

# Connections Online® Version 4.1 User Manual

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## *Accessing Connections Online From a Client Computer*

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]

### **At The Sign In Screen**

(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 with allowing the User to create their password.

The screenshot shows the sign-in interface for Connections Online. It includes a logo at the top left, followed by the text 'connections|online' and the tagline 'creating clarity in your business'. Below this are two text input fields labeled 'USER NAME' and 'PASSWORD'. To the left of the password field is a link for 'Forgot Your Password?' and to the right is a checkbox for 'Remember Me'. At the bottom left is an 'Options' link and at the bottom right is a 'Sign In' button. The footer contains the text 'Powered by Connections Online Visit the Support Community' and a 'GODADDY VERIFIED & SECURED' logo.

## Connections Online Basics

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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](#).

## 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.

The screenshot displays the Connections Online application interface. At the top, there are navigation tabs: Organization, Department, Projects, People, and my custom view. The main content area is titled "Demonstration Financial Institution" with the goal "Improving Organic Growth, we will be \$10 Billion by 2012". Below this, there is a "SCORECARDS (17)" section. The scorecard is organized into four main categories: 1. FINANCIAL PERFORMANCE, 2. EMPLOYEE ENGAGEMENT, 3. CUSTOMER LOYALTY, and 4. OPERATIONAL EFFICIENCY. Each category contains several metrics with current values, minimums, and stretch goals. For example, under Financial Performance, "1.3 Growth" is at \$620.0 M, with a minimum of \$425.0 M and a stretch of \$475.0 M. Under Employee Engagement, "2.1 Charitable Time Given Monthly" is at 101 Hrs. Under Customer Loyalty, "3.1 Net Promoter Score" is at 77%, with a minimum of 55% and a stretch of 65%. Under Operational Efficiency, the "Total" is at -\$6,106. To the right of the scorecard, there is a "CALENDAR" for December 2011, an "ORGANIZATION DIALOG (23)" section with various dialog boxes, and "CORE VALUES" including "Demonstrate Integrity" and "Member Focus". The bottom of the screen shows a "PROJECTS PORTFOLIO (15)" section with a "Project Portfolio" table. The browser status bar at the bottom indicates "Internet | Protected Mode: On".

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

Organization | Department | Projects | People | my custom view

connections online  
enabling strategy, getting productivity

Corporate / Marketing  
Improving Organic Growth, we will be \$10 Billion by 2010

kn (sign out)  
Search / View Another

STRATEGY

SCORECARDS (3)

Scorecard	Current	Minimum	Meets	Stretch
1. CUSTOMER LOYALTY	55			
1.1 Net Promoter Score	66%	55%	60%	65%
1.2 Net Customer Growth	1,000	1,000	1,250	1,500

PROJECTS PORTFOLIO (14)

Project Portfolio	Starts	Ends	Tracking Label
1. Implement a training program	03/07/12		TP07-01
2. Project Life Cycle - Detailed Framework-September			Operational Efficiency
3. Campaigns: improve SEG penetration	04/28/10	11/15/11	

DEPARTMENT MEETINGS (2)

CALENDAR

December 2011

October 9th, 2009 - New agenda  
Training room 2

April 2nd, 2009 - sff  
office

CORE VALUES

Demonstrate Integrity

1. Be straightforward and honest
2. Show respect for yourself and others

Member Focus

1. Consistently deliver service members can count on

Build an Open Learning Environment

1. Encourage challenging discussion
2. Listen -- be accessible, approachable.

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

Organization | Department | Projects | People | my custom view

connections online  
enabling strategy, getting productivity

Demonstration Financial Institution / Projects Portfolio / 1. Headquarters Renovation [HQ]  
8/7/2007 - 6/29/2012 STARTED  
Status: Current / Phase: Development and Testing / Tracking: Strategy is Growth / Total Hours: 1330 actual, 24.6 projected

kn (sign out)  
Search / View Another

DESCRIPTION

METRICS (3)

Metric	Current	Minimum	Meets	Stretch
1. Budget				
1.1 New Member - organic growth	90	72	75	100
1.2 Contractor construction - average	21			

TASKS (10)

Task	Hours	Starts	Due	Tracking
1. Contact Architect Supply Company to get a list of local architects	8 / 40.13	2/14/11		
2. Select Architectural Firm	1 / 0	8/7/07		
2.1 Select the site	0 / 0	8/7/07		
2.2 Architectural plan and interior design completed	1344 / 8.26	2/2/11		Issue Risk
3. Permits completed	0.98 / 10	5/18/10		
3.1 building permit	0 / 14.23	12/13/10		Risk
4. create a task for training	0 / 0	10/11/11		
5. Grand Opening for Members	0 / 0.38	8/17/10		
6. testing the task function		10/5/11		
7. test	0 / 0			

PROJECT MEMBERS (13)

Name	Role	From	Actual	Projected
Pearl Baird	Sponsor	Marketing	0	0
Bobbu Baxter	Leader	Marketing	1328	0.51

CALENDAR

December 2011

December 20

December 27

December 29

PROJECT MEETING (4)

April 14th 9a - Headquarters Project Dialog  
Conference room 8

May 31st, 2008 2:30p - Name your Dialog  
Kantor's Office

May 31st, 2008 - test link

PROJECT SCOPE (8)

1. GENERAL INTENT  
re-develop the HQ branch to improve member service flow, better utilize space and technology

2. OUTSIDE ARCHITECTS

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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.

**Cindy Siders**  
CTO, Information Technology  
cindy.siders@gmail.com

kn (sign out)  
Search / View Another

**BASIC ROLE (6)**

#	%	Basic Role
1.	5%	Big Picture
2.	15%	Leadership and Team Development description of this KRA
3.	10%	Projects
4.	20%	Business Fundamentals
5.	40%	Department Management
6.	10%	Basic Role for Training

**BASIC ROLE TASKS (1)**

**INDIVIDUAL METRICS (7)**

Individual Metric	Current	Minimum	Meets	Stretch
<b>1. GOALS</b>				
1.1 Financial Soundness	3.00	2.00	3.00	4.00
1.2 Net Customer Growth - Cindy →	1,600	1,000	1,250	1,500
2. Cross Sells per Week	7	5	10	15
3. Training Hours per year	16	35	35	40
4. Org Metrics I Own				
4.1 ROA - Cindy →		6%	9%	1.2%

**CONNECTED METRICS (0)**

**PROJECTS PORTFOLIO (21)**

**PROJECT TASKS (38)**

**MEETING TASKS (4)** [Click to show](#)

**PERSONAL TASKS (3)**

**COMMENTS (1)**

**CALENDAR**  
December 2011

S	M	T	W	T	F	S
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

**December 14**  
Task 'Select the site' ends  
Task 'Select the site' ends  
Sp Project Portfolio 'Project2' ends  
Sp Project Portfolio 'Project2b' ends

**December 20**  
Sp Task 'Select the site' ends

**December 28**  
Basic Role Task associated with Leadership

**INDIVIDUAL MEETINGS (22)**

- October 21st - another test
- October 18th 4p - beta test  
My office
- October 11th -
- August 19th 12p - August Meeting  
Boss' Office

**SUPERVISORY SCOPE (5)**

- 1. Scope 1a
- 1. sdf
- 1. This is my supervisory scope link

Internet | Protected Mode: On | 100%

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- **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.

Organization ▾ Department ▾ Projects ▾ People ▾ my custom view

connections online  
enabling strategy, igniting productivity

bob-demo (sign out)  
Search / View Another

**My Connection**  
Bob Builder

BRANCH ABC  
SCORECARDS (1)

Scorecard	Current	Minimum	Meets	Stretch
1. New Accounts - Monthly	46	35	45	50

BRANCH DEF  
SCORECARDS (3)

Scorecard	Current	Minimum	Meets	Stretch
1. New Accounts - Monthly	48	35	45	55
1.1 New Accounts Per Month [B. Builder]	16	5	10	15
1.2 New Accounts - Monthly [S. Farmer]	32	8	10	15

HEADQUARTERS RENOVATION (HQ)  
TASKS (10)

Task	Hours	Starts	Due	Tracking
1. Contact Architect Supply Company to get a list of local architects	8 / 40.13	2/14/11		
2. Select Architectural Firm	1 / 0	8/7/07		
2.1 Select the site	0 / 0	8/7/07		
2.2 Architectural plan and interior design completed	1344 / 8.26	2/2/11		Issue Risk
3. Permits completed	0.98 / 10	5/18/10		
3.1 building permit	0 / 14.23	12/13/10		Risk
4. create a task for training	0 / 0	10/11/11		
5. Grand Opening for Members	0 / 0.38	8/17/10		
6. testing the task function		10/5/11		
7. test	0 / 0			

Done Internet | Protected Mode: On 100%

- **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.

The screenshot displays the Connections Online interface for the 'Demonstration Financial Institution'. The main content area, highlighted by a large black circle, contains a scorecard with the following data:

Scorecard	Current	Minimum	Meets	Stretch
<b>1. FINANCIAL PERFORMANCE</b>				
1.1 Add another metric				
1.1.1 add metric				
1.2 Interest Rate Margin				
1.3 Growth	\$620.0 M	\$425.0 M	\$450.0 M	\$475.0 M
1.3.1 Capital	.072			
1.4 ROA	.9%	.6%	.9%	1.2%
<b>2. EMPLOYEE ENGAGEMENT</b>				
2.1 Charitable Time Given Monthly	101 Hrs			
2.2 Community Volunteer Hours				
2.3 Products Per Member				
2.4 Organization Culture Survey	88%	80%	85%	90%
<b>3. CUSTOMER LOYALTY</b>				
3.1 Net Promoter Score	77%	55%	60%	65%
3.2 Net Customer Growth	1,600	1,000	1,250	1,500
3.3 Total New Accounts - Monthly Total	94	70	75	125
<b>4. OPERATIONAL EFFICIENCY</b>				
	-\$6.106			

The interface also includes a navigation bar at the top with 'Organization', 'Department', 'Projects', and 'People' dropdowns, and a 'my custom view' button. On the right side, there is a 'CALENDAR' for December 2011, an 'ORGANIZATION DIALOG' showing meeting dates, and 'CORE VALUES' such as 'Demonstrate Integrity' and 'Build an Open Learning'. The bottom status bar shows 'Done', 'Internet | Protected Mode: On', and a zoom level of 100%.

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- **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)

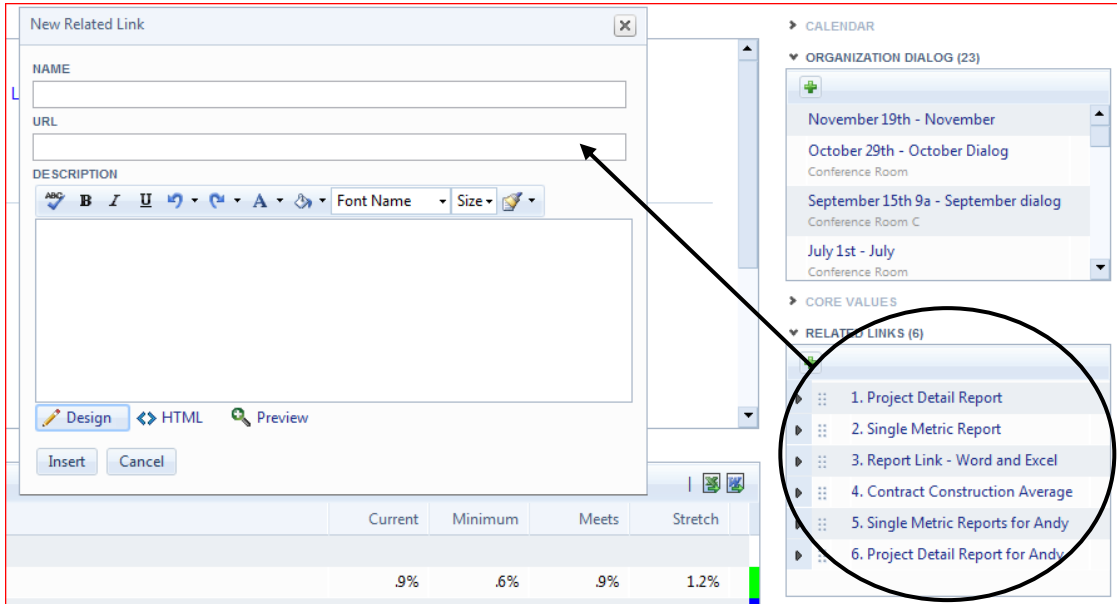
The screenshot displays the Connections Online interface for 'Demonstration Financial Institution'. The main content area shows a 'SCORECARDS (17)' section with a table of metrics. The sidebar on the right contains several modules: 'CALENDAR' (showing December 2011), 'ORGANIZATION DIALOG (23)' (listing various dialog events), and 'CORE VALUES' (listing 'Demonstrate Integrity' and 'Member Focus'). A black oval highlights the 'ORGANIZATION DIALOG' and 'CORE VALUES' sections in the sidebar.

Scorecard	Current	Minimum	Meets	Stretch
<b>1. FINANCIAL PERFORMANCE</b>				
1.1 Add another metric				
1.1.1 add metric				
1.2 Interest Rate Margin				
1.3 Growth	\$620.0 M	\$425.0 M	\$450.0 M	\$475.0 M
1.3.1 Capital	.072			
1.4 ROA	.9%	.6%	.9%	1.2%
<b>2. EMPLOYEE ENGAGEMENT</b>	30			
2.1 Charitable Time Given Monthly	101 Hrs			
2.2 Community Volunteer Hours				
2.3 Products Per Member				
2.4 Organization Culture Survey	88%	80%	85%	90%
<b>3. CUSTOMER LOYALTY</b>				
3.1 Net Promoter Score	77%	55%	60%	65%
3.2 Net Customer Growth	1,600	1,000	1,250	1,500
3.3 Total New Accounts - Monthly Total	94	70	75	125
<b>4. OPERATIONAL EFFICIENCY</b>	-\$6.106			

**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.)

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**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 for 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.

### 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.



**Help ?:** If you click on the “?” you will see Help for that particular page in the form of short videos and narrative explanations. You can also search for other Help.



## 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.

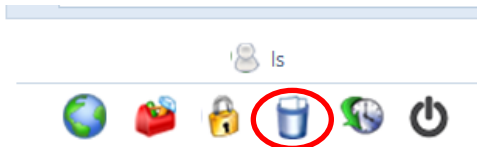


**Copy Projects or Metrics:** User can copy metrics and projects within an organization or department and people pages – or copy one metric or project to another organization, department, or people tab.

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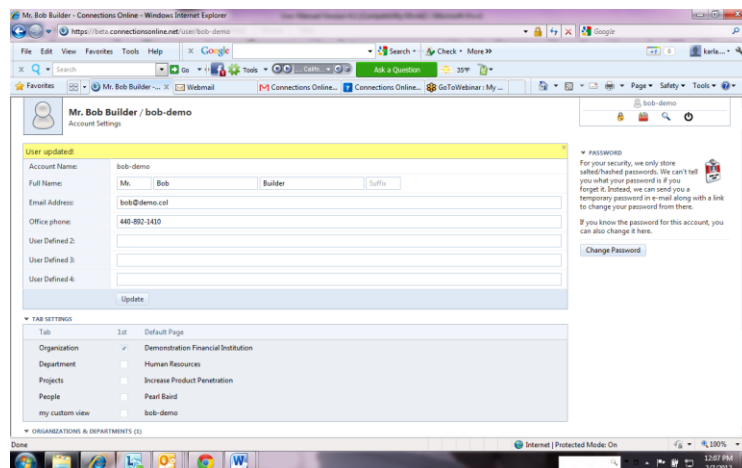


**Undelete Symbol:** Click this symbol, found at the upper right of the page, and you will open an “Undelete” page. Deleted items will be listed on this page. Roll over the item you want to undelete and click on the undelete symbol to the left of the item. Navigate back to the original page and the item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

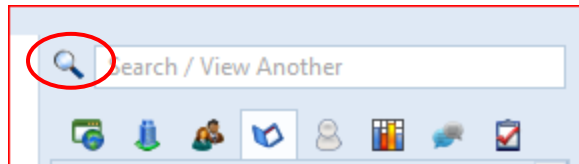


## Search Feature

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,

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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.

Organization ▾ Department ▾ Projects ▾ People ▾ my custom view

**Demonstration Financial Institution**  
*Improving Organic Growth, we will be \$10 Billion by 2012*

► STRATEGY

▼ SCORECARDS (15)

Scorecard	Current	Minimum	Meets	Stretch
<b>1. FINANCIAL PERFORMANCE</b>				
▶ 1.1 ROA	.9%	.6%	.9%	1.2%
▶ 1.2 Interest Rate Margin				
▶ 1.3 Growth	\$620.0 M	\$425.0 M	\$450.0 M	\$475.0 M
▶ 1.3.1 Capital	.072			
<b>2. EMPLOYEE ENGAGEMENT</b>	<b>30</b>			
▶ 2.1 Charitable Time Given Monthly	101 Hrs			
▶ 2.2 Community Volunteer Hours				
▶ 2.3 Products Per Member				
▶ 2.4 Organization Culture Survey	88%	80%	85%	90%
<b>3. CUSTOMER LOYALTY</b>				

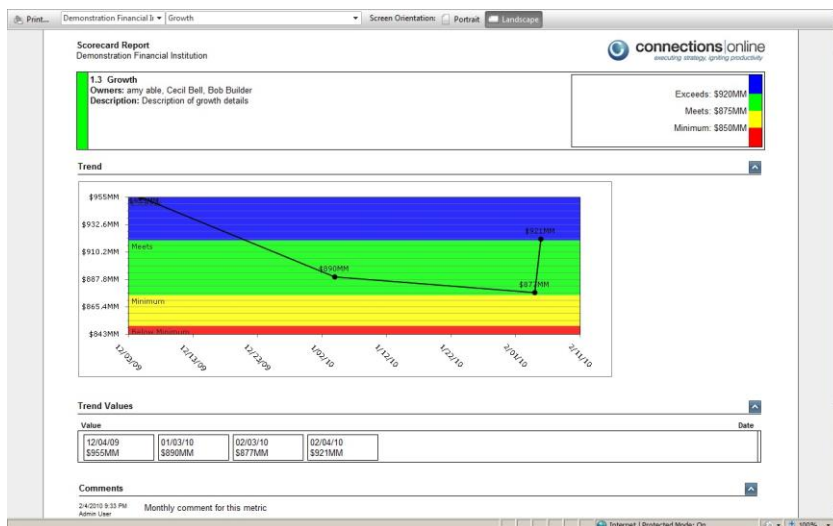
The list boxes on the right side bar for main tabs are working as they did before – select the expand symbol and the item expands.

**Printing Reports:** 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**
- 📄 Organization Connection
- 📄 Organization Dialog
- 📄 Resource Utilization (By Task)
- 📄 Resource Utilization (By Project)
- 📄 All Projects
- 📄 Activity Report
- 📄 Metric Report

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

**Critical Measure Report:** 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.



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## Resource Utilization Report

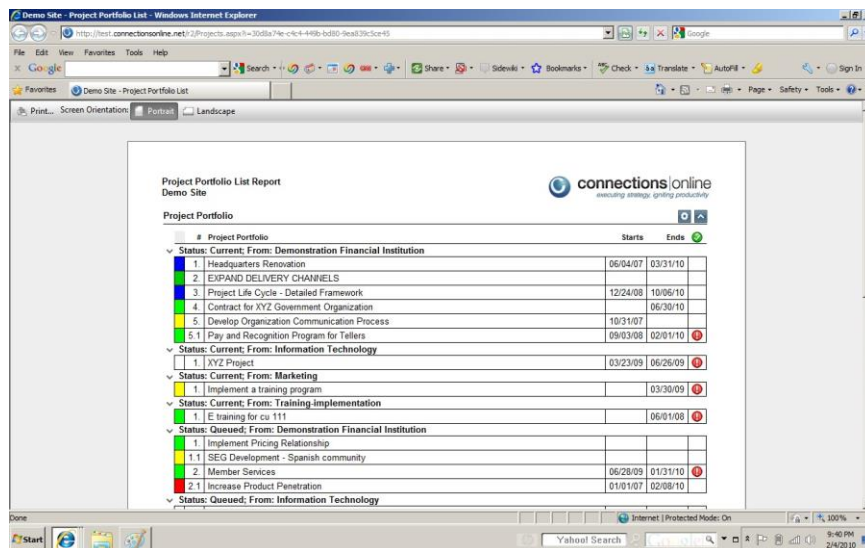
Go to the org/dept page, click on the resource utilization report, then click on the org, select Not Grouped, check show subs, click refresh and all the tasks for all projects show up. Click the column header that says Projects (and the projects will resort by project name alpha) the header turns blue 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.

Resource Utilization  
Demonstration Financial Institution  
Improving Organic Growth, we will be \$10 Billion by 2012

Starts	Ends	Project Portfolio	From	Individual	Projected	Actual
Task: Log Project Request						
		Project Life Cycle - Detailed Framework	Marketing	Bobby Brown	0	0
Task: Log Project Request						
		Project Life Cycle - Detailed Framework	Demonstration Financial Institution	Bobby Brown	0	0
Task: Grand Opening for Members						
	04/20/10	Headquarters Renovation	Demonstration Financial Institution	Bobby Brown	0	0

**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.

# Connections Online® Version 4.1 User Manual



## 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

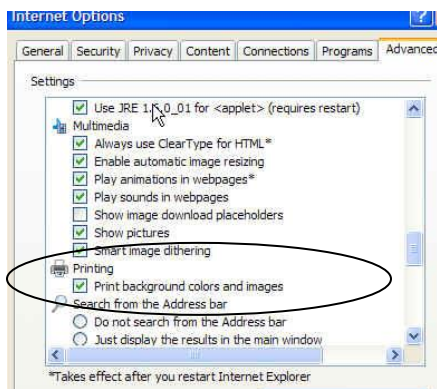
### ***Firefox***

- 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

## **Printing a Connections Tab**

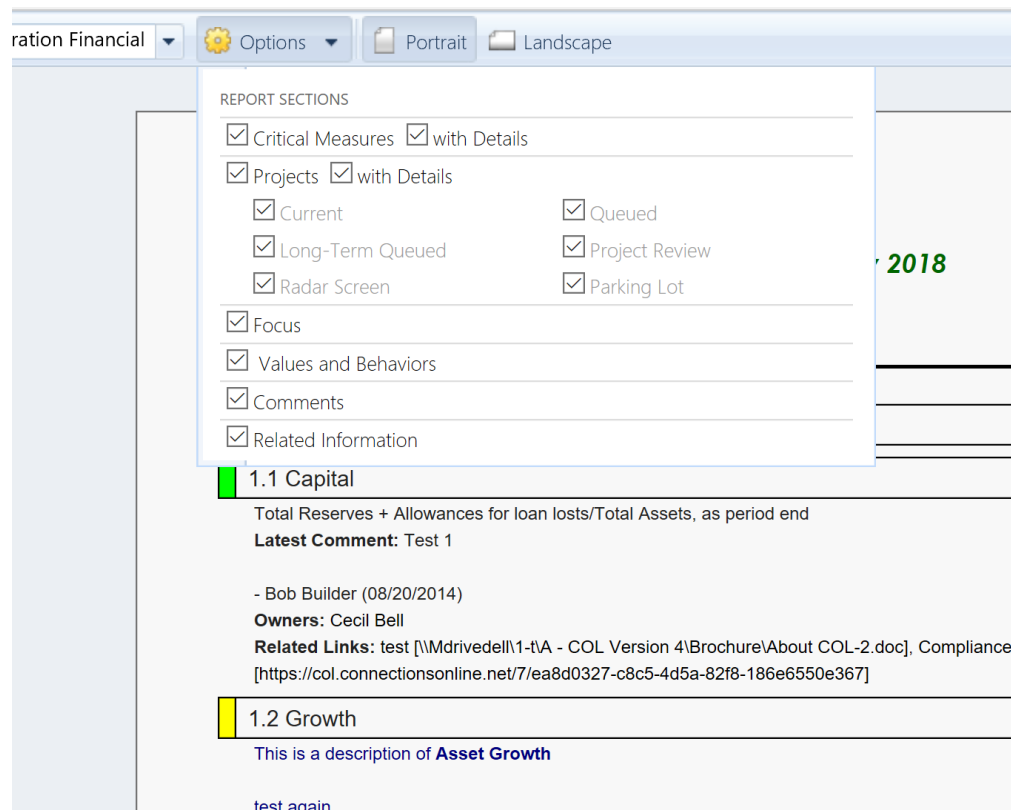
A Connection Tab page can be quickly printed by using the print function on the browser. The User can select the view to be printed by selecting the page, opening or closing modules that the User wants represented on the printed page report, checking boxes next to line items to see more detail of a line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



# Connections Online® Version 4.1 User Manual

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.

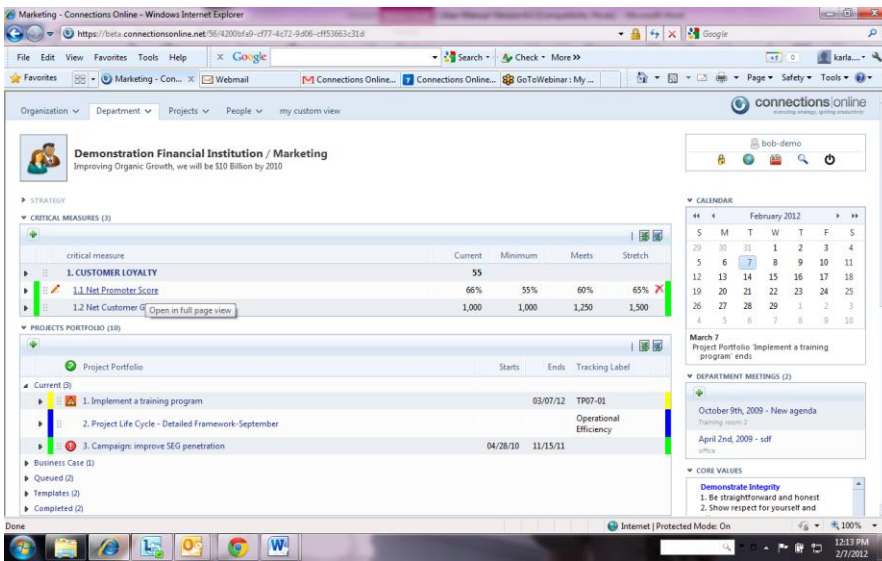
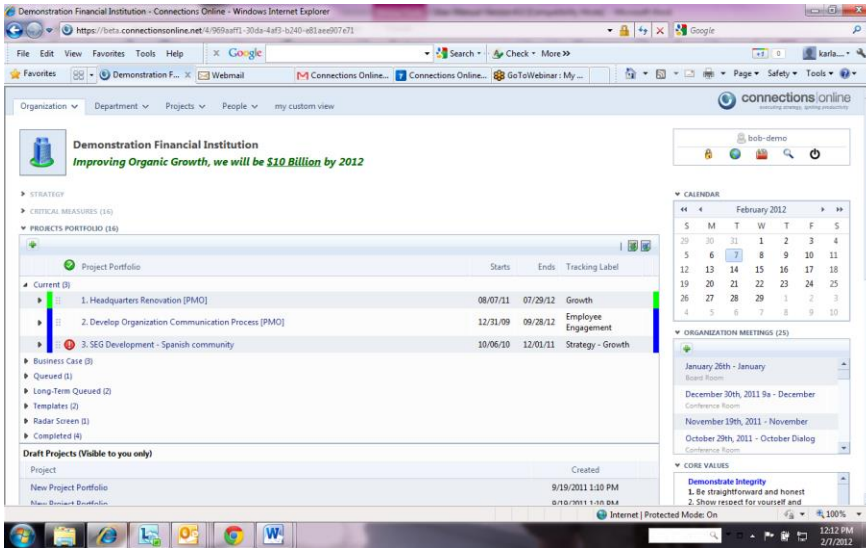


Click on the Options drop down at the top of the page and check the items you want to appear on the report. You can also choose Portrait or Landscape. On the far right, at the top of the page you can also toggle between the specific tabs – i.e. you can select any org or dept and the page with refresh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

# Connections Online® Version 4.1 User Manual

**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. At the bottom of the Tab, Admins can also see a list of individuals “assigned” to that particular Org or Dept tab.



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**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).

The screenshot displays the Connections Online web application interface within a Windows Internet Explorer browser. The page title is "Headquarters Renovation [PMO] - Connections Online". The URL is "https://beta.connectionsonline.net/15/40004167-56be-4ea5-8144-4b73f99d7c07".

The interface shows the following sections:

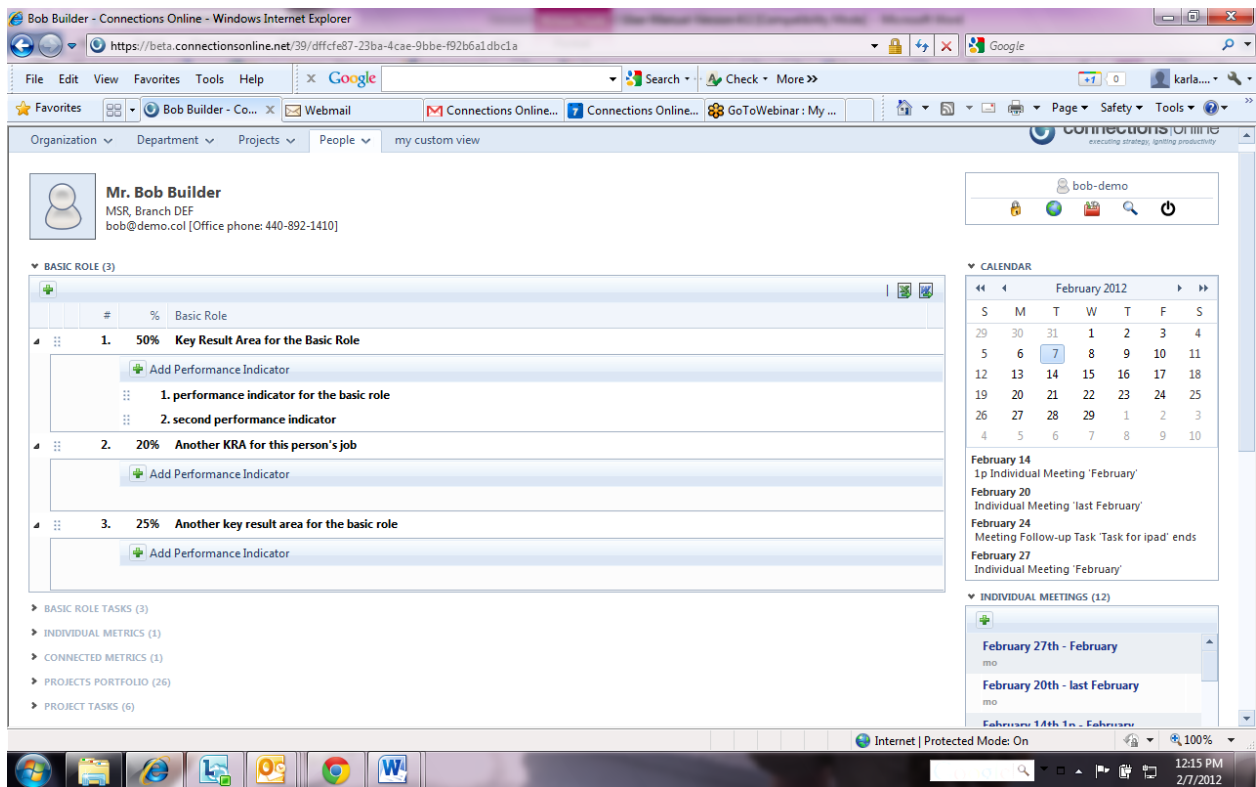
- Organization:** Demonstration Financial Institution / Projects Portfolio / 1. Headquarters Renovation [PMO]
- Timeline:** 8/7/2011 - 7/29/2012 (STARTED)
- Status:** Current / Phase: Development and Testing / Tracking: Growth / Total Hours: 1329 actual, 10.5 projected
- DESCRIPTION:** Renovations to attract other neighborhood groups to our branch (that is part of our headquarters) Firefox IE8
- METRICS (3):**

Metric	Current	Minimum	Meets	Stretch
<b>1. Budget</b>				
1.1 New Member - organic growth	90	72	75	100
1.2 Contractor construction - average	21			
- TASKS (7):**

Task	Hours	Starts	Due	Tracking
1. Contact Architect Supply Company to get a list of local architects	8 / 40.13	2/14/11	5/6/13	
2. Select Architectural Firm	1 / 0	8/7/07	2/8/12	
2.1 Select the site	0 / 0	8/7/07	1/27/12	
3. Architectural plan and interior design completed	1344 / 8.26	2/2/11	2/1/12	Issue Risk
4. Permits completed	0.98 / 10	5/18/10	8/21/12	
- CALENDAR:** February 2012. Task: 'Select Architectural Firm' ends.
- PROJECT MEETING (4):** April 14th, 2011 9a - Headquarters Project Dialog; May 31st, 2008 2:30p - Name your Dialog; May 31st, 2008 - test link.
- PROJECT SCOPE (4):**

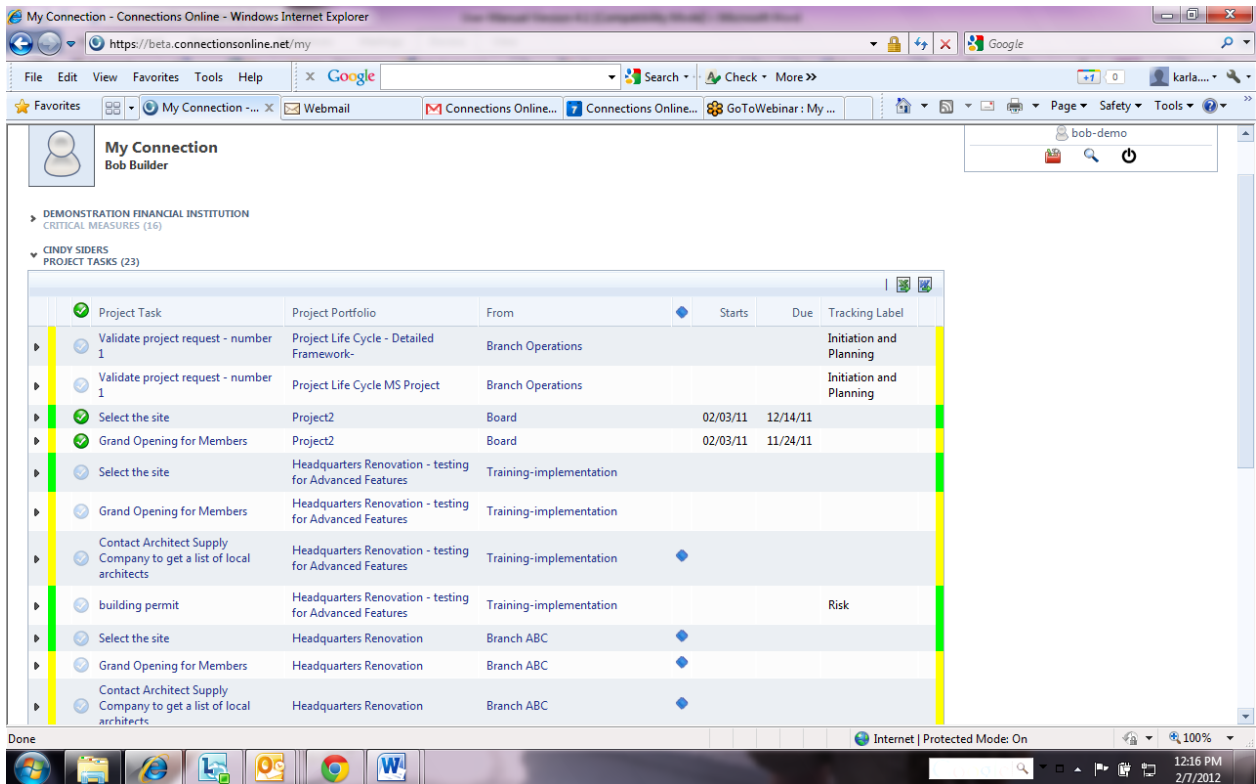
# Connections Online® Version 4.1 User Manual

**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.



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



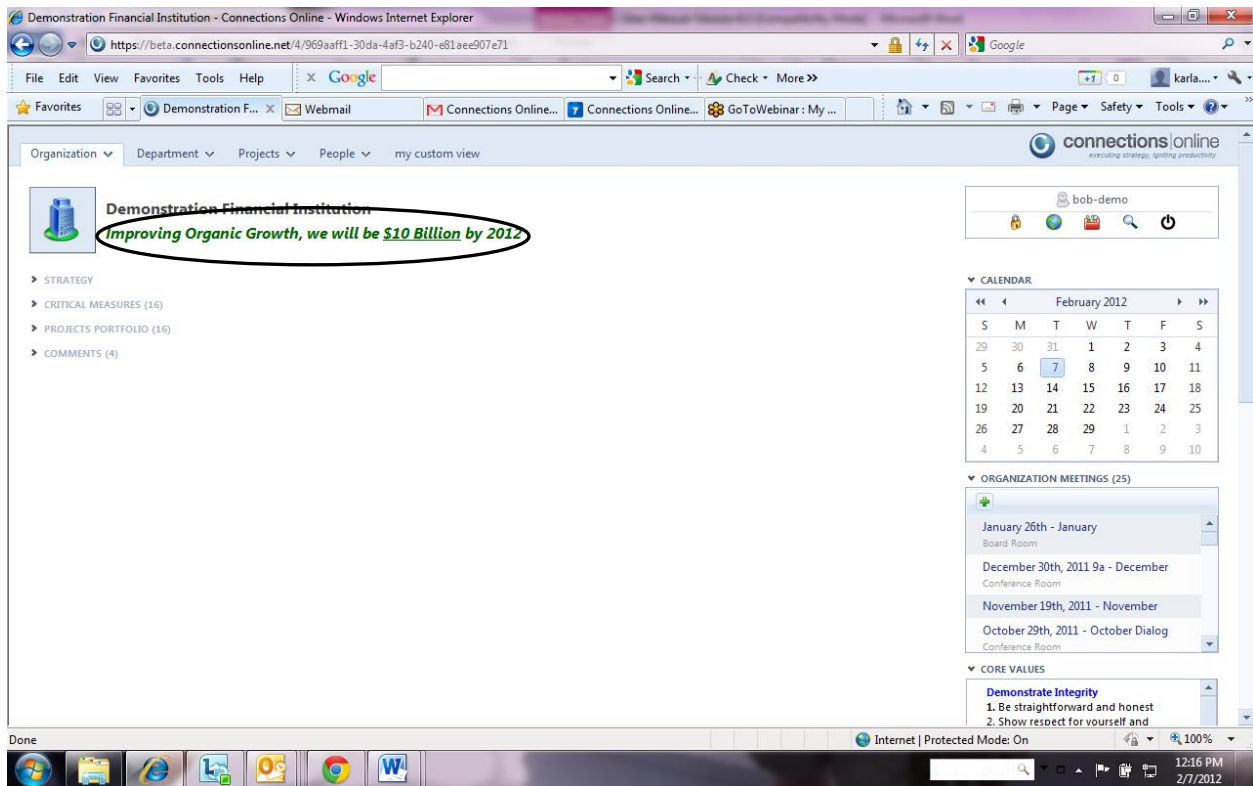
# Connections Online® Version 4.1 User Manual

## 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.



# Connections Online® Version 4.1 User Manual

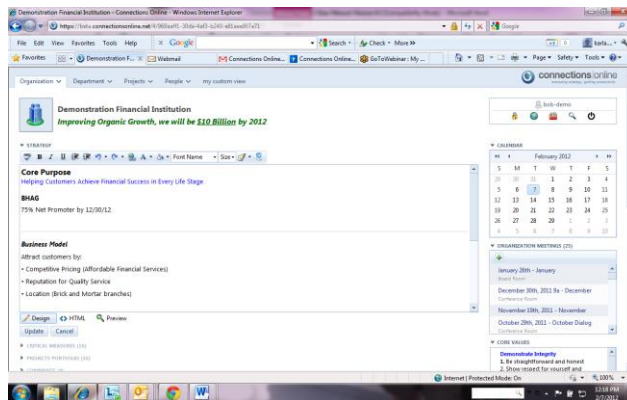
## Focus

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

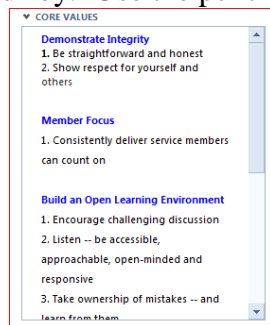
Using web editor functionality in the application, the user has the ability to add an image viewable within the Focus Module (in both the Organization and Department tabs) using html code. Please see this link for the instructions: <http://www.tizag.com/htmlT/images.php>. This link shows how to write 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.

The screenshot shows the 'CRITICAL MEASURES (23)' interface. At the top, there is a form for creating or editing a metric. The form includes fields for 'NAME', 'COLOR', 'IMPORTANCE', 'DATA SOURCE', and 'VALUE FORMAT'. There are also 'THRESHOLDS' settings for 'Stretch', 'Meets', 'Minimum', and 'Below Minimum'. Below the form is a table of existing metrics.

Critical Measure	Date	Current	Minimum	Meets	Stretch
<b>1. FINANCIAL PERFORMANCE</b>					
1.1 Capital	1/20/16	.9	.7	.77	.8
1.2 Growth	12/13/16	\$650.0 M	\$425.0 M	\$500.0 M	\$700.0 M
1.3 Interest Rate Margin					
1.4 ROA [ incentive goal is 1.1]	1/20/15	.95%	.6%	.9%	1.1%

## 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.

The screenshot displays the configuration interface for a metric. It includes the following elements:

- NAME:** A text input field.
- COLOR:** A color selection dropdown and a checkbox labeled "Tie color to value".
- IMPORTANCE:** A checkbox labeled "Mark as 80/20 Metric".
- DATA SOURCE:** A dropdown menu currently set to "Values entered manually".
- VALUE FORMAT:** A dropdown menu that is open, showing a list of format strings: `###0`, `###0.0`, `###0.00`, `(###0)`, `(###0.0)`, and `(###0.00)`. The "VALUE FORMAT" label is circled in the image.
- Buttons:** "Insert" and "Cancel" buttons are located below the DATA SOURCE dropdown.
- Background:** A scorecard structure is visible with a section "1. FINANCIAL PERFORMANCE" and a sub-section "1.1 Capital".

## 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).

<b>Format ( if typing the following format string, the columns to the right will show the results)</b>	<b>If 5 typed: (positive # in minimum, meets, exceeds fields)</b>	<b>If -5 typed: (negative # in minimum, meets, exceeds fields)</b>	<b>If .5 typed: (Decimal # in minimum, meets, exceeds fields)</b>	<b>If typed: (Null)</b>
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:

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

## 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...

▼ CRITICAL MEASURES (23)

Critical Measure	Date	Current	Minimum	Meets	Stretch
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>NAME</b></p> <input type="text"/></div> <div style="width: 45%;"> <p><b>THRESHOLDS</b></p> <p>Stretch: <input type="text"/> <input type="checkbox"/></p> <p>Meets: <input type="text"/> <input type="checkbox"/></p> <p>Minimum: <input type="text"/> <input type="checkbox"/></p> <p>Below Minimum: <input type="text"/> <input type="checkbox"/></p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%;"> <p><b>COLOR</b></p> <input type="text"/> <input type="checkbox"/> Tie color to value</div> <div style="width: 45%;"> <p><b>IMPORTANCE</b></p> <input type="checkbox"/> Mark as 80/20 Metric</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%;"> <p><b>DATA SOURCE</b></p> <input type="text" value="Values entered manually"/></div> <div style="width: 45%;"> <p><b>VALUE FORMAT</b></p> <input type="text"/></div> </div>					

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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.

The screenshot displays a dashboard with a list of metrics under three categories: Financial Performance, Operational Efficiency, and Employee Engagement. The '1.4 ROA [ incentive goal is 1.1]' metric is highlighted in blue. Below the list, a detailed edit form is shown for this metric. The form includes fields for Name, Color, Importance, Data Source, Value Format, New Comment, Thresholds (Stretch, Meets, Minimum, Below Minimum), and New Value. The 'Stretch' threshold is set to 0.011 with a blue color, 'Meets' is 0.009 with a green color, 'Minimum' is 0.006 with a yellow color, and 'Below Minimum' is a red color. The 'New Value' is set to 5/18/2017 5:59 PM. The 'Update' and 'Cancel' buttons are visible at the bottom of the form.

1. FINANCIAL PERFORMANCE						
1.1 Capital	1/20/16	.9	.7	.77	.8	
1.2 Growth	12/13/16	\$650.0 M	\$425.0 M	\$500.0 M	\$700.0 M	
1.3 Interest Rate Margin						
1.4 ROA [ incentive goal is 1.1]	1/20/15	.95%	.6%	.9%	1.1%	X

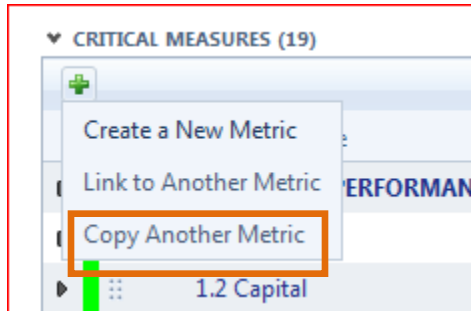
NAME		THRESHOLDS	
ROA [ incentive goal is 1.1]		Stretch: 0.011	Blue
COLOR	IMPORTANCE	Meets: 0.009	Green
(Set by value)	<input type="checkbox"/> Mark as 80/20 Metric	Minimum: 0.006	Yellow
DATA SOURCE	VALUE FORMAT	Below Minimum:	Red
Values entered manually	#####		
NEW COMMENT		NEW VALUE	
		5/18/2017 5:59 PM	
		New Value	

- **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)

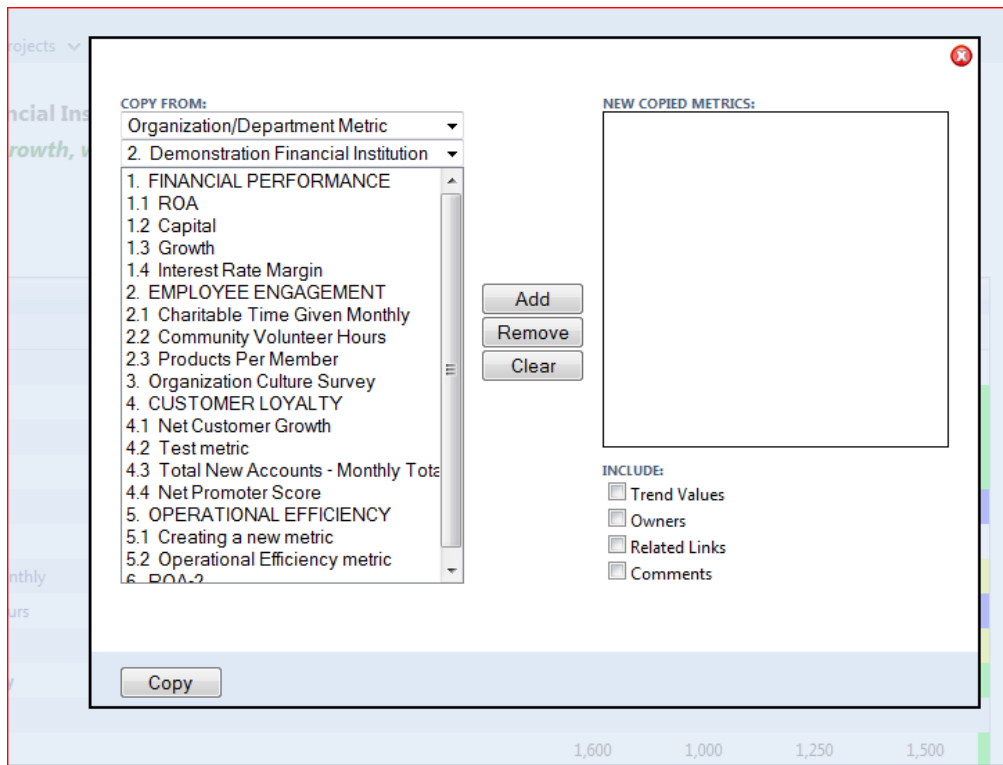
Once the Metrics have been entered and saved, the User will see the list of Metrics on the Metrics module. To move the Metrics up/down/in/out, the User must select the drag and drop feature.

### 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.



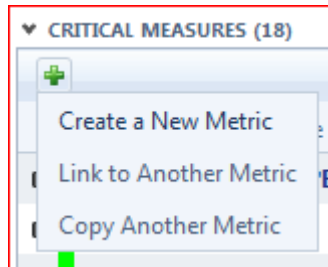
## Roll-Ups and Linking Metrics

### Overview:

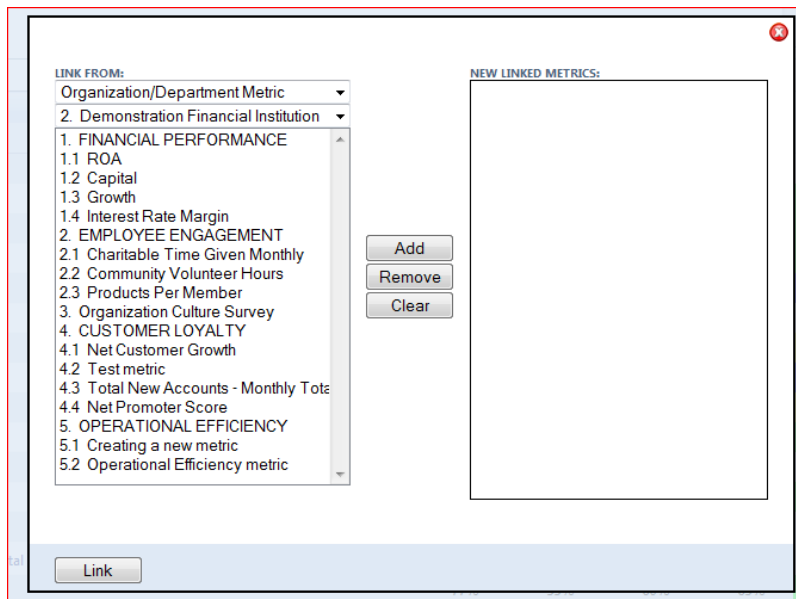
An example: Your VP Branch Operations, on the Branch Operations Department page, could have a parent metric – called “total loan metrics”. Then subordinate to “total loan metrics”, the VP could “link” the loan metrics from the first branch with total loan metrics, then link second branch loan metrics, 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.



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- 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.

CRITICAL MEASURES (3)					
Critical Measure	Current	Minimum	Meets	Stretch	
1. New Accounts - Monthly	42	35	45	55	
1.1 New Accounts Per Month [B. Builder]	10	5	10	15	
1.2 New Accounts - Monthly [S. Farmer]	32	8	10	15	

- 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.

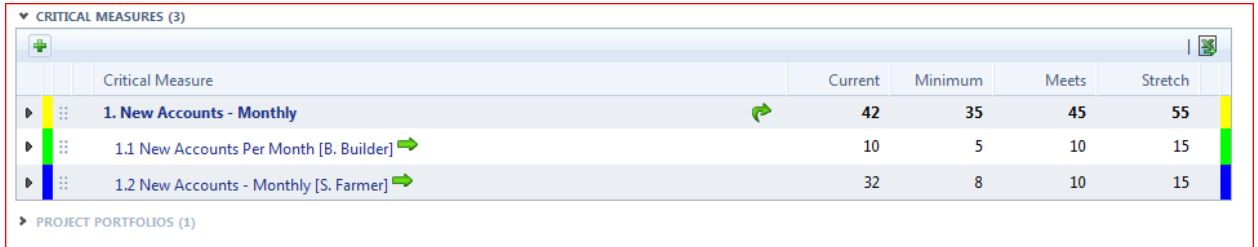
**Branch DEF / Metrics / New Accounts Per Month [B. Builder]**  
 → Linked to Bob Builder / New Accounts Per Month.  
 Current: 10 | Minimum: 5 | Meets: 10 | Stretch: 15

- 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.

Organization ▾ Department ▾ Projects ▾ People ▾ My

SUM OF CHILD METRICS	
New Accounts Per Month [B Builder]	25
This is a test metric	12
New Accounts - Monthly [S. Farmer]	11
Sum:	48

- 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”.



CRITICAL MEASURES (3)		Current	Minimum	Meets	Stretch
▶	1. New Accounts - Monthly	42	35	45	55
▶	1.1 New Accounts Per Month [B. Builder]	10	5	10	15
▶	1.2 New Accounts - Monthly [S. Farmer]	32	8	10	15

▶ PROJECT PORTFOLIOS (1)

- **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."

The screenshot displays the Connections Online web application interface. The browser window title is "Demonstration Financial Institution - Connections Online - Windows Internet Explorer". The address bar shows the URL: <https://beta.connectionsonline.net/4/969aaff1-30da-4af3-b240-e81aee907e71>. The application header includes navigation tabs for Organization, Department, Projects, People, and my custom view. The main content area is titled "Demonstration Financial Institution" with the tagline "Improving Organic Growth, we will be \$10 Billion by 2012". A sidebar on the left shows a "PROJECTS PORTFOLIO (16)" with categories: Current (3), Business Case (3), Queued (1), Long-Term Queued (2), Templates (2), Radar Screen (1), and Completed (4). The "Current" category is expanded, showing a table of projects:

Project	Starts	Ends	Tracking Label
1. Headquarters Renovation [PMO]	08/07/11	07/29/12	Growth
2. Develop Organization Communication Process [PMO]	12/31/09	09/28/12	Employee Engagement
3. SEG Development - Spanish community	10/06/10	12/01/11	Strategy - Growth

Below the table is a "Draft Projects (Visible to you only)" section with a table:

Project	Created
New Project Portfolio	9/19/2011 1:10 PM
New Draft Portfolio	01/02/2011 1:10 PM

On the right side, there is a "CALENDAR" for February 2012 and "ORGANIZATION MEETINGS (25)" including "January 26th - January Board Room", "December 30th, 2011 9a - December Conference Room", "November 19th, 2011 - November Conference Room", and "October 29th, 2011 - October Dialog Conference Room". At the bottom, there are "CORE VALUES" listed as "Demonstrate Integrity" with sub-points: "1. Be straightforward and honest" and "2. Show respect for yourself and others". The Windows taskbar at the bottom shows the system clock as 1:47 PM on 2/7/2012.

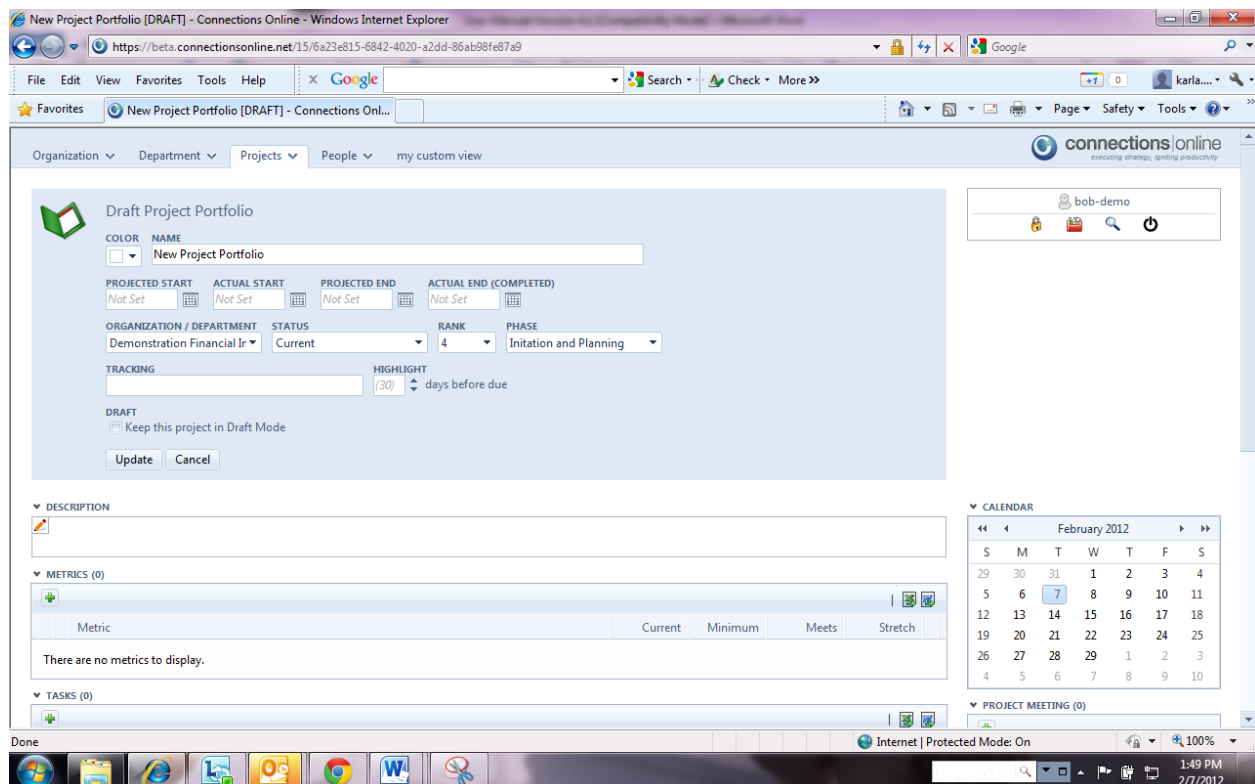
# Connections Online® Version 4.1 User Manual

**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.



## 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.*

TEAM MEMBERS (7)

Name	Team Survey	Role	Projected Hours		Actual Hours		
			Entered	Rolled Up	Entered	Rolled Up	
Name: <input type="text" value="Individual to add"/>	Team Survey: <input type="checkbox"/>	Role: <input type="text" value="Consultant"/>	Notes: <input type="text"/>	Projected: <input type="text"/>	Actual: <input type="text"/>		
<input type="button" value="Insert"/> <input type="button" value="Cancel"/>							
Albert Able Quality	<input type="checkbox"/>	Sponsor	45	19.5	0	20.25	
Ann Able Information Technology	<input checked="" type="checkbox"/>	Leader	45	18	0	8.5	

## 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.

The screenshot shows a web-based form for adding a task. At the top, there are fields for 'COLOR' (a dropdown menu), 'NAME' (a text input), 'PRIORITY' (a dropdown menu), and 'MILESTONE' (a dropdown menu with 'No' selected). Below these are 'PEOPLE' and 'SUPPORTING' text input fields. A 'Dates' section contains 'PROJECTED START' and 'PROJECTED END' (both with 'Not Set' and a calendar icon), 'HIGHLIGHT' (a dropdown menu), 'ACTUAL START' (with 'Not Set' and a calendar icon), and 'COMPLETED' (with 'Not Set' and a calendar icon). To the right of the dates is a 'Recurring' checkbox and a 'Day(s)' dropdown menu. A large 'DESCRIPTION' text area is at the bottom. At the very bottom right are 'Insert' and 'Cancel' buttons.

**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.

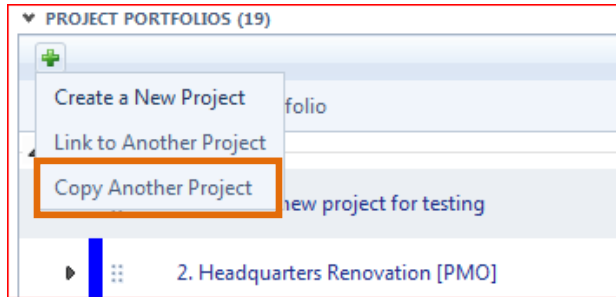
**Project Scope:** this module shows the intended scope of this Project – what is included and what isn't included. In the project plan, there is a brief statement that explains the purpose of the Project. The Scope will spell out what the Project's end product will be, for example research report of 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.

The screenshot displays two sections of a software interface. The top section is titled "PROJECT SCOPE (4)" and contains a list of four items, each with a plus icon and a three-dot menu icon to its left. The items are: 1. GENERAL INTENT (re-develop the HQ branch to improve member service flow, better utilize space and technology), 2. OUTSIDE ARCHITECTS (we will work with Sunnyvale Architects in the needs analysis and space planning phase), 3. CONTRACTORS (we will work with Perfection Builders to the completion of the build out phase), and 4. Business Case. The bottom section is titled "EVALUATION CRITERIAS (3)" and contains a list of three items, each with a plus icon and a three-dot menu icon to its left. The items are: 1. Timing (On time), 2. General Intent (re-develop the HQ branch to improve member service flow, better utilize space and technology), and 3. Business Case (we will work with Perfection Builders to the completion of the build out phase).

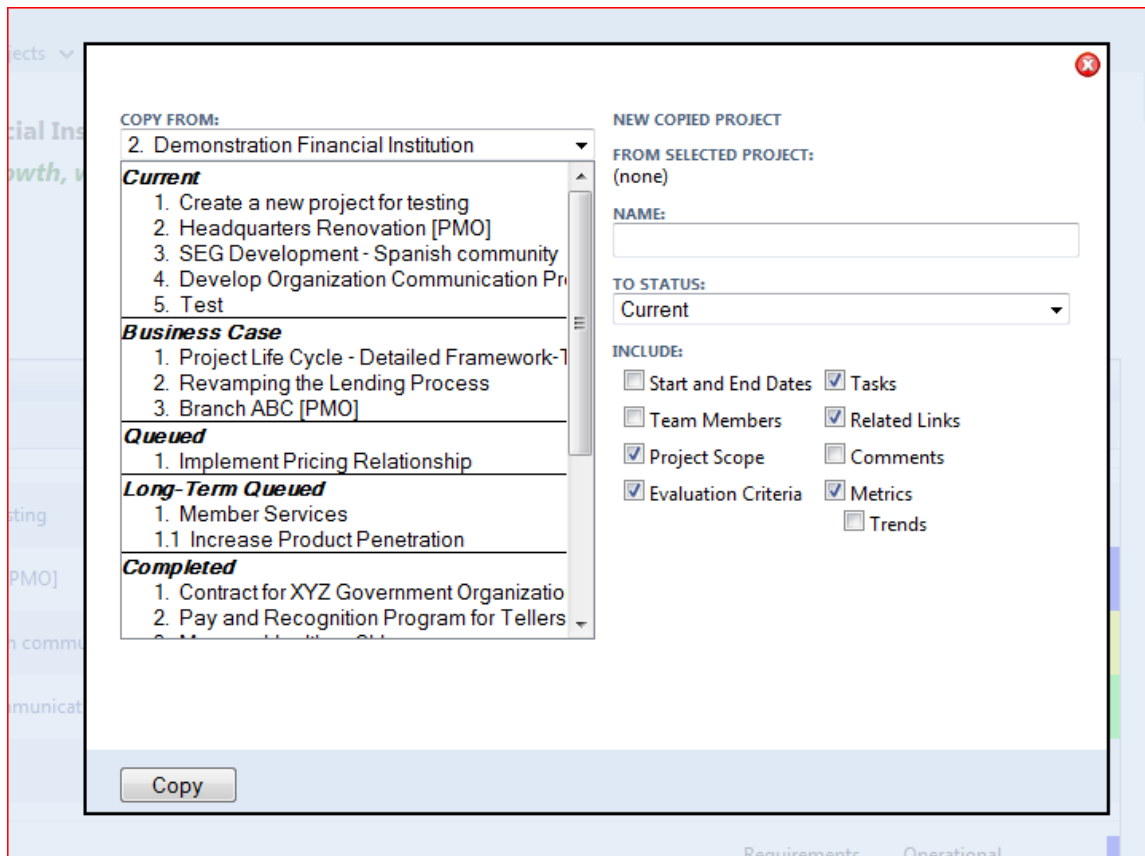
**Project Evaluation Criteria:** this module is an explanation of how this Project will be evaluated – when you will know it is done and how you will know if it is successful or not. It answers the questions: What will happen as a result of the Project being accomplished? What will improve? How will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

## 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 Make Copy – the edit window will be closed, the page will refresh to the page that has the copied project.

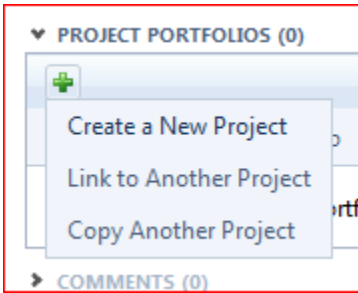
## **Optional – Project Authority**

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?

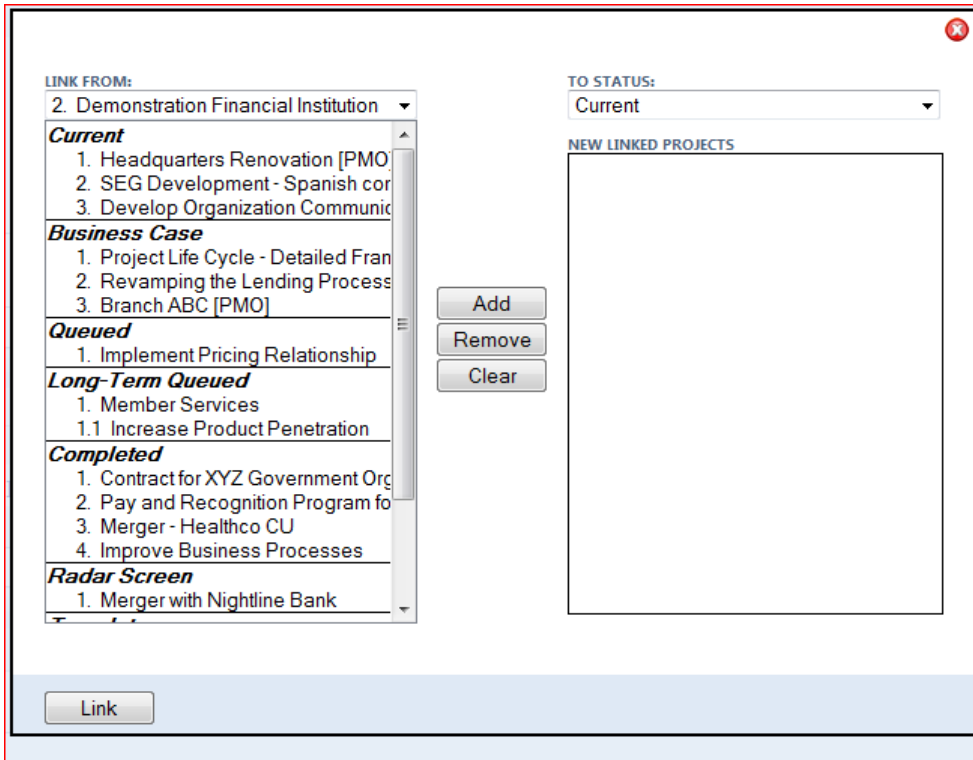
## Linking Projects

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”



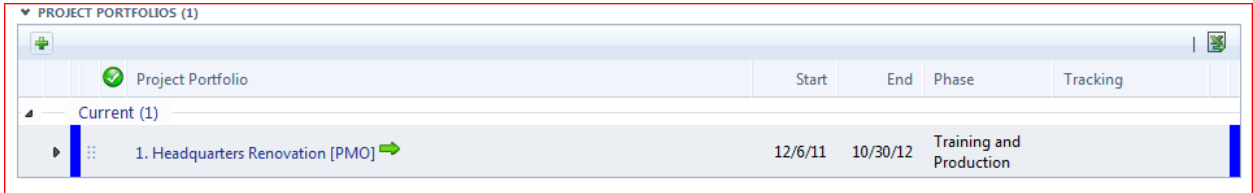
- An edit box will open. Select the Org/dept that has the original project. Select the project that you want to link to the Org or Department page you have opened. Then click “Link” and the project will appear on your project list with a green arrow next to it to show that it has been “linked” from elsewhere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



# Connections Online® Version 4.1 User Manual

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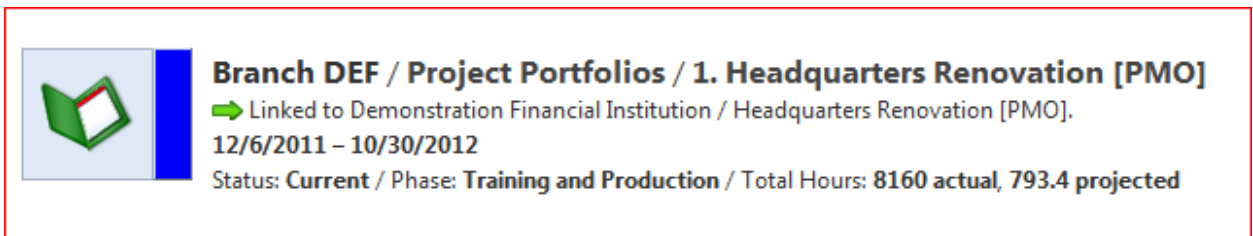
- See the green arrow indicating this project has been “linked”



The screenshot shows a table titled "PROJECT PORTFOLIOS (1)". The table has columns for "Project Portfolio", "Start", "End", "Phase", and "Tracking". A row is expanded under "Current (1)", showing "1. Headquarters Renovation [PMO]" with a green arrow icon to its right. The "Start" date is 12/6/11, the "End" date is 10/30/12, and the "Phase" is "Training and Production".

Project Portfolio	Start	End	Phase	Tracking
Current (1)				
1. Headquarters Renovation [PMO] →	12/6/11	10/30/12	Training and Production	

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



The screenshot shows the project details page for "1. Headquarters Renovation [PMO]". It features a green folder icon with a red arrow pointing to the right. The text reads: "Branch DEF / Project Portfolios / 1. Headquarters Renovation [PMO]". Below this, it says "Linked to Demonstration Financial Institution / Headquarters Renovation [PMO].", "12/6/2011 – 10/30/2012", and "Status: Current / Phase: Training and Production / Total Hours: 8160 actual, 793.4 projected".

**Branch DEF / Project Portfolios / 1. Headquarters Renovation [PMO]**  
→ Linked to Demonstration Financial Institution / Headquarters Renovation [PMO].  
12/6/2011 – 10/30/2012  
Status: **Current** / Phase: **Training and Production** / Total Hours: **8160 actual, 793.4 projected**

# Connections Online® Version 4.1 User Manual

## Using the Project Task Template

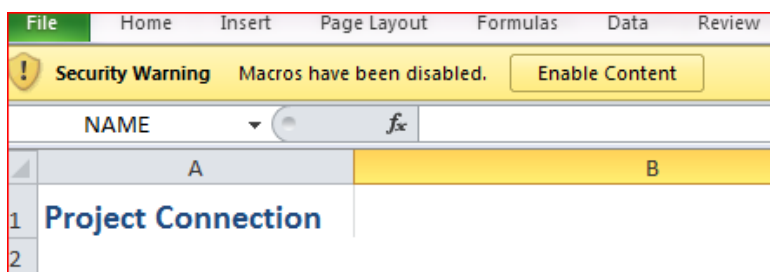
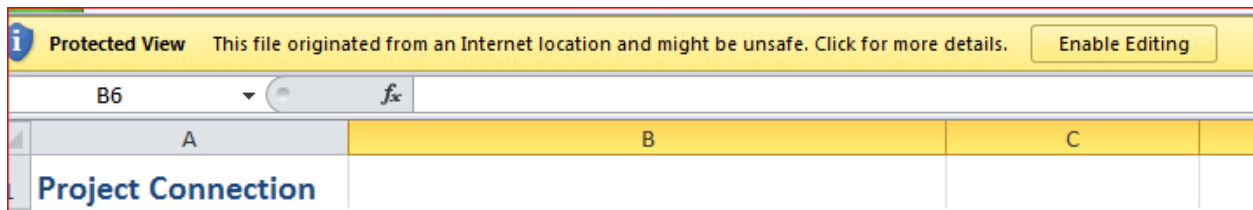
### Additional Domains to use these templates

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.

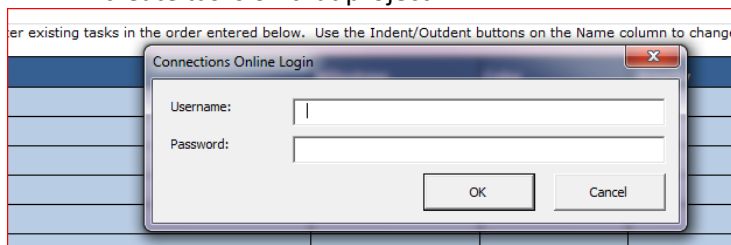
Link to the templates: [https://support.connectionsonline.net/hc/en-us/articles/215968143-Microsoft-Excel-Templates?flash\\_digest=07fbae59d6ce523ff11d5b97146e328d3bf61b84](https://support.connectionsonline.net/hc/en-us/articles/215968143-Microsoft-Excel-Templates?flash_digest=07fbae59d6ce523ff11d5b97146e328d3bf61b84)

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.

**Project Connection**

Select a Project and then enter Tasks for importing. \*Required. PLEASE DO NOT CHANGE COLORS OF CELLS.

Organization/Department:\* 1. Board

Project Name:\* Business Case - 1. test project

- 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.

The screenshot shows a spreadsheet interface. A dialog box titled "Select Team Members" is open in the center. It has a table with columns: Name, Proj., and Actual. The table lists several names with checkboxes and numerical values in the Proj. and Actual columns. Below the table are "OK" and "Cancel" buttons. In the background, the spreadsheet has columns for "Actual Start", "Actual End", "Description", and "Person - Name (Projected | Actual)". The "Person - Name" column contains "Add" buttons for each row.

- 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.

## ***Connections Online<sup>®</sup> Version 4.1 User Manual***

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- Please note: do not change the color of the fields that will be syncing. 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.

The screenshot displays the 'Connections Online' web application in Internet Explorer. The main content area is titled 'BASIC ROLE (6)' and lists four Key Result Areas (KRAs) with their respective percentages and descriptions:

- 1. 5% Big Picture**
  - Add Performance Indicator
  - 1. Name of the indicator
  - 2. Competition (best practices, recommendations)
  - 3. another performance indicator
  - 4. one more indicator
- 2. 15% Leadership and Team Development**  
description of this KRA
  - Add Performance Indicator
  - 1. Personal Development (issues, focus, outcomes) testing
  - 2. Team Development (issues, focus, outcomes) Description of this metric
  - 3. Organization Development (issues, actions, outcomes)
- 3. 10% Projects**
  - Add Performance Indicator
  - 1. Department Projects (issues, actions, outcomes)
  - 2. Organization Projects (issues, actions, outcomes)
- 4. 20% Business Fundamentals**
  - Add Performance Indicator

On the right side, there is a 'CALENDAR' widget for February 2012, showing the 7th as the current date. Below the calendar is an 'INDIVIDUAL MEETINGS (22)' list with entries for October 21st, 18th, and 11th, 2011, and August 19th, 2011. Other widgets include 'SUPERVISORY SCOPE (1)' and 'OVERALL GOALS AND ACCOUNTABILITY (2)'. The bottom of the screen shows the Windows taskbar with various application icons and the system clock displaying 2:07 PM on 2/7/2012.

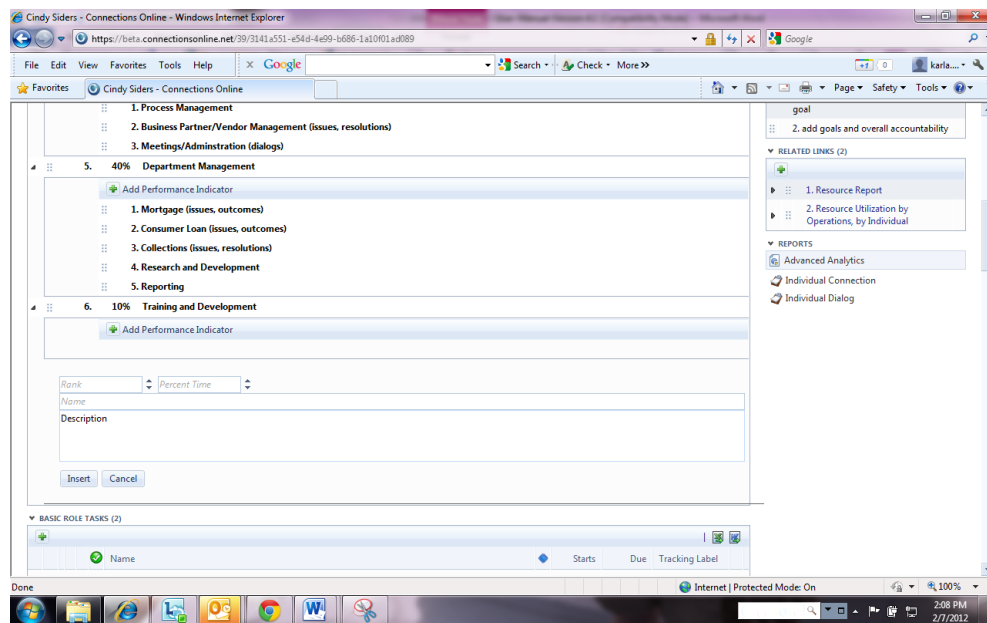
# Connections Online® Version 4.1 User Manual

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.

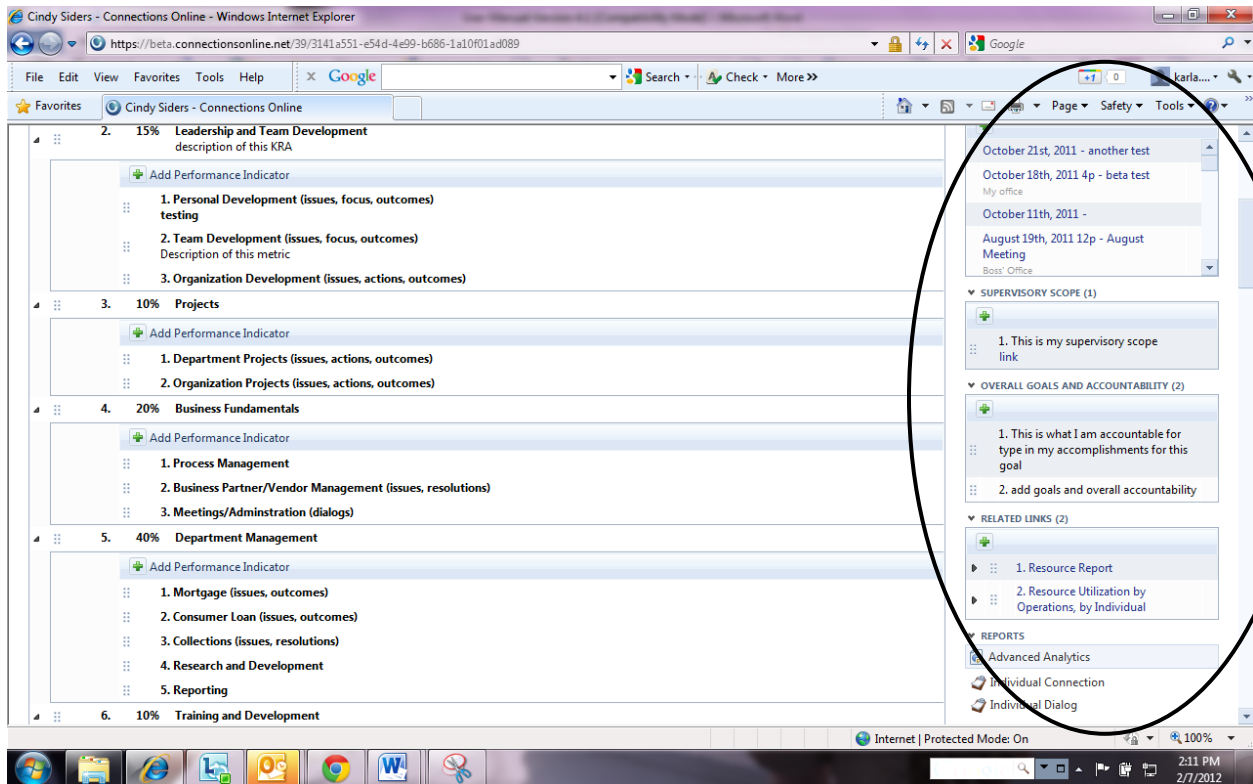
After the Performance Indicators have been input for the Basic Role, they can be edited through the edit pencil icon. The Performance Indicator can also be selected to drag up or down using the drag and drop feature.

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

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## Overall Accountabilities Module

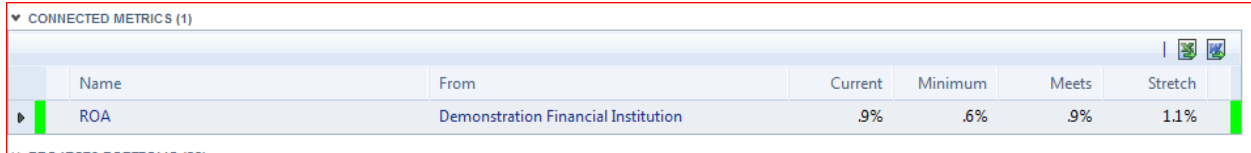
This module reflects what the individual is accountable for – Why does this position exist?



## Supervisory Scope Module

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

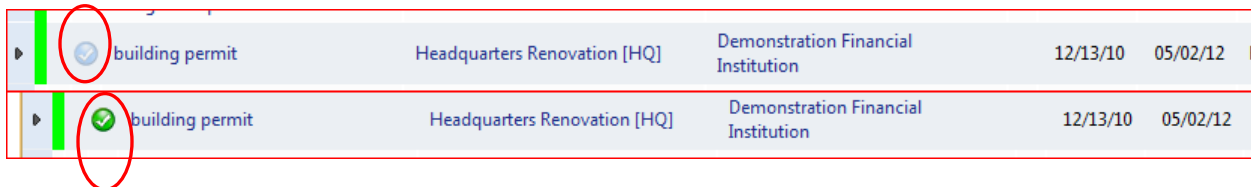
**People Tab – Individual and Connected Metrics:** this is a module that shows all metrics that the individual you are viewing has ownership for that are not under the individual metric module. If this person “owns” a metric in an organization or department scorecard, it will show on their page in the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



Name	From	Current	Minimum	Meets	Stretch
ROA	Demonstration Financial Institution	.9%	.6%	.9%	1.1%

**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”.



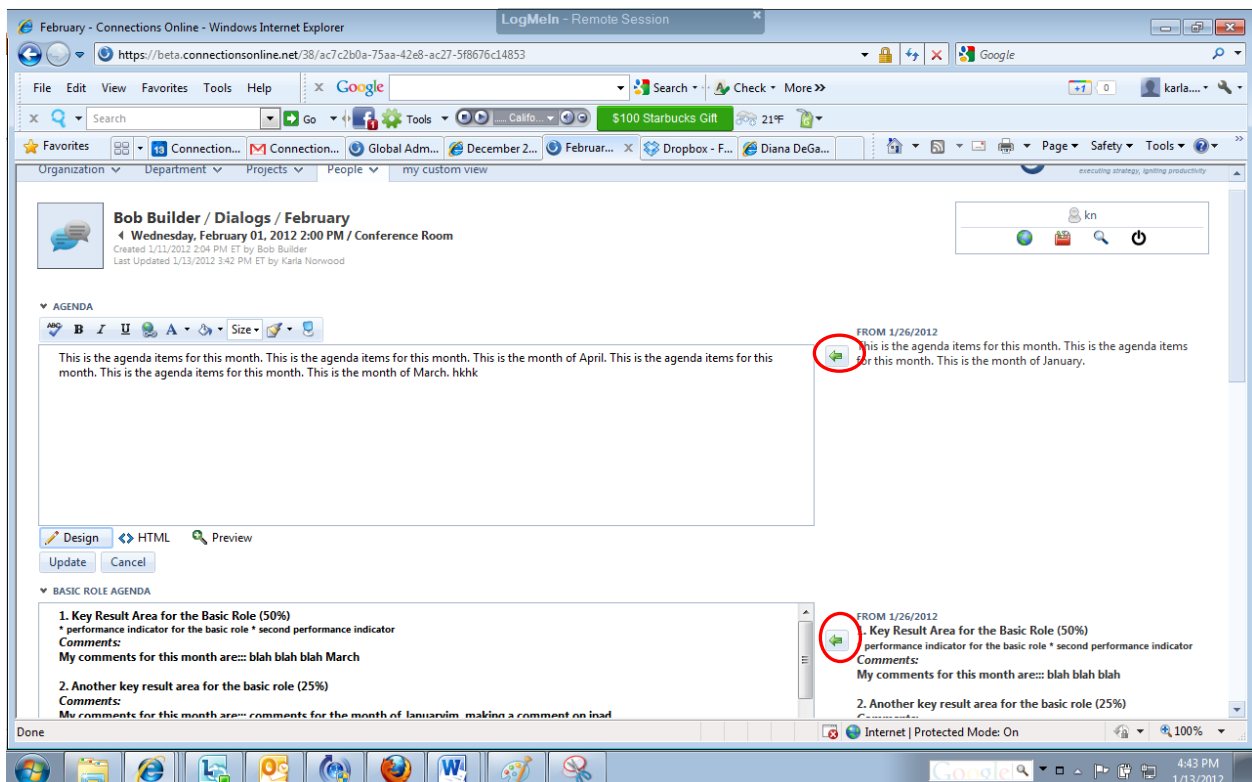
<input type="checkbox"/>	building permit	Headquarters Renovation [HQ]	Demonstration Financial Institution	12/13/10	05/02/12
<input checked="" type="checkbox"/>	building permit	Headquarters Renovation [HQ]	Demonstration Financial Institution	12/13/10	05/02/12

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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.

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## 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.

The screenshot displays the 'My Connection' page in a web browser. The user is identified as Bob Builder. The page is organized into sections: 'DEMONSTRATION FINANCIAL INSTITUTION CRITICAL MEASURES (16)' and 'CINDY SIDERS PROJECT TASKS (23)'. A table lists project tasks with the following columns: Project Task, Project Portfolio, From, Starts, Due, and Tracking Label.

Project Task	Project Portfolio	From	Starts	Due	Tracking Label
Validate project request - number 1	Project Life Cycle - Detailed Framework-	Branch Operations			Initiation and Planning
Validate project request - number 1	Project Life Cycle MS Project	Branch Operations			Initiation and Planning
Select the site	Project2	Board	02/03/11	12/14/11	
Grand Opening for Members	Project2	Board	02/03/11	11/24/11	
Select the site	Headquarters Renovation - testing for Advanced Features	Training-implementation			
Grand Opening for Members	Headquarters Renovation - testing for Advanced Features	Training-implementation			
Contact Architect Supply Company to get a list of local architects	Headquarters Renovation - testing for Advanced Features	Training-implementation			
building permit	Headquarters Renovation - testing for Advanced Features	Training-implementation			Risk
Select the site	Headquarters Renovation	Branch ABC			

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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.

The screenshot displays the 'My Connection' interface for user Bob Builder. The 'Add Module' dialog box is open, showing three columns for selection:

- 1. CHOOSE A MODULE:** A list of modules including Comments, Dialogs, Evaluation Criteria, Members, Metrics, Project Scope, Project Tasks (highlighted), and Related Information.
- 2. CHOOSE A SUBJECT:** A list of subjects including test project SC [Current] Board, scottsample [Current] Board, gbproject2 [Current] Board, Branch ABC [Current] Quality, and Headquarters Renovation [PMO] [Current] Information Technology.
- 3. CHOOSE A LOCATION:** Two location icons are shown.
- 4. AND YOU'RE DONE!** Buttons for 'Add' and 'Cancel'.

Below the dialog box, the 'Modules in Main Dock' section lists:

- Critical Measure for **East Branch DEF**
- Critical Measure for **Information Technology**
- Task for **Contract for XYZ Government Organization**

A 'Done' button is located at the bottom of the dialog box.

Below the main dock, the 'EAST BRANCH DEF SCOREBOARD (10)' is visible, showing a table with the following data:

Scoreboard	Date	Current	Minimum	Budget	Exceeds
1. New Accounts - Monthly	11/16/16	48	35	45	55
1.1 New Accounts Per Month [B Builder]	11/16/16	25	5	10	15
1.2 This is a test metric	10/12/11	12	10	15	20

## **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 "Forgot 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

# Connections Online® Version 4.1 User Manual

**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:

The screenshot displays the security configuration for 'Information Technology / Cindy Siders / Security'. It features four main sections, each with a table of permissions for different user groups. A legend on the right clarifies the meaning of the radio button states.


Section	User / Group	Create	Read	Update	Delete	Delegate
SECURITY SETTINGS	Default	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Given Individual	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	Reports To	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
DEFAULT SETTINGS FOR INDIVIDUAL METRICS	Default	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Given Individual	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	Metric Owners	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	Reports To	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
DEFAULT SETTINGS FOR PERSONAL TASKS	Default	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Reports To	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
DEFAULT SETTINGS FOR DIALOGS	Default	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Reports To	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**LEGEND**

- Not set: no access added here, may be added from somewhere else
- Allow: access to this action is given
- Deny: access to this action is revoked, even if the person/group has access from another setting


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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.



**Information Technology / Security**

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**SECURITY SETTINGS**

User / Group	Read	Update	Delete	Delegate
<b>Default</b>	✔	○	○	○
IT	✔	✔	✔	✔
Organization Editors	✔	✔	✔	✔

**DEFAULT SETTINGS FOR SCORECARDS**

User / Group	Create	Read	Update	Delete	Delegate
<b>Default</b>	○	✔	○	○	○
Metric Owners	○	✔	✔	✔	○
IT	✔	✔	✔	✔	✔
Organization Editors	✔	✔	✔	✔	✔

**DEFAULT SETTINGS FOR PROJECT PORTFOLIOS**

User / Group	Create	Read	Update	Delete	Delegate
<b>Default</b>	○	✔	○	○	○
IT	✔	✔	✔	✔	✔
Leader	○	✔	✔	✔	✔
Member	○	✔	✔	○	○
Sponsor	○	✔	✔	✔	✔

**DEFAULT SETTINGS FOR DIALOGS**

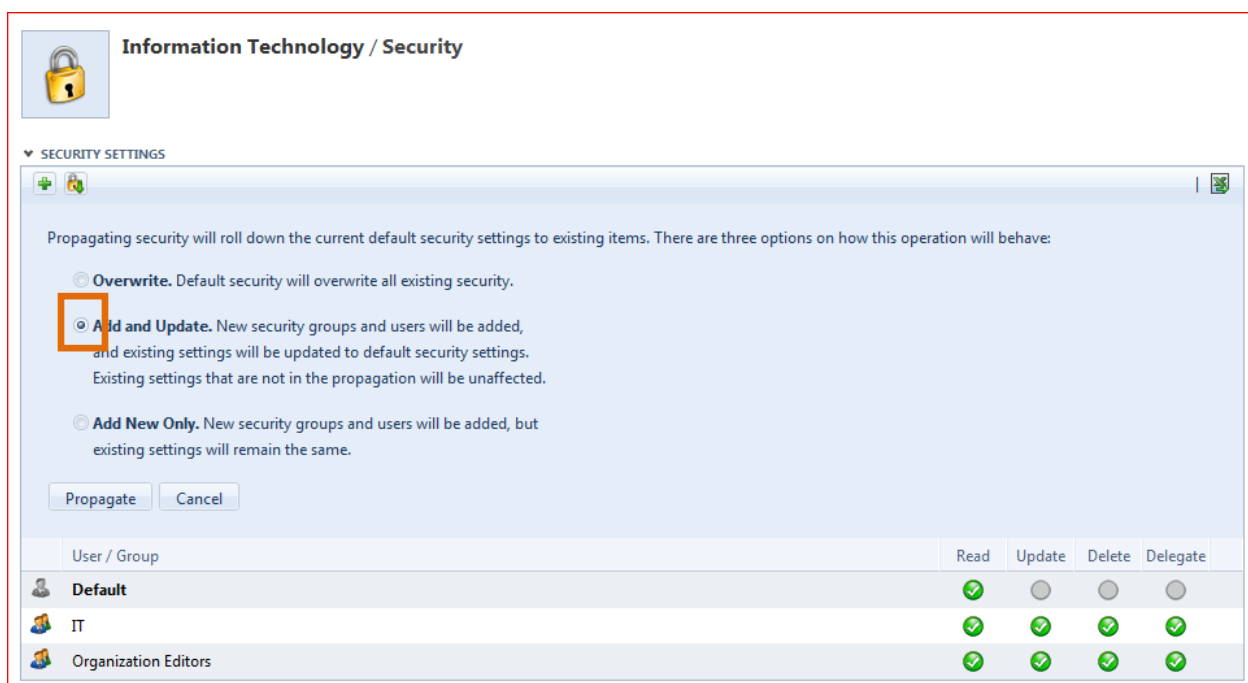
User / Group	Create	Read	Update	Delete	Delegate
<b>Default</b>	○	✔	○	○	○
IT	✔	✔	✔	✔	✔
Organization Editors	✔	✔	✔	✔	✔

**LEGEND**

- Not set  
no access added here, may be added from somewhere else
- Allow  
access to this action is given
- Deny  
access to this action is revoked, even if the person/group has access from another setting

**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.



**Information Technology / Security**

▼ SECURITY SETTINGS

Propagating security will roll down the current default security settings to existing items. There are three options on how this operation will behave:

- Overwrite.** Default security will overwrite all existing security.
- 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.
- Add New Only.** New security groups and users will be added, but existing settings will remain the same.

Propagate Cancel

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

## 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:

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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:

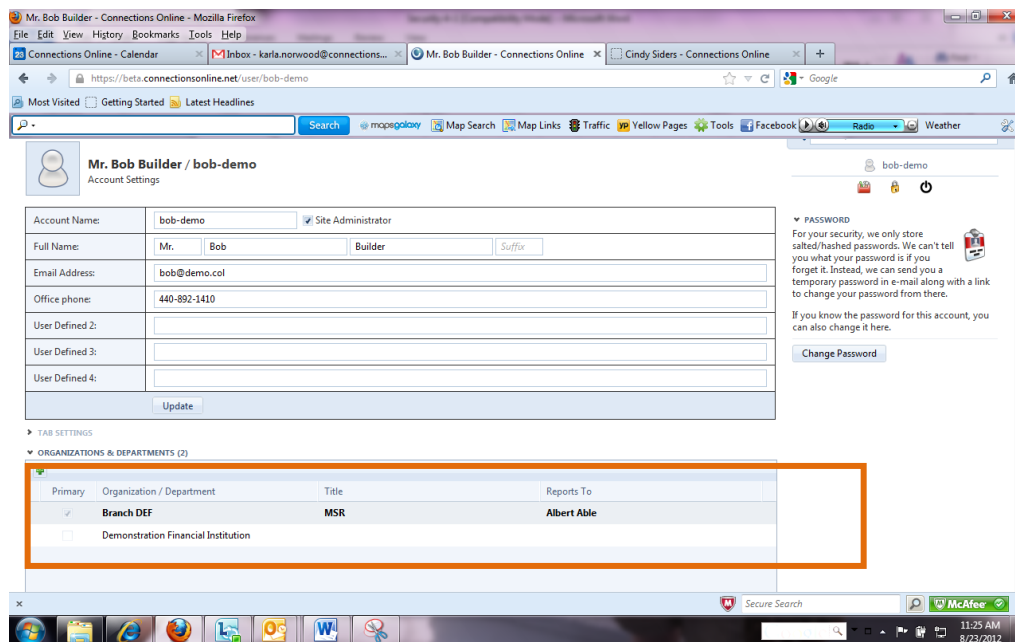
User A - Read, Update, Delete (this is NOT overwritten)

User B - Read, Delete (this is untouched)

User C - Read, Update (this is added)

**Security Using “Reports to” and Propagation:** 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.)

## ***Connections Terminology***

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

### **Organization/Department Connection Terminology**

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

### **Project Terminology**

<b>Project Connection</b>	This is a plan that includes the overall Project Details and the Project Tasks that each project team member is accountable for completing
<b>Project Details</b>	This is the part of the Project Connection that communicates start and end dates, Project, Scope, Evaluation Criteria, Members and Scorecard
<b>Project Teams</b>	The short-term “cross-discipline” teams that are responsible for Projects
<b>Project Team Leader (default terminology)</b>	This is the individual responsible for leading a Project Team
<b>Project Team Member (default terminology)</b>	This is an individual who participates in the Connections process
<b>Sponsor (default terminology)</b>	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.”
<b>Project Team Authorities</b>	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)

## **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

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<b>Business Priority Team Authority Matrix</b>	<b>Demonstration Financial Institution</b>
<b>Success through Service. Growth through Customer Choice. \$500M in Assets by 2007.</b>	
<b>Organization Leader</b>	
<ul style="list-style-type: none"><li>* THE CEOs TEAM CONNECTION AUTHORITY</li><li>* Sign-off authority on business project priorities (what's current, queued and dropped)</li><li>* Final authority in arbitrating any project disputes (on scope, evaluation criteria, resources, staffing and timelines)</li><li>* Final sign-off authority for all budget expenditures for all project teams</li><li>* Sole approval authority for making any adjustment to the 'final completion deadline date' on all cross-functional projects</li></ul>	
<b>Function/Department Leader</b>	
<ul style="list-style-type: none"><li>* THE DEPARTMENT LEADER'S TEAM CONNECTION AUTHORITY</li><li>* Sign-off authority on project-related time or budget commitments that directly impacts resources in their functional area</li><li>* Authority to veto staffing assignments on cross-functional projects (for people in their functional area)</li><li>* Authority to negotiate and resolve any conflicts on projects which will eventually be "owned" by their functional area</li><li>* Authority to review and approve scope changes that will directly impact their functional area</li></ul>	
<b>Sponsor</b>	
<ul style="list-style-type: none"><li>* EXPECTATION of the SPONSOR in DEVELOPING THE BUSINESS CASE</li><li>* Meet with the Team Leader and probable Team Members to discuss the "big picture" strategic issues that are driving the need for this project</li><li>* 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</li><li>* EXPECTATION of the SPONSOR in DEVELOPING THE TEAM CONNECTION</li><li>* Do a final review of the Team Connection before the team's work on the project begins</li><li>* EXPECTATION of the SPONSOR in IMPLEMENTING THE TEAM CONNECTION</li><li>* Attend some of the Team Dialogs (including the initial Team Connection development session, the Mid-Project Review and the Project Close-Out Session)</li><li>* Provide support for the Team Leader</li><li>* When possible, remove roadblocks and barriers for the Team</li><li>* Coach, encourage and keep communications open with the Team Leader</li><li>* Find resources for the Team, when needed</li><li>* Monitor the Team Connection (to recognize accomplishments and ensure that the project is staying within the agreed-upon Scope and Evaluation Criteria)</li><li>* THE SPONSOR'S AUTHORITY</li><li>* Sign-off authority for the Business Case (before it is presented to the CEO and leadership team for approval)</li><li>* Sign-off authority on all elements of the Team Connection (sign-off needs to be done before the work on the team project begins)</li><li>* 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)</li></ul>	
<b>Team Leader</b>	
<ul style="list-style-type: none"><li>* EXPECTATION of the TEAM LEADER in DEVELOPING THE BUSINESS CASE</li><li>* 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</li><li>* 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</li><li>* EXPECTATION of the TEAM LEADER in DEVELOPING THE TEAM CONNECTION</li><li>* Facilitate all Team Members through the development of the complete Team Connection</li><li>* Work with the Sponsor to ensure that the project plan aligns with organization's priorities</li><li>* Enter the project plan into the Connections software – including relevant Related Links, as deemed appropriate for team communication, coordination and productivity</li><li>* EXPECTATION of the TEAM LEADER in IMPLEMENTING THE TEAM CONNECTION</li><li>* Accountable for successful team results</li><li>* Set the dates for bi-weekly Team Dialogs</li><li>* Take the lead role in facilitating the Team Dialogs – ensuring that the team's time is used wisely</li><li>* Keep the Team focused on the work outlined in the Team Connection</li><li>* Monitor that the team's work is staying within the established project scope and budget</li><li>* 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</li><li>* Make sure that the team's work is consistent with the standards set forth in the project Evaluation Criteria</li><li>* Ensure the team has the resources needed to complete its work</li></ul>	

<http://www.connectionsonline.net/demo/default.asp?t=report&s=teamam&id=1>

8/30/2006



**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



**Business Priority Team Authority Matrix**

**Success through Service. Growth through Customer Choice. \$500M in Assets by 2007.**

**Demonstration Financial Institution**

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)

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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

***Appendix B***

**Authority Matrix Guidelines**

**Sample Level Authorities**

**Job Specific Authorities Questionnaire**

## **Authority Matrix® Guidelines**

### **ABC Company**

#### **Index:**

- Page One**      • **Strategic Planning**
- Page Two**     • **Budget and Contract Authority**
- Page Three**   • **Training and Development**
- Page Four**    • **Human Resource Management**
- Page Five**    • **Policies and Procedures**

**Authority Matrix® Guidelines**

**ABC Company**

***Strategic Planning***

<i>Board</i>	<i>CEO</i>	<i>Leadership Team</i>	<i>Middle Managers</i>
<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>Review the mission statement (the purpose of the business) and ratify updates</li> <li>Review the critical factors that are significant to future success</li> <li>Review and ratify the Company’s long-term objectives</li> <li>Review and ratify annual priorities</li> <li>Review progress on long-term objectives and annual priorities</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>Establish a methodology for maximizing the appropriate involvement and input of stakeholders in the planning process</li> <li>Evaluate input and establish recommended priorities (and assign to the appropriate functional area)</li> <li>Review and approve departmental plans, priorities and Initiative Teams</li> <li>Recommend updates to the vision, mission statement, critical factors, long-term objectives and annual priorities</li> <li>Review and communicate objectives and priorities (and periodic progress updates) to members, staff, Board and other stakeholders</li> <li>Establish strategic alliances/partnerships</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>Develop, recommend and approve divisional/departmental plans and priorities as appropriate (including the appropriate measurement methodology)</li> <li>Make recommendations and provide input on the Company’s vision, mission statement, critical factors, long-term objectives and annual priorities</li> <li>Make assignments (and adjust priorities) for the achievement of annual plans to others within my functional area</li> <li>Approve cross-functional team participation (for people within my Supervisory Scope)</li> <li>Review and communicate objectives and priorities (and periodic progress updates) within my Supervisory Scope</li> <li>Recommend strategic alliances and partnerships to the CEO</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>Make recommendations and provide input to the Leadership Team on the Company’s annual priorities</li> <li>Provide input into departmental plans and priorities</li> <li>Serve on cross-functional teams to provide input (or for development)</li> <li>Review and communicate objectives and priorities (and periodic progress updates) within my Supervisory Scope</li> <li>Recommend strategic alliances and partnerships to the Leadership Team</li> </ul>

**Authority Matrix® Guidelines**

**ABC Company**

***Budget and Contract Authority***

<i>Board</i>	<i>CEO</i>	<i>Leadership Team</i>	<i>Middle Managers</i>
<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>Review and ratify the annual budgets (including budget assumptions)</li> <li>Review budget variances</li> <li>Ratify recommended changes over the aggregate budget</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>Allocate (or reallocate) funds within aggregate, approved budget</li> <li>Establish annual budget process and timelines</li> <li>Recommend budgets (and variances) to the Board for approval</li> <li>Review budget results and financial performance</li> <li>Delegate spending authority to the Leadership team (or below) for budget-approved capital and operating expenditures</li> <li>Approve contingency expenditures (and follow-up for Board ratifications)</li> <li>Negotiate and approve contracts with vendors</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>Participate in the development of detailed budget assumptions</li> <li>Facilitate and recommend the development of the operating plan and budget for my area</li> <li>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)</li> <li>Recommend budget variances to the CEO for approval</li> <li>(The negotiation and approval of contracts with vendors will be an “individual authority”)</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>Provide input to the development of budget assumptions, operating plans and budgets</li> <li>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)</li> <li>Recommend budget variances to the Leadership Team (for CEO approval)</li> </ul>
<p><b><u>Follow Up:</u></b></p> <ul style="list-style-type: none"> <li>Determine individual signing authority limits for operating and capital expenditures</li> <li>Develop merchandising guidelines and enforcement standards</li> </ul>			

**Authority Matrix® Guidelines**

**ABC Company**

***Training and Development***

<i>Board</i>	<i>CEO</i>	<i>Leadership Team</i>	<i>Middle Managers</i>
<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Determine personal attendance at conferences and seminars (within Board policy guidelines)</li> <li>• Review and approve overall training and development budget (within budget process)</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Develop and recommend the Company’s training and development budget</li> <li>• Determine personal training and development activities (and ratify the plans and activities of direct reports)</li> <li>• Develop succession plans for the overall organization</li> <li>• Review and approve all out-of-state conferences</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Develop and recommend my department’s training and development budget to CEO</li> <li>• Recommend personal training and development activities (and ratify the plans and activities of direct reports)</li> <li>• Review and recommend all requests for out-of-state conferences (for self and direct reports)</li> <li>• Recommend the need for certain programs for development</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Send employees to internal training programs</li> <li>• Recommend outside training requests to HR</li> </ul>
<p><b><u>Leadership Council:</u></b></p> <ul style="list-style-type: none"> <li>• Assist in the development of succession plans</li> <li>• Prioritize the need for the development and implementation of new training programs</li> </ul>			

**Authority Matrix® Guidelines**

**ABC Company**

**Human Resource Management**

<i>Board</i>	<i>CEO</i>	<i>Leadership Team</i>	<i>Middle Managers</i>
<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Hire, evaluate and compensate the CEO</li> <li>• Ratify the decision to hire the Internal Audit Manager</li> <li>• Approve the executive benefits package</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Establish and modify the organizational structure</li> <li>• Approve the salary administration system (including discretionary bonuses)</li> <li>• Approve “Basic Roles” of staff</li> <li>• Recommend hiring, evaluation, compensation and benefits of executive direct reports</li> <li>• Review and approve overall additions to “head count” (consistent with budget)</li> <li>• Approve all starting salaries over midpoint, and all salary increases greater than 15%</li> <li>• Terminate any Company employee</li> <li>• Approve all promotions outside of a single Division</li> <li>• Approve all management-level promotions</li> <li>• Sign-off on all contract employees and temps</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Establish and modify the organizational structure (within my Supervisory Scope)</li> <li>• Recommend/approve salary actions for people within my department (in conjunction with HR)</li> <li>• Approve hiring, firing, promotions, transfers, replacements, status changes and demotions of all people within my department or division (in conjunction with HR)</li> <li>• Recommend hiring, firing, promotions, transfers, replacements, status changes and demotions of all people within my department (if cross-division, done in conjunction with HR)</li> <li>• Evaluate direct reports and review/approve evaluations of others within the department (in conjunction with HR)</li> <li>• Review, approve and reallocate departmental staffing levels (within overall budget)</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Recommend staffing levels</li> <li>• Recommend salary actions for people within my department (in conjunction with HR)</li> <li>• Recommend hiring, firing, promotions, transfers, replacements, status changes and demotions of all people within my department (in conjunction with HR)</li> <li>• Recommend evaluations of direct reports</li> <li>• Manage overtime (within budget)</li> </ul>
<p><b><u>Executive Committee (of the Board):</u></b></p> <ul style="list-style-type: none"> <li>• Recruit and recommend the CEO (and Internal Audit Manager) to the full Board for hire</li> <li>• Develop and approve the CEO (and Internal Audit Manager’s) evaluation</li> <li>• Recommend CEOs compensation to the Board</li> <li>• Review and approve the hiring, evaluation and compensation of the CEOs direct reports that are executives</li> <li>• Review and recommend executive benefits to the Board</li> </ul>			

**Authority Matrix® Guidelines**

**ABC Company**

***Policies and Procedures***

<i>Board</i>	<i>CEO</i>	<i>Leadership Team</i>	<i>Middle Managers</i>
<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Approve policies (consistent with regulations)</li> <li>• Monitor the Company’s compliance with policy and regulations</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Ensure that the Company is in compliance with all applicable laws and regulations</li> <li>• Establish the philosophy for policy development (example: tone of customer service orientation, quality initiative...)</li> <li>• Review and approve policies prior to Board consideration</li> <li>• Work with legal counsel to assure the legality of policy and procedure compliance</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Develop policies within area of responsibility (to ensure compliance with laws and regulations) -- for CEO review and Board approval, as applicable</li> <li>• Ensure that there are standard operating procedures within department/area that are: written, communicated and monitored/followed</li> <li>• Review and approve procedures to implement the policies</li> <li>• Communicate all policies and procedures within area(s) of my responsibility</li> <li>• Work with legal counsel to assure the legality of policy and procedure compliance (coordinate with appropriate Department Head)</li> <li>• Provide input on cross-functional policy development considerations</li> </ul>	<p><b>Authority To:</b></p> <ul style="list-style-type: none"> <li>• Recommend and implement policies/procedures in area of responsibility</li> <li>• Communicate and update policies and procedures to staff in area of responsibility</li> <li>• Monitor staff compliance to policies and procedures, and take corrective action (as needed)</li> <li>• Provide input on cross-functional policy development considerations</li> </ul>
<p><b><u>Compliance Accountabilities:</u></b> <i>Karen and Ted</i> <i>Steve and Barb</i></p>		<p><b><u>Authority To:</u></b> HR-related, accounting, investment/financial and remote delivery Deposit and loan products; and service delivery</p>	

# Connections Online® Version 4.1 User Manual

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## Sample Level Authorities (Discussion Draft)

### *Human Resource Management*

<i>Authority</i>	<i>CEO</i>	<i>VP's</i>	<i>Directors</i>	<i>Mid-Management</i>
<ul style="list-style-type: none"> <li>▪ <b>Hire</b></li> </ul>	<p><b>Authority to:</b> Hire for all positions, other than those requiring Board approval</p>	<p><b>Authority to:</b> Hire director positions, within scope of accountability</p>	<p><b>Authority to:</b> Hire all mid-management level positions, within scope of accountability</p>	<p><b>Authority to:</b> Hire all staff level positions, within scope of accountability</p>
<ul style="list-style-type: none"> <li>▪ <b>Terminate</b></li> </ul>	<p>Terminate all positions including vice presidents and all officers other than those requiring Board approval</p>	<p>Terminate the employment of all positions, within scope of accountability, after the review of human resources</p>	<p>Terminate the employment of all positions, within scope of accountability, after the review of human resources</p>	<p>Terminate the employment of all staff level positions, within scope of accountability, after the review of human resources</p>
<ul style="list-style-type: none"> <li>▪ <b>Promote</b></li> </ul>	<p>Promote, within guidelines, all company personnel to all positions including vice presidents and all officers, other than those requiring Board approval</p>	<p>Promote all departmental personnel, within scope of accountability</p>	<p>Promote all positions, within scope of accountability</p>	<p>Promote all staff level positions, within scope of accountability</p>
<ul style="list-style-type: none"> <li>▪ <b>Additional Head Count</b></li> </ul>	<p>Authorize any and all additions to payroll</p>	<p>Authorize additions to payroll within approved budget</p>		
<ul style="list-style-type: none"> <li>▪ <b>Rewards</b></li> </ul>	<p>Grant all rewards deemed appropriate, other than those requiring Board approval</p>	<p>Grant intrinsic and extrinsic rewards within company policy and budget, other than those requiring Board approval, within scope of accountability</p>	<p>Grant any and all mid-management and staff rewards within company policy and budget, within scope of accountability</p>	<p>Grant all staff level rewards within departmental guidelines, within scope of accountability</p>

## NOTES:

**Sample Level Authorities**

*(Discussion Draft)*

***Strategic/Operational Planning***

<i>Authority</i>	<i>CEO</i>	<i>VP's</i>	<i>Directors</i>	<i>Mid-Management</i>
<ul style="list-style-type: none"> <li>▪ <b>Strategic Planning</b></li> </ul>	<p><b>Authority to:</b></p> <p>Establish company vision/direction with Board input and review</p> <p>Approve all strategic plans</p> <p>Approve all strategic communications</p> <p>Establish all strategic external alliances/partnerships</p>	<p><b>Authority to:</b></p> <p>Develop all plans, priorities and initiatives</p> <p>Implement updates to long-term objectives</p>	<p><b>Authority to:</b></p> <p>Implement all plans, priorities and initiatives</p>	<p><b>Authority to:</b></p>
<ul style="list-style-type: none"> <li>▪ <b>Operational Planning</b></li> </ul>		<p>Approve all departmental operational plans</p>	<p>Develop and implement departmental operational plans</p>	<p>Implement all unit plans</p>

**NOTES:**

**Sample Level Authorities**

*(Discussion Draft)*

***Budgeting/Purchasing and Contracts***

<b><i>Authority</i></b>	<b><i>CEO</i></b>	<b><i>VP's</i></b>	<b><i>Directors</i></b>	<b><i>Mid-Management</i></b>
<ul style="list-style-type: none"> <li>▪ <b>Budgeting</b></li> </ul>	<p><b>Authority to:</b> Plan, develop and implement subject to Board approval</p>	<p><b>Authority to:</b> Plan, develop and implement appropriate departmental budgets with CEO approval</p>	<p><b>Authority to:</b> Plan, develop and implement appropriate departmental budgets with VP approval</p>	<p><b>Authority to:</b> Plan, develop and implement appropriate unit/departmental budgets with Director approval</p>
<ul style="list-style-type: none"> <li>▪ <b>Purchasing</b></li> </ul>	<p>Authorize all purchases within Board guidelines</p>	<p>Authorize all purchases within budget guidelines</p>	<p>Authorize all purchases within budget guidelines</p>	<p>Authorize all purchases within budget guidelines</p>
<ul style="list-style-type: none"> <li>▪ <b>Contracts</b></li> </ul>	<p>Approve all contracts within Board guidelines</p>	<p>Approve all departmental contracts within budget guidelines</p>		

**NOTES:**

**Sample Level Authorities**

*(Discussion Draft)*

***Policies and Procedures***

<b><i>Authority</i></b>	<b><i>CEO</i></b>	<b><i>VP's</i></b>	<b><i>Directors</i></b>	<b><i>Mid-Management</i></b>
<ul style="list-style-type: none"> <li>▪ <b>Corporate Policy</b></li> </ul>	<b>Authority to:</b> Approve all corporate policies			
<ul style="list-style-type: none"> <li>▪ <b>Functional Policy</b></li> </ul>	Approve all functional policies within scope of accountability	Approve all functional policies within scope of accountability		
<ul style="list-style-type: none"> <li>▪ <b>Operational Procedures</b></li> </ul>	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

**NOTES:**

**Sample Level Authorities**

*(Discussion Draft)*

***Corporate and Regulatory Compliance and Market Conducts***

<b><i>Authority</i></b>	<b><i>CEO</i></b>	<b><i>VP's</i></b>	<b><i>Directors</i></b>	<b><i>Mid-Management</i></b>
<ul style="list-style-type: none"> <li>▪ <b>Corporate Compliance</b></li> </ul>	<p><b>Authority to:</b> Work with Board to establish ethical/legal standards and direction for the company</p>	<p><b>Authority to:</b> Ensure compliance with ethical/legal standards within departmental scope and take action when violations occur anywhere in the company</p>	<p><b>Authority to:</b> Ensure compliance with ethical/legal standards within departmental scope and take action when violations occur anywhere in the company</p>	<p><b>Authority to:</b> Ensure compliance with ethical/legal standards within departmental scope and take action when violations occur anywhere in the company</p>
<ul style="list-style-type: none"> <li>▪ <b>Regulatory Compliance/Market Conduct</b></li> </ul>	<p>Establish policy</p>	<p>Set standards and direction for compliance</p>	<p>Implement, monitor and correct compliance procedures</p>	<p>Implement, monitor and correct compliance procedures</p>

**NOTES:**

**Sample Level Authorities**  
*(Discussion Draft)*

***Human Resource Management***

<i>Authority</i>	<u><i>CEO</i></u> Authority to:	<u><i>VP's</i></u> Authority to:	<u><i>Directors</i></u> Authority to:	<u><i>Mid-Management</i></u> Authority to:
▪ Hire				
▪ Terminate				
▪ Promote				
▪ Additional Head Count				
▪ Rewards				

**NOTES:**

**Sample Level Authorities**  
*(Discussion Draft)*

*Strategic/Operational Planning*

<i>Authority</i>	<u><i>CEO</i></u> Authority to:	<u><i>VP's</i></u> Authority to:	<u><i>Directors</i></u> Authority to:	<u><i>Mid-Management</i></u> Authority to:
▪ <b>Strategic Planning</b>				
▪ <b>Operational Planning</b>				

**NOTES:**

**Sample Level Authorities**  
*(Discussion Draft)*

***Budgeting/Purchasing and Contracts***

<i>Authority</i>	<u><i>CEO</i></u> Authority to:	<u><i>VP's</i></u> Authority to:	<u><i>Directors</i></u> Authority to:	<u><i>Mid-Management</i></u> Authority to:
▪ <b>Budgeting</b>				
▪ <b>Purchasing</b>				
▪ <b>Contracts</b>				

**NOTES:**

**Sample Level Authorities**  
*(Discussion Draft)*

***Policies and Procedures***

<b><i>Authority</i></b>	<b><i><u>CEO</u></i></b> Authority to:	<b><i><u>VP's</u></i></b> Authority to:	<b><i><u>Directors</u></i></b> Authority to:	<b><i><u>Mid-Management</u></i></b> Authority to:
▪ <b>Corporate Policy</b>				
▪ <b>Functional Policy</b>				
▪ <b>Operational Procedures</b>				

**NOTES:**

**Sample Level Authorities**

*(Discussion Draft)*

***Corporate and Regulatory Compliance and Market Conducts***

<i>Authority</i>	<u><i>CEO</i></u> Authority to:	<u><i>VP's</i></u> Authority to:	<u><i>Directors</i></u> Authority to:	<u><i>Mid-Management</i></u> Authority to:
<ul style="list-style-type: none"> <li>▪ <b>Corporate Compliance</b></li> </ul>				
<ul style="list-style-type: none"> <li>▪ <b>Regulatory Compliance/ Market Conduct</b></li> </ul>				

**NOTES:**

**Sample Level Authorities**  
*(Discussion Draft)*

*Authority Category:*

<i>Authority</i>	<u>CEO</u> Authority to:	<u>VP's</u> Authority to:	<u>Directors</u> Authority to:	<u>Mid-Management</u> Authority to:

**Job Specific Authorities Questionnaire**

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

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