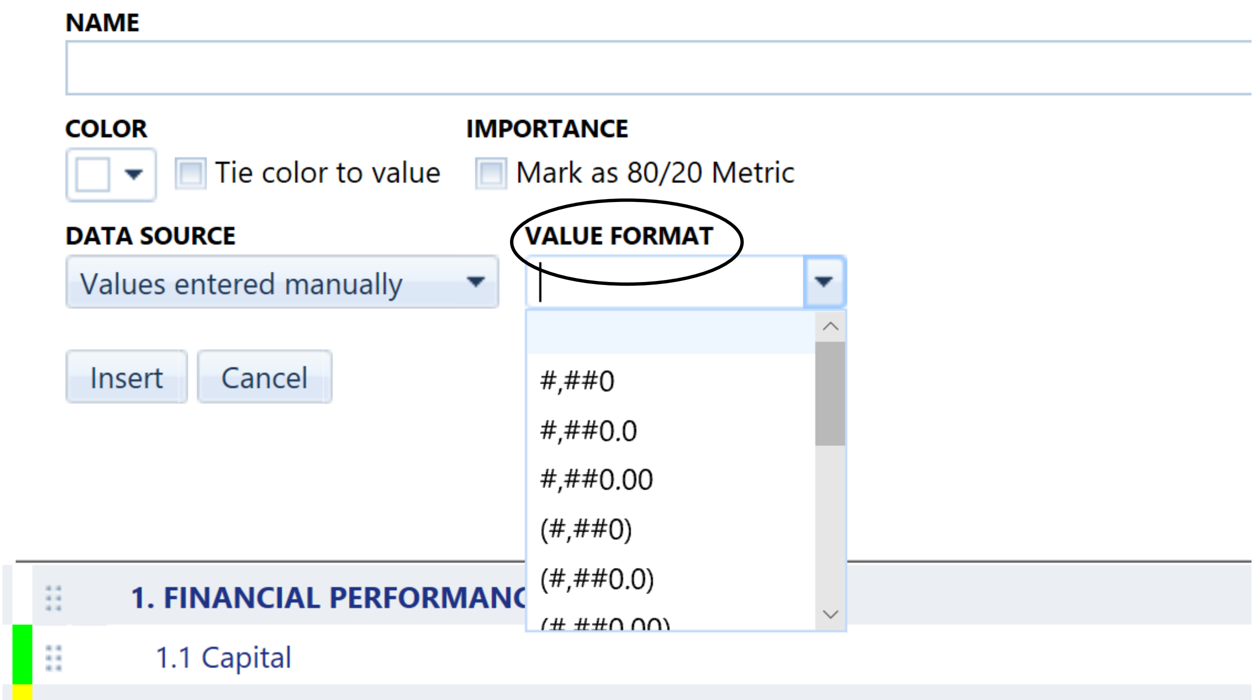
Critical Measures/Scorecard

This is a balanced list of the "critical few" performance measure targets that need to be achieved for short-term and long-term success. The Critical Measures/Scorecard View can show the hierarchy of metrics – starting by naming the Categories (for example Employees, Customers, Operations, Innovation, Community, etc.) and the Metric associated with the category names (the actual Critical Measure that the organization wants to track). Click to open metric and the whole page edit view of the Critical Measure shows the color scorecard and shows the "Owners" of the Metric (which is also reflected in the Basic Role of the People Connection). The whole page edit view also lists the Trend Data (if appropriate) so that Users can see progress-to-expectation over time; this view also shows the color coded trend line showing progress to plan. Comments specific to a Metric can be noted in the Comment box. Related Links for documents or websites can also be added to support reporting and understanding of the Metric. Use the add symbol on the main page view to create a new Metric. Use the dots to drop and drag to re-order. To edit after the category /metric has been created, click the Metric link and the edit screen will open. To create a metric, click the plus and fill out the quick edit information. Insert (save) the metric and edit using quick edit or click on the metric name link to edit the full metric information.



Critical Measures/Scorecard, Formatting

For the Format field, there are commonly used format strings found in the menu when the drop down arrow is clicked. If the desired format formula is **not** on the list, a User can delete the data currently appearing in the Format field and input a custom formula (review the table on the next page). A custom format formula will be available for that specific Metric only.



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User Defined Numeric Format Examples

Some sample format expressions for numbers are shown below. (These examples all assume that a system's local setting is English-U.S.) The first column contains the format strings. The other columns contain the output that results if the formatted data has the value given in the column headings (minimum, meets, exceeds and trend data). A User can choose the format string that will represent the format for the metric to show (type it into the format field on the metric edit page if it is not available by default).

Format (*if typing the following format string, the columns to the right will show the results)*	If **5** typed: (**positive** # in minimum, meets, exceeds fields)	If **-5** typed: **(negative** # in minimum, meets, exceeds fields**)**	If **.5** typed: **(Decimal** # in minimum, meets, exceeds fields**)**	If typed: (**Null)**
Zero-length string	5	-5	0.5	
0	5	-5	1	
0.00	5.00	-5.00	0.50	
#,##0	5	-5	1	
#,##0.00;;;Nil	5.00	-5.00	0.50	Nil
$#,##0; ($#,##0)	$5	($5)	$1	
$#,##0.00; ($#,##0.00)	$5.00	($5.00)	$0.50	
0%	500%	-500%	50%	
0.00%	500.00%	-500.00%	50.00%	
0.00E+00	5.00E+00	-5.00E+00	5.00E-01	
0.00E-00	5.00E00	-5.00E00	5.00E-01	

Examples of Common bank Measures and Formats:

Common Credit Union Measures	**Formatting Examples**	**Numeric Data to be Displayed**	**How Number Displays on Org/Dept Tab**
ROA	#.####%	.0097	.97%
Percentages	#.####%	.85	85%
Dollars	$#,###	4500	$4,500

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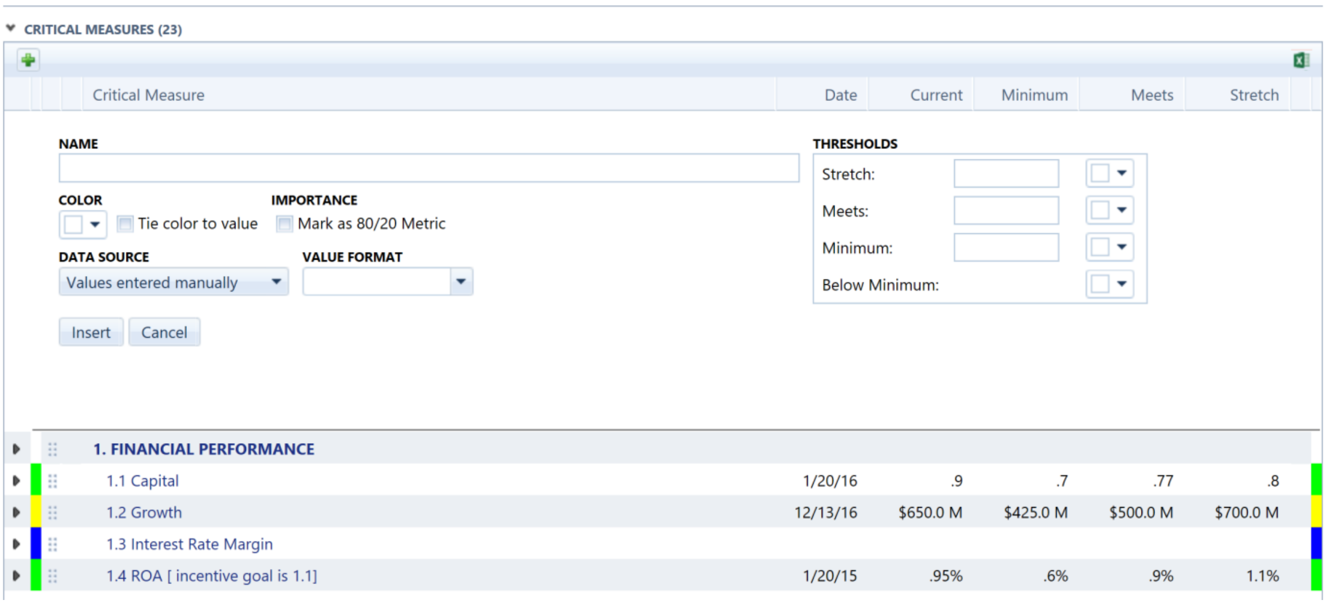
Critical Measures/Scorecard, Entering Metric Data

To enter data, click the Add symbol and type in the name of the metric as well as the other quick metric data (format, minimum, meets, exceeds thresholds, comments...



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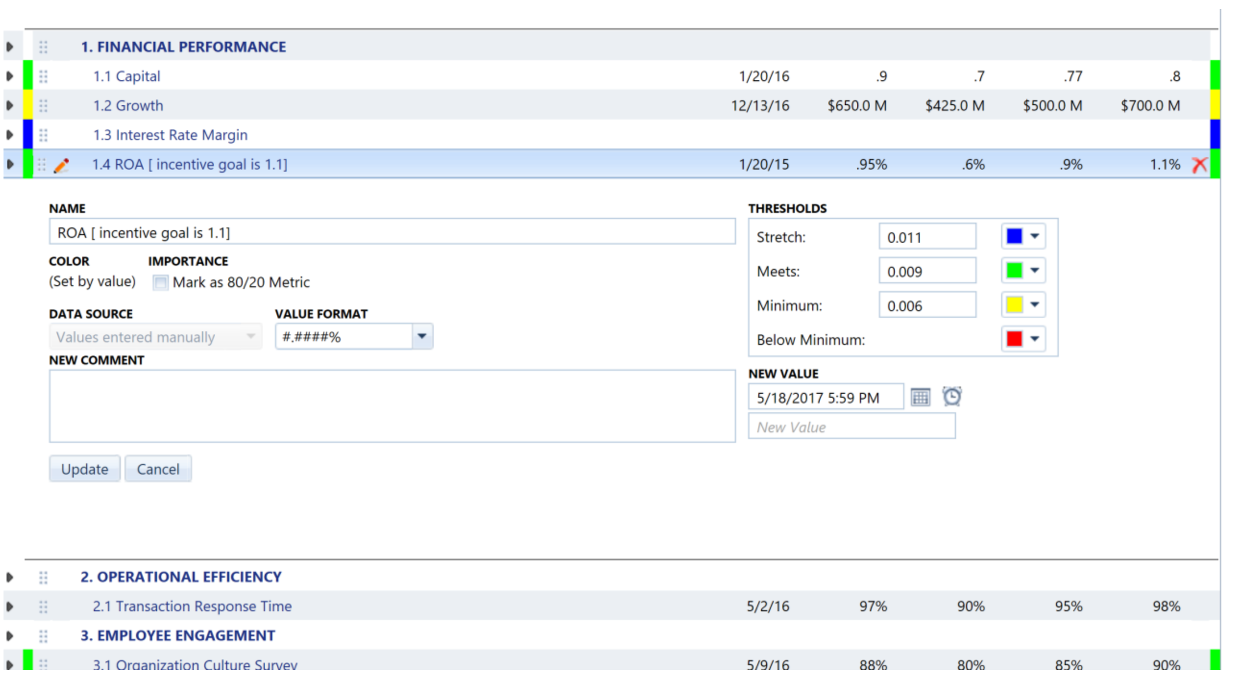
The User can input additional detail about the Metric:

- Thresholds: [lets the User input 3 levels of colors for easy view of Scorecard] (Enter threshold number/metric, and select the colors to indicate the different thresholds.)
- Format: See previous section
- Click Insert.
- Trend Values: [The trend values create the trend "picture view" of the on-going performance of the threshold information.] Trend values can be entered using the pencil on the main page next to the metric for a "quick edit" or the User can click on the metric name link to enter the trend values
- For a Quick Edit after the metric has been created, click the pencil to the left of the metric, add current threshold, comment, etc.



- Comments: the Owners will provide the comments related to the metric (saves date and time of comment).
- Owners: add the individual(s) who are accountable for updating the metric. (metric must be open to full page to add Owners)
- Related Links: Owners can add related links specific to this metric – this can be from the User's network or web. (Metric must be open to full page to add Related Links)

Once the Metrics have been entered and saved, the User will see the list of Metrics on the Metrics module. To move the Metrics up/down/in/out, the User must select the drag and drop feature.

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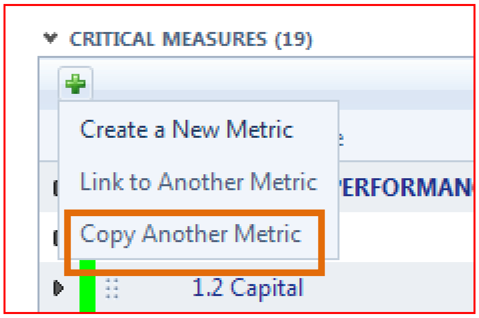
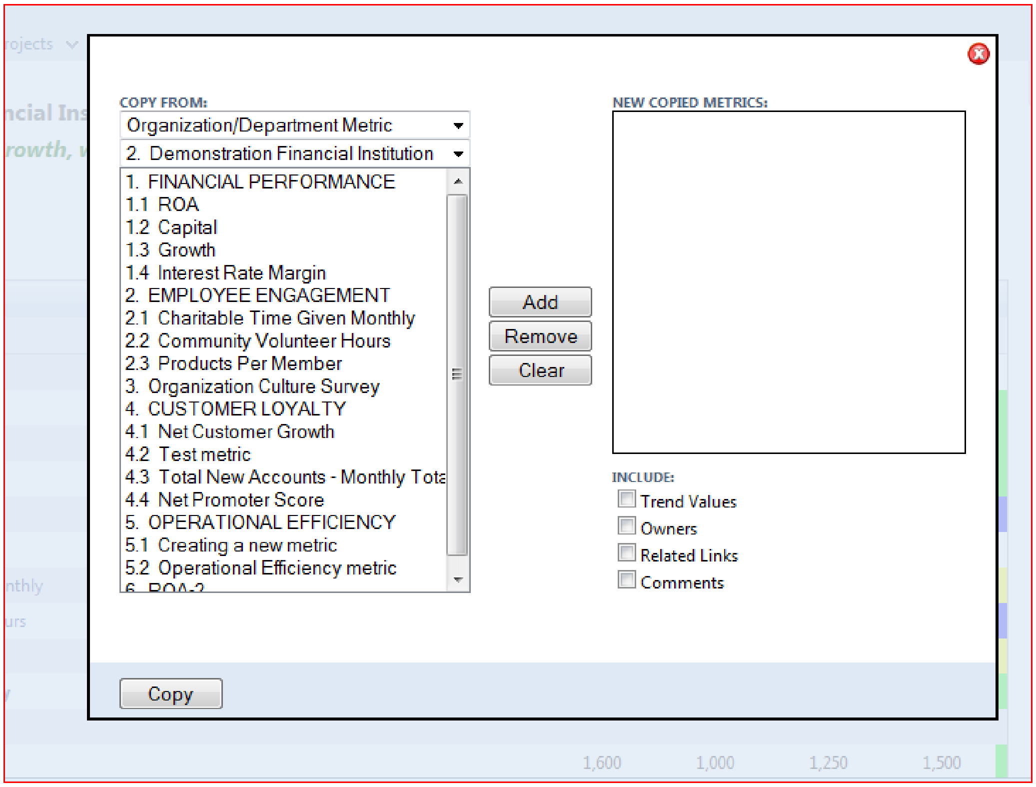
Copying Metrics

You can copy metrics within an organization or department and people pages – or copy one metric to another organization, department, or people tab. Click the "Add" icon displayed under the name of your metric modules.



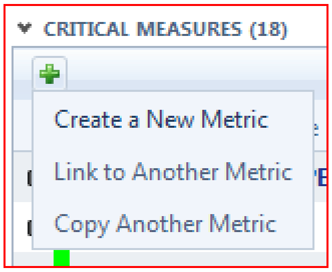
To copy a metric, first navigate to the page where you want the metric to be copied TO. Click the Copy Metric icon, and the Copy Metric screen will open. When the copy metric edit window opens, select the metric you want to copy and click "add". You will also be able to edit the name of the metric, just as you would change a file name. Check whether you also want the trend values, owners, related links and comments to be copied. If you do want them to copy, you simply check which you want copied (or uncheck if you don't want them to copy.) You will be able to select the specific organization, department or people tab by using the drop-down arrows. Click copy when you have completed your list of metrics to be copied.



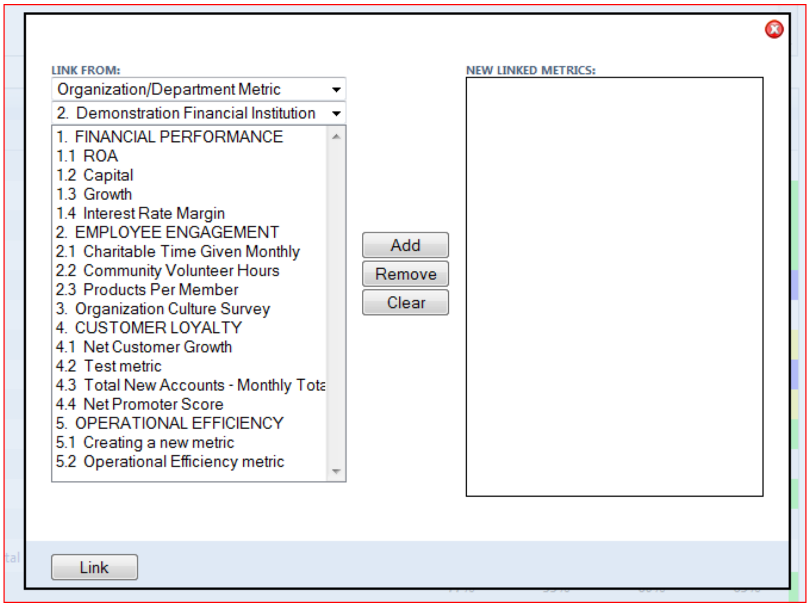
Roll-Ups and Linking Metrics

Overview:
An example: Your VP Branch Operations, on the Branch Operations Department page, could have a parent metric – called “total loan metrics”. Then subordinate to “total loan metrics”, the VP could “link” the loan metrics from the first branch with total loan metrics, then link second branch loan metrics, etc. – and add those together on the Branch Operations Department page to be the sum for “total loan metrics”. The linking function allows the owner of each branch loan metric to change the metric on their department page and it will automatically show the change on the VP Branch Operation’s page, and the “total loan metrics” sum will also change when these subordinate metrics change. The VP can also link to the other metrics without doing a calculation. You can also do the same process on the Organization page.
Linking metrics between Organizations, Departments and People tabs:

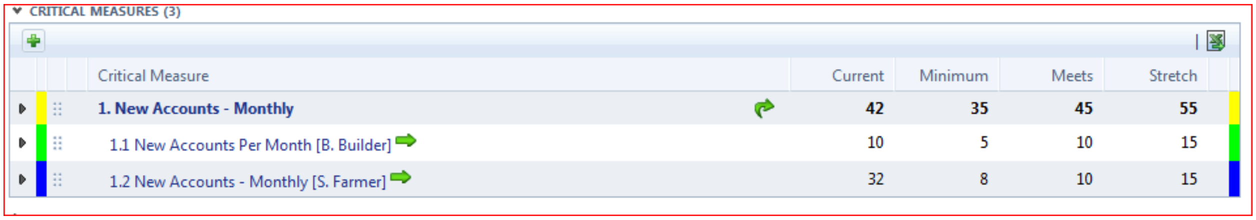
- Navigate to the page where you want the linked metric to show.
- Click the metric “Add” icon at the top of the metric module.
- Click Link to Another Metric



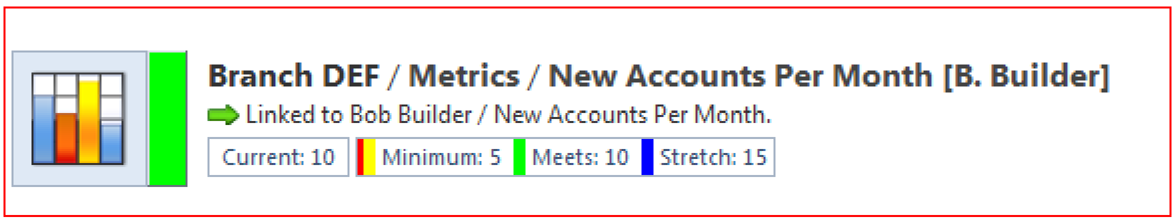
- The New Metric Link edit window opens – select the Organization, Department, Project or Individual from which the metric will “link” FROM.



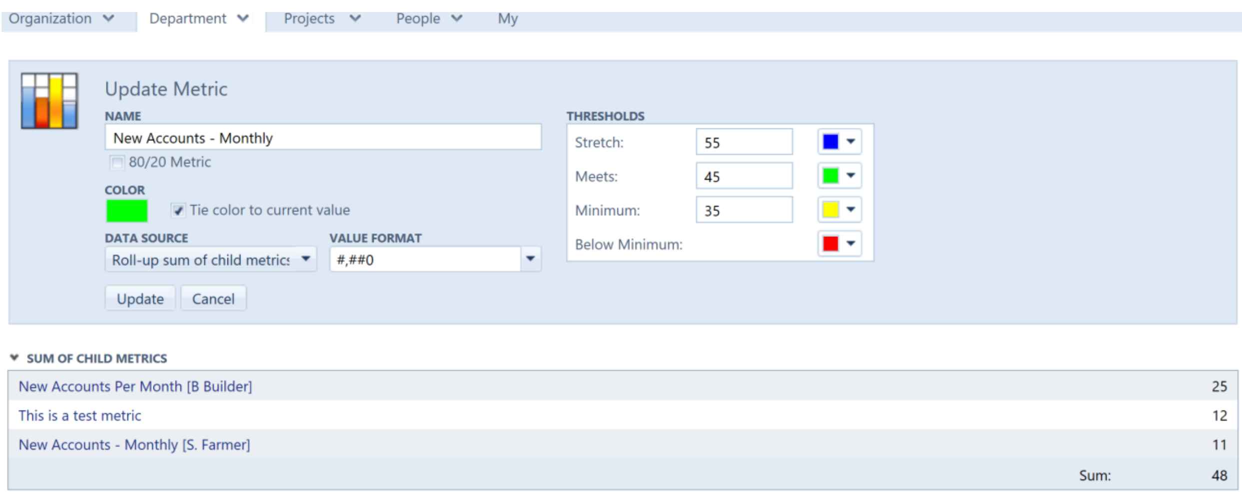
- Highlight the metric on the left and click Add. Change the name of the metric as desired, and click the "Link" button at the bottom left of the edit window.
- The metric will now be displayed on the page where you want it "linked" – it will have a green arrow next to the metric to show that it was linked. Drag and drop the metric where you want it to be on the metric list. In the example below, see the two New accounts monthly metrics are "children" of the "parent" New Accounts Monthly metric.



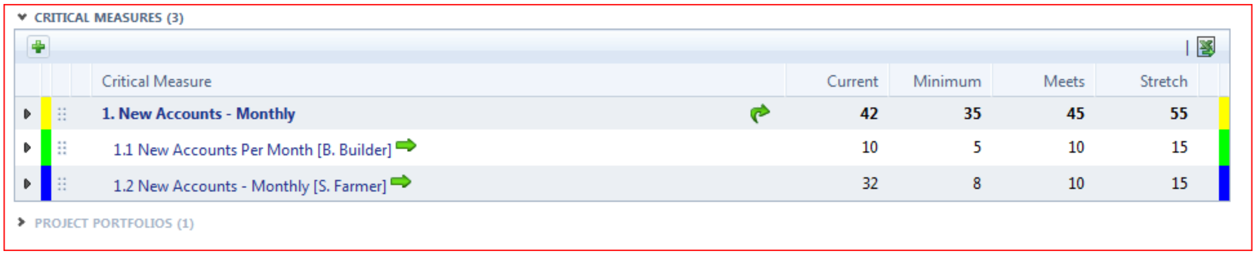
- In the example below, if you open the child metric New Accounts Per Month [B. Builder], you will see where the metric was linked from.



- If you want to "roll-up" the two metrics into a sum or average of all the children metrics, open the parent "New Accounts – Monthly" and select the computation you want to make from the Data Source filed – i.e. Roll-up sum of child metrics, or Roll-up average of child metrics.
  Note: Child metrics do not all have to be linked metrics to roll up.



- When you save the changes to the metric, you will now see the list of child metrics under the "parent" and those "linked" metrics will show the green arrow as explained above. If there is a Roll-up calculation, you will see a green curved arrow around the calculated parent metric. In the example below, we have set the computation to be "Rolled-up Average".



- **Please note: you cannot roll up metrics that do not have the same format – for obvious reasons the "calculation" will not work – make sure the children metric all have the same format.**

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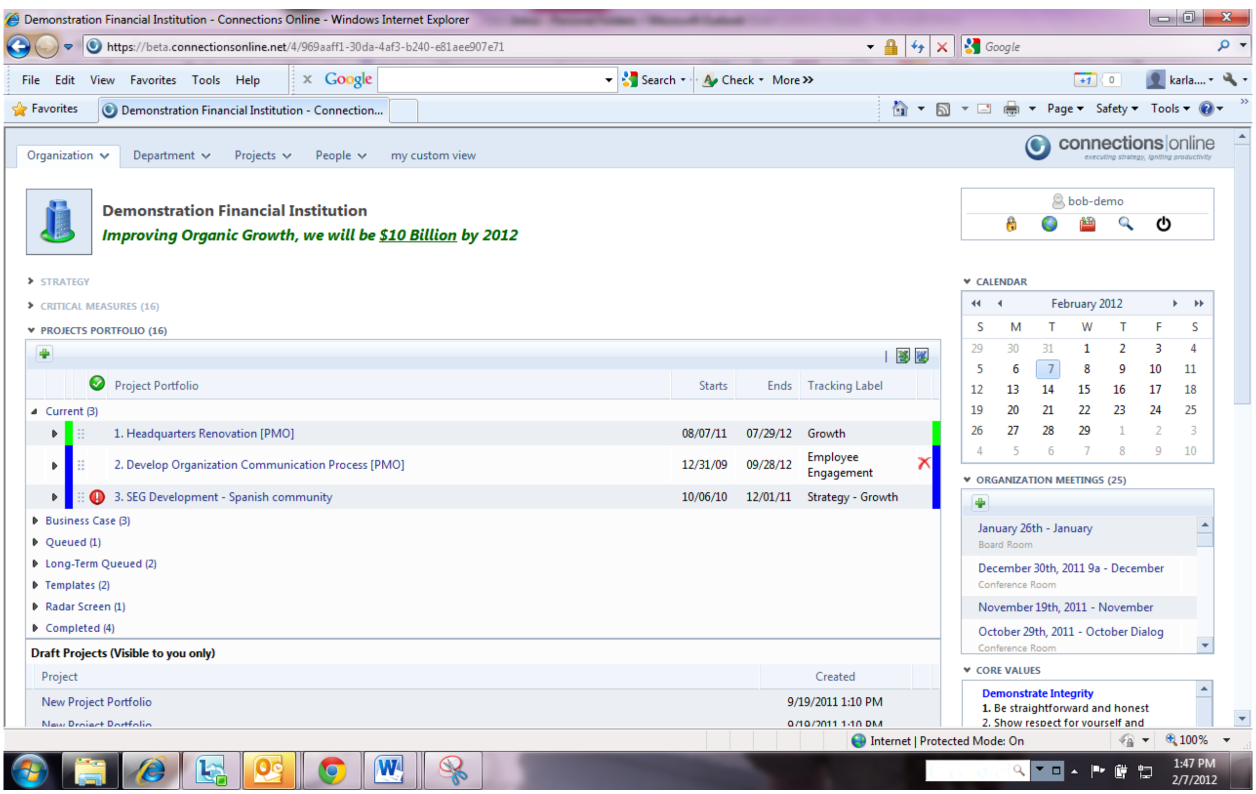
Projects

Projects can be found on the Organization and Department Tabs. Projects are an agreed-upon, priority listing of the projects/goals that merit organizational resource allocation, and cross-discipline attention. Each is a brief statement that explains the purpose of the team, answering the questions: What will this project team do that no one else in the organization is doing? What organizational goal does this team support? What resources are required? What is the scope of work involved?

There are five "default" categories of Projects: Current (the "critical few" priorities that require immediate resources and focus), Business Case (projects that are currently have a business case prepared), Queued (the priorities that are "on hold" until resources are freed up from completed Current Projects), Queued Long-Term, Completed (the priorities that have been completed and there is a "record" for celebration), and Dropped (the priorities that the team has agreed to drop due to adjustment to strategy, lack of resources, etc.) On a monthly basis, the team re-prioritizes projects and resources and adjusts the Project module "just-in-time."



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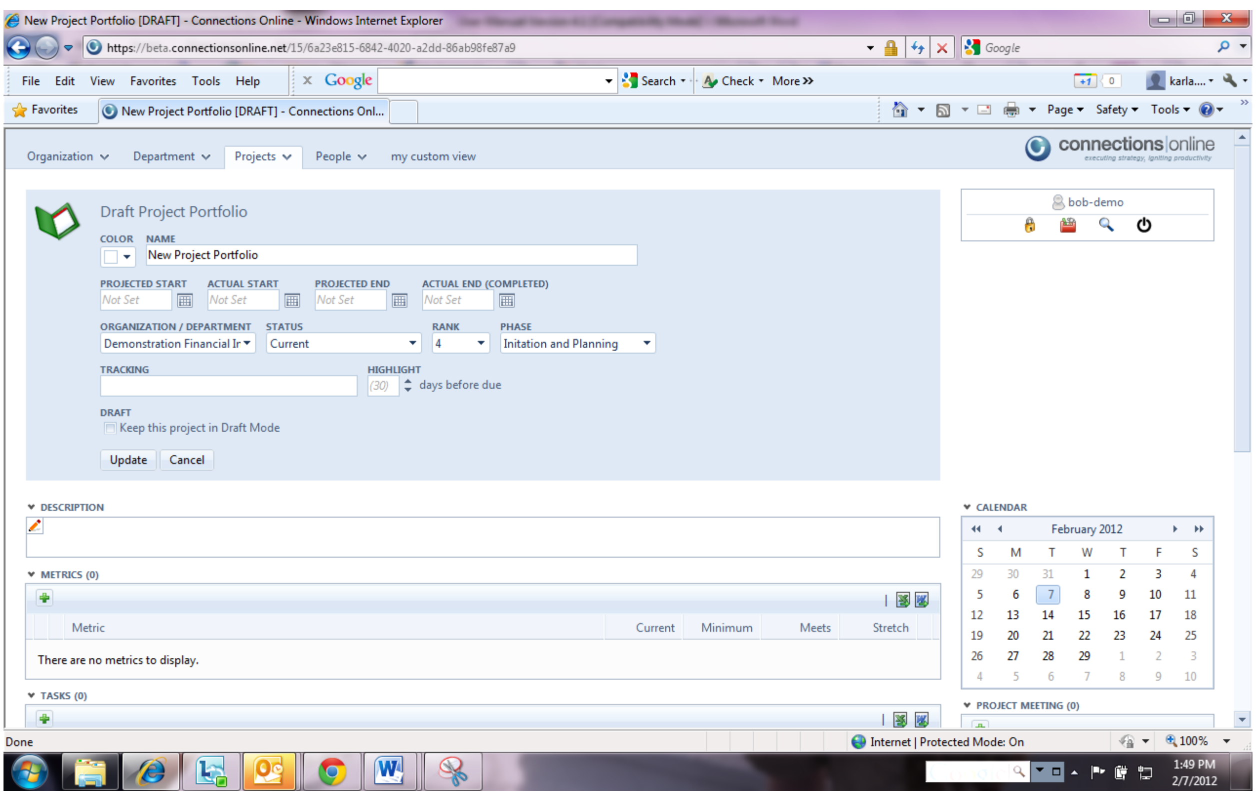
Project General Information: This Project tab lets Users select a Project to be able to view: sponsor/customer, project health through scorecarding, the project's status (current, queued, queued long-term, completed or dropped), project phase, its priority ranking, the project scorecard, start date, near date, end date (the date the project will actually be completed). There is also a comment field to keep everyone abreast of progress, if appropriate.

In the Organization or Department tab, select the Add symbol to open the Project window.

Input the data that will provide Users with information about the project:

- Project Name
- Project Color (tells the other viewers about the "health" of the project)
- Status (how resources are being used in relation to the project status i.e. current – currently being worked on, queued – waiting for resources to work on it, long-term queued, completed, etc.)
- Phase (project phases i.e. business case, design, construction, testing, production, etc.)
- Dates – Projected and Actual
- Rank – you can drag and drop the project to the order of priority you desire
- Click "Update" to save the information.
- Organization and Status – you can "move" the project by selecting the Org/dept and status using these fields



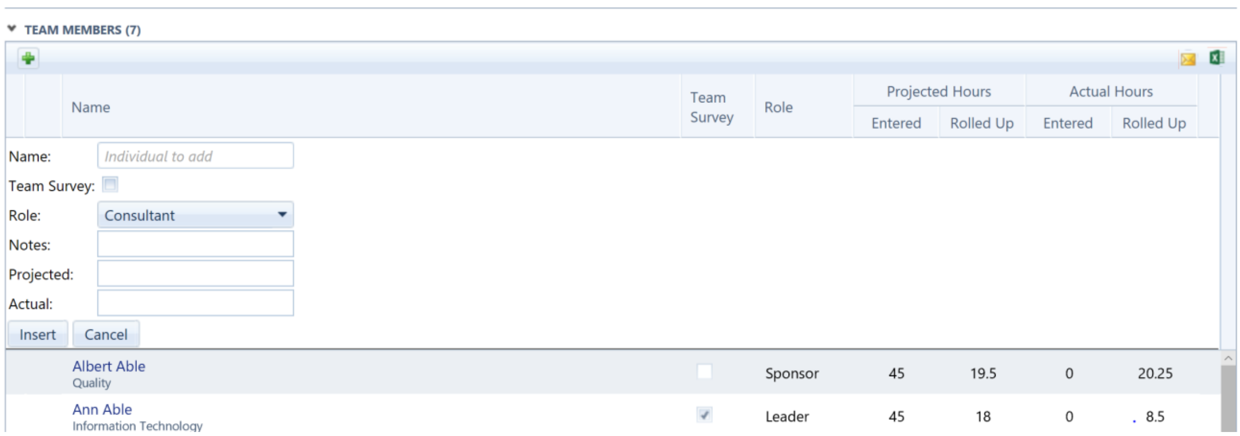
Adding Project Detail

Once the Project has been added, the Project will open. If a User wishes to open the Project from the Organization or Department Connection Tab, click the Project link on the Project module and it will automatically open in the Project Tab.

To edit the Project Status detail (or any other detail) at the top of the page, a User can click the edit pencil symbol next to the name of the project to open the edit window.

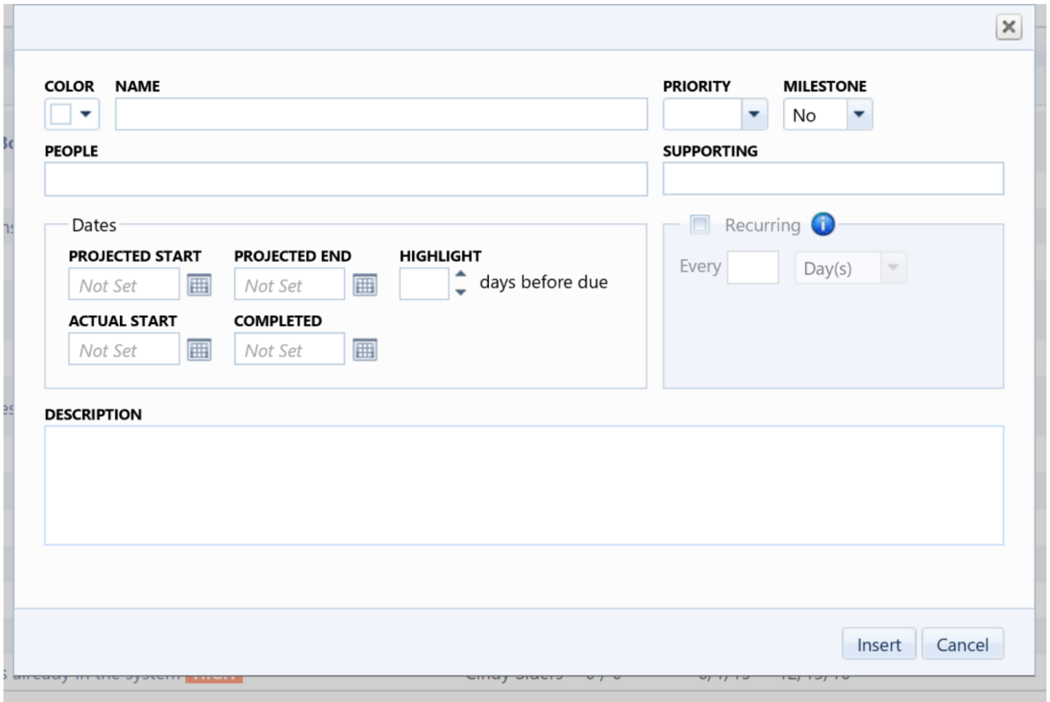
Add or Edit the Project Metrics. Procedures are the same as for the Organization/Department Metrics.

Add or Edit Project Team Members by clicking the Add symbol in the Team Member section. On the left of the edit window, a User can select and add the people who will be on the team (click the box next to the name, then click the Insert button). Under the name, select their project roles from the drop down menu and, if desired, add Notes to further define the individual's role on the project. User can also input projected time to spend on project and the User can add their actual time to be spent on the task. [As the individuals work on the task, they can enter total time spent on the task.]   *Make sure to select the correct Team Member role because roles are linked to project security.*



Project Tasks

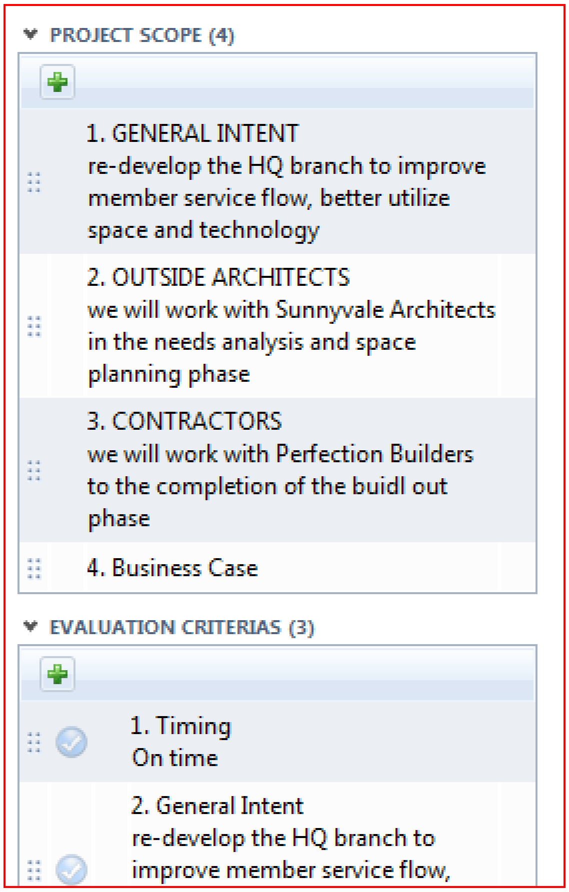
Project members can add Tasks, set them as "milestones," and color code the health of the task. The "Tasks" will be tangible results, stated in past tense. For example, if getting 10 people to participate in a focus group was a step in achieving the goal of the project, *calling 10 people* is an activity, *10 people participated in the Chicago focus group* is a Task. When viewing the Task module, members can change its Priority (e.g., low, normal, high), add People Responsible (which will automatically link and show up on their respective People Connections) and write Comments about this task.



Add Task by clicking the Add symbol. Add task Name, task Description, Projected and Actual dates. User can also select the task as "recurring." (Please note, once a User adds the Actual end date, the Task will have a green check mark at the beginning of the task, to show it as completed on the Project Tab.)

Save the Task by clicking the Insert button. You can now click the pencil next to the task and enter "quick edit" information or you can click on the name of the task, open the task in a full web page and enter all task information, including person responsible, related links, etc.

Project Scope: this module shows the intended scope of this Project – what is included and what isn't included. In the project plan, there is a brief statement that explains the purpose of the Project. The Scope will spell out what the Project's end product will be, for example research report of what, benchmark metrics in what form and of what, study in what form and of what, presentation analyzing what, development of a plan for what, make recommendations on what, make a decision regarding what, implement what, run what… Examples of Scope might include such things as: develop a plan, develop/administer/analyze survey results, make recommendations, develop new business process schematic, develop and implement training programs on new business process, train all employees on business process, etc.



Project Evaluation Criteria: this module is an explanation of how this Project will be evaluated – when you will know it is done and how you will know if it is successful or not. It answers the questions: What will happen as a result of the Project being accomplished? What will improve? How will improvement be measured? What will be different?

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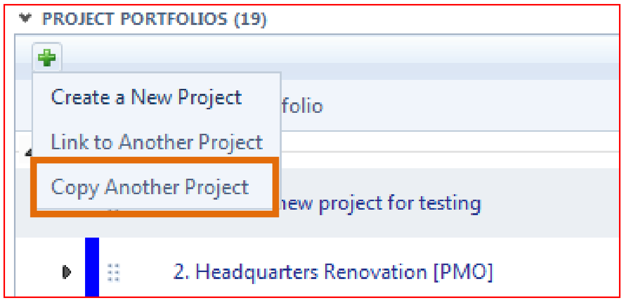
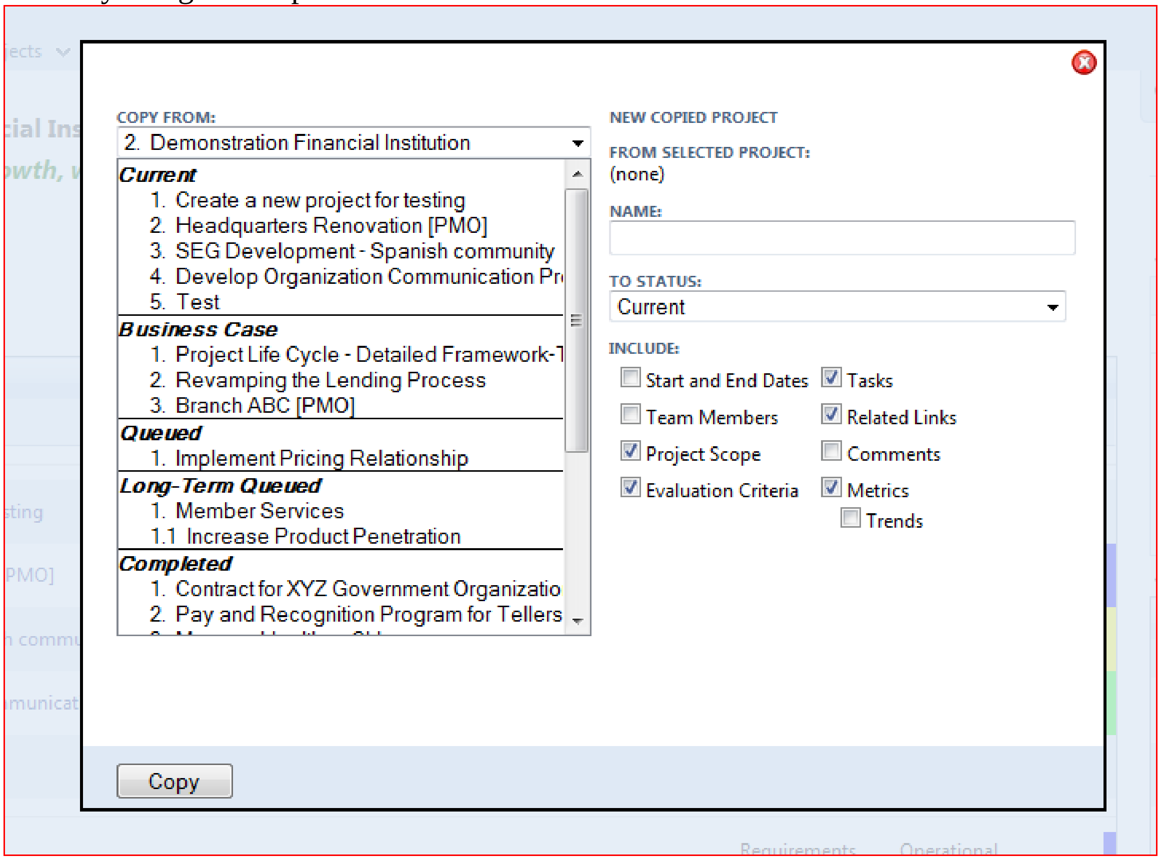
Copying Projects

You are able to copy projects within an organization or department – or copy one project to another organization or department. See image to view icon displayed under the name of your project modules.



Navigate to the Org/Dept where you want the project to be copied TO. To copy a project click the Add button, click the Copy Project icon, and the Copy Project screen will open. When the copy project edit window opens, select whether you also want to copy the start/end dates, project scope, evaluation related links comments, team members, metrics, trend values, and tasks. If you want them to copy, you simply check which you want copied (or uncheck if you don't want them to copy.) You will be able to select the specific organization or department and corresponding status by using the drop-down arrows.



Once the copy information has been completed, click Copy – the edit window will be closed, the page will refresh to the page that has the copied project.

Optional – Project Authority

This document (see Appendix A for sample) will outline the authority of a Project team. Most Users will not use this page. However, if it is to be used, the following question will help determine whether to fill it out or not: What unique authority will these Project team members have that other teams will not?

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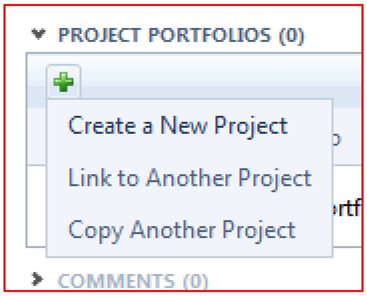
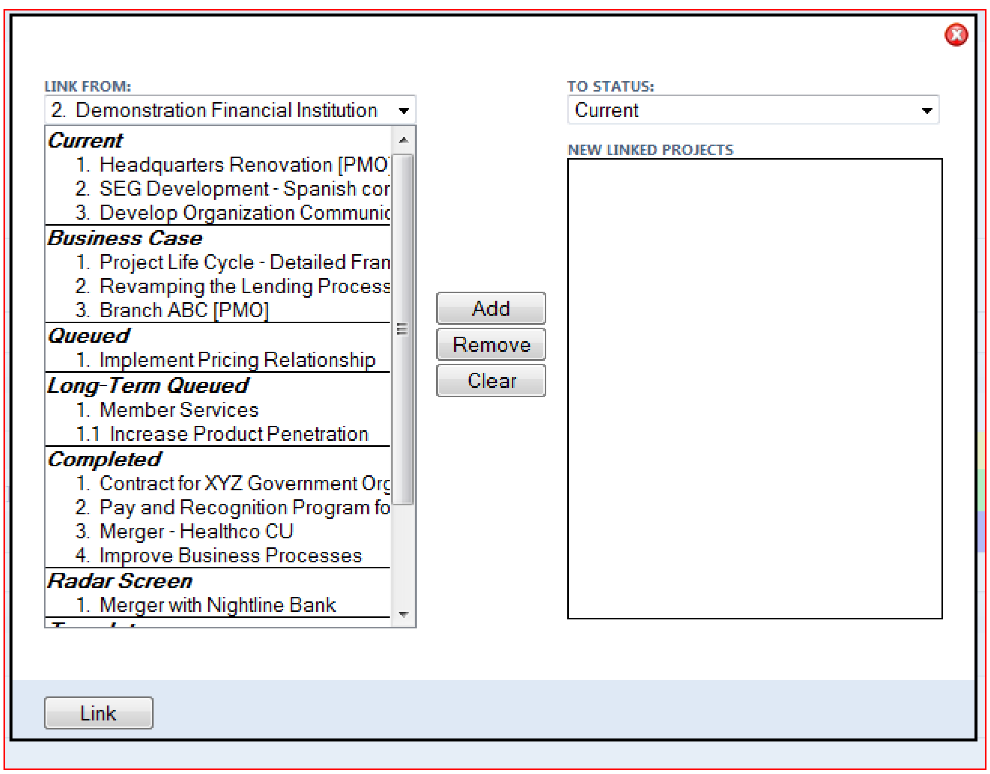
Linking Projects

An example would be if you created a project on the Org tab and you wanted to "link" that project on a department tab, you would open the department tab where you want to show the linked project.

- Click the "Add" button on the Project module.
- Select "Link to Another Project"



- An edit box will open. Select the Org/dept that has the original project. Select the project that you want to link to the Org or Department page you have opened. Then click "Link" and the project will appear on your project list with a green arrow next to it to show that it has been "linked" from elsewhere in the application



- See the green arrow indicating this project has been "linked"

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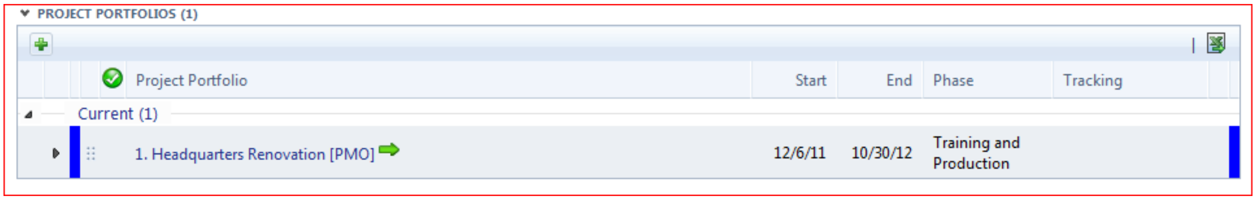


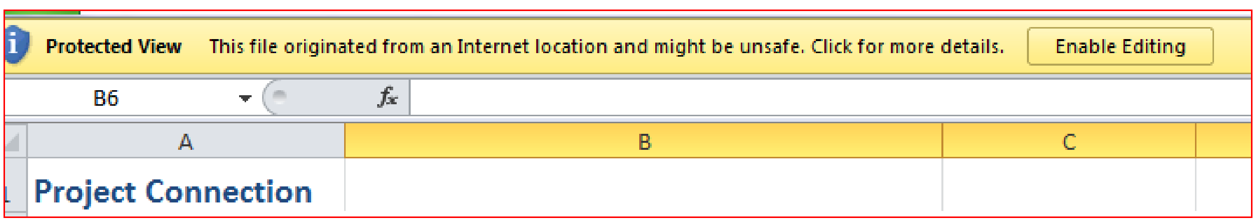
- When you open the project, it will show where it was linked from

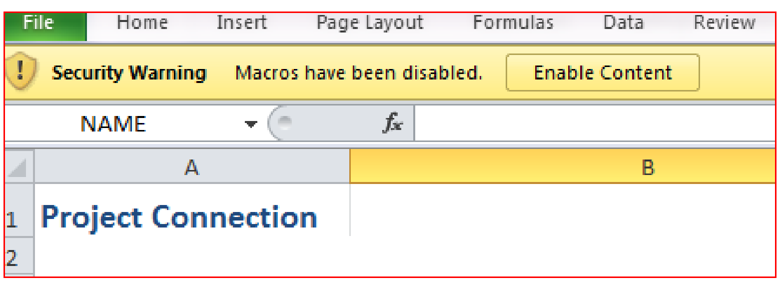
Using the Project Task Template

Additional Domains to use these templates
Please make sure that the domains *cows.connectionsonline.net* as well as (or instead of) *api.connectionsonline.net*, are working so firewalls will allow access to anyone using the Web Services, Excel Templates, Outlook Connector, or Project Connector.
Link to the templates: https://support.connectionsonline.net/hc/en-us/articles/215968143-Microsoft-Excel-Templates?flash_digest=07fbae59d6ce523ff11d5b97146e328d3bf61b84

To use the templates, follow these instructions (you must be using MS Office 2007 or 2010):

- Be sure that the Web Services feature has been turned on (contact Karla Norwood for the website location – templates use web services and this feature must be turned on before you can use the templates)
- Download and save the template from our website
- Save the template in a folder on your desktop
- In Connections Online, create a project
- Enter the names of the project members in Connections
- Open the saved template form (Excel may ask you to enable editing and/or enable content/macros – make sure you enable them)





- You will be asked for your Connections Login – login with your Connections login. If you are not a COL Administrator, make sure you are a member of the project team that has security to create tasks on that project.

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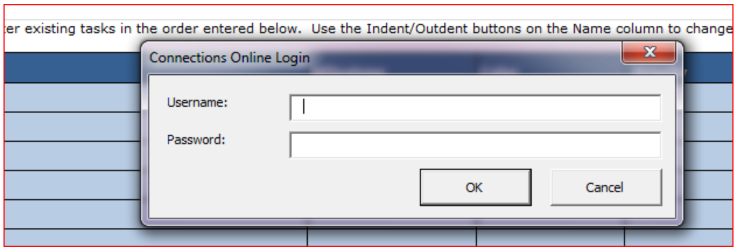
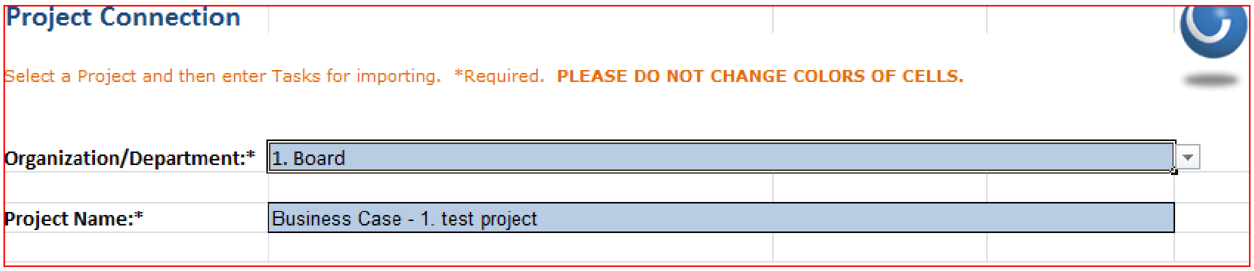
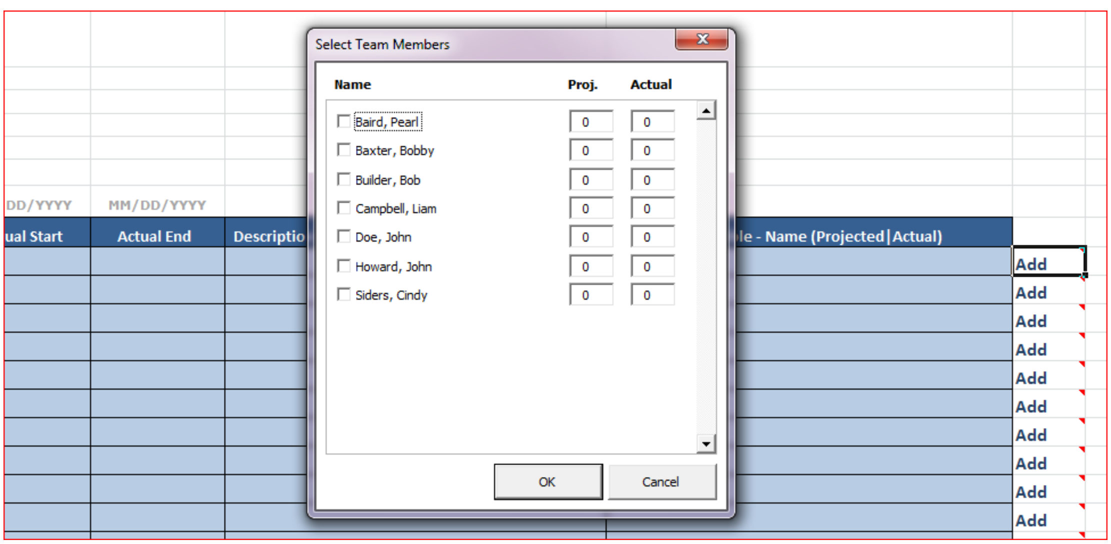


- On the Organization/Department line, select the project's Org/Dept from the drop down at the end of the blue field.
- Select the project at the end of the Project Name field.



- Enter the name of the task on Line 11. (Do **not** enter a rank number. These numbers will automatically populate as you create your list of tasks.)
- Go across the row/cells to the right of the name of the task and use the drop down or fill in the dates and descriptions as noted at the top of the row.
- When you get to the end of the row, you will see the column for person responsible. Double click "Add" at the end of the row and the box pops up with the names of the project members. Check the person(s) responsible for the task.



- When you want to have a "child" task, enter the task name, move to the next cell in that row and click the indent arrow on your Excel function bar and the task will indent. Notice the rank order of the task will change accordingly too.

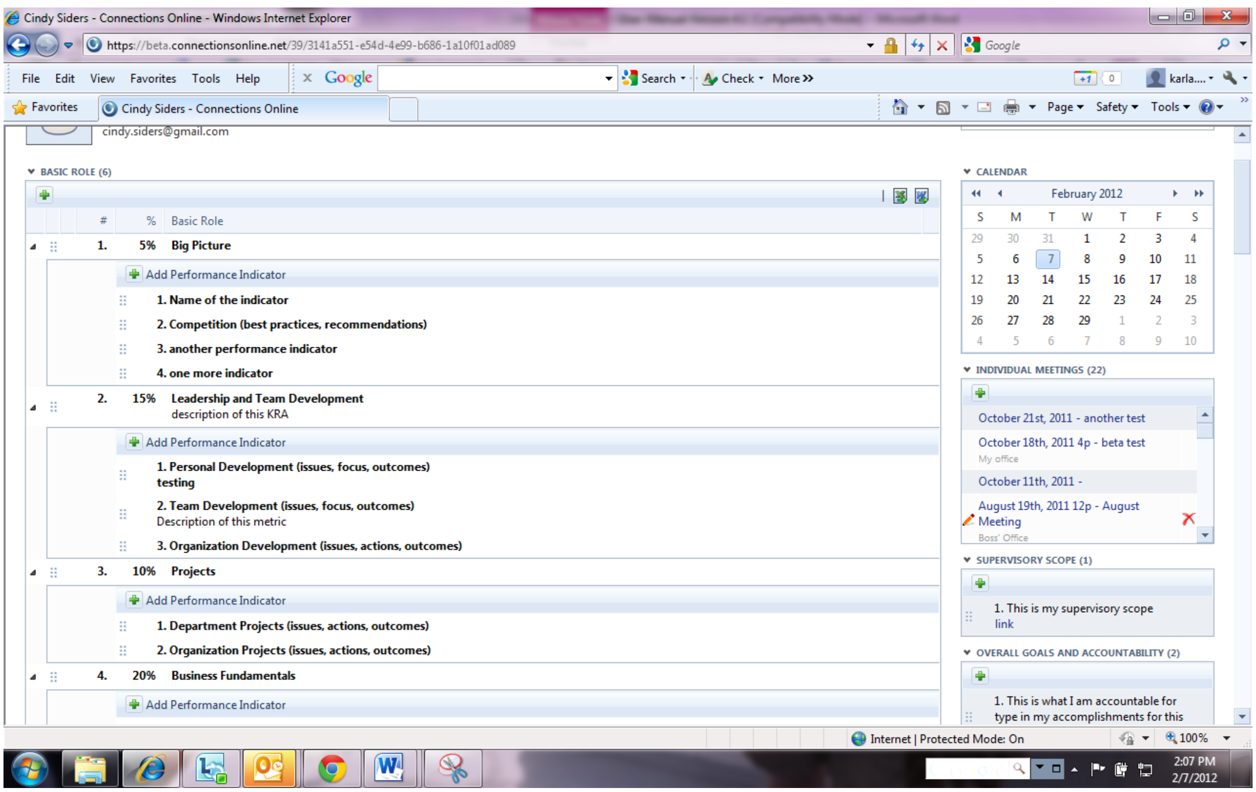
- To “send” these tasks to the project, click on the Add-in tab and click the arrow next to Connections Online and click “send.” The tasks will be sent to the project.
- Save the template with a new name (for example, the project name) and you can reuse it when necessary. Just change the dates, people responsible etc. and you will be able to send the tasks again.
- Please note: do not change the color of the fields that will be synching. It will NOT sync if the colors are changed.

People Connection

The People Connection provides a clear focus for the resources controlled by an individual. It links individual results to organizational outcomes. Everyone understands how he/she contributes to the success of the organization. It is used as an important guide for prioritizing the allocation of resources, recognizing performance, coaching, and for updating targeted outcomes throughout the year.

Basic Role

Organizational and departmental scorecards drill down to the Individual's Basic Role as well as the individual scorecard. This clearly links individual focus with desired organization outcomes. It contains clear, agreed upon personal performance goals and appropriate indicators. The Basic Role is made up of 4-7 Key Result Areas, many of which will align back to the Organization's Critical Measures/Scorecard.



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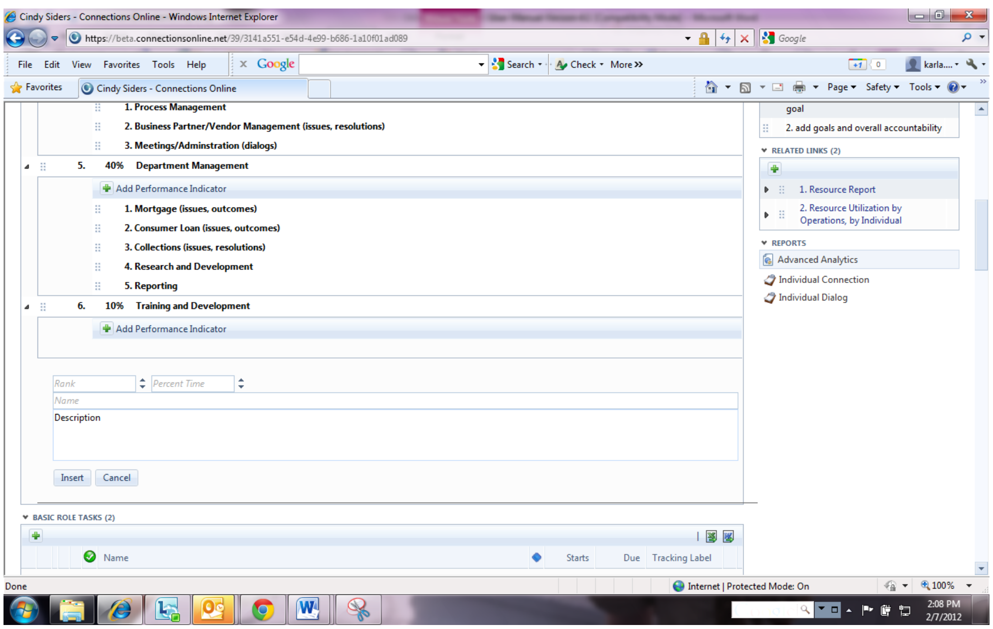
The specific indicators for each Basic Role Area (Key Result Area) will be either quantitative or qualitative. The Scorecard module can provide specific detail for qualitative information. A User can add Basic Role Key Result Areas [KRA] and KRA Indicators [KRIs]. There is a comment box for each Performance Indicator (Key Result Area Indicator) where a User can note variances to the Indicators. These Key Result Areas should equal 100% of the "work to be done" by the User.

Users can also post and track Tasks associated with each Basic Role KRA.

Basic Role Detail:

Click the Add symbol which will open the first edit window. Enter a Basic Role Area (KRA), including the percentage of time a User will spend in that area. Users can also add a description of the KRA.



Click the Insert button to save the information, which will open the Basic Role detail edit window. Click the Add symbol to add the Performance Indicators (KRIs), then click the Insert button.

After the Performance Indicators have been input for the Basic Role, they can be edited through the edit pencil icon. The Performance Indicator can also be selected to drag up or down using the drag and drop feature.

Other information for each Basic Role can also be edited (Tasks, Comments, and Related Links).

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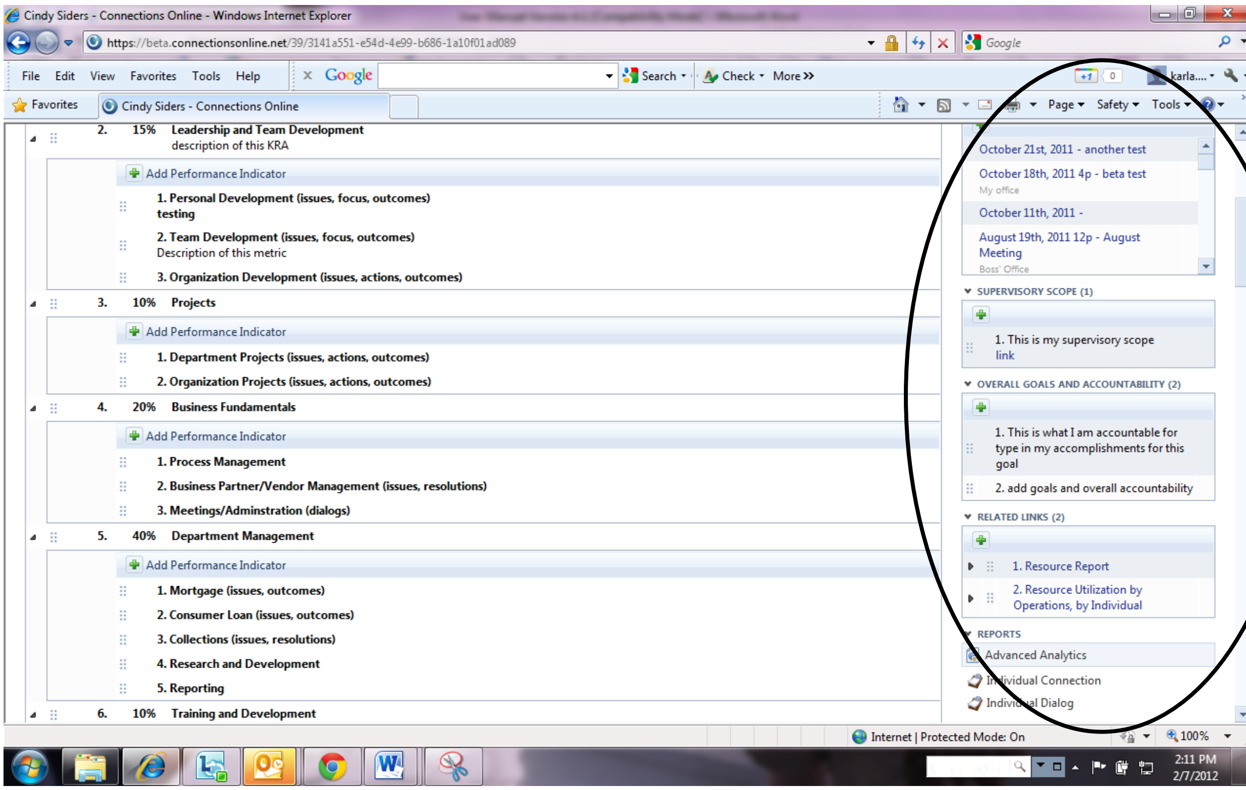
Overall Accountabilities Module

This module reflects what the individual is accountable for – Why does this position exist?



Supervisory Scope Module

This module defines the Departments (or major functional areas) under a User's supervisory control.

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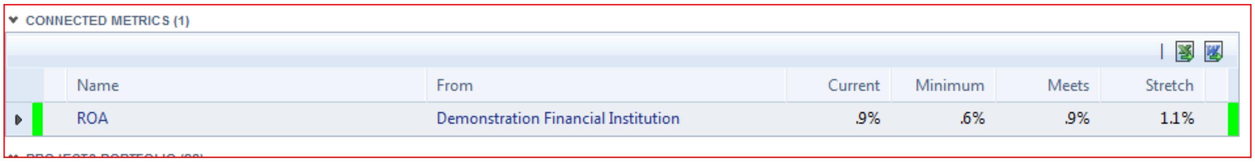
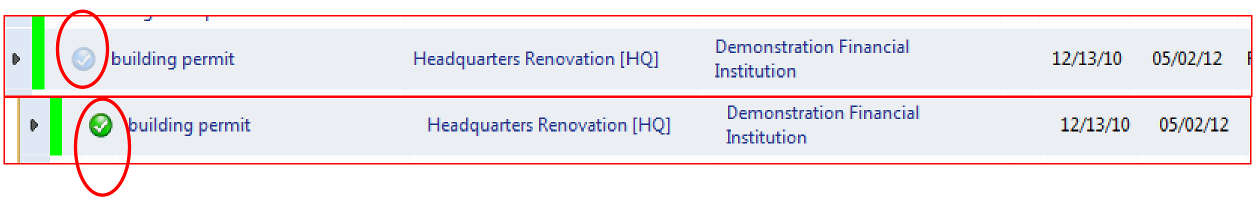
People Tab – Individual and Connected Metrics: this is a module that shows all metrics that the individual you are viewing has ownership for that are not under the individual metric module. If this person "owns" a metric in an organization or department scorecard, it will show on their page in the Connected Metrics module.



People Tab - Project Module: the projects only module lists the projects the person is a member of.

People Tab - All Tasks (Project, Dialog Follow-Up, Basic Role, and Personal): the tasks anywhere in the application that the user owns and has security to update can be seen on their People tab. The User can just click the "blue circle check" next to the task and that will mark the task as completed. Once the circle is clicked it will change to green showing that the task is completed. The "Actual end date" will be the date the circle is clicked to show that it has been completed. You can still do a quick edit and add a comment and also mark as completed by entering the "actual end date".



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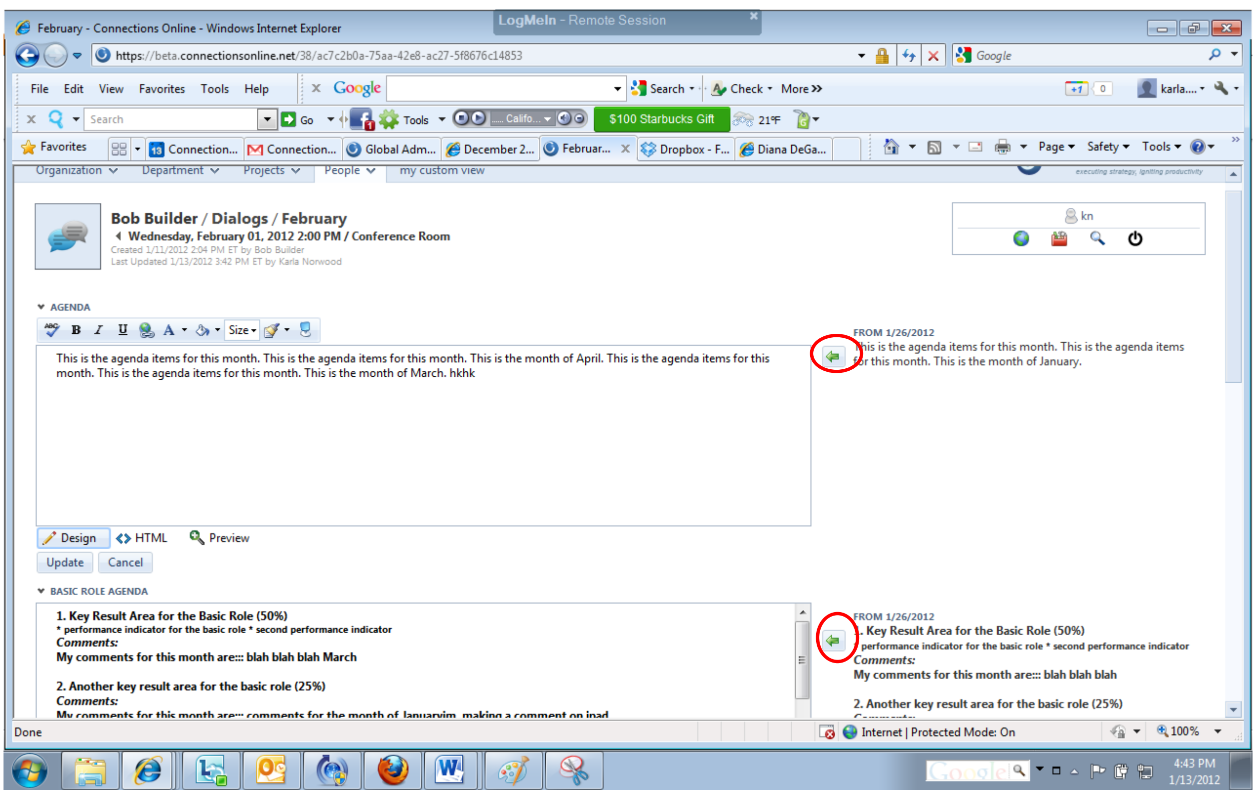
All Dialogs

To create a dialog, click the green + sign icon under Dialogs. Add the name of the Dialog. Click on the dialog date link, and the dialog will open in a full web page. You will see a blank agenda box. Click the edit pencil. You will then see last month's agenda on the right and a blank agenda to edit on the left. If you want to copy the agenda from last month (then edit it), click the green arrow in the center between the two agendas and the agenda on the right will automatically copy into the agenda on the left. You can then make any adjustments to the current agenda on the left. Click Update to save the changes.

The same procedure will work for Basic Role comments on the Individual Dialog. In the Basic Role Module, you will note that the Basic Roles are automatically copied from the Basic Role on the main page along with Basic Role indicators. There is the word "comment" under each Basic Role. Click the edit pencil to edit the Basic Role. This is where you can type in your comment. When you click the pencil to edit the Basic Role, you can use the Basic Role comments from the previous month (that you see on the right). Place your cursor where you want the copy from last month to appear in the current month dialog. Click the green arrow and the Basic Role comments from last month will automatically copy to the cursor in the left box. Edit as desired. Click Update to save your changes.

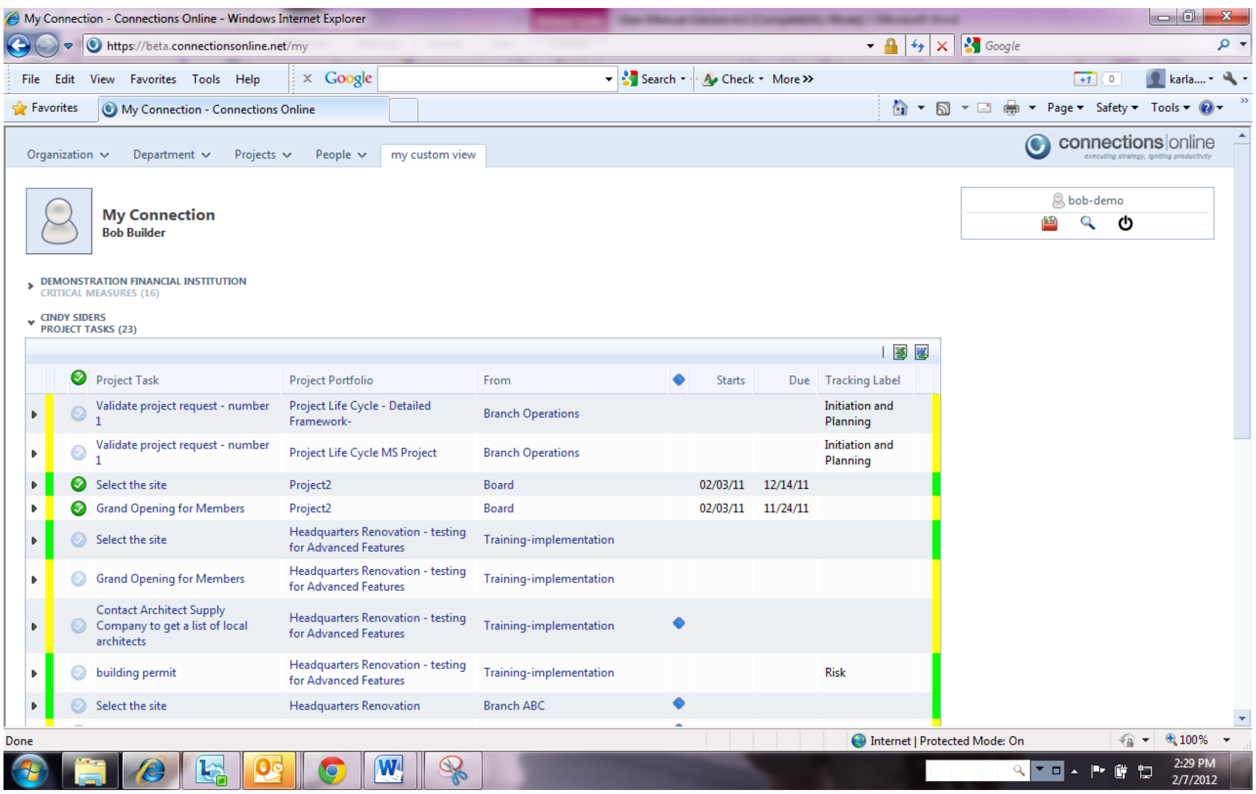


Authority Matrix Document

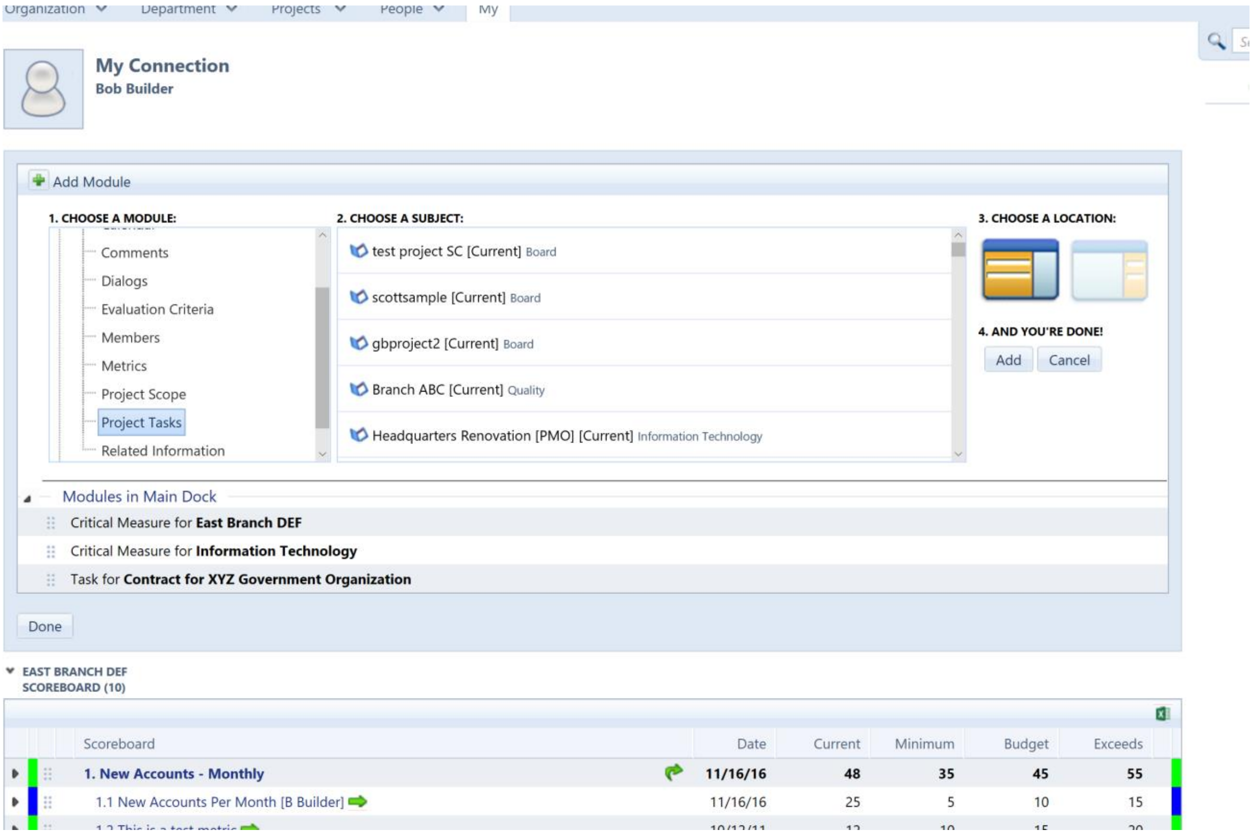
The Authority Matrix is posted as a Related Link on the People Tab's Related Link module. This document reflects the organizational levels' (e.g., Board, CEO, Executives, Senior VPs, Directors, Managers, etc.) authorities for each agreed-upon business category (e.g., hire, fire, budget, planning, etc.). It also reflects the individual's Job-Specific Authorities, which are specific to the role. For example, "the Senior VP of Finance has $1 Million signature authority to change an investment." See appendix B for a sample.

My Connection

This page can be customized using data modules from the Organization, Department, Project, and People Connection Tabs to show just the information a User wants to view.



A User can select the modules to appear on the My Connection Tab by clicking the pencil at the top of the page on the icon next to the name. There are three steps to adding a module to the My Connection Tab. First, choose a module (click arrow and then highlight one module from list). Then click item in second column and choose a location in the third column. Click Add. To arrange order of the modules position the cursor over the dots of the module to be moved and drag it to the desired location. Add any other modules and then click Done when completed.



Instructions for Using Connections with Outlook

Please open this link to get more information on the Outlook Connector:
https://support.connectionsonline.net/hc/en-us/articles/215968223-Microsoft-Outlook-Connector

Setting Security for Users

Access to different parts of the application can be given to specific employees or groups of employees. This access can be set at five levels:

1. **Reader** - This user or group has the ability to read the given area.
2. **Create** – This user or group can create items in a given area.
3. **Update** - This user or group has the ability to add and edit items in the given area.
4. **Delete** – This user or group can delete items in a given area.
5. **Delegate** - This user or group has the ability to grant/restrict access to the given area by using the Security Settings window. Ability to add, edit and delete.

Note: Site Administrators have access to all areas of the application regardless of security settings.

The security for each specific Tab, module, or module item will be identified through a lock icon.

Re-Setting User Password

Navigate to the User's People Tab. Select the pencil edit symbol at the top of the page next to the User's name. The User's information opens in an edit screen. Re-type the password under the User Name (re-type again.) Save. The next time the User logs in, he/she will use the new password.

Forgot Your Password Feature

The "Forget Your Password" option on the log in screen has a new e-mail message and a new password changing screen.

If you have multiple Connections Online accounts with the same e-mail address, all of them will be listed in the same message and have the same temporary password

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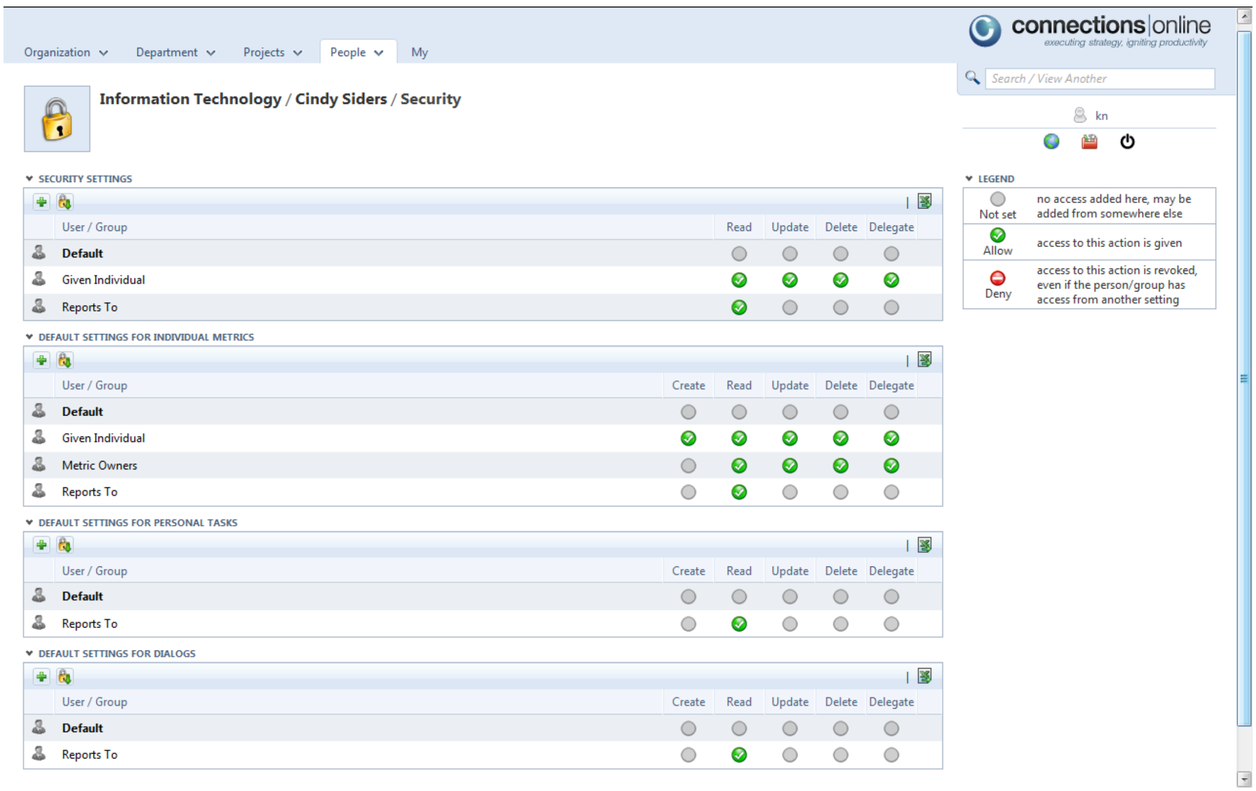
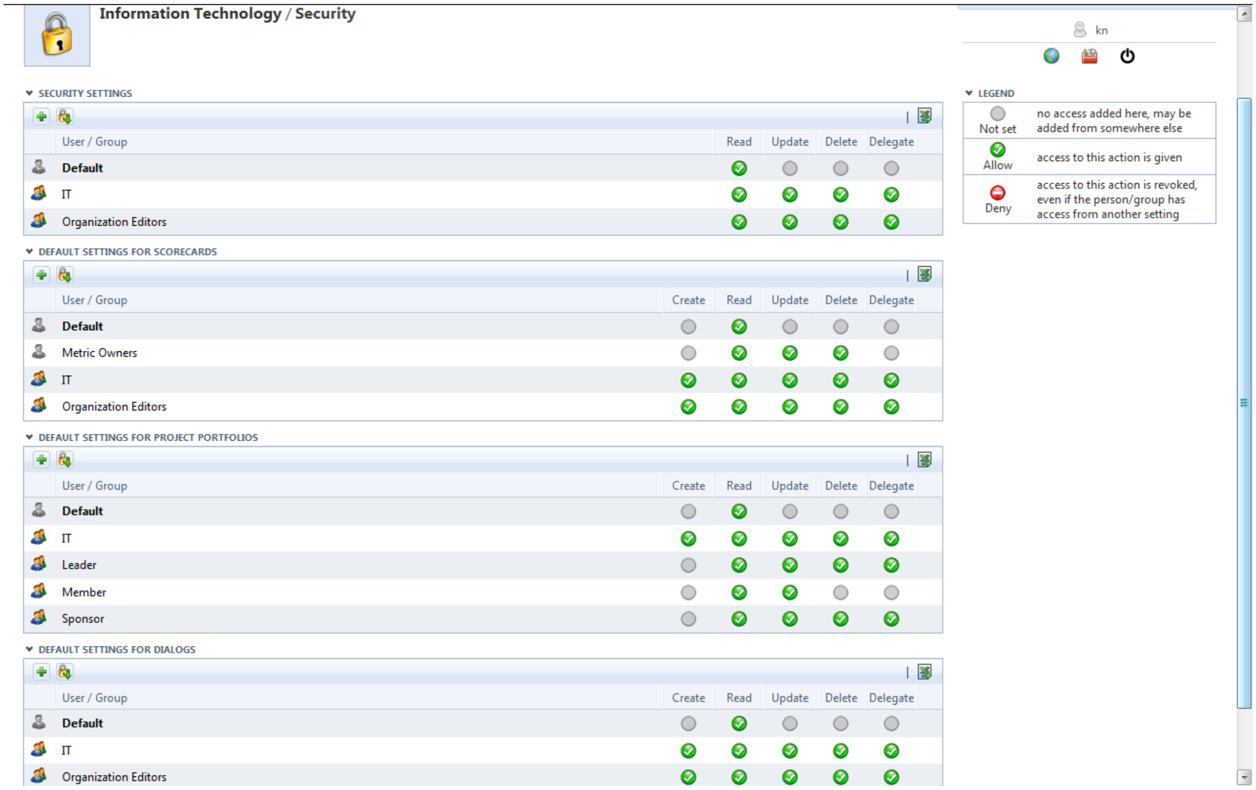
Common Security for Users will be Delegate Authority for their own People Tab and specific modules on that page.

Users will set the security for the page at the top right of the page – click the security icon. A typical default setting would be that the User's People Tab cannot be seen by other people in the organization. Users can set the security on that page to allow boss (or others) to see their data. Users click the lock icon, add their boss' name, and check the security they want their boss to have. Then the User needs to save the security setting just created. Users will do the same thing for Individual Metrics, Follow-up Tasks and the Dialog.

Typical Security:



Another typical setting will be for Users to be part of a Department Security Group. This security group, added to the group's Department Tab security, allows the members of that group to read, create, update, delete, and/or delegate security for the Department.



Security Using Propagation: The security change will propagate "backwards" to all the elements on the security module you are editing. You will be able to propagate the default security on the site page as well as security elements on the metric and project modules on the organization, department and people tabs within the application.

To propagate the security changes "back to the creation of the element" open the security lock on the page, make the security change, then click the propagate icon for the security module you changed. An edit window will appear for a choice of three ways to propagate. Check the one you want and click the "Propagate" button. A message will appear to tell you that the security has been propagated. Use the second radial button for most propagation.

Propagating Options

There are three options on how this operation will behave when you click on propagate security:

- *Option One*: Overwrite. Default security will overwrite all existing security.
- *Option Two*: Add and Update. New security groups and users will be added, and existing settings will be updated to default security settings. Existing settings that are not in the propagation will be unaffected.
- *Option Three*: Add New Only. New security groups and users will be added, but existing settings will remain the same.

Option Two will add new items and update any overlapping items. Option three just adds new items and doesn't update overlapping items. Here's an example:

Current:
User A - Read, Update, Delete
User B - Read, Delete

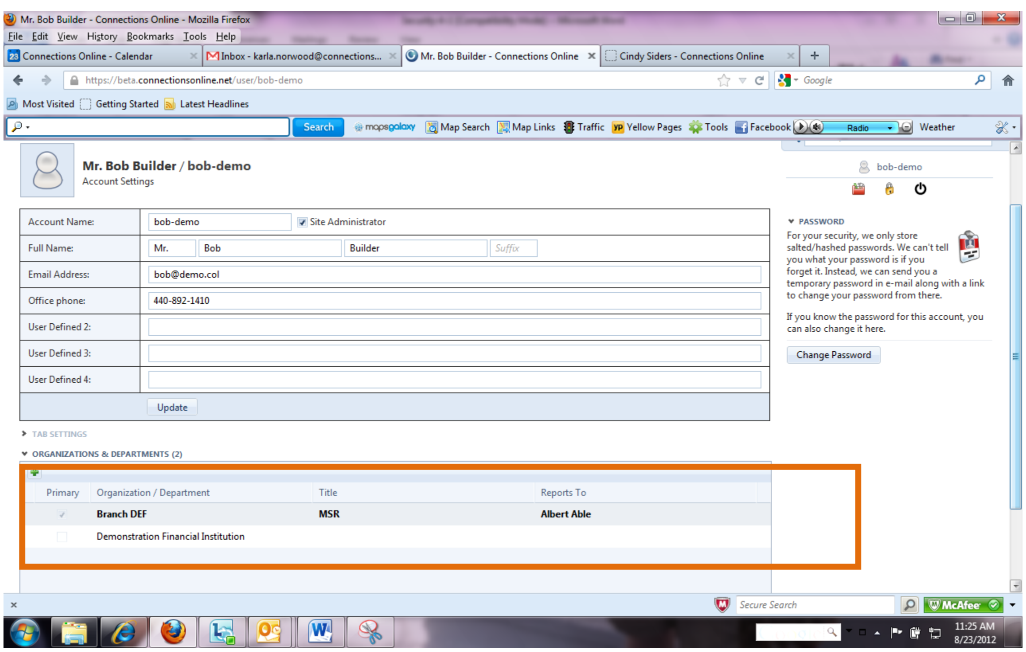
New Security to Propagate:
User A - Read
User C - Read, Update

After Option 1: (overwritten)
User A - Read
User C - Read, Update

After Option 2:
User A - Read (this is overwritten)
User B - Read, Delete (this is untouched)
User C - Read, Update (this is added)

After propagating with option 3, you would have:
User A - Read, Update, Delete (this is NOT overwritten)
User B - Read, Delete (this is untouched)
User C- Read, Update (this is added)

<u>Security Using "Reports to" and Propagation</u>: There has been a security category created called "Reports to". All Users should have their boss as the person the User reports to. This can be checked by the User on the People tab – click the the user's name and under the organ/dept, the "reports to" will be listed. If this needs to change, please contact your Connections Online Coordinator.



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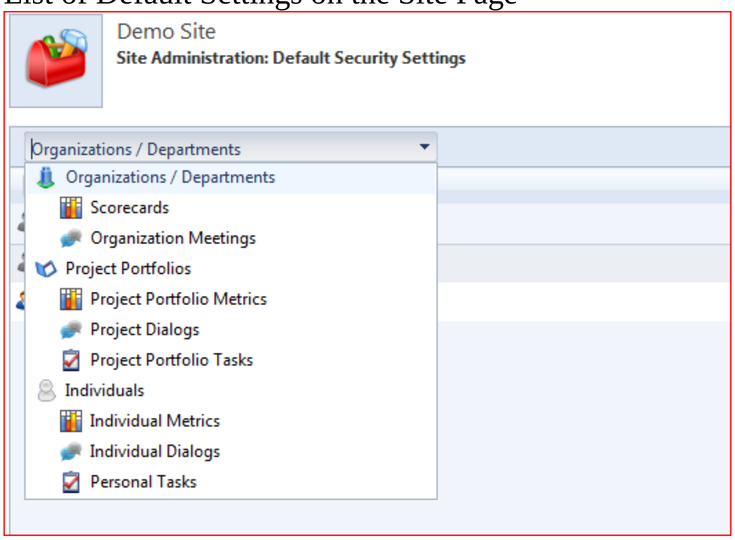
If the user has security to change (or create) the person the user reports to, check the box to the right of the department listed, an edit pencil will appear, click the pencil and edit the "Reports to" individual.

Security Tip: On the People security page, under Individual metrics, the default is that no other user can "read/see" the Individual metrics. Consequently, the default is that the employee's boss cannot "see" the individual metrics. If the employee wants the boss to see their individual metrics, they can select the lock in the Individual Metric module, click add, click "Reports to", add the security you want the "reports to" to have (i.e. reader, create, edit, etc.). Click the Propagate icon to allow the security to overwrite existing security. Close the security module. Your boss should now be able to see the user's metric. Saving automatically happens when you change security on the discrete pages (org, dept, or individual.)

Setting Security on the Site Page

Default Security Settings

List of Default Settings on the Site Page



Below is a list of each security setting group with a screen shot of the default settings:

Organizations/Departments

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Organizations/Departments – Critical Measures

Scorecards

User / Group	Create	Read	Update	Delete	Delegate
Default	○	✓	○	○	○
Metric Owners	○	✓	✓	✓	○
Organization Editors	✓	✓	✓	✓	✓

Organizations/Departments – Organization Dialogs

Organization Dialog

User / Group	Create	Read	Update	Delete	Delegate
Default	○	✓	○	○	○
Organization Editors	✓	✓	✓	✓	✓

Projects

Project Portfolios

User / Group	Create	Read	Update	Delete	Delegate
Default	○	✓	○	○	○
Consultant	○	✓	✓	○	○
Leader	○	✓	✓	✓	✓
Member	○	✓	✓	○	○
Sponsor	○	✓	✓	✓	✓

Project Metrics

Project Portfolio Metrics

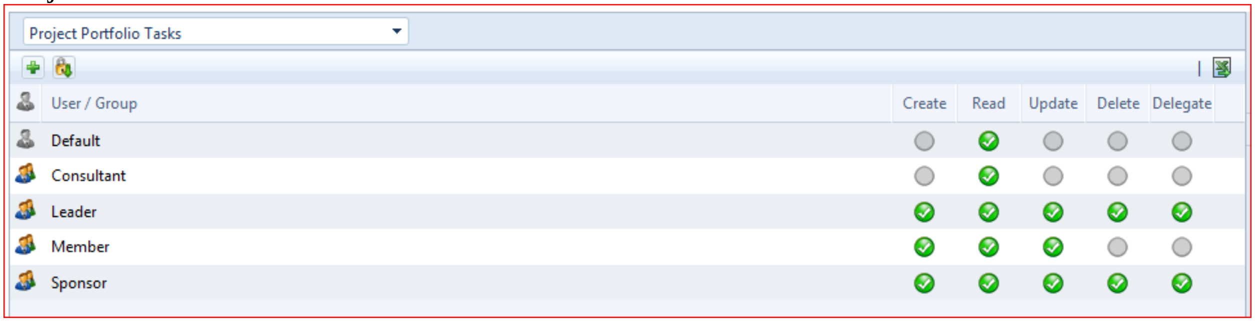
User / Group	Create	Read	Update	Delete	Delegate
Default	○	✓	○	○	○
Metric Owners	○	✓	✓	✓	✓
Consultant	○	✓	○	○	○
Leader	✓	✓	✓	✓	✓
Member	✓	✓	✓	○	○
Sponsor	✓	✓	✓	✓	✓

Project Dialogs

Project Dialogs

User / Group	Create	Read	Update	Delete	Delegate
Default	○	✓	○	○	○
Consultant	○	✓	○	○	○
Leader	✓	✓	✓	✓	✓
Member	✓	✓	✓	○	○
Sponsor	✓	✓	✓	✓	✓

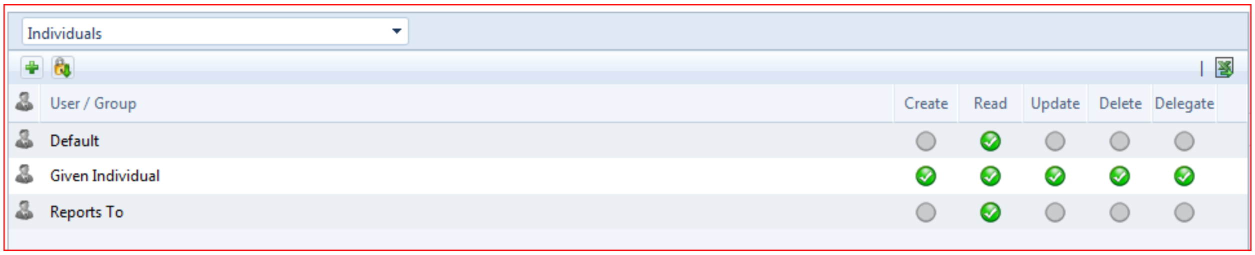
Project Tasks



Project Portfolio Tasks

User / Group	Create	Read	Update	Delete	Delegate
Default	○	✓	○	○	○
Consultant	○	✓	○	○	○
Leader	✓	✓	✓	✓	✓
Member	✓	✓	✓	○	○
Sponsor	✓	✓	✓	✓	✓

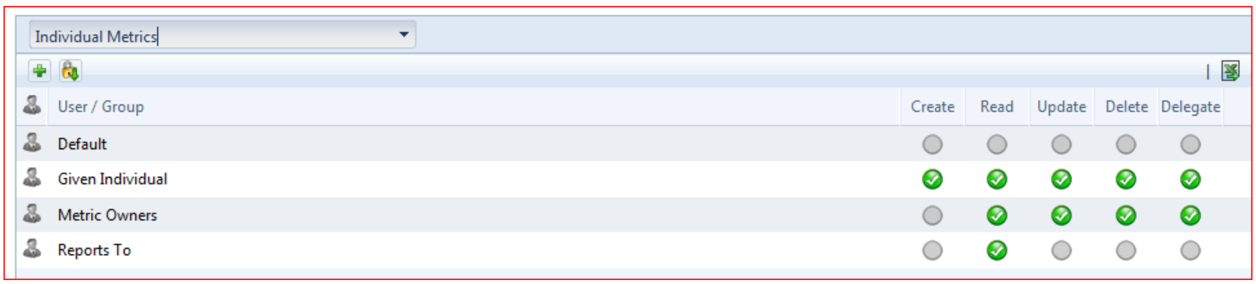
Individuals



Individuals

User / Group	Create	Read	Update	Delete	Delegate
Default	○	✓	○	○	○
Given Individual	✓	✓	✓	✓	✓
Reports To	○	✓	○	○	○

Individual Metrics



Individual Metrics

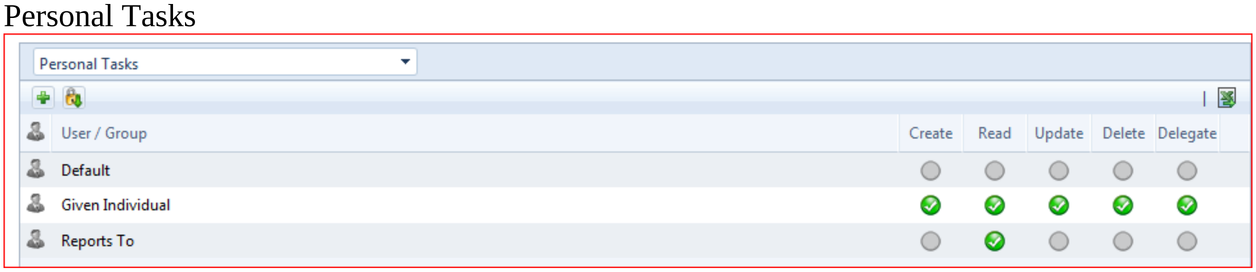
User / Group	Create	Read	Update	Delete	Delegate
Default	○	○	○	○	○
Given Individual	✓	✓	✓	✓	✓
Metric Owners	○	✓	✓	✓	✓
Reports To	○	✓	○	○	○

Individual Dialogs

Individual Dialogs

User / Group	Create	Read	Update	Delete	Delegate
Default	○	○	○	○	○
Given Individual	✓	✓	✓	✓	✓
Reports To	○	✓	○	○	○

Personal Tasks



Personal Tasks

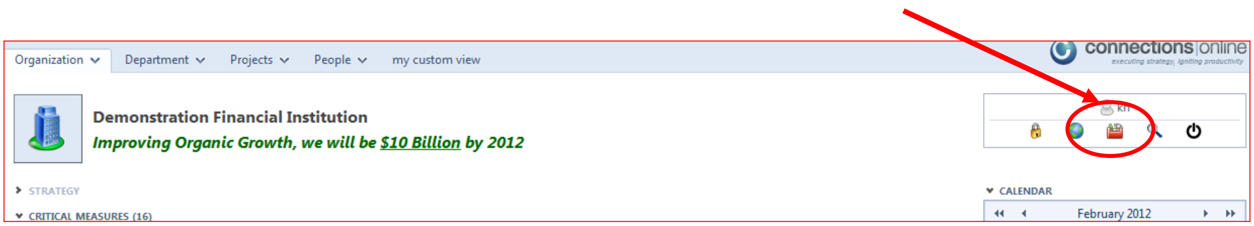
User / Group	Create	Read	Update	Delete	Delegate
Default	○	○	○	○	○
Given Individual	✓	✓	✓	✓	✓
Reports To	○	✓	○	○	○

Managing the Site

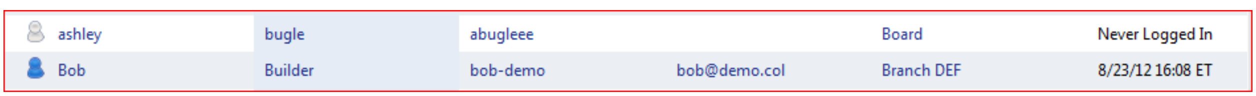
Editing the Site

When a User logs in, he/she will be in one of the main tabs (Organization, Department, Project, People, My Connection). Using the menu at the top right of the window, click the "Site Admin" link (red tool box) to administer the structure and terms of the organization and tabs, and to add people.

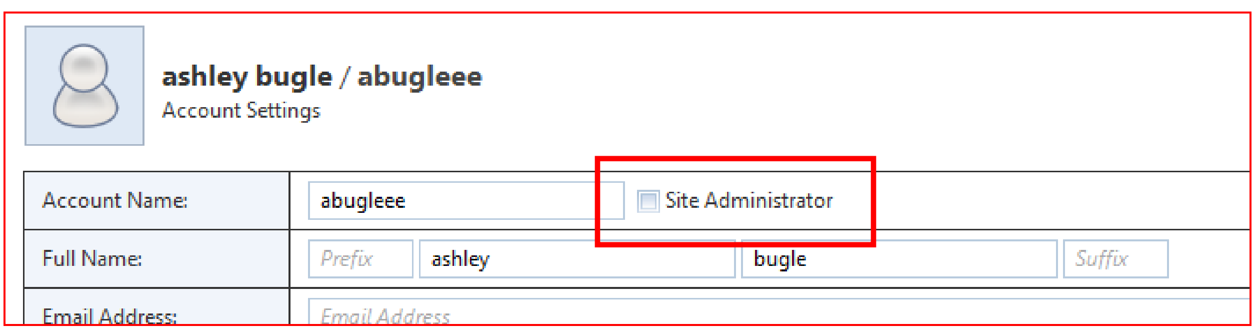
Organizations and Departments will be added so they are structured hierarchically like the Organization chart. This structure will then allow use of the Resource Utilization Report to show how resources are being used down to the lowest department level, or to be able to roll the resources up through the hierarchy (e. g., Marketing Research Department rolls up to Marketing, or Networking and Web Design Departments both roll up to IT…), or be able to view by employee.



To add a user to have Site Security, open the site page. You can tell who has site security because the user icon will be dark blue – in the example below, Bob Builder is a Site Administrator.



To add the security to a user, click on the pencil to the left of their name which opens the user edit page – check the site administrator check mark – then click update.



Deleting an Organization or Department

Before deleting an organization or department, check to see what individuals have this org/dept listed as their primary department. These will need to be changed to a new org/dept before deleting the old one. You can edit this on their people page. Click on the pencil next to their name and an edit box will pop up. Change the primary department and if necessary the person they report to. Once this has been changed, you can delete the old department they were attached to.

Setting Security

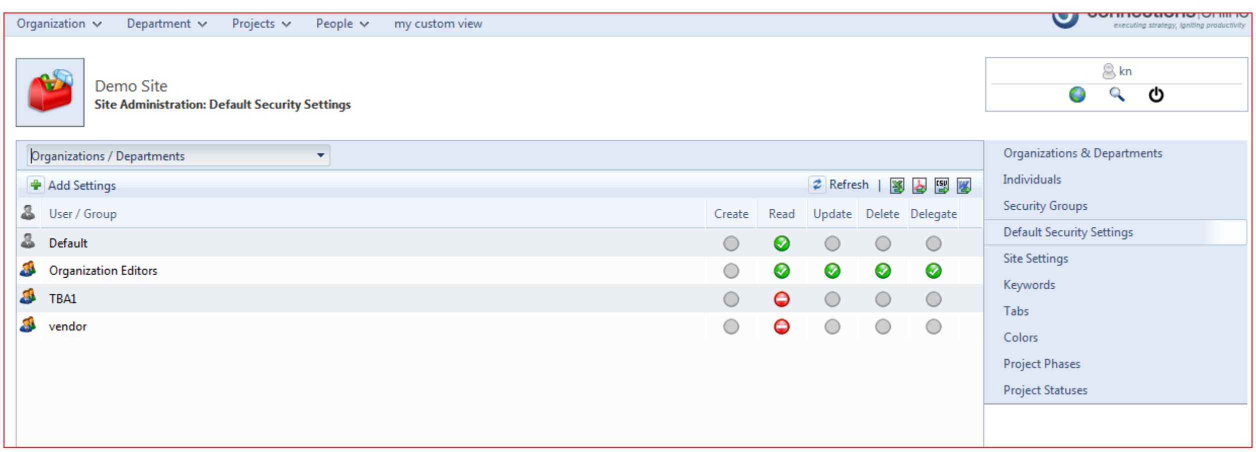
Access to different parts of the application can be given to specific employees or groups of employees. This access can be set at five levels:

1. **Reader** - This user or group has the ability to read the given area.
2. **Create** – This user or group can create items in a given area.
3. **Edit -** This user or group has the ability to add and edit items in the given area.
4. **Delete** – This user or group can delete items in a given area.
5. **Delegate** - This user or group has the ability to grant/restrict access in the given area by using the Security Settings window. Ability to add, edit and delete.

Note: Site Administrators have access to all areas of the application regardless of security settings.

The security module allows the site administrator to set the global default security for the system. The default security can be globally changed but should be "thought through" before the production launch of Connections Online. Security can also be set for users or groups on individual modules within the Org/Dept, Project or People tabs, as well as unique items within the modules.

Global Default Security: Global security is organized by Tabs (Organization/Department Tab, Project Tab, and People Tab). Simply look at the default settings to see if these are the desired settings. If not, change them at the global level.



The following table details the default security settings. Specific changes to specific elements in the application can also be set and will override the default settings. See next section for more information.

Connections Online 4.0 Default Security Settings

Security Principal	Create	Read	Update	Delete	Delegate
Organizations / Departments					
Default	—	yes	—	—	—
Organization Editor	—	yes	yes	yes	yes
Organization / Department Metrics					
Default	—	yes	—	—	—
Organization Editor	yes	yes	yes	yes	yes
Metric Owner	—	yes	yes	yes	yes
Organization / Department Dialogs					
Default	—	yes	—	—	—
Organization Editor	yes	yes	yes	yes	yes
Projects					
Default	—	yes	—	—	—
Organization Editor	yes	yes	yes	yes	yes
Project Leader	—	yes	yes	yes	yes
Project Member	—	yes	yes	—	—
Project Sponsor	—	yes	yes	yes	yes
Consultant	—	yes	—	—	—
Project Metrics					
Default	—	yes	—	—	—
Project Leader	yes	yes	yes	yes	yes
Project Member	yes	yes	yes	—	—
Metric Owner	—	yes	yes	yes	yes
Project Sponsor	yes	yes	yes	yes	yes
Consultant	—	yes	—	—	—
Project Dialogs					
Default	—	yes	—	—	—
Project Leader	yes	yes	yes	yes	yes
Project Member	yes	yes	yes	—	—
Project Sponsor	yes	yes	yes	yes	yes
Consultant	—	yes	—	—	—

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Security Principal	Create	Read	Update	Delete	Delegate
Project Tasks					
Default	—	yes	—	—	—
Project Leader	yes	yes	yes	yes	yes
Project Member	yes	yes	yes	—	—
Project Sponsor	yes	yes	yes	yes	yes
Consultant	—	yes	—	—	—
Individuals					
Default	—	yes	—	—	—
Given Individual	yes	yes	yes	yes	yes
Individual Metrics					
Default	—	—	—	—	—
Given Individual	yes	yes	yes	yes	yes
Metric Owner	—	yes	yes	yes	yes
Individual Dialogs					
Default	—	—	—	—	—
Given Individual	yes	yes	yes	yes	yes
Personal Tasks					
Default	—	—	—	—	—
Given Individual	yes	yes	yes	yes	yes

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<u>Security Using Propagation</u>: The security change will propagate "backwards" to all the elements on the security module you are editing. You will be able to propagate the default security on the site page as well as security elements on the metric and project modules on the organization, department and people tabs within the application.

To propagate the security changes "back to the creation of the element" open the security lock on the page, make the security change, then click the propagate icon for the security module you changed. An edit window will appear for a choice of three ways to propagate. Check the one you want and click the "Propagate" button. A message will appear to tell you that the security has been propagated. Use the second radial button for most propagation.

Propagating Options

There are three options on how this operation will behave when you click on propagate security:

- *Option One*: Overwrite. Default security will overwrite all existing security.
- *Option Two*: Add and Update. New security groups and users will be added, and existing settings will be updated to default security settings. Existing settings that are not in the propagation will be unaffected.
- *Option Three*: Add New Only. New security groups and users will be added, but existing settings will remain the same.

Option Two will add new items and update any overlapping items. Option three just adds new items and doesn't update overlapping items. Here's an example:

Current:
User A - Read, Update, Delete
User B - Read, Delete

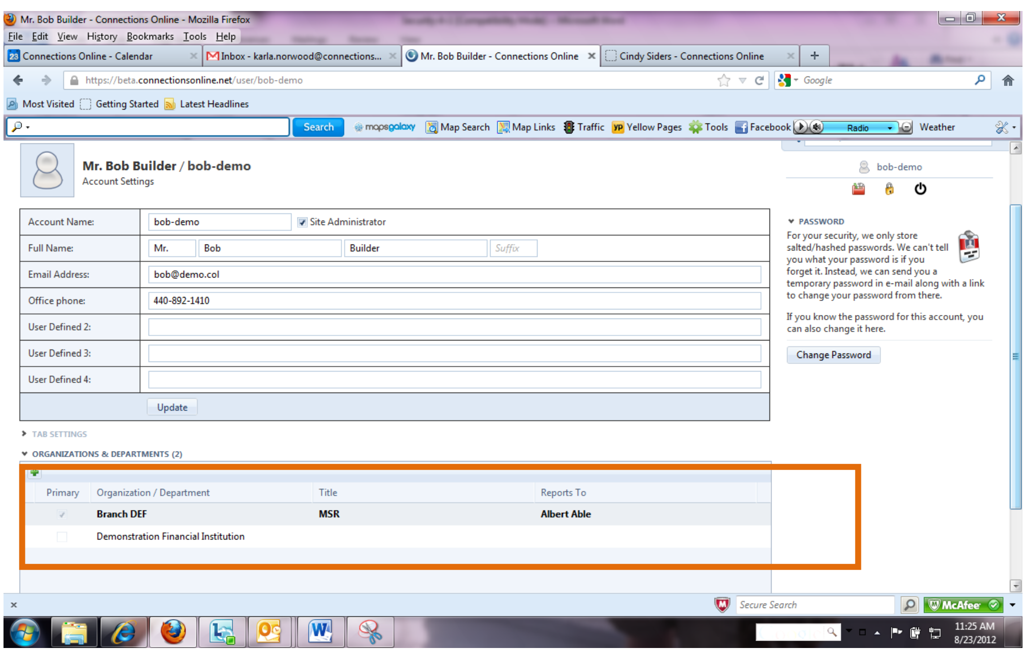
New Security to Propagate:
User A - Read
User C - Read, Update

After Option 1: (overwritten)
User A - Read
User C - Read, Update

After Option 2:
User A - Read (this is overwritten)
User B - Read, Delete (this is untouched)
User C - Read, Update (this is added)

After propagating with option 3, you would have:
User A - Read, Update, Delete (this is NOT overwritten)
User B - Read, Delete (this is untouched)
User C- Read, Update (this is added)

<u>Security Using "Reports to":</u> There has been a security category created called "Reports to". All Users should have their boss as the person the User reports to. This can be checked by the User on the People tab – click the the user's name and under the organ/dept, the "reports to" will be listed. If this needs to change, please contact your Connections Online Coordinator.



If the user has security to change (or create) the person the user reports to, check the box to the right of the department listed, an edit pencil will appear, click the pencil and edit the "Reports to" individual.

Security Tip: On the People security page, under Individual metrics, the default is that no other user can "read/see" the Individual metrics. Consequently, the default is that the employee's boss cannot "see" the individual metrics. If the employee wants the boss to see their individual metrics, they can select the lock in the Individual Metric module, click add, click "Reports to", add the security you want the "reports to" to have (i.e. reader, create, edit, etc.). Click the Propagate icon to allow the security to overwrite existing security. Close the security module. Your boss should now be able to see the user's metric. Saving automatically happens when you change security on the discrete pages (org, dept, or individual.)

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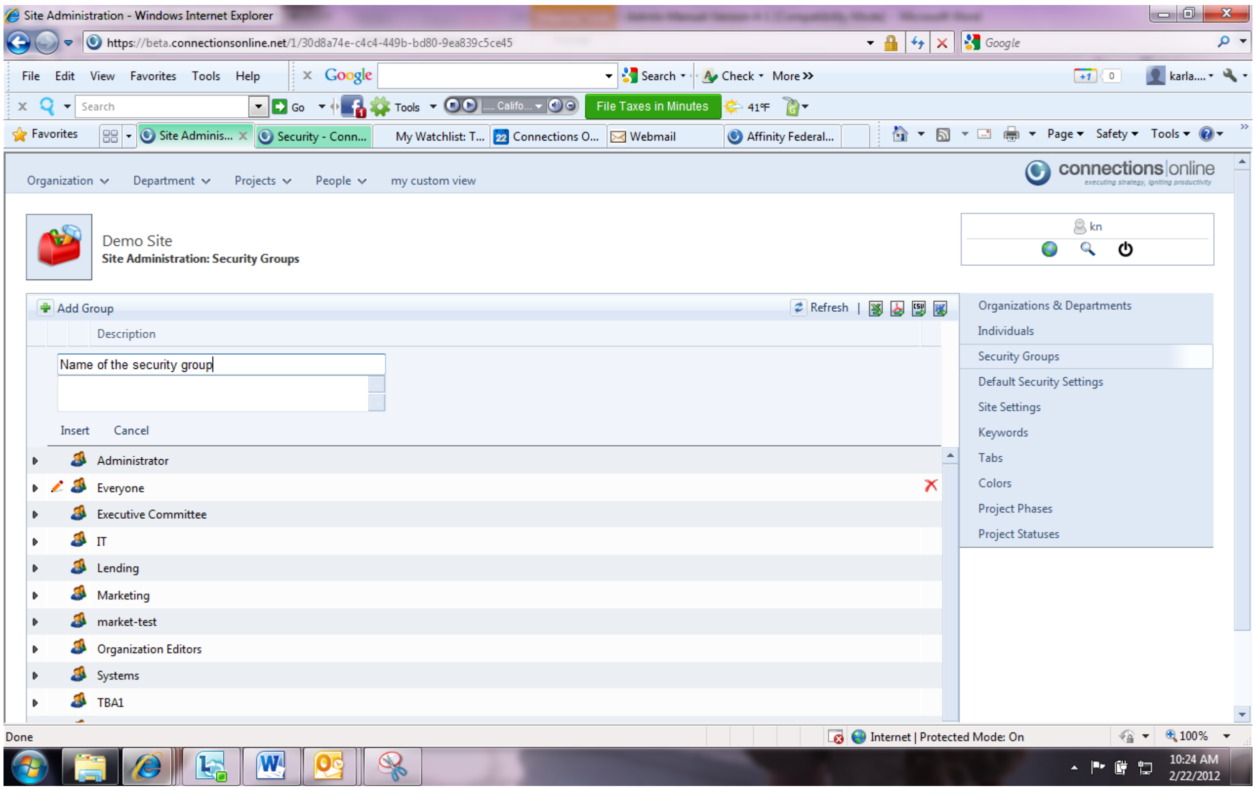
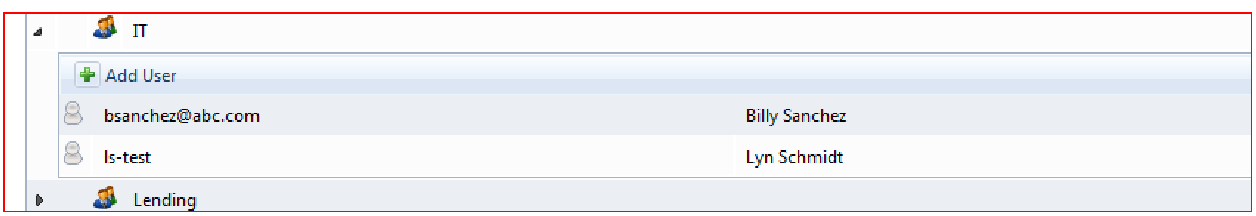
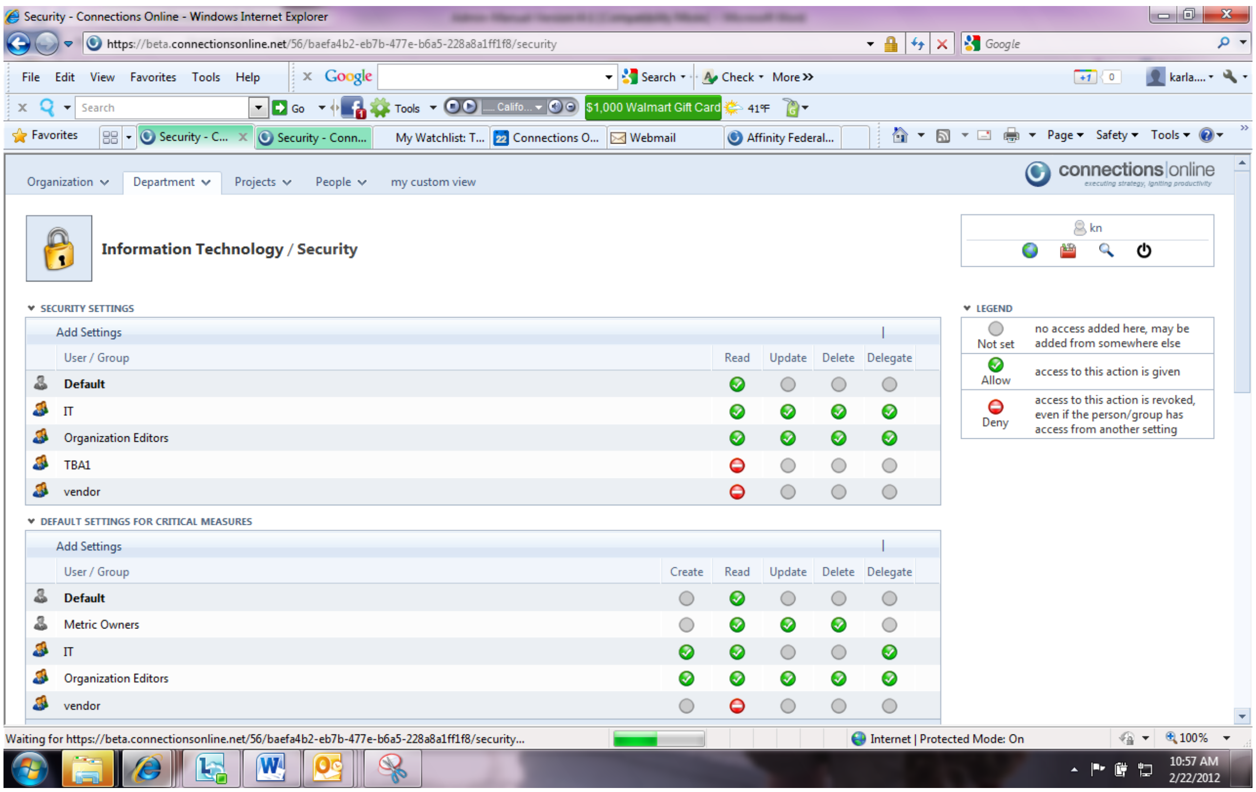
Creating Security Groups: Security can be customized by creating security groups. For instance, departments create a security group with the members of that department for whom special security access is desired. Use the "Security Groups" module to create a security group. Click the add button and create a group. Click Insert.



Once the security group is created, click the expand arrow to the left of the group and click Add User to add employees to the security group. Select an employee from the list and click Insert.



Customizing a Tab or Page's Security: To customize a tab's security, open the tab (org, department, project, people), and select the security lock in the upper right side of the page. The security page will open – adjust security for the page. I.e., add the group or employee to the security window and check the desired security settings (Read, Update, Delete, Delegate) for this group or user to have. For example, create the security group "Information Technology". Next, open the Information Technology Department Connection. At the top of the page, click the lock icon and "add" the security group "Information Technology" for each module's security desired (i.e. main page, critical measures, projects, dialogs).



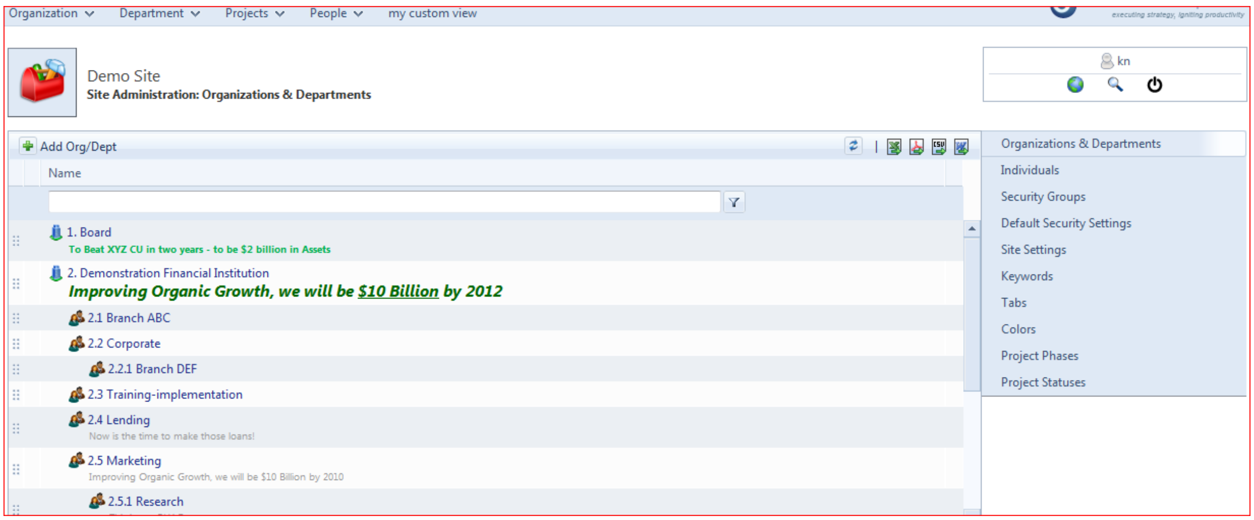
Scroll down the page to the Critical Measures module, add the "Information Technology" security group and check the security the group is to have, (Create, Read, Update, Delete, Delegate). Repeat for the Projects module and the Dialog module.

Please note: Click Propagate icon after you add or change security for each module on this security page – click the SECOND radial and propagate.

Create Organization and Departments

To create an Organization or Department, click on Organization and Departments from the dropdown on the right. The Organization is usually listed as the name of the enterprise (main company). The Departments are then created as "children" of the organization.

Click Add. At the bottom of the window, type in the name of the Organization or Department. Click the drop down to select whether you want this item to be an Org tab or a department tab. If the name is to show as a Department tab, click "This is a department". Then click Insert.



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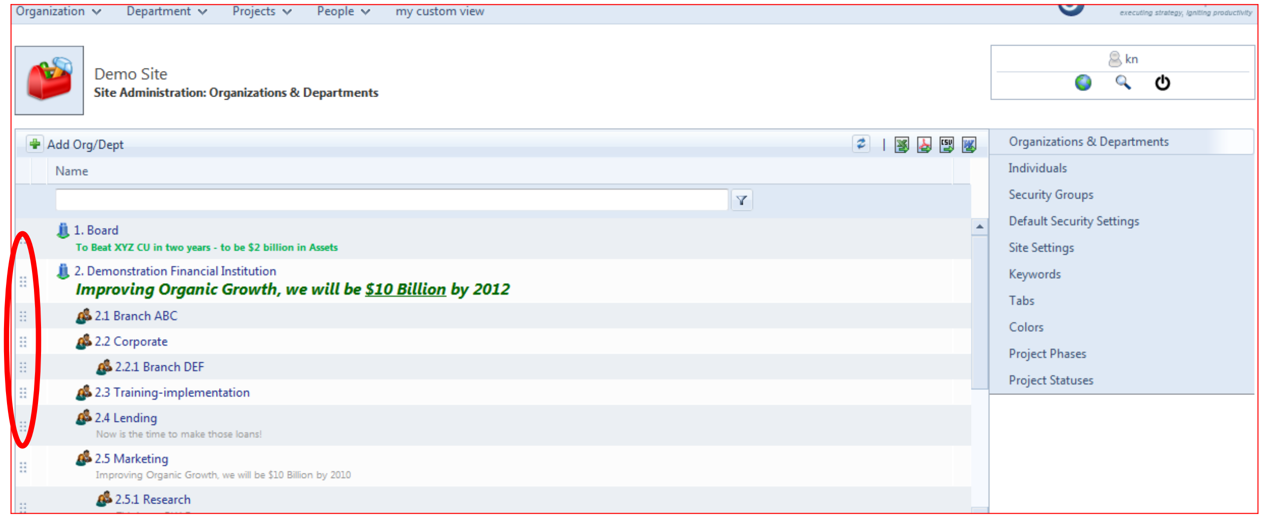
Once the Organization and Departments have been created, they can be moved to create an "organization chart" by dragging and dropping the org/department to the desired location.

Select Organization/Department. Move up/down/in/out using the drag and drop feature:



The Organization/Department module will have a scroll bar. To see all of the information for the Org/Dept module, you will see a clip board symbol – click the symbol and the entire list of Org/Depts will export to an Excel document. You can view all the information from that module in the Excel report.

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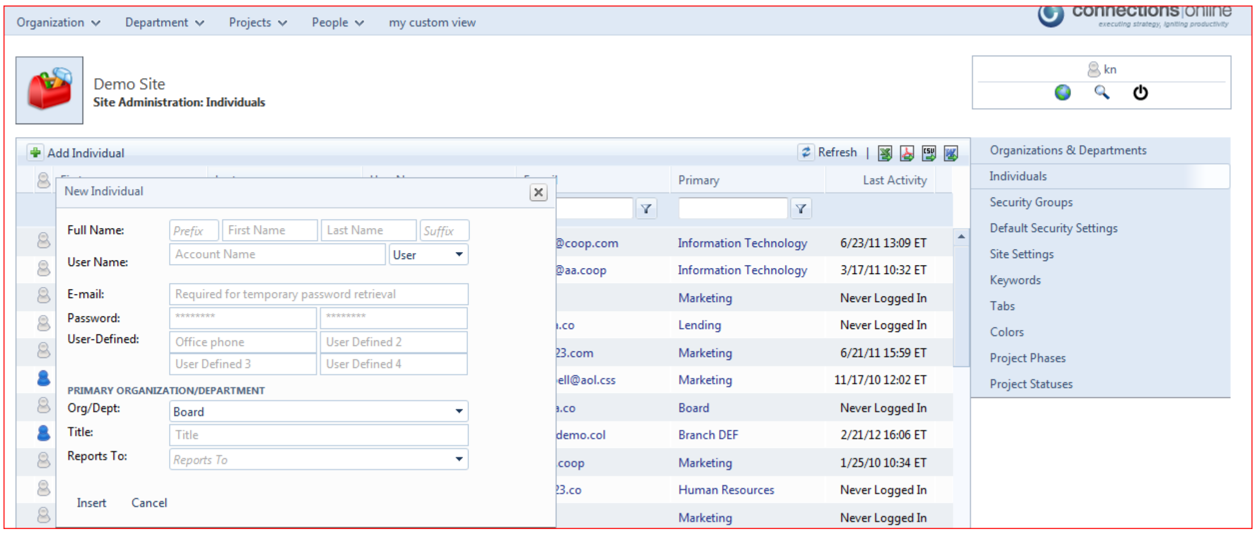
Adding Users

Click on Individuals from the list on the right. Click on the Add symbol to add a User, and the People window opens. In the prefix field, type Mr., Ms., etc.

Type in first and last name and email address. Select the department for which the User is a member from the dropdown list. (A department will not appear until a Department Tab has already been set up.) **Use the email address for the user name!** It is highly recommended that a password is created for all Users (this password can be changed the first time Users log in.) Click the Insert button when finished.



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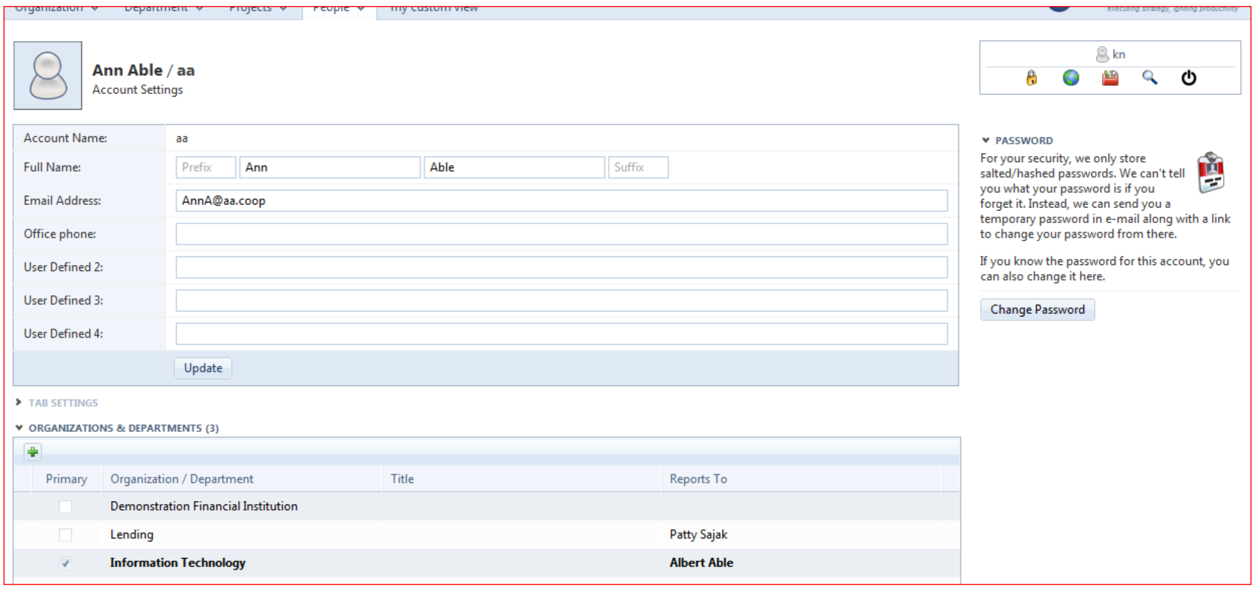
In order to Edit an individual's information (name, title, department, etc.), click the pencil to the left of the person's name. The User's information can be changed and saved by clicking Update. Under Orgs/Departments, click the pencil next to a department name and then edit to update the information as to the department, title, and "reports to" information. Users can also edit their own information – title, password, etc. at their name on the People Tab. Users can click their login name on the People tab (upper right of page) and they can edit this information. When done editing, click the Insert or Save button.



The Employee Module on the site page will have a scroll bar. To see all of the information for the Employee module, you will see a clip board symbol – click the symbol and the entire list of Employees will export to an Excel document. You can view all the information from that module in the Excel report.

If you want to search on a column, type in the information you are looking for, click the search symbol next to the search field, and the module will resort to display the information you searched. To get the entire list back, click F5 to refresh the page.

<u>Inactivate a User</u> -- and keep past history of tasks

A user cannot be "inactivated" per se. Connections is really about the WORK that a person is responsible for. If you are tracking the "work" like tasks in a project, if you delete the employee/user, the project tasks are not deleted (the person's name associ**ated with the task is deleted, so you would have to assign the task work to someone else, but you don't lose** the task itself.) You do lose the person's basic role, however, if you delete the user. We recommend that people do not delete an employee when they are terminated. We recommend that the COL admin make a hard copy of all dialogs on their People Tab for HR, then delete all dialogs from their People Tab. The Admin should delete personal tasks if not work related, and all comments and tasks associated with the Basic Role (but do not delete the Basic Role). Then the Admin should change the name of the User to "TBD" if they are going to replace the person – remember, this system is about the WORK and then who OWNS the work. When the new person is hired, they can replace that person's name with TBD and that person can re-negotiate the Basic Role, Project Work tasks, etc.

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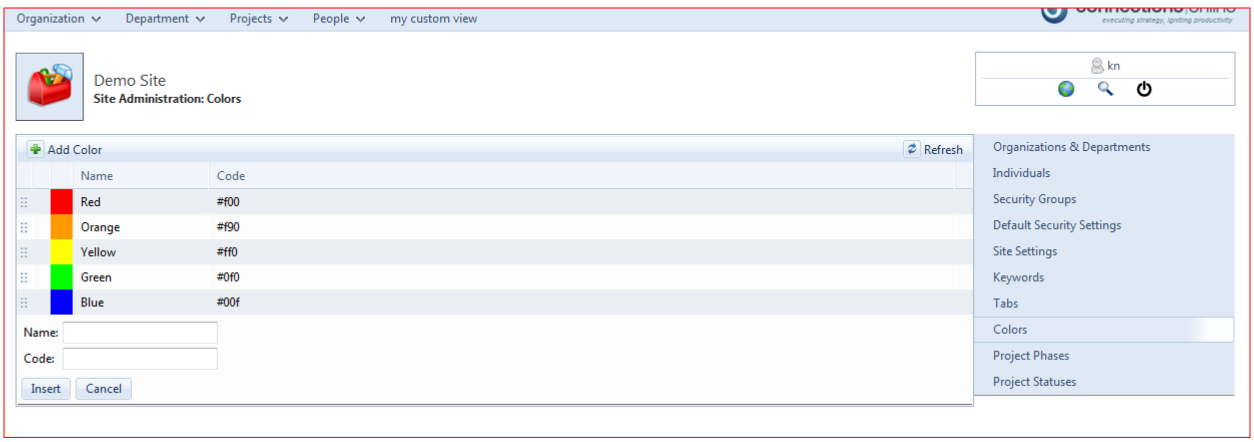
Setting Colors

Colors can be used for the Scorecards throughout the application. For example, red could mean a serious problem for a metric, project, or task. Blue might mean expectations are exceeded for a metric, project, or task. It is a "short cut" for the viewer to see the health of the list of metrics or work.

To set the color, first choose how the organization wants to use the colors. If a Scorecard, the typical color choices would be blue (exceeds), green (meets), yellow (minimum), red (problem) with the metric or project or task/work. Whatever colors are listed on the Default Color Palette module will be the colors that show up on the "pick a color" field in the application. Therefore, if only the 4 colors listed above are desired, the other colors in the color module list need to be deleted. If additional colors are desired, they must be added with the standard html color code. Click the add symbol to add a color. In the field at the bottom of the color module, just type in the number/alpha characters representing the color being added (it is NOT necessary to type the # sign.) Click the Add Color button to Insert.

For reference, here is a link to the color html code list: http://www.devguru.com/Technologies/html/quickref/color_chart.html.



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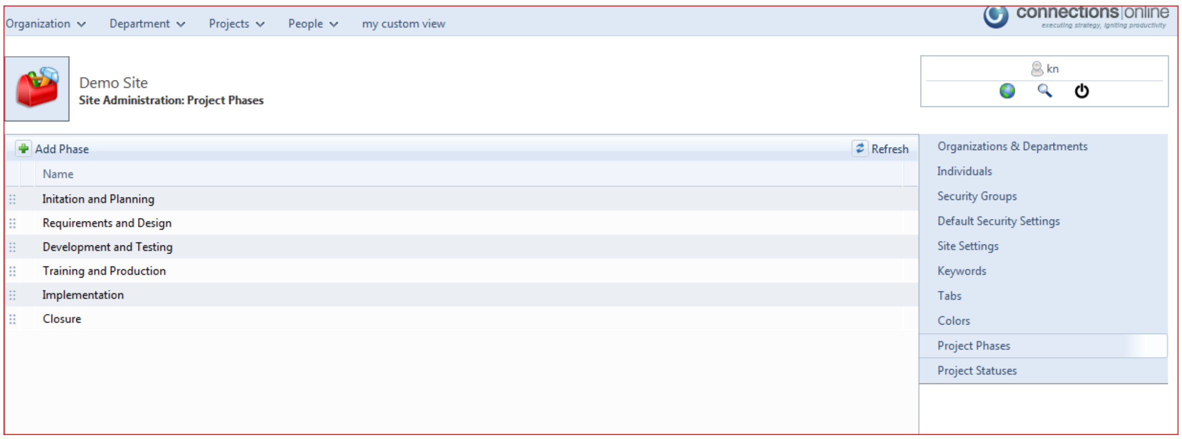
Adding/Editing Project Phases or Adding/Editing Project Status

Organizations use various words/phrases when defining both the Phase of a Project and Status of a Project. These defining words/phrases will appear in conjunction with each Project.

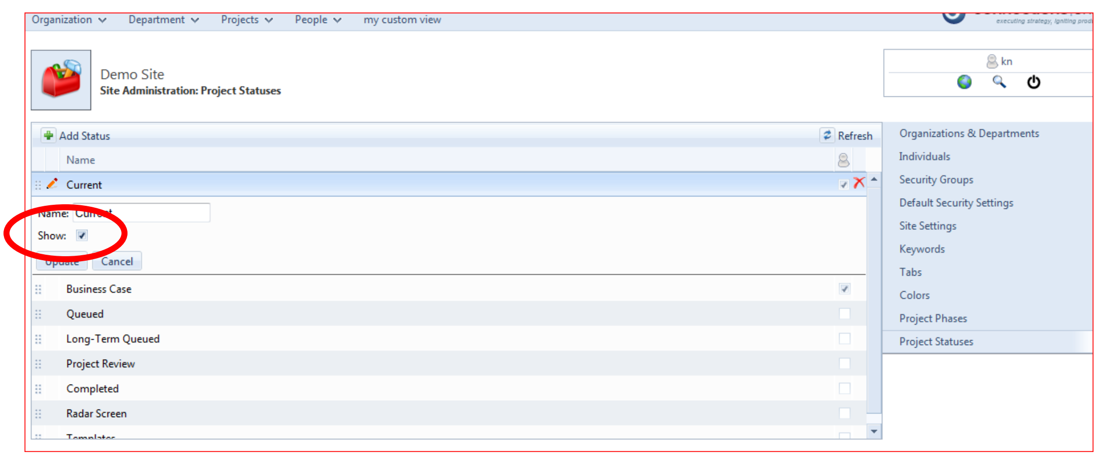
To Add a word/phrase, locate the appropriate module (Phases or Status). Click the Add Symbol and a box will appear in that module. Type in the word/phrase and click Insert.

To Edit an existing word/phrase, click the pencil symbol to the left of what is being Edited, make change and then click Update.



Project Tasks list on People Tab

Site Administrators may select what to put on the People Tab's Project Task list. By selecting the status on the Site page (for example, on the site page, site administrators can check just one status, i.e. "current", or multiple status categories) only those projects from the checked status will appear on the People Tab. To edit, click on the edit pencil, check the box , and click on Update to save.

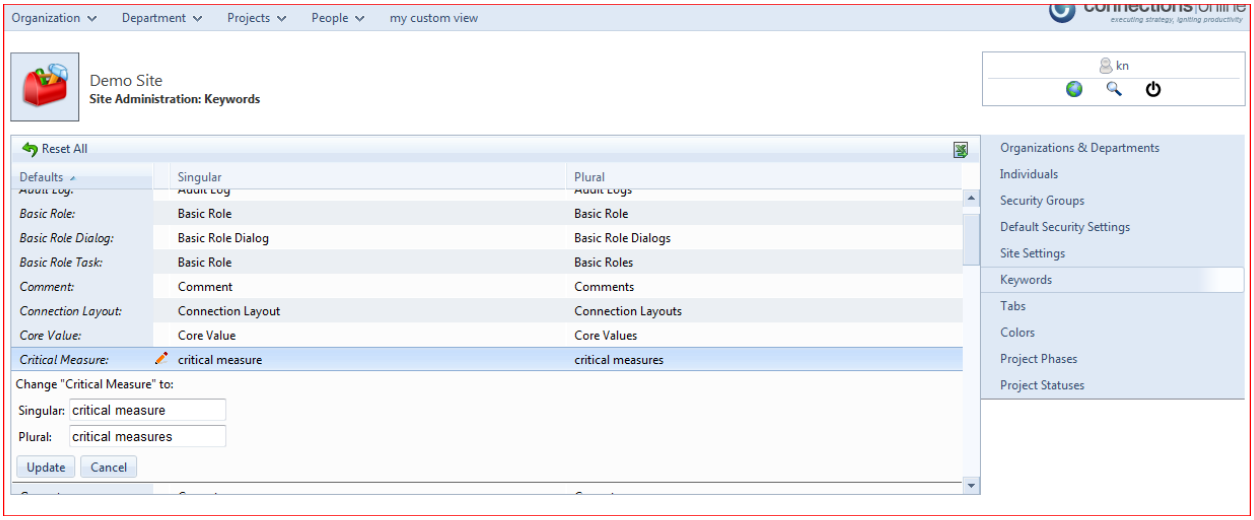


Setting Key Words

The application can be modified to reflect an organization's terminology. The Keywords module allows changes and modifications to the keywords that appear on an organization's site.

For example, there is a module on the Organization and Department tabs called "Focus" – using the Keywords module, the terminology can be changed to use "Strategy" instead of "Focus". Click the edit pencil for the keyword to be changed. Below the Default terminology, type in the words that the organization wishes to use in the fields and click Update to save. The terms will be changed throughout the site.

Please note: Clicking "Reset All" will revert the page back to its original, default state. Use caution when choosing this option.



The Connections Online Logo

The Connections Online Logo (found in the upper right corner of the application and reports) can be customized per site with the customer's logo. We have the ability to replace the Connections Online logo on all of the main pages near the tabs and on all of the reports. These can be different logos to allow them to look better with the background of the main pages or of the reports. From a technical perspective, a requirement is for the logo to be in an Adobe EPS or other vectorized format. We can then take that logo and make versions of it that work for both spots in Connections Online. The company logo should be 280px wide by 80px tall or less. Contact Linda Schmidt – lschmidt@cardwellgroup.com for more information. There is a minimal fee for this service.

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Archiving

Introduction

In the latest version of Connections Online 4.1, the on demand archiving system was removed and replaced by an automatic monthly archiving system. In addition to this, the ability to view items archived in Connections Online 4.0 was added as well. These options are accessible to all users with Read security. The following sections outline how to use these new features.

The Archive Menu

On each page in Connections Online 4.1, there is a new Archive menu available from the Archive icon in the right sidebar. Clicking the Archive icon will display options for the page as shown below.

The above image shows the following:

- **Monthly Archives from 2013 and 2012**. These are full site archives done on the 1st of each month. The monthly archives are labeled by previous month. For example, the archive created December 1st, 2013 would be labeled November 2013 in the sidebar.

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Bold month names indicate the current page item is available in that monthly archive. Click the month and it will open the item as it was at the end of that month.

- **4.0 Archives Dates** - List of archives created in Connections Online 4.0 for the current page item. Hover over the date to get the timestamp. Click the date to open a report for the item.
- **Link to 4.0 Archives** - This link provides access to the 4.0 Archive list page which lists the archive dates available for the current page item as well as any children including Critical Measures, Project Metrics and Dialogs, or Individual Metrics. The "Viewing 4.0 Archived Items" section describes this in more detail.

How Do the Monthly Archives Work?

The monthly archives are automatic backups of the entire Connections Online system. This backup is done at 2am EST on the 1st of each month. Upon release, there are monthly archives available back to November 2012.

To open a monthly archive, navigate to any page in the 4.1 application and click the month to open the archive for that month. Remember, months that are in **bold** indicate that the current page exists in that month's archive. If the date is not bold, it will still open the archive but to a different page. The same thing will happen if the current user did not have Read access to the item as of the selected month.

The Archive application has a different appearance from the live application. It is colored in grey with all edit buttons removed and with an orange box on the right-hand side indicating which monthly archive is currently open. Users can also switch to another archive by clicking the "Select Another Archive" link in the orange box. The following screenshot shows the "5. Alameda Branch Opening" sample Project as contained in the August 2013 Monthly Archive:

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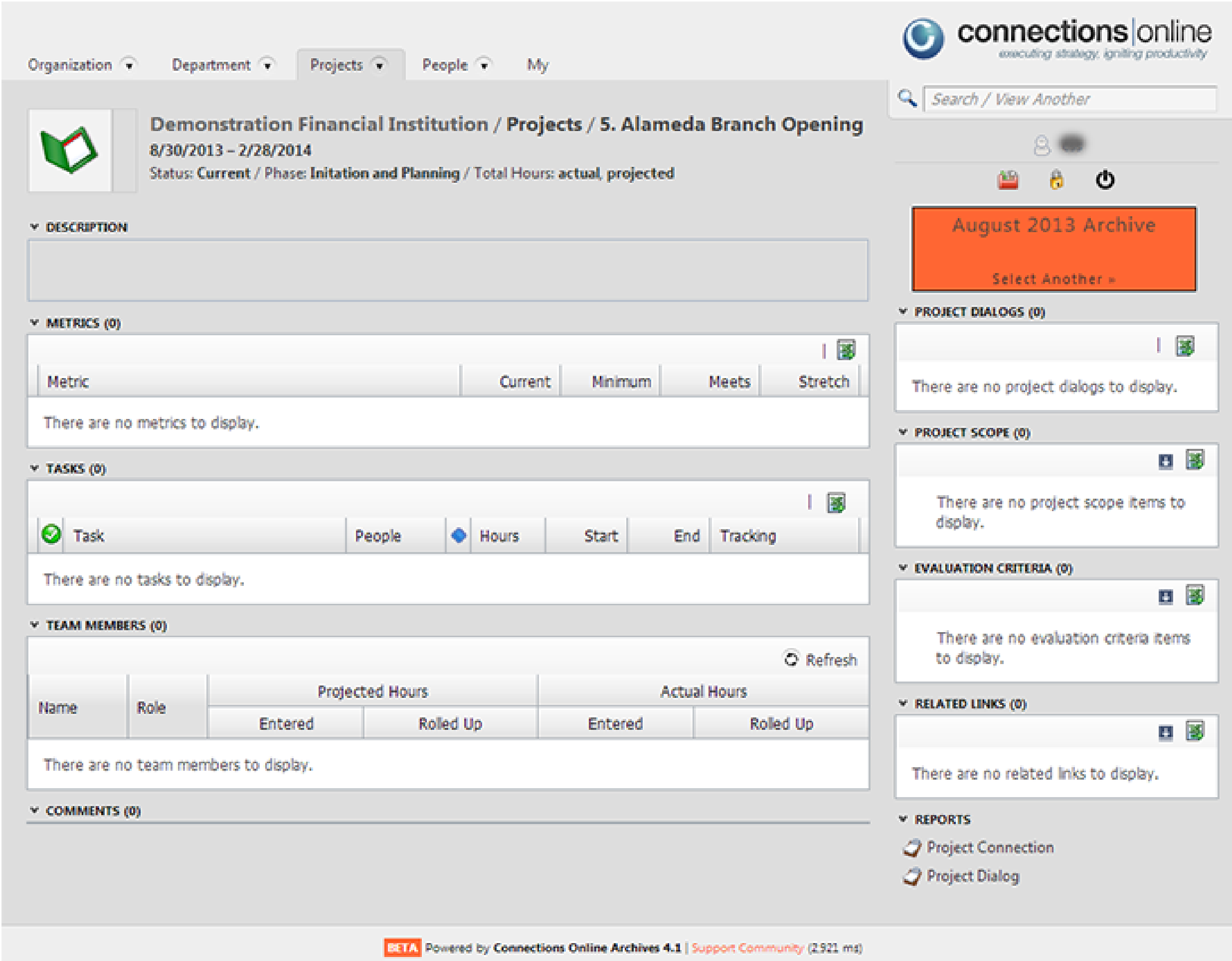
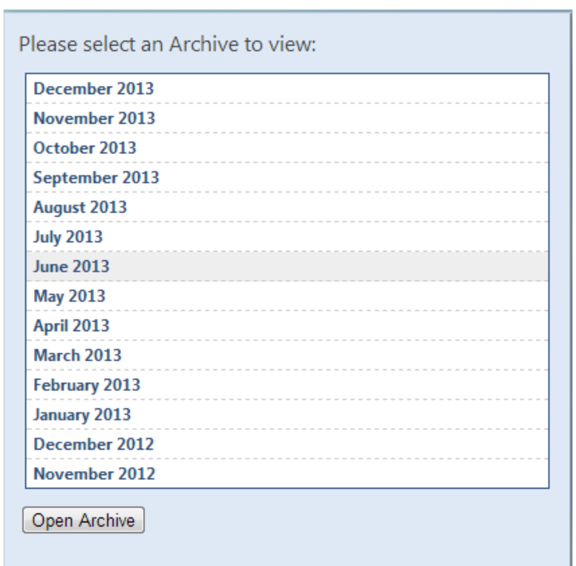
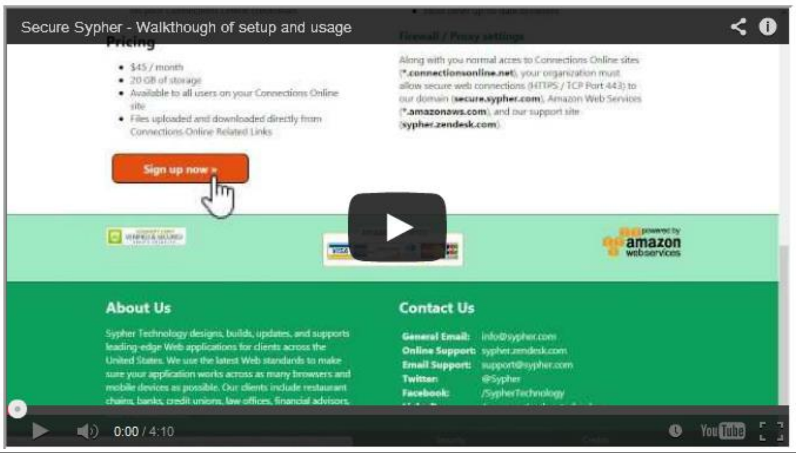


To switch to a different Archive, click "Select Another" in the orange box. The following screen will open allowing selection from all available monthly archives:



Secure Sypher for Related Links

By popular demand, file uploads directly into Connections Online related links are now possible with Secure Sypher. For $45 per month, your entire Connections Online site can upload and store up to 20 GB of files that are kept secure based on your Connections Online page security settings. A video walk-though of setup and usage is available on YouTube (http://www.youtube.com/watch?v=PSXZ7-3hyio). Links for more information and to sign up can be found on your Connections Online site admin page or by visiting https://secure.sypher.com.



Sharing files for Related Links with Web Sharing on Windows Server 2003

In Connections Online, we have a feature called Related Links where we allow you to link to files that that are related to the information stored in our application. These links can be to files out on the Internet or to files shared on your local network.

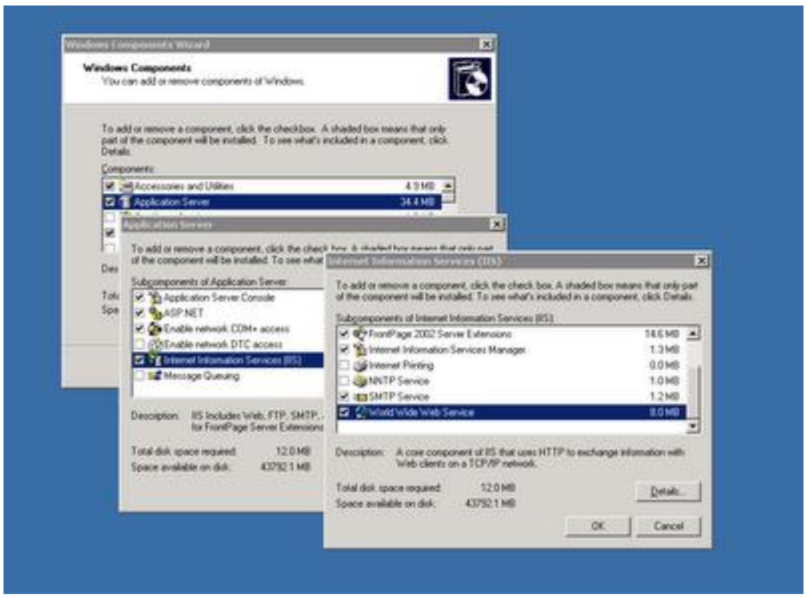
In the past, these related links were mostly used for files shared on local networks. They would link to files with locations that looked like *M:\Shared\file.doc* or *\\servername\share\file.doc*. These links made it easy for users to point to files that were already shared on their internal networks even when those files were not normally opened from Web browsers.

In the last few years, however, the Web browsers have realized that allowing links to local network files is a security risk, and they have gradually removed the ability to use those types of links in favor of using Web-safe links only. Some examples of Web-safe links are *http://servername/share/file.doc*, *https://servername/share/file.doc*, and *ftp://servername/share/file.doc*. Even if your current browser still allows the old links, it is a good idea to go ahead and update all of your links to use the newer, safer format.

For internal file servers that are running Windows Server 2003 and sharing files with the *\\servername\share* or mapped network drive format, this is an easy update and does not require that the files are moved or that the current network shares are removed. I'm going to use

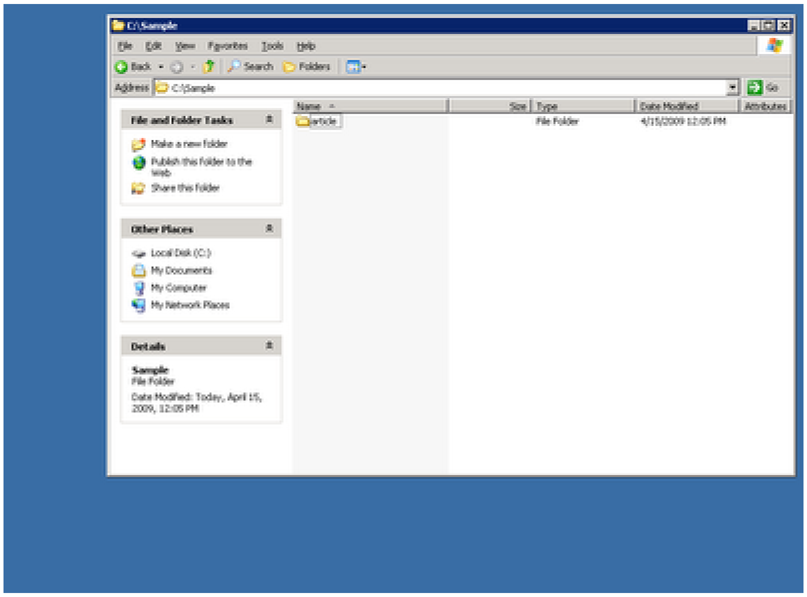
Windows Server 2003 in this article, but the steps are very similar in Windows Server 2000, Windows Server 2008, and even in Windows XP Professional.

First off, make sure that Internet Information Services (IIS) is installed on the server. It is a Windows Component that is included with Windows Server 2003 but may not have been installed. If it is not installed, you can install it by going to *Control Panel*, *Add or Remove Programs*, *Add/Remove Windows Components*. In the Components list, select *Application Server*, then select *Internet Information Services (IIS)*, and finally *World Wide Web Service*. Press OK to close all of the option windows and continue with the installation. You may need to have your original Windows Server 2003 installation media to complete the installation.

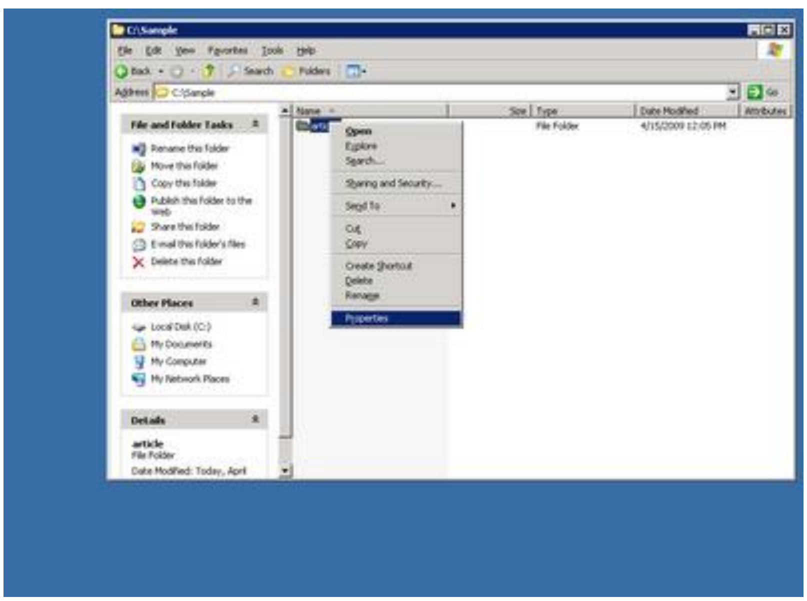


Once it is installed and running, you should be able to get to a welcome page by going to *http://servername* in a Web browser. If it isn't working, check Microsoft's site for more help.

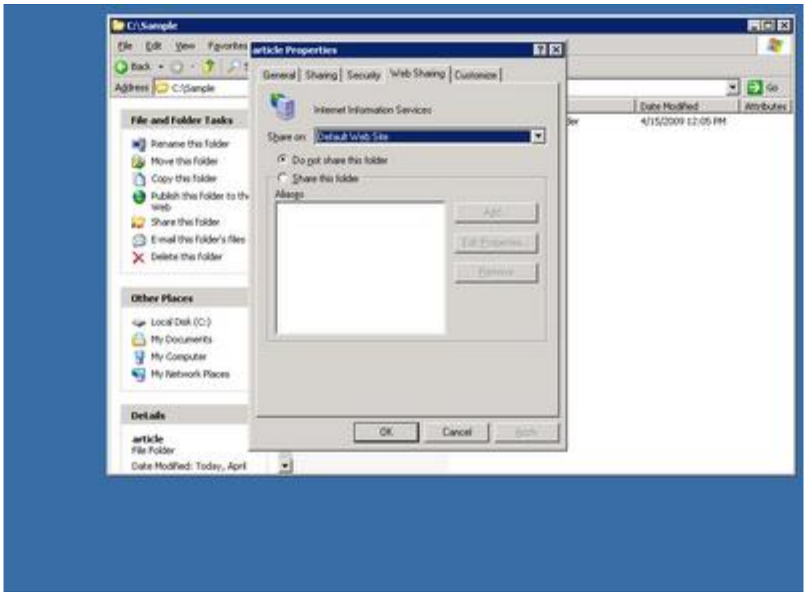
Now, you're ready to share your files with web folders. In Windows Explorer, browse to the location where your files are located.



Right-click on the folder you wish to share and click *Properties* or *Sharing and Security*... from the menu. Both options open up the properties window.

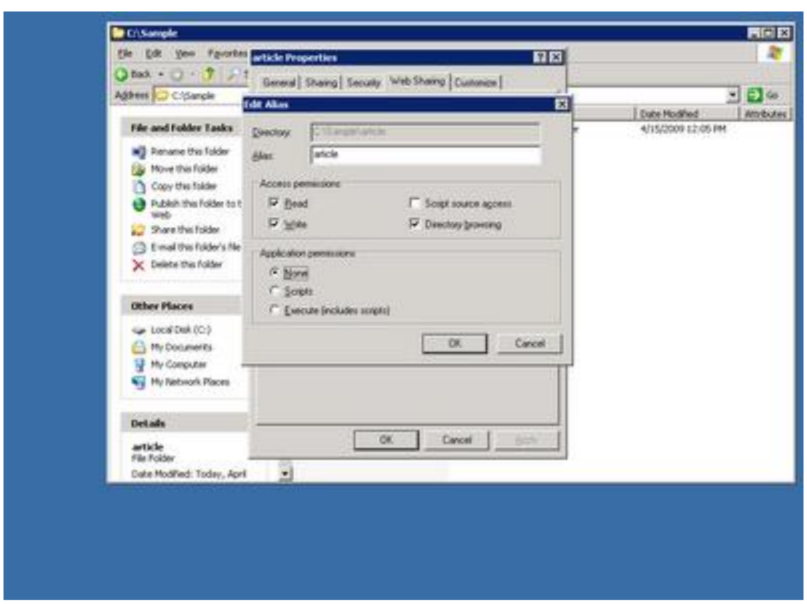


In the properties window, select the *Web Sharing* tab, and click on the *Share this folder* option. On this window, you could also choose to share your files in a location other that the *Default Web Site* on your server, but to keep it simple, I'm just going to use the default option.



Choose an alias for the folder to be used on the Web share. You can just use the default alias which matches the directory name on the server, but if the directory name has spaces or other non-alpha-numeric characters in it (or if it is a long name) you may want to use a shorter alias. Later on, this alias will be part of the file location: *http://servername/**alias**/file.doc*.

In the *Access permissions* section, only the *Read* option is required for the Related Links to work, but the *Directory browsing* option makes using the shared folder a bit easier, and the *Write* option allows the files to be updated through WebDAV connections to the folder. I'm going to use the directory browsing option later in this example, so if you're following along, you may want to do the same.



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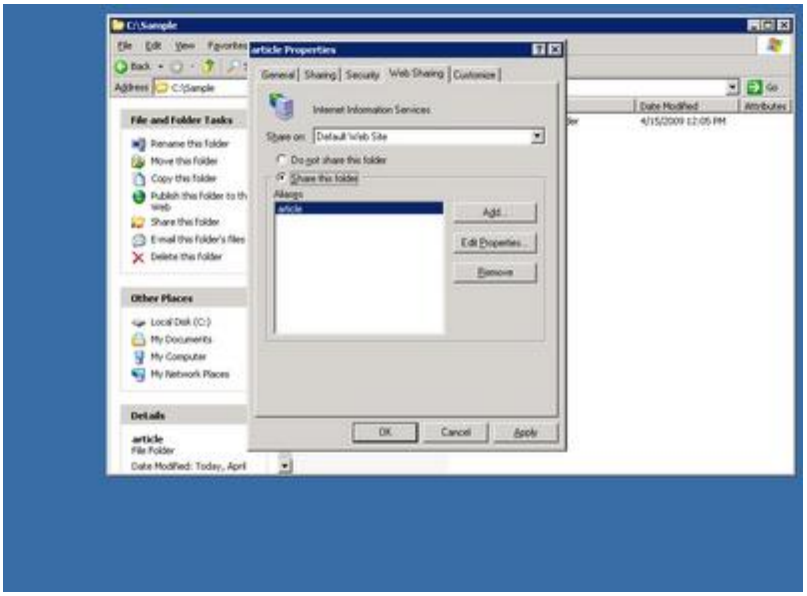
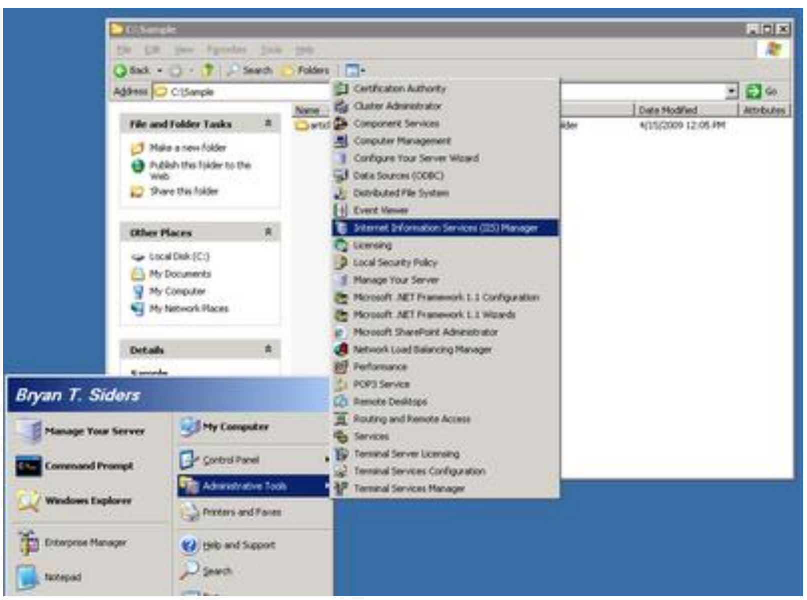
When you close the *Alias* window, the new alias will show up in the *Properties* window. Press OK a couple of times and close all of the open dialog windows.



Now, you can check your IIS settings to see that the new web folder is being shared. Open the *Internet Information Services (IIS) Manager* in *Administrative Tools*. Administrative Tools may not show up on your Start Menu in the same spot it does for me, but it should be in there somewhere.



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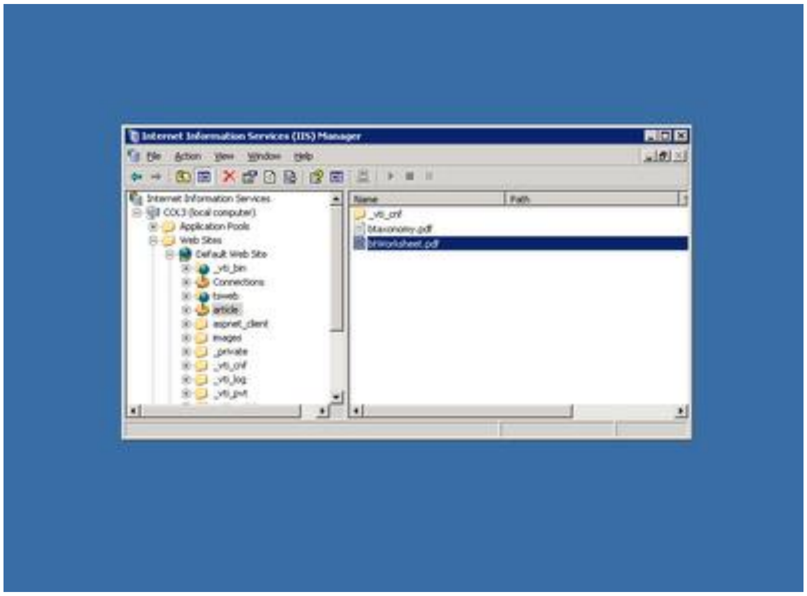
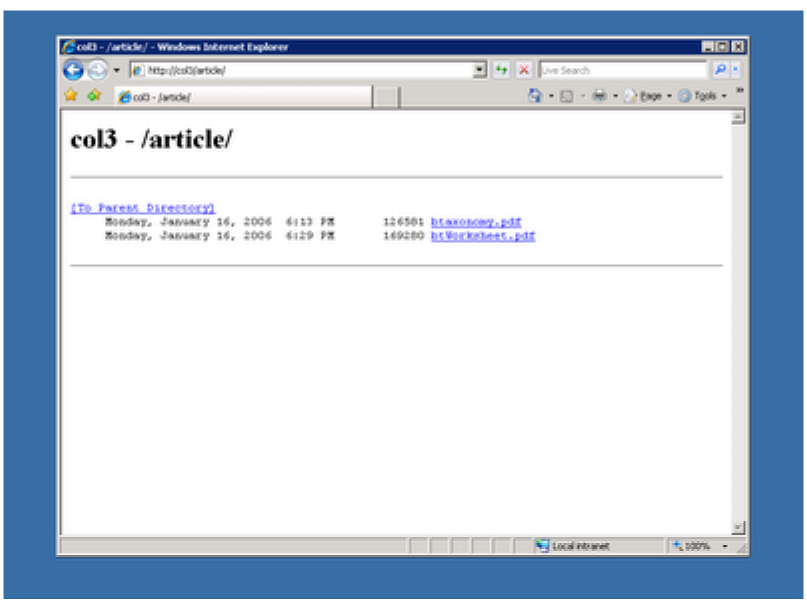
In the IIS Manager, expand the tree on the left side so you can see the Web Sites on your server. Under the *Default Web Site*, you should see a folder or cog icon that matches the alias you set for the shared folder. Select that alias and the shared files and sub-folders should show up in the right side of the window.



If everything is showing up in IIS Manager, it's time to try to open the links in Internet Explorer. Open Internet Explorer and type in the link *http://servername/alias* where *servername* is the machine name (mine was COL3) and *alias* is your web folder name (mine was *article*). Since we enabled directory browsing, this link opens up a directory view of the files available.



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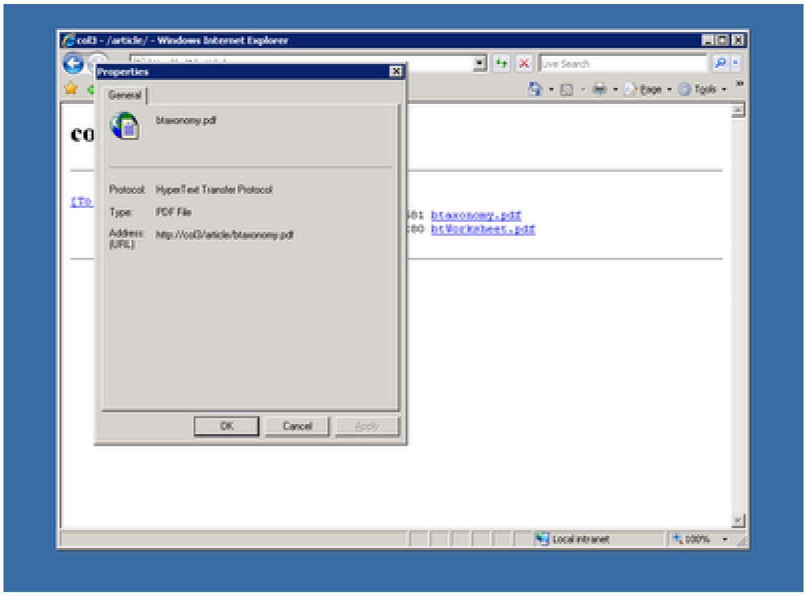
Right-click on one of the file links and choose Properties. This will show you the new Web address (URL) for the file. In my example, the link is *http://col3/article/btaxonomy.pdf*. You now have the new link that you can use in Connections Online.



That's it! Once you begin using these new links, they should become more and more familiar and easy to use, your Connections Online site will be more secure, and you will no longer have to worry about supporting the older link formats or older, less secure Web browsers.

Connections Terminology

(The following are terms and definitions that are important to the Connections process and software.)

Organization/Department Connection Terminology

Organization and Department Connection	This is a multi-page report that provides status on organizational and department critical measures as well as the Projects and Business Strategy
Core Values	A consensus on "how the business will be run"
Emotional Goal/BHAG (Big Hairy Audacious Goal)	A short "emotional" statement that creates a common perspective throughout the organization about "what we're trying to do as a business"
Business Strategy Focus	A summary of the organization's strategies that link to the organization's purpose and Emotional Goal
Critical Measures	Key measurements that the organization, department, project, or individual will use to trend and evaluate success
Projects	Projects that the organization and/or departments feel that needs to be accomplished to push the organization forward to meet strategic objectives. There may be project *teams* for each priority Project
Status: Current Projects	The Projects that the organization and/or departmental teams are working on to complete
Status: Queued Projects	The Projects that the organization and/or department have "tabled" for the moment
Status: Completed Projects	The Projects that the organization and/or department teams have completed
Status: Dropped Projects	The Projects that the organization or department will no longer be addressing

Project Terminology

Project Connection	This is a plan that includes the overall Project Details and the Project Tasks that each project team member is accountable for completing
Project Details	This is the part of the Project Connection that communicates start and end dates, Project, Scope, Evaluation Criteria, Members and Scorecard
Project Teams	The short-term "cross-discipline" teams that are responsible for Projects
Project Team Leader (default terminology)	This is the individual responsible for leading a Project Team
Project Team Member (default terminology)	This is an individual who participates in the Connections process
Sponsor (default terminology)	In developing the Project Connection, a sponsor is identified as the individual who will frame-in the specific purpose/focus of the Project's output. The sponsor can be the actual internal or external customer, or may have overall expertise in the Current Priority, but for business reasons is not "on the team."
Project Team Authorities	These are the authorities given to the different stakeholders of the Project Team (i.e., CEO, Natural Team Leader, Sponsor, Project Team Leader, Project Team Member)

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People Connection Terminology

People Connection	This is a User's Connection that will provide Basic Role, Current Project Tasks, Overall Accountability, Supervisory Scope, Completed Tasks, and level and job specific Authorities
Coach	The Coach is the person an individual will report to from his/her Natural Team – this person will participate in the individual's monthly Dialog meetings
Dialogs	This is a communication process whereby a Dialog meeting is scheduled monthly to review and update the Organization Connection, the Project Connections, and the People Connection — this reinforces alignment and communicates in a timely fashion the status of all organization, department and people performance

Appendix A

Business Project Team Authority Matrix

Business Priority Team Authority Matrix **Demonstration Financial Institution**
Success through Service. Growth through Customer Choice. $500M in Assets by 2007.

Organization Leader

* THE CEOs TEAM CONNECTION AUTHORITY
* Sign-off authority on business project priorities (what's current, queued and dropped)
* Final authority in arbitrating any project disputes (on scope, evaluation criteria, resources, staffing and timelines)
* Final sign-off authority for all budget expenditures for all project teams
* Sole approval authority for making any adjustment to the 'final completion deadline date' on all cross-functional projects

Function/Department Leader

* THE DEPARTMENT LEADER'S TEAM CONNECTION AUTHORITY
* Sign-off authority on project-related time or budget commitments that directly impacts resources in their functional area
* Authority to veto staffing assignments on cross-functional projects (for people in their functional area)
* Authority to negotiate and resolve any conflicts on projects which will eventually be "owned" by their functional area
* Authority to review and approve scope changes that will directly impact their functional area

Sponsor

* EXPECTATION of the SPONSOR in DEVELOPING THE BUSINESS CASE
* Meet with the Team Leader and probable Team Members to discuss the "big picture" strategic issues that are driving the need for this project
* Clarify the organization's general expectations and provide information on any relevant issues or constraints that may impact the design, implementation or impact of this project
* EXPECTATION of the SPONSOR in DEVELOPING THE TEAM CONNECTION
* Do a final review of the Team Connection before the team's work on the project begins
* EXPECTATION of the SPONSOR in IMPLEMENTING THE TEAM CONNECTION
* Attend some of the Team Dialogs (including the initial Team Connection development session, the Mid-Project Review and the Project Close-Out Session)
* Provide support for the Team Leader
* When possible, remove roadblocks and barriers for the Team
* Coach, encourage and keep communications open with the Team Leader
* Find resources for the Team, when needed
* Monitor the Team Connection (to recognize accomplishments and ensure that the project is staying within the agreed-upon Scope and Evaluation Criteria)
* THE SPONSOR'S AUTHORITY
* Sign-off authority for the Business Case (before it is presented to the CEO and leadership team for approval)
* Sign-off authority on all elements of the Team Connection (sign-off needs to be done before the work on the team project begins)
* Can update the CEO and leadership team on the team's progress at the monthly Organization Dialog (when the Team Leader is not a regular member of this forum)

Team Leader

* EXPECTATION of the TEAM LEADER in DEVELOPING THE BUSINESS CASE
* Once the project has been put in the Short-Term Queue by the leadership team, work with the Sponsor to identify who should be included in the development of the Business Case
* Present the Business Case to the leadership team to win approval for moving the project from the Short-Term Queue to Current Business Priority status
* EXPECTATION of the TEAM LEADER in DEVELOPING THE TEAM CONNECTION
* Facilitate all Team Members through the development of the complete Team Connection
* Work with the Sponsor to ensure that the project plan aligns with organization's priorities
* Enter the project plan into the Connections software – including relevant Related Links, as deemed appropriate for team communication, coordination and productivity
* EXPECTATION of the TEAM LEADER in IMPLEMENTING THE TEAM CONNECTION
* Accountable for successful team results
* Set the dates for bi-weekly Team Dialogs
* Take the lead role in facilitating the Team Dialogs – ensuring that the team's time is used wisely
* Keep the Team focused on the work outlined in the Team Connection
* Monitor that the team's work is staying within the established project scope and budget
* Ensure team productivity – the completion of deliverables within established timelines, effective teamwork, open communication, effective resource coordination, on-going strategic alignment and effective problem solving
* Make sure that the team's work is consistent with the standards set forth in the project Evaluation Criteria
* Ensure the team has the resources needed to complete its work

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Business Priority Team Authority Matrix **Demonstration Financial Institution**
Success through Service. Growth through Customer Choice. $500M in Assets by 2007.

* Facilitate team problem-solving and ensure the removal of any roadblock and barrier to team success
* Facilitate Team Dialog debriefings to continuously improve team communications, productivity and effectiveness
* Update the 'Comment' field in the Organization Connection and ensure all completed deliverables have been checked off as 'completed' before each month's Organization Dialog
* Contribute to the work of the team as a team member (without dominating)
* Encourage dialog between Team Members (Team Members are "Partners" not "Your Staff")
* EXPECTATION of the TEAM LEADER in the MID-PROJECT REVIEW
* Facilitate a Team Dialog with all Team Members to identify specific ways to improve the team's performance in the second half of the project
* Work with the team to identify any needed improvements in team process or needed refinements in the Team Connection (such as team assignments, deliverables or timeline)
* [Any changes in Project Scope or Project Evaluation Criteria require Sponsor sign-off; Changes in the final Project Completion Date require CEO sign-off]
* EXPECTATION of the TEAM LEADER in the PROJECT CLOSE-OUT REVIEW
* Facilitate a session with the Sponsor and all Team Members to identify: Did the team stay within the original Project Scope? Did the team's work meet the performance standards outlined in the Project Evaluation Criteria? What did the team learn? What impact will the completion of this project have on the organization? And, what 'teamwork lessons' did you learn that could be used by future teams?
* Facilitate the team in using this information to develop a '5 to 7 minute presentation' for the CEO and leadership team (which will be presented at the next Organization Dialog)
* Participate in a Team Connection Close-Out presentation (along with other Team Members)
* ACROSS ALL ELEMENTS OF THE TEAM CONNECTION, THE TEAM LEADER HAS THE AUTHORITY
* Set team performance standards, establish team priorities, determine team accountabilities, establish Team Dialog Follow-Ups and hold Team Members accountable for performance commitments
* Negotiate additional Authorities with the Sponsor on an as-needed basis
* Delegate Authority to individual Team Members (up to the Team Leader's Authority level)
* Coordinate the team's resources, and resolve the team's internal problems
* Facilitate negotiations with any department leader to remove project roadblocks to ensure timely project completion
* Track the agreed-upon project timeline and hold team members accountable for their contribution to the projects' successful outcome
* Remove non-performing team members from the team
* Change Deliverable Due Dates or make changes in project Staffing assignments (The Team Leader does not have the authority to move the final Project Completion Date -- this requires CEO sign-off)
* Expend funds within the agreed upon project budget
* Select and integrate Consultants into the project team

Team Member

* EXPECTATION of TEAM MEMBERS in DEVELOPING THE BUSINESS CASE
* Work with the Team Leader to develop a meaningful Business Case that is business-strategy driven, with a cross-functional perspective
* Assist in developing 'support data' to prove the efficacy of the Business Case
* EXPECTATION of TEAM MEMBERS in DEVELOPING THE TEAM CONNECTION
* Actively participate in the development of the complete Team Connection to ensure it is realistic in its timeline, and represents the needs of their department and the overall organization
* Work with the team leader in the development of meaningful Related Links, as deemed appropriate for team communication, coordination and productivity
* EXPECTATION of TEAM MEMBERS in IMPLEMENTING THE TEAM CONNECTION
* Accountable for successful team results – stay focused on the work outlined in the Team Connection
* Monitor your due dates, and complete all assignments promised to the team (including Deliverables, Tasks and Follow-Ups)
* Monitor your work to ensure that you are staying within the established Project Scope and contributing to the achievement of the Project Evaluation Criteria
* Come prepared for the bi-weekly Team Dialogs – help ensure that the team's time is used wisely
* Work cooperatively – take the personal responsibility for effective teamwork, open dialog with other Team Members, effective resource coordination, on-going strategic alignment and effective problem-solving
* Use your professional skills and experience to help the team gain insight and improve its effectiveness
* Contribute to discussions and decisions (without dominating or over-influencing)
* Keep your department leader up to date on team results and anticipated outcomes
* EXPECTATION of TEAM MEMBERS in the MID-PROJECT REVIEW
* Actively work with the Team Leader and the other members of the team to identify specific ways to improve the team's performance in the second half of the project
* Work with the team to identify any needed improvements in team process or needed refinements in the Team Connection (such as team

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assignments, deliverables or timeline)

* [Any changes in Project Scope or Project Evaluation Criteria require Sponsor sign-off; Changes in the final Project Completion Date require CEO sign off]
* EXPECTATION of TEAM MEMBERS in the PROJECT CLOSE-OUT REVIEW
* Meet with the Sponsor, Team Leader and all Team Members to identify: Did the team stay within the original Project Scope? Did the team's work meet the performance standards outlined in the Project Evaluation Criteria? What did the team learn? What impact will the completion of this project have on the organization? And, what 'teamwork lessons' did you learn that could be used by future teams?
* Use this information to develop a '5 to 7 minute presentation' for the CEO and leadership team (which will be presented at the next Organization Dialog)
* Participate in a Team Connection Close-Out presentation (along with other Team Members)
* ACROSS ALL ELEMENTS OF THE TEAM CONNECTION, TEAM MEMBERS HAVE THE AUTHORITY TO:
* Actively participate in developing the Team Connection – the Team Leader and/or Team Sponsor cannot develop the Team Connection in the absence of the Team
* Actively participate in the establishment of team process and performance standards
* Provide feedback to the team to continuously improve team effectiveness – including team process, accountability and standards
* Identify any needed changes in project timelines or project staffing assignments
* Identify underlying issues and problems that may prevent the team from hitting its final Completion Deadline (including blowing the whistle if the project is moving beyond its original scope)
* Work with the Team Leader and other Team Members to continuously improve Team Dialogs
* Authority to spend approved time and expense budget (within agreed-upon organizational strategy and team scope)

At the beginning of the project, reach agreement on general expectations on which of the following your team is expected to produce as an outcome:
* Develop and make recommendations * Develop and make decisions * Implement decisions

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Appendix B

Authority Matrix Guidelines

Sample Level Authorities

Job Specific Authorities Questionnaire

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<u>Authority Matrix® Guidelines</u>

ABC Company

Index:

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Authority Matrix® Guidelines

ABC Company

Strategic Planning

Board	*CEO*	*Leadership Team*	*Middle Managers*
Authority To: • Review the mission statement (the purpose of the business) and ratify updates • Review the critical factors that are significant to future success • Review and ratify the Company's long-term objectives • Review and ratify annual priorities • Review progress on long-term objectives and annual priorities	**Authority To:** • Establish a methodology for maximizing the appropriate involvement and input of stakeholders in the planning process • Evaluate input and establish recommended priorities (and assign to the appropriate functional area) • Review and approve departmental plans, priorities and Initiative Teams • Recommend updates to the vision, mission statement, critical factors, long-term objectives and annual priorities • Review and communicate objectives and priorities (and periodic progress updates) to members, staff, Board and other stakeholders • Establish strategic alliances/partnerships	**Authority To:** • Develop, recommend and approve divisional/departmental plans and priorities as appropriate (including the appropriate measurement methodology) • Make recommendations and provide input on the Company's vision, mission statement, critical factors, long-term objectives and annual priorities • Make assignments (and adjust priorities) for the achievement of annual plans to others within my functional area • Approve cross-functional team participation (for people within my Supervisory Scope) • Review and communicate objectives and priorities (and periodic progress updates) within my Supervisory Scope • Recommend strategic alliances and partnerships to the CEO	**Authority To:** • Make recommendations and provide input to the Leadership Team on the Company's annual priorities • Provide input into departmental plans and priorities • Serve on cross-functional teams to provide input (or for development) • Review and communicate objectives and priorities (and periodic progress updates) within my Supervisory Scope • Recommend strategic alliances and partnerships to the Leadership Team

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Authority Matrix® Guidelines

ABC Company

Budget and Contract Authority

Board	*CEO*	*Leadership Team*	*Middle Managers*
Authority To: • Review and ratify the annual budgets (including budget assumptions) • Review budget variances • Ratify recommended changes over the aggregate budget	**Authority To:** • Allocate (or reallocate) funds within aggregate, approved budget • Establish annual budget process and timelines • Recommend budgets (and variances) to the Board for approval • Review budget results and financial performance • Delegate spending authority to the Leadership team (or below) for budget-approved capital and operating expenditures • Approve contingency expenditures (and follow-up for Board ratifications) • Negotiate and approve contracts with vendors	**Authority To:** • Participate in the development of detailed budget assumptions • Facilitate and recommend the development of the operating plan and budget for my area • Facilitate the implementation of the operating plan and budget for my area (up to the budget-approved amount, and within individual signing authority limitations and Company policy guidelines) • Recommend budget variances to the CEO for approval • (The negotiation and approval of contracts with vendors will be an "individual authority")	**Authority To:** • Provide input to the development of budget assumptions, operating plans and budgets • Facilitate the implementation of the operating plan and budget (up to the budget-approved amount, and within individual signing authority limitations and Company policy guidelines) • Recommend budget variances to the Leadership Team (for CEO approval)

Follow Up:

- Determine individual signing authority limits for operating and capital expenditures
- Develop merchandising guidelines and enforcement standards

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Authority Matrix® Guidelines

ABC Company

Training and Development

Board	*CEO*	*Leadership Team*	*Middle Managers*
Authority To: • Determine personal attendance at conferences and seminars (within Board policy guidelines) • Review and approve overall training and development budget (within budget process)	**Authority To:** • Develop and recommend the Company's training and development budget • Determine personal training and development activities (and ratify the plans and activities of direct reports) • Develop succession plans for the overall organization • Review and approve all out-of-state conferences	**Authority To:** • Develop and recommend my department's training and development budget to CEO • Recommend personal training and development activities (and ratify the plans and activities of direct reports) • Review and recommend all requests for out-of-state conferences (for self and direct reports) • Recommend the need for certain programs for development	**Authority To:** • Send employees to internal training programs • Recommend outside training requests to HR
Leadership Council: • Assist in the development of succession plans • Prioritize the need for the development and implementation of new training programs			

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Authority Matrix® Guidelines

ABC Company

Human Resource Management

Board	*CEO*	*Leadership Team*	*Middle Managers*
Authority To: • Hire, evaluate and compensate the CEO • Ratify the decision to hire the Internal Audit Manager • Approve the executive benefits package	**Authority To:** • Establish and modify the organizational structure • Approve the salary administration system (including discretionary bonuses) • Approve "Basic Roles" of staff • Recommend hiring, evaluation, compensation and benefits of executive direct reports • Review and approve overall additions to "head count" (consistent with budget) • Approve all starting salaries over midpoint, and all salary increases greater than 15% • Terminate any Company employee • Approve all promotions outside of a single Division • Approve all management-level promotions • Sign-off on all contract employees and temps	**Authority To:** • Establish and modify the organizational structure (within my Supervisory Scope) • Recommend/approve salary actions for people within my department (in conjunction with HR) • Approve hiring, firing, promotions, transfers, replacements, status changes and demotions of all people within my department or division (in conjunction with HR) • Recommend hiring, firing, promotions, transfers, replacements, status changes and demotions of all people within my department (if cross-division, done in conjunction with HR) • Evaluate direct reports and review/approve evaluations of others within the department (in conjunction with HR) • Review, approve and reallocate departmental staffing levels (within overall budget)	**Authority To:** • Recommend staffing levels • Recommend salary actions for people within my department (in conjunction with HR) • Recommend hiring, firing, promotions, transfers, replacements, status changes and demotions of all people within my department (in conjunction with HR) • Recommend evaluations of direct reports • Manage overtime (within budget)

Executive Committee (of the Board):
- Recruit and recommend the CEO (and Internal Audit Manager) to the full Board for hire
- Develop and approve the CEO (and Internal Audit Manager's) evaluation
- Recommend CEOs compensation to the Board
- Review and approve the hiring, evaluation and compensation of the CEOs direct reports that are executives
- Review and recommend executive benefits to the Board

Authority Matrix® Guidelines

ABC Company

Policies and Procedures

Board	*CEO*	*Leadership Team*	*Middle Managers*
Authority To: • Approve policies (consistent with regulations) • Monitor the Company's compliance with policy and regulations	**Authority To:** • Ensure that the Company is in compliance with all applicable laws and regulations • Establish the philosophy for policy development (example: tone of customer service orientation, quality initiative...) • Review and approve policies prior to Board consideration • Work with legal counsel to assure the legality of policy and procedure compliance	**Authority To:** • Develop policies within area of responsibility (to ensure compliance with laws and regulations) -- for CEO review and Board approval, as applicable • Ensure that there are standard operating procedures within department/area that are: written, communicated and monitored/followed • Review and approve procedures to implement the policies • Communicate all policies and procedures within area(s) of my responsibility • Work with legal counsel to assure the legality of policy and procedure compliance (coordinate with appropriate Department Head) • Provide input on cross-functional policy development considerations	**Authority To:** • Recommend and implement policies/procedures in area of responsibility • Communicate and update policies and procedures to staff in area of responsibility • Monitor staff compliance to policies and procedures, and take corrective action (as needed) • Provide input on cross-functional policy development considerations

Compliance Accountabilities:	**Authority To:**
Karen and Ted	HR-related, accounting, investment/financial and remote delivery
Steve and Barb	Deposit and loan products; and service delivery

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Sample Level Authorities
(Discussion Draft)

Human Resource Management

Authority	*CEO*	*VP's*	*Directors*	*Mid-Management*
▪ **Hire**	**Authority to:** Hire for all positions, other than those requiring Board approval	**Authority to:** Hire director positions, within scope of accountability	**Authority to:** Hire all mid-management level positions, within scope of accountability	**Authority to:** Hire all staff level positions, within scope of accountability
▪ **Terminate**	Terminate all positions including vice presidents and all officers other than those requiring Board approval	Terminate the employment of all positions, within scope of accountability, after the review of human resources	Terminate the employment of all positions, within scope of accountability, after the review of human resources	Terminate the employment of all staff level positions, within scope of accountability, after the review of human resources
▪ **Promote**	Promote, within guidelines, all company personnel to all positions including vice presidents and all officers, other than those requiring Board approval	Promote all departmental personnel, within scope of accountability	Promote all positions, within scope of accountability	Promote all staff level positions, within scope of accountability
▪ **Additional Head Count**	Authorize any and all additions to payroll	Authorize additions to payroll within approved budget		
▪ **Rewards**	Grant all rewards deemed appropriate, other than those requiring Board approval	Grant intrinsic and extrinsic rewards within company policy and budget, other than those requiring Board approval, within scope of accountability	Grant any and all mid-management and staff rewards within company policy and budget, within scope of accountability	Grant all staff level rewards within departmental guidelines, within scope of accountability

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Sample Level Authorities

(Discussion Draft)

Strategic/Operational Planning

Authority	*CEO*	*VP's*	*Directors*	*Mid-Management*
▪ **Strategic Planning**	**Authority to:** Establish company vision/direction with Board input and review Approve all strategic plans Approve all strategic communications Establish all strategic external alliances/partnerships	**Authority to:** Develop all plans, priorities and initiatives Implement updates to long-term objectives	**Authority to:** Implement all plans, priorities and initiatives	**Authority to:**
▪ **Operational Planning**		Approve all departmental operational plans	Develop and implement departmental operational plans	Implement all unit plans

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Sample Level Authorities
(Discussion Draft)

Budgeting/Purchasing and Contracts

Authority	*CEO*	*VP's*	*Directors*	*Mid-Management*
▪ **Budgeting**	**Authority to:** Plan, develop and implement subject to Board approval	**Authority to:** Plan, develop and implement appropriate departmental budgets with CEO approval	**Authority to:** Plan, develop and implement appropriate departmental budgets with VP approval	**Authority to:** Plan, develop and implement appropriate unit/departmental budgets with Director approval
▪ **Purchasing**	Authorize all purchases within Board guidelines	Authorize all purchases within budget guidelines	Authorize all purchases within budget guidelines	Authorize all purchases within budget guidelines
▪ **Contracts**	Approve all contracts within Board guidelines	Approve all departmental contracts within budget guidelines		

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Sample Level Authorities
(Discussion Draft)

Policies and Procedures

Authority	*CEO*	*VP's*	*Directors*	*Mid-Management*
▪ **Corporate Policy**	**Authority to:** Approve all corporate policies			
▪ **Functional Policy**	Approve all functional policies within scope of accountability	Approve all functional policies within scope of accountability		
▪ **Operational Procedures**	Approve all operational procedures within scope of accountability	Approve all operational procedures within scope of accountability	Approve all operational procedures within scope of accountability	Approve all operational procedures within scope of accountability

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Sample Level Authorities
(Discussion Draft)

Corporate and Regulatory Compliance and Market Conducts

Authority	*CEO*	*VP's*	*Directors*	*Mid-Management*
▪ **Corporate Compliance**	**Authority to:** Work with Board to establish ethical/legal standards and direction for the company	**Authority to:** Ensure compliance with ethical/legal standards within departmental scope and take action when violations occur anywhere in the company	**Authority to:** Ensure compliance with ethical/legal standards within departmental scope and take action when violations occur anywhere in the company	**Authority to:** Ensure compliance with ethical/legal standards within departmental scope and take action when violations occur anywhere in the company
▪ **Regulatory Compliance/ Market Conduct**	Establish policy	Set standards and direction for compliance	Implement, monitor and correct compliance procedures	Implement, monitor and correct compliance procedures

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Sample Level Authorities

(Discussion Draft)

Human Resource Management

Authority	***CEO*** **Authority to:**	***VP's*** **Authority to:**	***Directors*** **Authority to:**	***Mid-Management*** **Authority to:**
▪ **Hire**				
▪ **Terminate**				
▪ **Promote**				
▪ **Additional Head Count**				
▪ **Rewards**				

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Sample Level Authorities

(Discussion Draft)

Strategic/Operational Planning

Authority	***CEO*** **Authority to:**	***VP's*** **Authority to:**	***Directors*** **Authority to:**	***Mid-Management*** **Authority to:**
▪ **Strategic Planning**				
▪ **Operational Planning**				

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Sample Level Authorities
(Discussion Draft)

Budgeting/Purchasing and Contracts

Authority	***CEO*** **Authority to:**	***VP's*** **Authority to:**	***Directors*** **Authority to:**	***Mid-Management*** **Authority to:**
▪ **Budgeting**				
▪ **Purchasing**				
▪ **Contracts**				

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Sample Level Authorities

(Discussion Draft)

Policies and Procedures

Authority	***CEO*** Authority to:	***VP's*** Authority to:	***Directors*** Authority to:	***Mid-Management*** Authority to:
▪ **Corporate Policy**				
▪ **Functional Policy**				
▪ **Operational Procedures**				

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Sample Level Authorities

(Discussion Draft)

Corporate and Regulatory Compliance and Market Conducts

Authority	***CEO*** **Authority to:**	***VP's*** **Authority to:**	***Directors*** **Authority to:**	***Mid-Management*** **Authority to:**
▪ **Corporate Compliance**				
▪ **Regulatory Compliance/ Market Conduct**				

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Sample Level Authorities

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Authority Category:

Authority	***CEO*** **Authority to:**	***VP's*** **Authority to:**	***Directors*** **Authority to:**	***Mid-Management*** **Authority to:**

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Job Specific Authorities Questionnaire

What authorities do you need to do your job that no one else would have?

-
-
-
-
-