Kavi® Status Tracker Help

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How to configure and use Kavi Status Tracker.

Chapter 1. Introduction to Kavi Status Tracker

Kavi Status Tracker allows your organization to track and display information about its projects, including a detailed, up-to-date activity schedule. It supports projects where the end product is a document, including standards, technical reports, bylaws, etc.

The Member Area

Your organization may opt to display project status tracking information in member-only areas of the site, which can be accessed only by logged in account holders. Look for project and activity data reports in the Kavi Status Tracker Member Landing page (http://example.org/kst/).

Kavi® Groups can be extended to provide a Status Tracker tab on the Group Home page. This usually allows group participants to view information on projects conducted within the group or shared by any other group.

In your organization, the Status Tracker Admin (or Organization Admin) may share project status tracking responsibilities with people who've been designated as Project Recorders. If you are a Project Recorder, the Kavi Status Tracker Member Landing page also displays the Projects link, which you can click to access all the projects for which you are a Project Recorder. Through the Projects tool you'll have access to all project status tracking data and activities, and all the tools you need to manage this data. If you are a Project Recorder, see the Concepts document Scheduling and Recording Activities for an introduction to these tools — or take a tour of the Projects area, clicking a help link any time you want to know more.

Setting Project State is one of the most important tasks entrusted to a Project Recorder, since Project State is used to determine when and how project information is displayed to different audiences (e.g., the general public, top-level groups within the organization, the membership at large, etc.). For more information, see the Concepts document Managing Project State.

The Admin Area

In Kavi Status Tracker, data is naturally organized into projects, and each project has it's own activity schedule. For a quick overview, see the Concepts document Scheduling and Recording Activities.

Depending on configuration, maintenance of project status tracking data may be handled by administrators only, or the workload may be distributed and shared by Project Recorders who are associated with a specific project. Project Recorders can only access projects with which they are associated, and there are some other restrictions on the kinds of activities they can perform. For more information, see the Concepts document Access Control.

You will also find that setting Project State is one of the most important tasks you perform, since Project State is used to determine when and how project information is displayed to different audiences (e.g., the general public, top-level groups within the organization, the membership at large, etc.). For more information on this subject, see the Concepts document Managing Project State.

The Super Admin Area

Once Kavi Status Tracker has been configured, it is intuitive and easy to use. But identifying the configuration that best suits your organization is not a trivial task, so most of the Kavi Status Tracker Concepts documents focus on setup and configuration. The Concepts document Kavi Status Tracker Setup provides a global view of the requirements collection and configuration process, plus links to documents that describe specific aspects of the configuration process, such as Access Control, Managing Project States, Configuring and Using Activity Types and Project Type Configuration and Use.

Chapter 2. Scheduling and Recording Activities

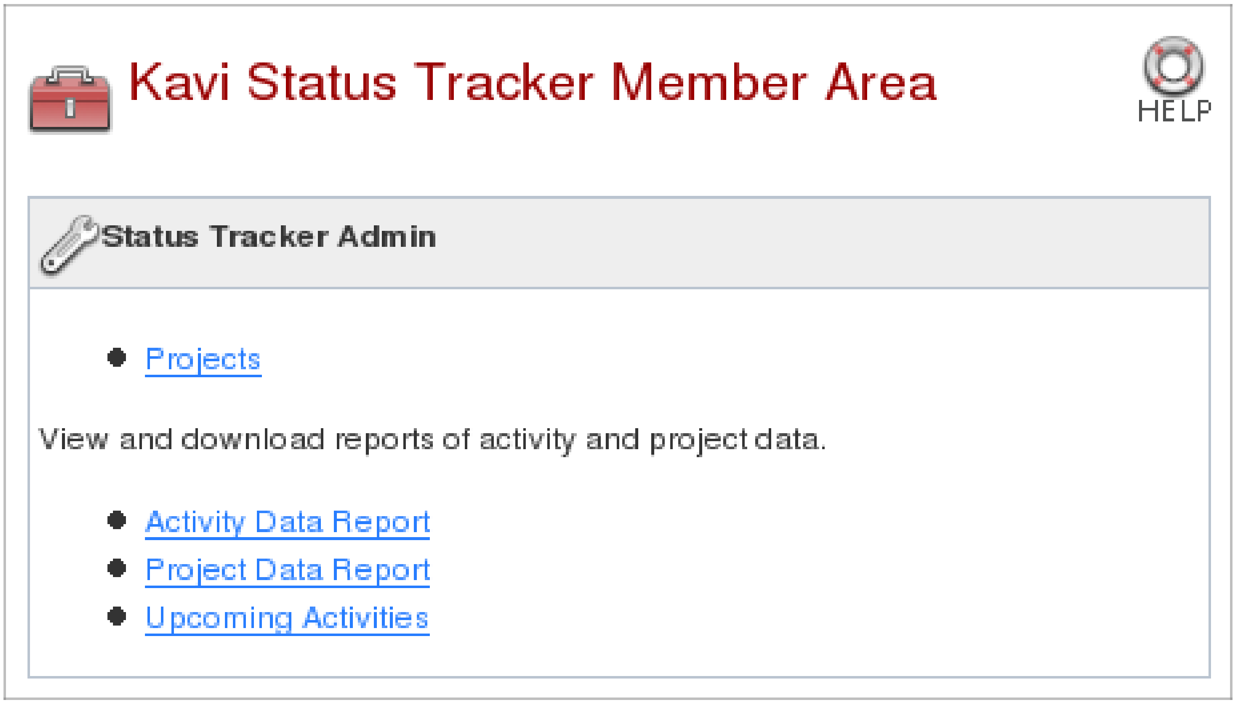
This document provides some hints on managing a project's status — including scheduling and recording activities, setting Project State and submitting project information to ANSI or another recipient.

Who Can Update Project Status Tracking Information

If you are a Status Tracker Admin, you can see and manage every project tracked in the Kavi Status Tracker.

Some organizations also grant status tracking privileges to Project Recorders, who are given access to the Kavi Status Tracker Member Area where they can access project data and status tracking tools. Project Recorders are selected through lookup fields that establish an individual-to-project relationship or a group-to-project relationship. Once established, these relationships provide access to this specific project — but a user may have a relationship with any number of projects. If you are a Project Recorder, you will see the Projects link when visiting the Kavi Status Tracker Member landing page. Click this link to go to the Projects page, where you can see all the projects for which you have Project Recorder access.

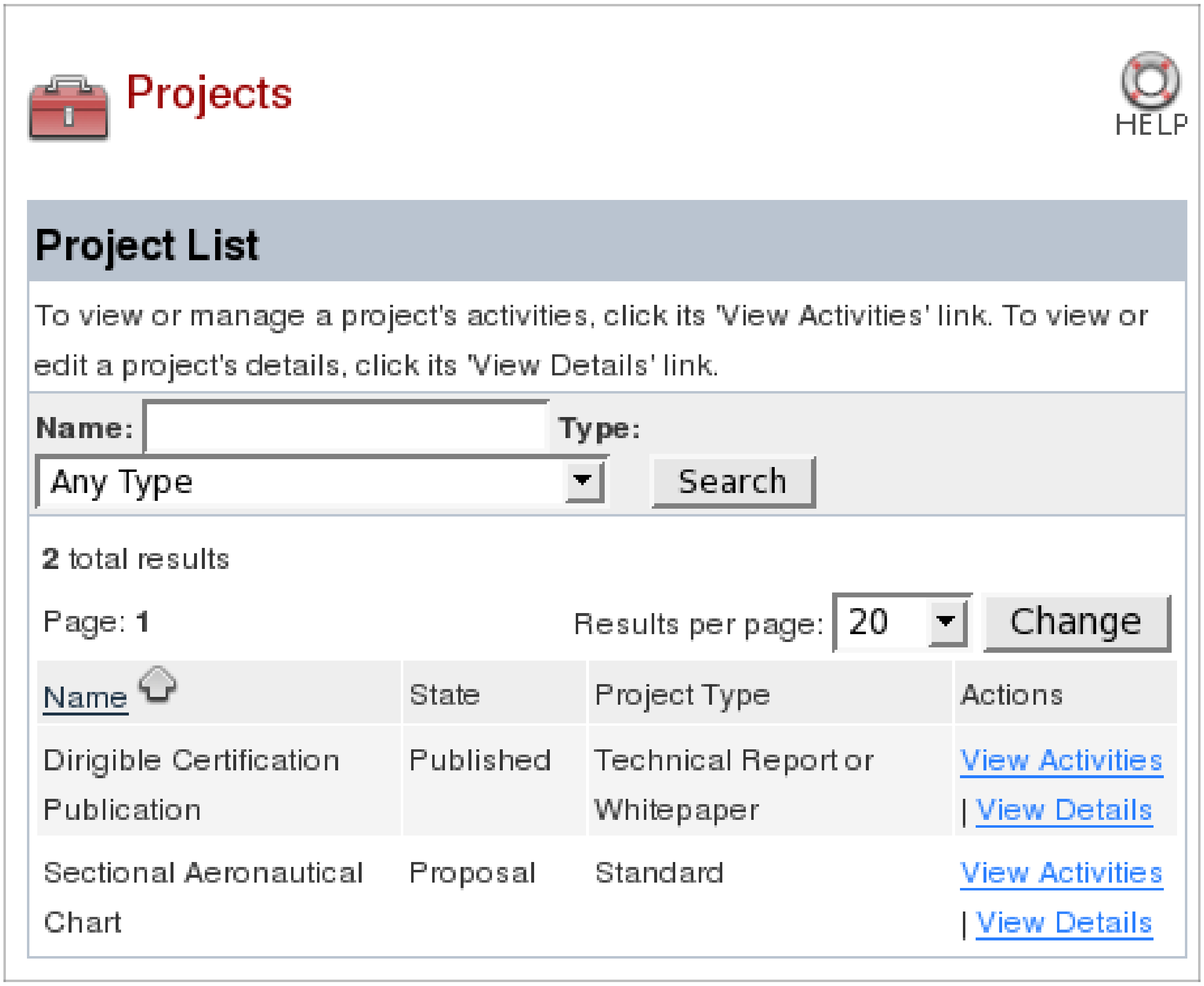
Figure 2.1. Project Recorder View of the Member Area



Project Recorder view of the Kavi Status Tracker Member Area landing page, with a link to the Projects page and three member-accessible reports. When this page is visited by an account holder who is not a Project Recorder, the Projects link is hidden.

Project Recorders have access to all project data, but the scope of access is limited to the projects with which they have relationships. Status Tracker Admins have access to all the organization's projects and have additional privileges, such as adding a new project. For more information on access privileges, see the Concepts document on Access Control or the Appendix document Default User Types and Project Relationships.

Figure 2.2. Project Recorder View of the Projects Page



Project Recorder view of the Projects page, showing just the projects that this Project recorder is authorized to view.

Project Status Tracking and Activity Scheduling

Whether you are a Status Tracker Admin or a Project Recorder, you will see approximately the same information and tools when you access a project. The Status Tracker Admin access projects through Admin Area tools, and the Project Recorder access projects through Member Area tools.

Once you access a project, you'll find that there are two principal divisions of project information and tools: project data and activity scheduling.

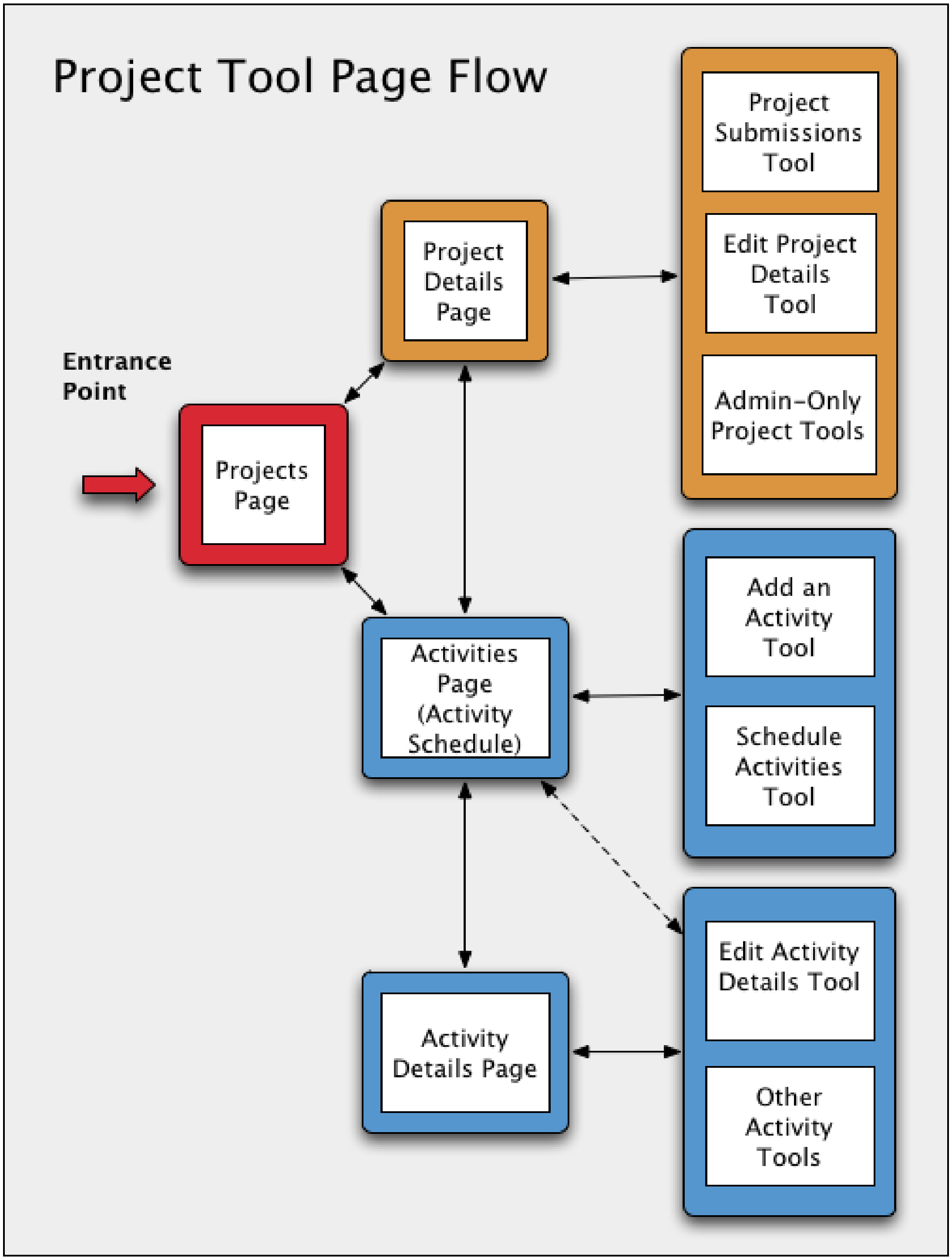
Project Metadata

Project metadata includes details such as the project name, description, Project State, the identities of groups or individuals who have a relationship with the project, and information about the deliverable, such as the document title or Designation.

Most project data is added at the beginning of the project development phase, and another set of data often becomes available as the project reaches completion and is ready for publication. In the interim, you will probably pass through project tools on most of your visits, and go straight to the activity tools, visiting the Edit Project Details tool only occasionally to reset the Project State field or add information as new project data becomes available.

If you want to view or manage project metadata, click the link to the Project Details page. If you are in the Admin Area, this link is labeled Manage. If you are in the Member Area, this link is labeled View Details. From this page you can access the Edit Project Details page or the Project Activities page.

Figure 2.3. Project Pages and Tools



Page flow diagram showing how the Projects page is the gateway to all project and activity data tools. It lists every available project, along with a pair of links used to access either the Project Details page or Activities page, which lead to extended sets of either project tools or activity tools, respectively. This diagram applies to both the Admin Area tools (used by Status Tracker Admins) and Member Area tools (used by Project Recorders), although administrators will see links to tools that aren't available in the Members Area.

The Admin Area page has one or more additional tool links. Depending on configuration, Status Tracker Admins will see a Change Project Type link and possibly a Delete Project link. The former allows you to switch the project to a different Project Type and the latter allows you to delete this project. If the Delete Project button is visible, use it cautiously, because this tool completely and permanently removes the project and all associated project and activity data. If the project should be archived, or if this button is not visible, contact support to have the project properly archived before it is removed from Kavi Status Tracker. If the Submissions module is enabled in Kavi Status Tracker and in the Project Type on which this project is based, you will also see a link to the Project Submissions page, which you can use to access and submit forms to ANSI, a publisher or other recipient at appropriate points in the project lifecycle.

Activity Schedule

To access the Activity Schedule, go to the Projects or Project Details pages and click the View Activities or Project Activities links. You will be taken to the Project Activities page, which displays the Activity Schedule. The Activity Schedule shows all the activities that are scheduled and/or recorded for this project, so it provides a snapshot of overall progress and reveals the type of activity that is currently under way.

When you view the Activity Schedule, you will see links to tools used to view or add activities, or update activity details. You'll also see a link to the Schedule Activities tool, which you should use when you want to schedule several activities at once. This tool is described in more detail in the following section.

Status Tracking Tools

Here are some short descriptions of the principal status tracking tools. Follow links to the tool page help for more detailed information about a particular tool.

Project Tools

Status Tracker Admins use project tools to add a new project and set project details. Once the project is set up, an administrator or Project Recorder can use project tools to review project details, set the Project State as the project moves through different stages of its lifecycle, and update project data by editing existing data or adding newly available information (e.g., ballot results or other support files). After the project deliverables are approved, final details are added in preparation for publication.

Project Details

When a new project is added to Kavi Status Tracker through the Add a Project tool, the Status Tracker Admin selects a Project Type on which the new project will be based. This causes all the components of the Project Type to be installed, including project data fields, Project States, Activity Types and activity data fields. The administrator enters a name and sets the Project State to a preliminary value. The administrator can enter any additional project data that is available at this time.

Once this initial setup is complete, the administrator or Project Recorder can project details or add new information as it becomes available.

Project State

Project State is project data, so it is managed through the Project Details tool, but is so important that it deserves it's own instructions. When a project is created, the set of Project States that are available in the Project Type are installed for that project. This is an ordered list of Project States that projects of this type can enter during the project lifecycle. The Project State is first set when the project is added. Later in the lifecycle, Project State is reset as the project passes certain milestones, represented in Kavi Status Tracker projects as recording a specific Activity Type. Each activity has its own instructions, so when you record an activity, check the instructions to see whether you should update the Project State. For more information, see the Concepts document on Managing Project States.

Be aware that Project State is frequently used to determine which projects are automatically included in the organization's project displays. If you change a project to a Project State that is eligible for public display, project data can become immediately viewable in public areas of the website, so it is a good idea to review project data and make sure everything is up to date and ready for prime time before setting a new Project State.

Project Submissions

If the Submissions module is enabled in Kavi Status Tracker and available in the Project Type on which this project is based, you will also see the Project Submissions button. The Project Submissions page lists all available submissions. If you are ready to submit project information through one of these submission forms, click the link for that submission and complete the submission form. You will be prompted to select any attachments that should be sent along with the form. When you click the Submit button, an email is created from the form, faithfully capturing all the information from the form and attaching the selected files before automatically sending the email to the designated recipients. The email is CC'd to a special 'status_tracker' mailing list that automatically archives the email and its attachments for retrieval by Mailing List Admins. The submission is automatically recorded in the project's Activity Schedule, entering the current date in the Date Occurred field.

Activity Schedule and Tools

The Activity Schedule is displayed on the Project Activities page, which can be accessed through the Projects or Project Details pages. The Activity Schedule shows all the activities that are scheduled and/or recorded for this project, so it can be used to review overall progress on the project and determine what kind of activity is currently under way. An activity in the Activity Schedule can be scheduled in advance and/or recorded as it occurs. Recorded activities are complete. Activities that are scheduled but not yet recorded are either currently under way or else scheduled to begin at some point in the future.

Scheduling Multiple Activities

When a new project is created, the Status Tracker Admin or Project Recorder can set up a preliminary Activity Schedule. The easiest way to do this is through the Schedule Activities tool, which presents a list of all available Activity Types in order. Just enter the Date Scheduled for those Activity Types that you want to schedule. The Date Occurred can be entered later when the activity is complete.

The Date Scheduled can be edited at any time, so you can use this tool anytime you want to update the schedules of multiple activities.

Recording an Activity

When you want to record an activity, you should use the Activity Schedule page. From here you can click Record Activity, which takes you to the Edit Activity Details tool. Read the instructions for recording this type of activity, then review the activity data to make sure it meets whatever criteria is established in the instructions. Enter the Date Occurred and update any other activity or project details as instructed.

The instructions may direct you to set a new Project State when this activity is recorded. To access the Edit Project Details tool, return to the Project Activities page and click the Project Details link.

View and Update Activity Details

When you want to view or update activity data, go to the Activity Schedule and click View Details (if you are a Project Recorder) or Manage (if you are an administrator), to go to the Activity Details page. From here you can click the link to Edit Activity Details. Read the instructions for this type of activity before adding or editing activity data.

If an activity is already recorded (i.e., the Date Occurred has been set), exercise discretion before updating activity data. This is particularly true of submissions activities, which store activity data that was transmitted in the submission form or as attachments. Submission form data and attachments are archived (in the 'status_tracker' mailing list message archives), and edits are logged, but you wouldn't want to edit information that should remain part of the project history. For instance, information submitted to ANSI should remain untouched so that when the project details are consulted, they present a true record of the exact set of information that was transmitted to ANSI. The one field where you can add information retroactively is the Activity Notes field, so if you need to add comments about a modified attachment that had to be sent separately or some such, you can make a note of it here.

Activity Notes

By default, every type of activity includes an Activity Notes field. The Activity Notes field is very flexible, and can be used anytime you want to add a comment or make a note about an event that happened offline, etc. Since this field may be used to add more than one note and may be used by other administrators or Project Recorders, it's a nice idea to include your initials and the date that the note was added. When you add a new note to the Activity Notes field, you should take care to leave other existing notes intact.

Submissions Activities

If your organization uses the Submissions module and Submissions are enabled for projects of this type, the Activity Types list displayed in the Schedule Activities tool will include submission-related activities such as 'ANSI PINS Submission'. You can schedule this kind of activity, but it is automatically recorded when the submission is sent through the Submissions tool. If it wasn't scheduled in advance, it will be automatically added to the Activity Schedule, and all the data from the form will be used to populate the activity data fields.

Chapter 3. Reports and Views

Another advantage of storing your project and activity information in Kavi Status Tracker's centralized Web-friendly database is that this information is easily exported for display. Kavi Status Tracker provides configurable reports and default views that can be tailored to fit the organization's needs, or your website may have built-to-suit views that are unique to your organization. Your organization will have multiple views, aimed at different audiences such as specific groups within the organization, the organization's general membership and the public.

Member Area Reports

Like other Kavi applications, Kavi Status Tracker relies on the Kavi Report Builder for robust, extensible reports. The default Project Data and Activity Data reports are easily augmented by anyone with Status Tracker Super Admin access.

Once a report is created and activated, it immediately becomes available in the Reports Area, but in Kavi Status Tracker, reports can also be displayed on the Kavi Status Tracker Member landing page. All that a Super Admin has to do make an active report available on the Member landing page is select the report in the Member Accessible Reports tool. Reports on the Member landing page are accessible by anyone in the organization by default.

Default Views

Kavi Status Tracker provides several default views, designed to be implemented in different locations, such as the Kavi® Groups Group Home tab, Member Area pages controlled by Kavi® Members and the Public Area of the website. These are plain-vanilla views, each acting as a framework on which your organization's views are built, so a default view described here as a public view may be implemented as a member-only view on your website, and vice versa.

Public Views

Most organizations use Kavi Status Tracker to display project information to the public. It is common to have multiple public views and to select projects for display in these views based on the Project State, so that projects that are ready for public comments are displayed through one view, and projects that have been approved for publication are displayed through another. Kavi Status Tracker includes a plain-vanilla default view for published standards. Like other default views, this one acts as a framework on which actual views can be built, so it is easily tailored to display bylaws or white papers.

Although the view is designed for display on public pages, it can just as easily serve as the basis for views displayed within protected areas of the website. Conversely, views described below in the sections Organization-Wide Views and Group Views can be modified for use on public pages.

Figure 3.1. Sample Public View of Published Standards

In this example, a simple view displays list of published standards plus a View Details link that the user clicks to go to a Single Project View that provides more information about a particular standard or project (e.g., a link to view the standard as HTML or download it as a PDF). The Published Projects sample view has a sortable Standard Name column and the results per page can be changed by the viewer. The Back to Public Area button and breadcrumbs at the top of the form return the visitor to one of the main public landing pages.

Organization-Wide Views

Kavi Status Tracker has two default views that are designed for display on Member Area pages where they are accessible to logged-in account holders. These plain-vanilla default views are altered to fit the organization's needs before installation, so views based on these defaults may include other fields, may be installed in a different area or may only be available to certain types of users. For examples of the default organization-wide views, see the screenshots of the Kavi SDO Demo site in the Appendix document Organization-Wide Project Views.

Group Views

Another set of Kavi Status Tracker default views is designed to display projects that are associated with a specific group. Because the projects are group-specific, these views are usually displayed on a tab on the Owning Group's Group Home page, but these views can be used wherever a view of group-specific projects is wanted. For examples of the default group views, see the screenshots of the Kavi SDO Demo site in the Appendix document Group Project Views.

Built-to-Suit Views

The default views can be used as the basis for any number of different views, but sometimes an organization requires a view that can't be created by tailoring any of the default views, which are fairly simple and straightforward in structure and content. In this case, your organization may have a view that is built-to-suit by Kavi or an authorized channel partner. These views can contain any data fields that are available in the Kavi Status Tracker database and sometimes include data from Kavi Groups, Kavi Members or other application database. These views may select projects for display based on Project State, and access may be restricted so that they are only displayed to certain types of users.

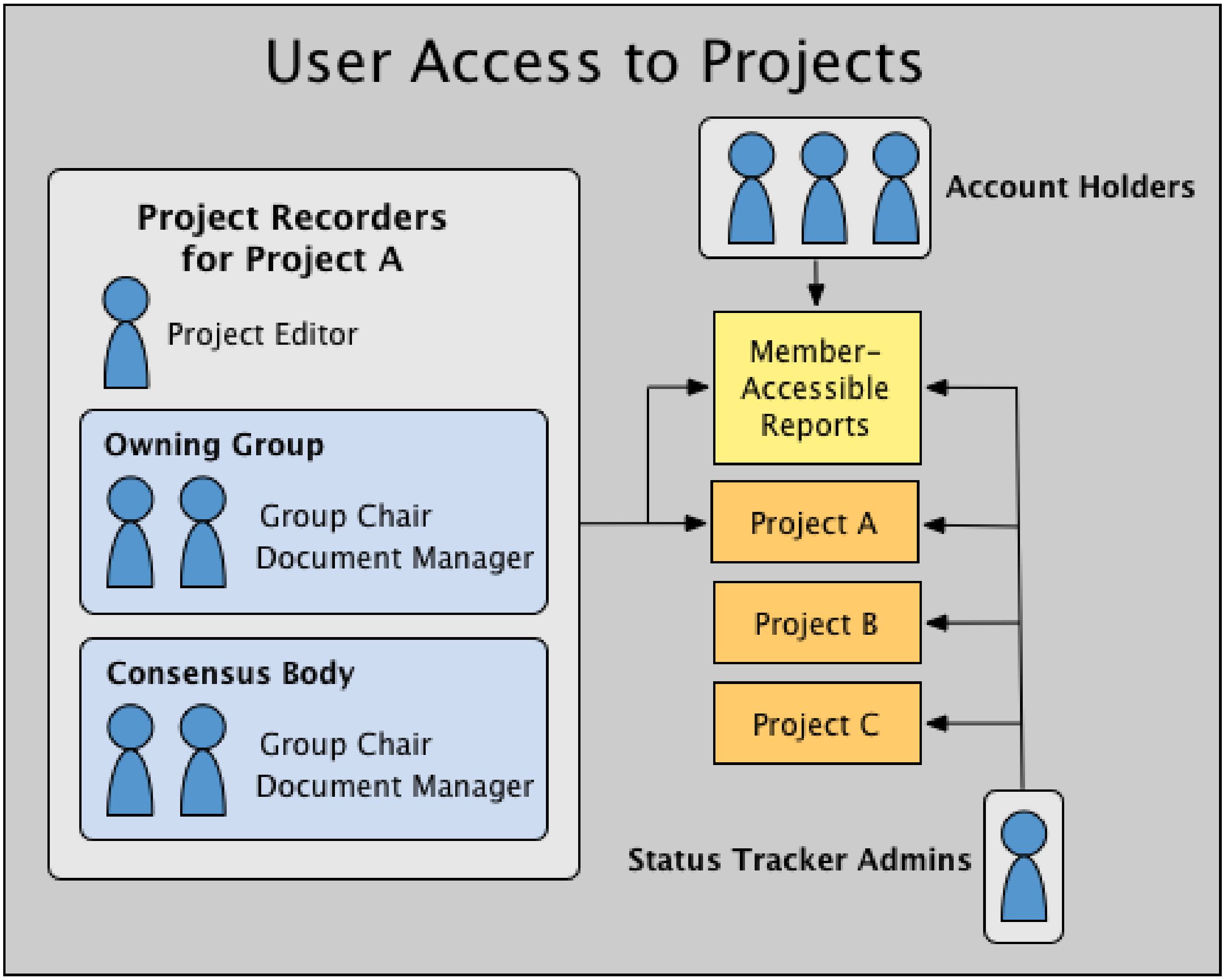
Chapter 4. Access Control

Kavi Status Tracker access to projects and activities is highly configurable and extensible. Every organization will allow its members to view project status and activities at some point, and most will present specially designed views to the public when projects are published or accepting comments. The ability to edit project status tracking data may be reserved for administrators only, or the organization may extend this power to certain people who are associated with a project.

Access to Status Tracking Data

Direct access to project information and activities is configured on a per site basis. By default, these permissions are restricted to the Status Tracker Admin, but access to Member Area tools can be enabled to allow the workload to be distributed to users or groups that have a relationship to the project, such as the Project Editor or Owning Group. These kinds of users are known as Project Recorders.

Figure 4.1. Who Can Access Status Tracking Data



Different types of users have different levels of access to status tracking data. All users can see member-accessible reports (if any exist) — and this is all that most Account Holders can see. Users with a Project Recorder relationship to Project A can manage that project's status tracking data. A Status Tracker Admin has direct access to status tracking data for all projects — including Projects A, B and C — as shown in this diagram.

The Concepts document Scheduling and Recording Activities has a screenshot showing aProject Recorder View of the Member Area.

View and Display Configuration

Member Area views of project and activity reports are enabled through the Member Accessible Reports tool in the Super Admin Area. This tool displays all reports that are available in Kavi Status Tracker, and all the Status Tracker Super Admin has to do to make a report available is select it via a check box and click the Save button.

Other sorts of displays are created specifically for the organization. These views are often gated on Project State, such as a new projects display, a display of projects currently accepting public comments and a published projects display. For more information, see Reports and Views.

Access Configuration

Administrative access is configured primarily through the Configure Kavi Status Tracker tool, possibly in conjunction with custom lookup fields that link to the Kavi® Groups or Kavi® Members databases.

Admin-Only Management (Default)

By default, only the Status Tracker Admin (and of course, the Status Tracker Super Admin, Organization Admin and Super Admin) have access to tools used to add or edit projects and activities.

Admin-Only Configuration

In this configuration, the Access by Person and Access by Group fields in Configure Kavi Status Tracker aren't used. None of the relationship lookup fields, such as Project Editor, Owning Group or Consensus Body, are selected. These fields may be deleted by Kavi if they aren't needed for project metadata or display purposes.

Project Deletion Privileges

Status Tracker Admins are not necessarily allowed to delete a project. This option is controlled through the Project Deletion option in the Configure Kavi Status Tracker tool. If this option is set to 'Yes', Status Tracker Admins will see the Delete Project link when viewing a project. If set to 'No', projects cannot be deleted through Kavi Status Tracker tools, and must be deleted by Kavi administrators or authorized channel partners as the need arises.

In general, projects are tracked long-term, throughout the development process and well into maintenance. When it is time to mothball projects like these, it is usually preferable to archive the Kavi Status Tracker data, as opposed to deleting the project and all status tracking data.

Advantages of Admin-Only Management

The default setting puts all the responsibility in the hands of administrators, which gives the organization tight control over project data. As explained in View and Display Configuration, Project State is often used to gate display, and admin-only access provides the most reliable control over Project State settings so it is easier to make sure that information isn't displayed prematurely.

Disadvantages of Admin-Only Management

On sites where administrators have sole control over status tracking data, information from project participants must be sent to administrators so it can be added to Kavi Status Tracker. This results in some lag between the time that the participant generates and sends instructions to the administrator and the time that the administrator performs the task, and also requires some duplication of work. Besides these inefficiencies, this approach also requires the administrator to interpret the instructions of the participant, so the task is not performed by the person who is the most knowledgeable about it.

Distributed Management

An organization can also choose to distribute the project status tracking workload among users who have a relationship with a specific project. These users, known as Project Recorders have access to Member Area tools and permission to edit their project's details and activities. Project Recorders do not have access to tools used to add or delete a project, send submissions or switch the project to a different Project Type.

Distributed Management Configuration

Before distributed management can be enabled, relationship lookup fields such as the default examples Project Editor, Owning Group or Consensus Body must be available. Your organization may have different relationship lookup fields.

Two kinds of relationships:

Person-to-project relationship	This type of relationship is established by performing a lookup on the Kavi Members database. This can be accomplished through the default Project Editor lookup field, or through a lookup field that is specific to your organization.
Group-to-project relationship	This type of relationship is established by performing a lookup on the Kavi Groups database. This can be accomplished through the default Owning Group or Consensus Body lookup fields, or through a lookup field that is specific to your organization.

Once the required relationship lookup fields exist, person-to-project lookup fields are displayed in the Access by Person option in the Configure Kavi Status Tracker tool, and group-to-project lookup fields are displayed in the Access by Group option.

Selecting a person-to-project lookup field in the Access by Person option allows an individual to be selected for each project. The selected individual is given Project Recorder access to Member Area tools and permission to edit project and activity data for that specific project. If the organization wants to give Project Recorder access to more than one individual per project, multiple lookup fields can be added and selected.

Selecting a group-to-project lookup field in the Access by Group option allows Project Recorder access to Member Area tools and permission to edit project and activity data for that specific project to be given to the Group Chair and Document Managers. If the organization wants to give Project Recorder access to participants in more than one group, multiple lookup fields can be added and selected. For example, Group Chairs and Document Managers in both the Owning Group and Consensus Body might be given Project Recorder access.

Advantages of Distributed Management

In distributed management, the workload is shared between users who are intimately involved with a project, so those with the most expertise on the project can update project data and activities directly. It eliminates the duplication of work that happens when each project participant must compose detailed requests for the administrator, who must then interpret and implement these requests. The distribution of work reduces chances that administrator availability will become a bottleneck.

Disadvantages of Distributed Management

Having a large number of Project Recorders with access to the Project State increases the chances that the Project State might set to the wrong value, inadvertently exposing project information prematurely, so this might not be the best choice for a project where information needs to be tightly held. It also opens up the possibility that Project Recorders will overwrite each others information.

Assigning Project Recorder Access

When a Status Tracker Admin adds a project, any relationship lookups that have been enabled for the organization are displayed. If a person-to-project lookup is enabled, the lookup displays users in the Kavi Members database so the administrator can select the person who is, for example, the Project Editor for this project. If a group-to-project lookup is enabled, the lookup displays groups in the Kavi Groups database so the administrator can select, for example, the Owning Group for this project.

Assuming Kavi Status Tracker has been configured for distributed project access, users who have been selected will be given Project Recorder access. These users will see a link to the Project when visiting the Kavi Status Tracker Member Area. The link leads to views of the project and activity schedule, and tools used to edit project and activity data.

Chapter 5. Managing Project States

Project State allows everyone who views a project to immediately gauge which phase of development a project is in. Project State can also be used as gating criteria in built-to-order views, such as a public view of all projects that are currently open for public comment (e.g., a selection of projects that are in the 'Public Comment' state) or a published projects view (e.g., a selection of projects that are in the 'Published' state).

What Are Project States?

Project State is a label applied to a project when it reaches a certain stage in its life cycle, such as when a project enters a new phase of development or passes a milestone in the approval process. Every Project Type has a set of Project States associated with it, and these are available in all projects based on this Project Type. When a project is added, these Project States are displayed so the Status Tracker Admin can assign the initial Project State, such as 'Proposal'.

Project States are listed in approximately sequential order, so the list of associated Project States provides a sort of road map of the project development process. When a project enters the next phase of its life cycle, an administrator or Project Recorder assigns the next appropriate Project State to the project. Over time, the project is assigned a series of Project States to mark its progress from proposal to active development to approval and publication.

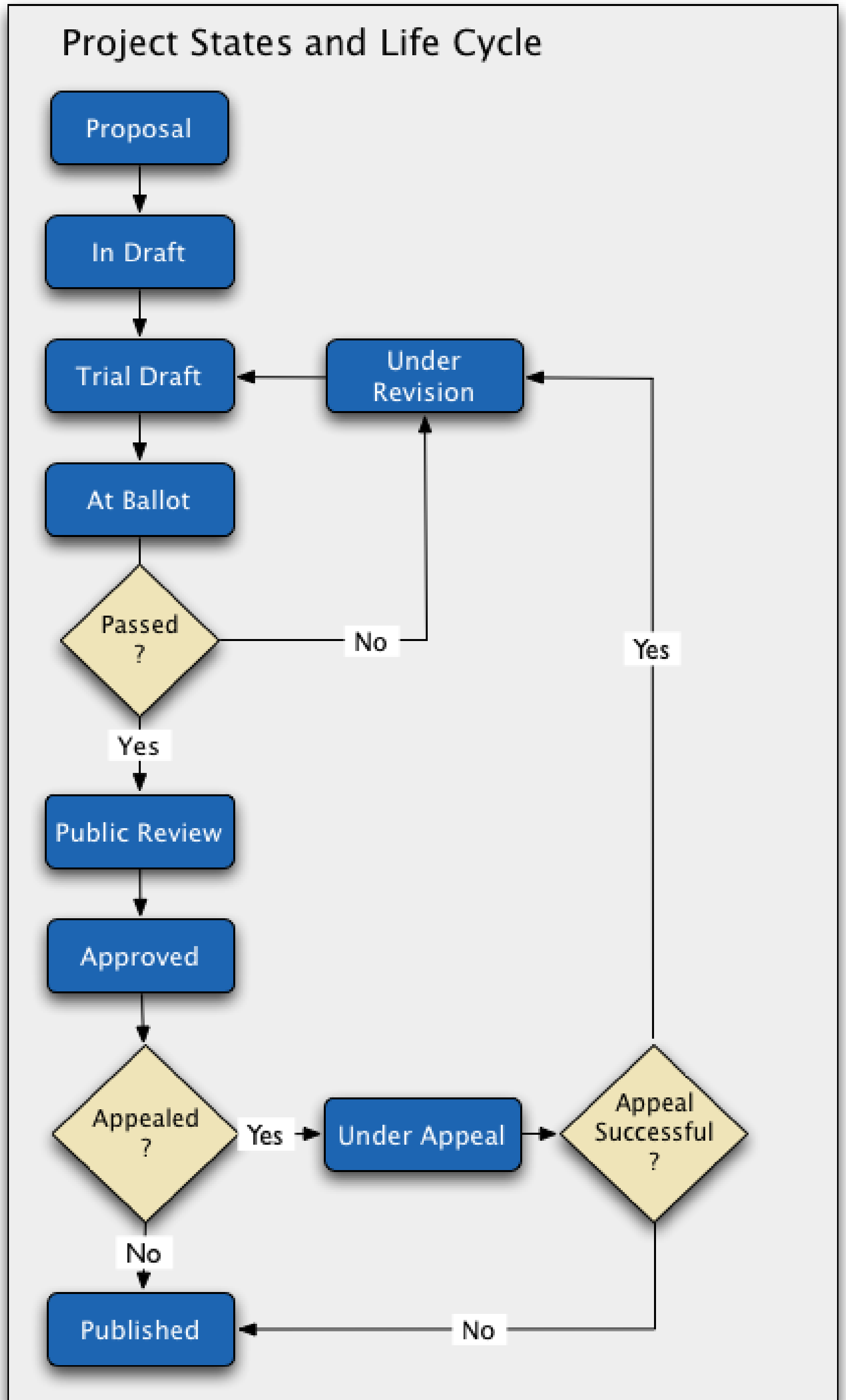
How Project States Reflect Project Life Cycle

Here is an example that uses the default Project States to illustrate how the life cycles of projects based on a simple 'Standard' Project Type might be modeled. In this simple model, a project is assigned the 'Proposal' Project State when it is created by a Status Tracker Admin. Once the proposal is accepted, it is assigned the 'In Draft' Project State. When the draft is ready for internal review, the Project state is set to 'Trial Draft'. At the close of the trial period, the state is set to 'At Ballot'. Here the life cycle can vary, depending on whether the draft passes the ballot or not. If not, the Project State is set to 'Under Revision', and the draft repeats the 'Trial Draft' and 'At Ballot' states cycle until it passes the ballot.

If the draft passes the ballot, the 'Public Review' Project State is assigned. At this point, the draft standard may be automatically displayed in the Public Area of your organization's website. After the public review phase the project may be 'Approved'. In real life, there would probably be another balloting phase where the standard is voted upon by the top-level voting group within the organization, so that passing this ballot means the standard has organization approval. Sometimes a standard meets with an appeal after approval, in which case the Project State would be set to 'Under Appeal' while the project goes through a formal appeals process. If there is no appeal, or if the appeal is unsuccessful, the Project moves to the 'Published' Project State.

At the end of the project lifecycle, an old standard (e.g., standards for vacuum tubes or 8-track tapes) is retired and the Project State set to 'Withdrawn'. This state can also be assigned to a project that fails to clear some hurdle such as an appeal.

Figure 5.1. Project States and Project Life Cycle



The arrows show the approximate order in which Project States might be assigned, beginning with 'Proposal' and ending with 'Published' or 'Withdrawn'. The diamonds represent decision points, indicating places where the assignment of Project States might diverge. A project that doesn't pass the initial ballot enters a revision cycle. A project that is appealed is published if the appeal is unsuccessful and withdrawn if the appeal is successful.

This is an overly simplified version of the real standards development process, but is probably more complex than the development processes of bylaws and white papers.

Configuring Project States For the Setup Process

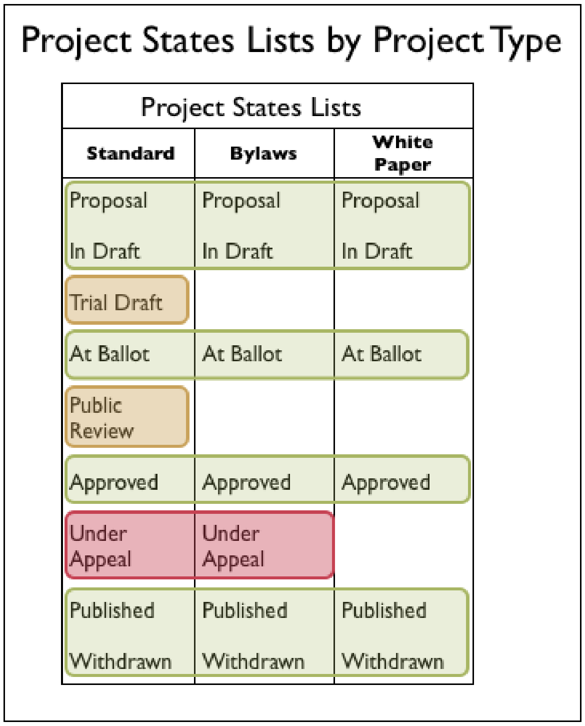
Identifying your organization's Project States is one of the first steps in Kavi Status Tracker Setup. Once you know which Project States are needed, the process of adding Project States is simple.

Determine Which Project States You Need

The set of Project States that you need to add is global, that is, it contains all the Project States that will be available in your organization's installation of Kavi Status Tracker. When a Project Type is added, this global list of Project States is displayed and the Super Admin selects which states will be associated with the new Project Type. Later, when an administrator adds a project based on this Project Type, only the selected set of Project States are displayed.

To compile this global list, it's easiest to create lists for each Project Type that your organization requires, then merge these into a single, ordered list. You'll find that there are certain Project States that are common to all your Project Types, and others that belong exclusively to a certain type of project, as illustrated in the following diagram.

Figure 5.2. Project States Lists by Project Type



The Project States lists of three different Project Types are shown in this table: Standard, Bylaws and White Paper. Colored overlays show that some Project States are used by all three Project Types, while other Project States may only be used by one or two Project Types. In this example, the Standard Project Type is the most complex, and includes all the Project States — whereas the White Paper Project Type is the simplest and includes the least number of Project States.

Steps

1. It's easiest to begin with the most complex Project Type first, which is usually the full-fledged standards development project. Put the Project States in the order that a project might typically pass through during its life cycle. You'll probably find it easiest to prepare this information in a spreadsheet, but some prefer to work it out on a whiteboard or scratch paper first.

2. Repeat this process for each Project Type.

3. Since Kavi Status Tracker uses a global list of Project States, these lists of Project States need to be merged into a single ordered list. If there is a conflict in the order, the order required by the most complex Project Type should be given precedence. Project States that aren't shared should be merged into the main list in relative order to the states that should precede and follow them. As long as an intermediate state is placed somewhere between the states it should follow and proceed, the order will be correct, even if it is not immediately adjacent to either of these two states. Remember that when the Project States are viewed in the context of a Project Type, only the applicable states will be displayed.

Tips

- Remember to include states that a project passes through before and after active development, as well as those that occur during the main phase of project development.
- Include states to cover the most common exceptions, such as a project being challenged, put on hold or withdrawn. New Project States can be added as needed, so it isn't imperative to compile an exhaustive list before setup—but if a Project State is added after Project Types are set up, it has to be added to each Project Type separately.
- Your lists of Project States can help you determine which Activity Types you need. Project States can be used to group activities and help you remember to add activities for states that aren't part of the main workflow, such as activities performed in response to challenges or other special circumstances, maintenance activities, etc.

Adding Project States

Click the Project States link in the Super Admin menu. From there you can use Add a Project State to add to the global list of Project States, or click the Manage link for each of the default states so you can edit or delete those that don't fit your organization's needs.

Associating Project States with a Project Type

Project States can be associated with a Project Type during site setup, when new Project Types are added or existing Project Types are edited. If a new Project State is added after site setup, each Project Type that should have this state will need to be edited through the Edit Project Details tool.

When Setting Up Project Types

A Project Type is a preconfigured template on which projects will be based, so it contains all the Project States, project data fields and Activity Types that will be available in the projects that are based upon it — so Project Types tend to be rather complex. You may find it simplest to add the most complex Project Type first, then clone it to create similar Project Types. If you take this approach, you'll edit the Project Type details, including associated Project States, for each new Project Type that you create by cloning.

When Adding a Project Type

When you add a new Project Type through the Project Types tool, the global list of Project States is displayed. Select those that will be available in projects based on this Project Type.

When Cloning a Project Type

Project Types can be created by cloning an existing Project Type, in which case the new Project Type will have the same Project States as the original on which it is based. These are edited as needed after cloning.

When Editing a Project Type

You can also edit the set of Project States associated with a specific Project Type any time, but this will affect every project based on this Project Type. Use the Edit Project Details tool to select or deselect associated Project States.

Changing Project State Order

Because the list of Project States is global, you shouldn't use the Project States tool to change the order of the states to fit a specific Project Type unless you want to change the order in which this Project State appears in all the Project Types that use it.

Assigning a Project State to a Project

If you have access to a project, you can set the Project State by opening the Projects page and clicking the Manage link for that project. The Project Details page is displayed. Click the Edit Project Details button. The pull-down list displays Project States in the approximate order in which they should be assigned. Assign the appropriate Project State and click the Save button.

Chapter 6. Configuring and Using Activity Types

Activity Types provide instructions and all the activity data fields that are needed to schedule and record a specific type of activity. Your organization should have an Activity Type for every activity that appears in its project activity schedules.

What Is an Activity Type?

An Activity Type is a template that is used when an activity is added to a project's activity schedule.When a Status Tracker Admins or Project Recorder wants to add an activity to a project's activity schedule, the administrator or Project Recorder selects the Activity Types that he or she wants to add. The Add an Activity tool displays all the activity data fields that are associated with the selected Activity Type. Activity data fields can include lookups that draw data from the Kavi® Groups or Kavi® Members databases, such as the name of the Owning Group or Project Editor.

Activity Types are one of the building blocks used in Project Types, which are templates on which projects are based. When a Status Tracker Super Admin adds a new Project Type, a global list of all of the organization's Activity Types is presented so the Super Admin can select those that are appropriate for this Project Type. Projects based on this Project Type will have all of these Activity Types available.

Preparing Activity Types Requirements

A fairly extensive set of Activity Types is needed to meet the needs of most organizations. The challenge is to identify a set that is as large as necessary, while still lean enough to be manageable. Kavi Status Tracker installs a slim set of Activity Types by default, as documented in the Default Activity Types document in the Appendix. Your organization will need to customize and expand these to create its own set of Activity Types.

As mentioned in the Concepts document Kavi Status Tracker Setup, it's easiest to begin by determining which Project Types your organization needs, then identify which types of activities occur in each Project Type. To divide the task up into even smaller units, you could use Project States, and develop separate lists of Activity Types for each Project State used in each Project Type. Once you have comprehensive lists of all the Activity Types needed in each Project Type, these list must be merged into a single Activity Types list, since the list maintained in the Super Admin Activity Types tool is global. After setup, Activity Types can always be added or edited to fine-tune the list or expand the available types when a new Project Type is added.

Tips

- The Activity Types list tends to be long. To keep the list streamlined while simultaneously providing a comprehensive set of Activity Types, try to keep the types generic whenever possible. For example, a 'Send Ballot Reminder' Activity Type would be useful for any Project Type that involves balloting.

- Certain Activity Types represent milestones in the project lifecycle. If the Project State should be set to a different value when the activity is recorded as complete, be sure to include this information in the Activity Type instructions. Instructions can also include information on submissions, what kind of ballot report to generate, etc.

- A naming convention can make it easier for users to find their desired Activity Type in a long list of Activity Types. Simply begin the names of related Activity Types with the same short phrase. For example, work done by a specific entity can begin with the name of that entity. So a set of related Activity Types might be named:

  - Technical Committee - Review

  - Technical Committee - Ballot Reminder

  - Technical Committee - Ballot

  - Technical Committee - Ballot Results Published

  Activity Types whose names begin with the same word are grouped together when alpha-sorted. The groups of similarly named terms stand out when the list of Activity Types is scanned. Activity Types grouped by name might all be tasks that occur during a specific phase of the project lifecycle (possibly corresponding to a Project State) such as 'Data Gathering', 'Trial Period' or 'Publication'. The group could also be defined by Project Type, if this Project Type has some Activity Types that are distinct from other Project Types, for example: 'White Paper', 'Recommended Practice', etc.

- If your are adding a new Activity Type, make sure that all the required activity data fields exist before adding the Activity Type. But if a data field does have to be added to an Activity Type later, the Activity Type can always be edited.

Instructions

These instructions describe one approach to consider when identifying the Activity Types your organization needs for its initial set of Project Types. The graphic shows how to merge Activity Type lists for different Project Types into a global list.

1. Beginning with the most complex Project Type, create an ordered list of activities that can occur during this type of project. You might find it easiest to divide the Activity Types up even further by listing the Project States, then the order in which activities occur under each of the different states. You'll probably want to prepare this information in a spreadsheet, but some prefer to work it out on whiteboard or scratch paper.

2. For each Activity Type, list any data fields that are required in addition to the default activity data fields listed in the Appendix. These additional data fields need to be added by an engineer before the Activity Types are added. For more information, see Identify Activity Data Fields in the Concepts document Kavi Status Tracker Setup.

3. Decide which Activity Types are auditable for reporting purposes and flag these with an asterisk or color-coded highlighter, etc.

4. Each Activity Type can include instructions on how and when to use the Activity Type, references to the applicable sections of the organization's bylaws, etc. Any ideas for instructions that come up now could be jotted down somewhere, and a more complete set of instructions can be added after the global list of Activity Types is compiled. Instructions can always be expanded later as time permits and the organization's processes evolve.

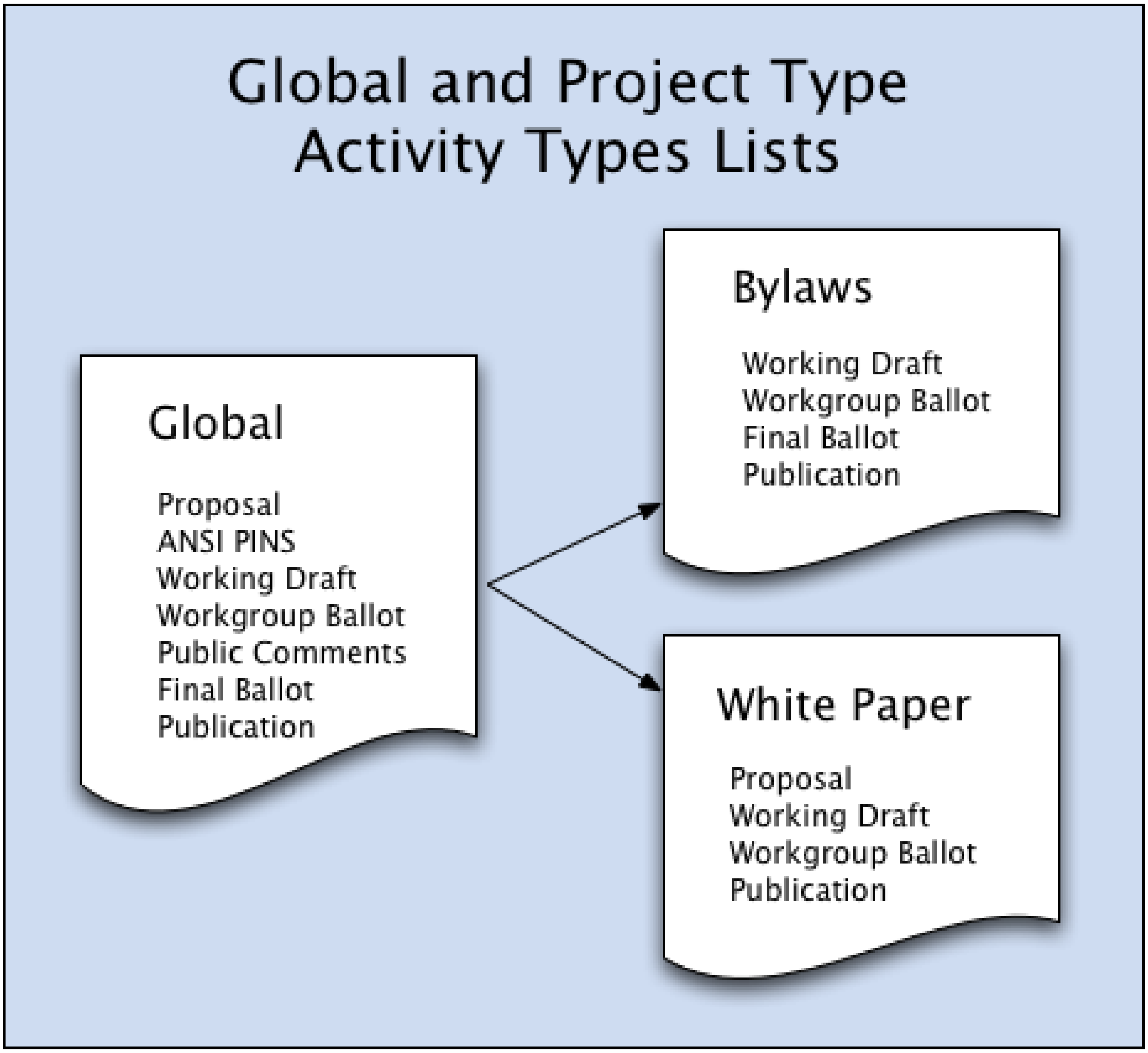
5. Repeat this process for each Project Type.

6. Now merge the Activity Types from all these Project Types into a single, global list. If you used Project State as a subheading when creating the lists of Activity Types, you can use these subheadings to help when merging the Activity Types.

   Many Activity Types will be shared by more than one Project Type. If there is a conflict in the order, the order set in the more complex Project Type should take precedence.

   Activity Types that aren't shared must be merged into the main list in the most appropriate order.

Figure 6.1. Global Versus Project Type Activity Types Lists



The Global list of Activity Types is a comprehensive list of all Activity Types in the Kavi Status Tracker, whereas a Project Type only includes relevant Activity Types, so a Project Type Activity Types list is a subset of the global Activity Types list, as shown in this diagram.

Prior to site setup, the organization determines which Project Types it needs and which Activity Types are needed for each Project Type. These are merged into a global list and added to Kavi Status Tracker through Activity Types tools in the Super Admin Area. Once the global Activity Types list exists, the process is reversed, as the relevant Activity Types are selected for each Project Type as the Project Type is added.

Adding and Editing Activity Types

Activity Types Tools

The Activity Types tools are available through the Status Tracker Super Admin menu. As mentioned, the list of Activity Types displayed through these tools is global. Once an Activity Type exists, it is added to a Project Type through the Project Types tools. When Project Recorders view Activity Types under a project, they only see the list of Activity Types associated with this Project Type.

How to Add or Edit Activity Types

Here are some general tips for adding and editing Activity Types. For information on how to use a specific Kavi Status Tracker tool, click the help icon on the tool page.

- Default data fields are automatically assigned to every Activity Type. If additional data fields are required, these need to be added before the Activity Type is added.

  If a data field has to be added after the Activity Type is created, the Activity Type can be edited.

- When adding Activity Types during the setup process, add the fields in order from first to last in the order specified in the requirements. The Order field is set to 'Bottom' by default, so you shouldn't need to touch this field during setup.

  When adding an Activity Type after setup, you need to determine where it fits into the global Activity Types list.

  The order can always be changed later if needed.

- If an existing Activity Type is edited or deleted, the action affects all projects that contain that Activity Type.

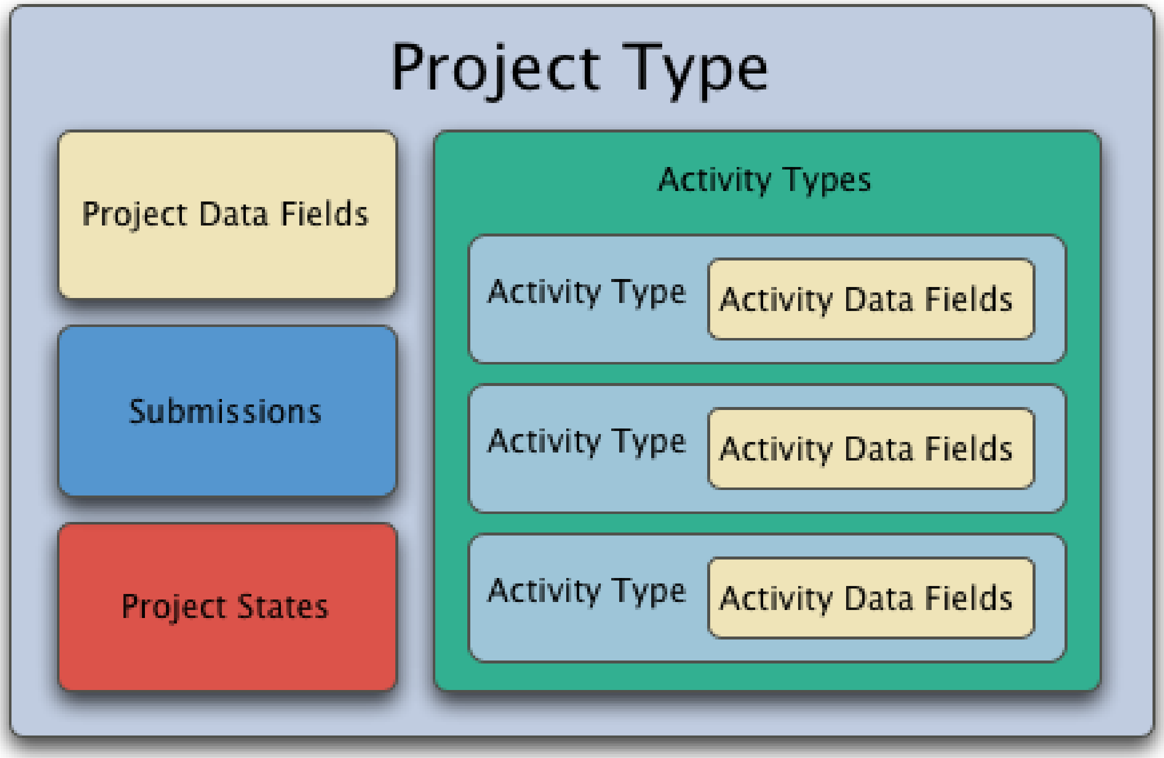
Chapter 7. Project Type Configuration and Use

A Project Type provides every Project State, Activity Type, data field and submission form needed for a specific kind of project. Your organization can have a Project Type for every kind of document development project, ranging from full-fledged standards development projects to simple white papers.

What Are Project Types?

A Project Type is a template that packages all the elements used to track a certain kind of project, including Project States, project data fields, Activity Types, activity data fields and submission forms. When a project is added to Kavi Status Tracker, the administrator selects the Project Type on which the project will be based, and the new project is installed along with all these components.

Figure 7.1. Project Type Components



A Project Type acts as a container for other components: Project Data Fields, Submissions, Project States and Activity Types. Some of these components are also containers, for example, Activity Types contain Activity Data fields and other elements, such as instructions. Elements contained within Submissions are not shown in this diagram because the Submissions module isn't enabled on every site, but Submissions do contain forms and data fields.

Configuring Project Types For Set Up

Defining the Project Types your organization needs is one of the first steps in the setup process, as described in Kavi Status Tracker Setup. Once you have an initial set of Project Types, you'll identify which Project States, project data fields, Activity Types and activity data fields are needed for each Project Type. Once these components have been added to Kavi Status Tracker, you can assemble your Project Types.

Identifying Project Types

Identify all the different kinds of projects your organization wants to track online through Kavi Status Tracker. Kavi Status Tracker is designed to support projects where the deliverable is a document. Besides standards projects, this can include white papers, bylaws, etc. Projects where different kinds of data is tracked usually need their own Project Types. Once you have a list of Project Types, decompose them into their constituent parts, as described in the Requirements and Initial Preparation section of the Concepts document Kavi Status Tracker Setup. Here is a quick reiteration of the process described there, and in documents that describe how to prepare each of these components.

Steps

1. Beginning with the most complex Project Type (usually a standards development project), identify all the components, beginning with Project State. This can be worked out on a whiteboard or scratch paper first, then transferred to a spreadsheet. List all Project States from project inception through the end of the project lifecycle. This is described in more detail in Determine What Project States You Need. Put the Project States in the order that the project might typically pass through during its lifecycle.

2. Identify all the project data you'll want to track in addition to the default project data fields for this type of project, including data that is needed by those who are performing status tracking tasks, data needed while the project is in development, data that should be included in public or other displays, and data that is needed when the project is complete and ready to be submitted to ANSI or a publisher.

3. Working through each of the Project States in order, identify all the activities that might take place while the project is in that state. These Activity Types also need to be in order. If completion of this activity means that the Project State should change, make a note of this for inclusion in the Activity Type instructions.

4. Identify any activity data you'll want to track in addition to the default activity data fields for each type of activity. These additional activity data fields should be added before Activity Types are created, since Activity Types are used to package activity data fields.

5. If the Submissions Module is enabled in the Kavi Status Tracker, a Project Type can contain one or more forms for automated submission of project deliverables to ANSI, a different standards organization or a publisher. Identify any Submissions that should be available in projects of this type.

Adding Project Types for Setup

When you've identified and added all the project and activity data fields, Project States and Activity Types you need, you can begin to add Project Types. Click the Project Types link in the Super Admin menu. From there you can use Add a Project Type to add a new Project Type or click the Manage link next to a default Project Type that you want to edit, delete or clone. Default Project Types use all the default Project States, Activity Types and project data fields. New

Project Types can be added by cloning and editing existing types. Use whatever approach seems fastest to you.

You'll see a list of additional project data fields so you can select any that you want to be available in projects based on the Project Type you're creating. Global, ordered lists of Project States and Activity Types are displayed so you can select those that belong in your Project Type.

If Submissions are available, the Submissions option will appear when adding a Project Type. Just click to select whichever submissions you want to be available in projects of this type.

Managing Project Types After Setup

Adding a New Project Type

Once initial setup is complete, it is easy to add a new Project Type. As with the initial setup process, if you need any new project or activity data fields, Project States, Activity Types or Submission forms, it's easiest to add these components first.

If the Project Type you are adding is similar to an existing type, you might find it easiest to clone the existing type, then edit the components as needed. To do this, click the Manage link next to existing Project Type, then click Clone. When you return to the Project Types list, you'll see the cloned Project Type in the list. Click the Manage link, then Edit to revise the settings as needed.

Once you've performed basic Project Type configuration, use the Edit Associated Activity Types tool to finish the configuration process.

Editing an Existing Project Type

Any edits made to a Project Type that is already in use will affect all projects based on this Project Type. If you add a new project data field, that field becomes instantly available in all projects based on this Project Type. If you select a new Project State or associate the Activity Type, these also become instantly available in projects.

If you delete a field, Project State or Activity Type, it is removed from all projects in which it is not currently in use. If it is in use, then it will remain part of the project record.

This same principal applies to the set of associated Activity Types, which is edited through the Edit Associated Activity Types tool. If an associated Activity Type itself is edited — by adding or removing an activity data field for instance — the data field becomes available or unavailable in all Project Types that use that Activity Type, but this doesn't affect data that is part of any project record.

Deleting an Unneeded Project Type

If you want to delete a Project Type and the Delete button is not displayed on the Manage a Project Type page, the Project Type is in use. You can't delete a Project Type that is currently in use by any project. Older projects might be archived, but current projects need to be changed to a new Project Type before the Project Type can be deleted. If the Delete button is displayed, you can delete the Project Type and it will have no effect on any projects or Project Type components.

Using Project Types

Selecting a Project Type

Selection of a Project Type is the first step in adding a new project to Kavi Status Tracker. If you are unsure which project to select, you may examine Project Types through the Project Type tool if you are a Status Tracker Super Admin. If you are a Status Tracker Admin, look at related projects to see which Project Type is in use.

Once you select the Project Type, all the Project States, Activity Types, project and activity data fields are installed for the new project. If Submissions are available, the submission forms are installed as well.

If you find you have selected the wrong type, you can switch to the correct Project Type later.

Changing a Project's Project Type

If a project needs to be switched to a different Project Type for any reason, use the Change Project Type tool. Any Project States, Activity Types, Submission forms or data fields that were not present in the prior Project Type will become instantly available. Any that were present in the prior type but do not exist in the new Project Type will go away, but if the data field was populated or the Activity Type was used in the project schedule, this data remains intact as part of the project record.

Chapter 8. Kavi Status Tracker Setup

Overview

Here are general instructions that Super Admins can follow when configuring Kavi Status Tracker. This document describes the overall setup process and provides links to detailed Concepts and How To documents that can be consulted for more information on each component. As explained in Requirements and Initial Preparation, the requirements phase is easiest if you work from the top down, beginning with the top-level Project Types then drilling down to identify how the various Project Type components need to be configured. When you begin the actual Setup Process, you'll work in reverse, configuring the components first, then assembling the Project Types last.

Requirements and Initial Preparation

To begin, detailed requirements are needed to define the kinds of projects the organization wants to track, the states or stages that each type of project goes through during its lifecycle and the activities that occur during project development. Ideally, the requirements identify custom project data fields and activity data fields that need to be added. Kavi provides a requirements worksheet to customers, and if you have a completed copy of the worksheet, you may skip to Setup Process in the second half of this document.

If you haven't completed the worksheet or have questions about it, read whatever. This section describes basic data preparation and includes pointers to Concepts documents that explain the different components of the Kavi Status Tracker, such as Project States, data fields and Activity Types, and how these are assembled to build robust Project Types.

The requirements should be comprehensive, but it isn't necessary to cover every possible contingency before setup, since Project Types and components can be added later. On the other hand, you want to make sure that all the basic components are in place so that your activities can be tracked and reported on from day one.

Step 1: Identify Project Types

Begin at the top by identifying which Project Types your organization wants to track, then drill down into the components of each Project Type, as described in the following sections. Project Types are project-tracking templates that include Project States, Activity Types and data fields. Kavi Status Tracker comes with three default Project Types as examples: 'Standards', 'Technical Report' and 'Revise Operating Procedures'. The set of Project Types used on your website may bear little resemblance to the defaults, but the defaults can serve as examples.

See the Concepts document Project Types and Project Tracking for more information.

Step 2: Identify Project States

Project States are an ordered series of states assigned to a project sequentially as the project passes from one phase to another, or crosses a significant threshold, during its lifecycle (e.g., 'Proposal', 'In Development', 'At Ballot', 'Approved', etc.). The list of Project States is displayed when a Project Type is added so that the Super Admin can select which Project States will be available for projects of that type.

See the Concepts document Managing Project States for more information on identifying and configuring Project States.

Step 3: Identify Submissions (Optional)

If the Submissions module is enabled on your website, the ANSI BSR-9 Submission form will be added automatically. Your organization may wish to have additional submission forms built to suit, such as a form to submit the finished document for publication. Consult Kavi or a Kavi-authorized channel partner for more information.

Step 4: Identify Activity Types

An Activity Type is a template used when scheduling or recording a project activity. When a user adds an activity to a project schedule, the user selects the activity and the activity data fields associated with this Activity Type are automatically installed.

See the Concepts document Configuring Activity Types for more information, including tips for keeping the list of Activity Types comprehensive yet streamlined.

Step 5: Identify Activity Data Fields

Activity Types are associated with activity data fields so that the relevant information can be collected about each of the activities your organization tracks. The default Activity Data Fields are automatically associated with each Activity Type and are adequate for most purposes, but some of your organization's activities may require additional fields.

Kinds of Activity Data Fields

- The Default Activity Data Fields are automatically assigned to every Activity Type.
- For any Activity Type that needs an extra field, list that field in parentheses after the Activity Type. A data field can be used by more than one Activity Type.
- Are there fields that should be included in displays of the project that have not yet been identified? Add these to the list.

Step 6: Identify Project Data Fields

Project Data Fields store information about a project, rather than its activities. There are only a few default Project Data Fields, so most project data fields on your site will be custom.

Kinds of Project Data Fields

- General project metadata that is entered when the project is added such as title, description, etc.
- Relationships between groups stored in the Kavi® Groups database and individual users stored in the Kavi® Members database and projects are established through data lookup fields. The default examples are 'Project Editor', which is used to select an individual from Kavi Members; and 'Owning Group' and 'Consensus Body', which is used to select a group (or groups) from Kavi Groups. These relationships can be used to confer administrative access on Project Recorders.
- Data collected as the project progresses, such as a link to a ballot results report that is stored in Kavi Groups.
- Data that is added after the document has been approved by the organization. These data fields commonly include information about submissions or publication.
- Data fields that are needed for one or more project displays.

Step 7: Specify Administrative Access Rules

Users who are granted administrative access to a project can edit project state, other project data and manage project activities. The Status Tracker Admin has administrative access to all the organization's projects, but other kinds of users can be assigned as 'Project Managers' if desired. Project Recorders have administrative access to a specific project only. Access is configured through the Configure Status Tracker tool.

- 'Project Managers' may belong to a specific group that is associated with the project through Kavi Groups. Usually this is either the 'Owning Group' or the 'Consensus Body'. If administrative access is granted through a group's relationship to a project, the 'Group Chair' and 'Document Manager' (i.e., any group member with document management privileges) will have administrative access to the project.
- An individual who has a relationship with the project, such as the 'Project Editor', may also be designated as a 'Project Manager'.
- Decide whether 'Project Managers' should be allowed to delete a project or not.

For more information, see the Concepts document Access Control.

Step 8: Identify Custom Views and Reports

Kavi Status Tracker can be configured to display default and custom reports in the Members Area by selecting the reports in the Member Accessible Reports tool. Status Tracker Super Admins may add custom reports through the Report Builder tool or your organization may want displays that can't be generated through the Report Builder and need to be created by custom engineers.

1. Identify the audiences that the organization wants to see displays of its projects. This may include groups associated with the project, the organization's membership and the general public. Now determine what kinds of information should be presented to each of these audiences.

2. Determine which of these needs can be served through the default project and activity data reports, which can be served by building custom reports in the Kavi Report Builder and which must be custom engineered.

The Configuration Process

Perform these steps in order.

Step 1: Add Non-Default Project and Activity Data Fields

Any additional fields must be added by Kavi or an authorized channel partner before site setup begins because these fields are needed to configure Activity Types and Project Types, and can be used when setting Project Recorder access.

For more information, see the preceding sections Identify Activity Data Fields and Identify Project Data Fields.

Step 2: Add Submissions (Optional)

Kavi or a Kavi-authorized channel partner can enable the submissions module and add any built-to-suit submissions you want on your website.

Step 3: Configure Access

Set global configuration options and configure access through the Configure Kavi Status Tracker tool. For more information, see the instructions for the Configure Kavi Status Tracker tool.

For more information, see the preceding section Specify Administrative Access Rules or the Concepts document Access Control.

Step 4: Add Project States

Click the Project States link on the Super Admin menu and use the Add a Project State tool to add the global list of Project States in the same order as those on the list.

For more information, see the preceding section Identify Project States or the Concepts document Managing Project States.

Step 5: Add Activity Types

Click the Activity Types link on the Super Admin menu and use the Add an Activity Type tool to add the global list of Activity Types in the same order as those on the list. The default activity data fields are added for every Activity Type. Select from the custom activity data fields as needed.

For more information, see the preceding section Identify Activity Types or the Concepts document Configuring Activity Types.

Step 6: Add Project Types

Now you are ready to add Project Types. Click the Project Types link on the Super Admin menu and use the Add a Project Type tool to add Project Types. For each Project Type, select the Project States that apply. The default project data fields are added for every Project Type. Select from the custom project data fields as needed. Activity Types are selected as a separate step through the Edit Associated Activity Types tool.

For more information, see the Concepts document Project Type Configuration and Use.

Step 7: Set Up Reports and Views

The Kavi Report Builder tool is the easiest way to generate views. Custom reports can be crafted for display to audiences with different levels of access from groups closely associated with the project to the general membership to the public.

- All that a Kavi Status Super Admin has to do to make a Kavi Report Builder report available in the Members Area is select it from the list presented in the Member Accessible Reports tool. The Super Admin can also configure custom reports if desired.
- Additional views can be created by adding a Status Tracker tab in the Group Home area or built-to-suit displays for the public, etc.

Part II. Kavi Status Tracker Member Tools

Account holders can view any member-accessible project and activity reports. Depending on configuration, certain users may be able to view projects they are associated with and edit the project schedule and metadata.

Chapter 9. Projects

Overview

The Projects page is used to view all the projects tracked in the Kavi Status Tracker to which you have access. If you are a Project Recorder you will see links to tools that you can use to manage these projects.

Use the Projects page to:

- View all projects to which you have access.
- Access tools to view and manage these projects and project activities.

Options

View all existing projects or search for specific projects by name or Project Type. Change the number of projects displayed per page if desired. To view or manage a project, click the Details link. To view or update a project's activity schedule, click the Project Activities link.

Name	The name of this project.
Project State	The Project State currently assigned to this project.
Project Type	The Project Type on which this project is based.
Action	Click Details to go to the Project Details page where you can view more information about a project and access tools that let you edit project details and project activities.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Project Details
- Project Activities

- Edit Project Details

Chapter 10. Project Details

Overview

The Project Details page is used to view project data and activities and access tools used to manage this data.

Use Project Details to:

View project data and access tools you can use to edit project metadata, or schedule and record activities.

How to Use Project Details

Project data id displayed for you to review. To edit project data, click Edit Project Details. To view or manage scheduled activities, click the Project Activities link.

Here are descriptions of some default project data fields. Your project may not include all these fields and is likely to include additional fields that are specific to your organization.

Name	The name of this project.
Project Type	The Project Type on which this project is based.
Project State	The Project State currently assigned to this project.
Last Modified	The Last Modified datestamp, set the last time that project data changed.
Project Editor	A default lookup field that stores the name of an individual from the Kavi Members database who is associated with the project. The field creates a person-to-project relationship that may be semantic only, or may be used to confer Project Recorder privileges. The default Project Editor field is used to identify the individual who is responsible for editing the draft standard or other project document deliverable. Your project may not use this field or may have similar fields with somewhat different definitions and uses.
Owning Group	A default lookup field that stores the name of a group from the Kavi Groups database that is associated with the project. The field creates a group-to-project relationship that may be semantic only, or may be used to confer Project Recorder privileges on the Group Chair and Document Managers. The default definition of Owning Group is the group responsible for the development of the standard or other project document deliverable. Your

	project may not use this field or may have similar fields with somewhat different definitions and uses.
Consensus Body	A default lookup field that stores the name of a group from the Kavi Groups database that is associated with the project. The field creates a group-to-project relationship that may be semantic only, or may be used to confer Project Recorder privileges on the Group Chair and Document Managers. The default definition of Consensus Body is the group that is responsible for final approval of the standard or other project document deliverable. Your project may not use this field or may have similar fields with somewhat different definitions and uses.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects
- Project Activities
- Edit Project Details

Chapter 11. Edit Project Details

Overview

The Edit Project Details tool is used to edit project metadata as new information becomes available over the course of the project. The most important project data field is Project State, which is reset as the project progresses through its lifecycle.

Use Edit Project Details to:

Edit Project State and other project data.

How to Edit Project Details

Edit the Project State and other project data fields as desired. When you are satisfied with your settings, click the Edit button.

There are only two fields required by default. Most of the data fields will be custom to your organization.

Name	Enter a name for this new project.
Project State	Set the Project State as desired. As the Project State changes, the project may become eligible for inclusions in different kinds of displays (e.g., if the state changed to 'Published' the project might be included in a display of published standards.

When you are satisfied with your edits, click the Edit button. The Project Details page is displayed so you can review the results.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects
- Project Details

- Project Activities

Chapter 12. Project Activities

Overview

The Project Activities page is used to view the project activity schedule and access tools for scheduling and recording activities. Click buttons to view and access Project Details, Add an Activity singly or Schedule Activities in bulk. If an activity is already scheduled but not yet recorded, the Record Activity link is displayed in the Date Occurred column. The Action column displays a link to the Activity Details tool where you can view and manage a specific activity.

Use Project Activities to:

View this project's activity schedule and access tools to manage it.

How to Use the Project Activities Page

View all activities for this project or search for activities by Activity Type. You may change the number of activities displayed in this activities list if desired, or sort activities by date scheduled or date occurred.

Tools

- To view or edit project metadata, click the Project Details button.
- To add a new activity, click the Add an Activity button.
- To view, edit or add project activies in bulk, click the Schedule Activities button.
- To view activity details, click Manage Details in the Action column.
- To record a scheduled activity, click Record Activity in the Date Occured column.

Project Fields

Name	The name of this project.
Project State	The Project State currently assigned to this project.
Last Modified	The Last Modified datestamp, set the last time that project data changed.

Activity Fields

Date	TBD--What does this do? What are the rules for setting this value?
Date Scheduled	The date this activity is scheduled to occur. This field may be empty if the activity wasn't scheduled in advance.
Date Occurred	The date recorded as the actual date that the activity occurred.
Activity Type	The Activity Type on which this activity is based.
Action	Use the View Details link in this column to view and manage activity data.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Schedule Activities
- Add an Activity
- Activity Details
- Edit Activity Details

Chapter 13. Schedule Activities

Overview

The Schedule Activities page is used to view and schedule project activities in bulk. This is especially useful when setting up a project schedule or when you have to revise a series of scheduled activities.

Note

You cannot record an activity (i.e., set the Date Occurred) or edit activity details through this tool. When you are done editing the schedule you will be taken to the Project Activities page where you can use the Record Activity link to access the Edit Activity Details tool.

Use Schedule Activities to:

View and revise this project's activity schedule.

How to Schedule Activities

View all scheduled and recorded activities for this project. You may sort activities by Activity Type, by date scheduled or by date occurred. You may use the 'Results per page' pull-down list and Change button if you want a different number of activities to be displayed.

To schedule a new activity or change the date on an activity that is already scheduled, enter a date in MM/DD/YYYY format.

When are satisified with your settings click the Save button. You are taken to the Project Activities page to review the schedule. Click the Record Activity link if you want to Edit Activity Details.

Project Fields

Name	The name of this project.
Project State	The Project State currently assigned to this project.
Last Modified	The Last Modified datestamp, set the last time that project data changed.

Activity Fields

Activity Type	The Activity Type on which this activity is based.
Date Scheduled	The date this activity is scheduled to occur. This field may be empty if the activity wasn't scheduled in advance.
Date Occurred	The date recorded as the actual date that the activity occurred.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Project Activities
- Add an Activity
- Activity Details
- Edit Activity Details

Chapter 14. Add an Activity

Overview

Use the Add an Activity tool when you have only one activity to add or when there is detailed information that should be entered as the activity is added. If you want to add multiple activities at once, use the Schedule Activities tool instead.

The tool displays a list of all available Activity Types. Select the Activity Type on which your activity will be based.

On the next step, a form displays instructions for adding an activity of this type, plus data collection fields associated with this type of activity. An asterisk indicates that a field is required. Click the calendar icons to set the Date Scheduled or Date Occurred fields (or enter text in MM/DD/YYYY format). If the activity has already occurred and you just want to record it, you may enter the date in the Date Occurred field only and leave the Date Scheduled field blank. If you want to schedule an activity for the future, you may enter the date in the Date Scheduled field only and leave the Date Occurred field blank for now.

As soon as you've set the activity details and click Save, this activity will appear in the activity schedule. As you can see from the Activity Details page, your name has been automatically entered as the Submitter of this activity.

Use Add an Activity to:

Add an activity to this project's activity schedule.

How to Add an Activity

Select the Activity Type on which this activity will be based, then set values for all required fields and any optional fields for which data is available at this time. When you are satisfied with your settings, click the Save button.

Select Activity Type

All Activity Types associated with this project are displayed. Select the appropriate type of activity, then click the Select button to proceed to the next step.

Add

Set values for all required fields, plus any optional fields for which you have data. An asterisk indicates that a field is required.

To set the Date Scheduled or Date Occurred fields, click the calendar icons or enter text in MM/DD/YYYY format. If the activity has already occurred and you just want to record it, you may enter the date in the Date Occurred field only and leave the Date Scheduled field blank. If you want to schedule an activity for the future, you may enter the date in the Date Scheduled field only and leave the Date Occurred field blank for now. You may enter dates for both fields if you are recording an activity that occurred in the past and you want the Date Scheduled to appear in Project Data Reports.

Name	The name of this project.
Activity Type	The Activity Type on which this activity is based.
Date Scheduled	The date this activity is scheduled to occur. This field is usually only populated if an activity is scheduled in advance. In MM/DD/YYYY format.
Date Occurred	The date this activity actually occurred. This field is populated when the activity is recorded. If the activity was not scheduled in advance, the Date Occurred field is set when the activity is added and the Date Scheduled field remains empty. If the activity is scheduled in advance, this field is left blank until the activity is recorded. In MM/DD/YYYY format.
Last Modified	The Last Modified Date for this activity. Set automatically by Kavi Status Tracker.
Summary	A short summary of this activity. This optional field is present in all Activity Types by default.
Note	A field used to store notes about this activity. This optional field is present in all Activity Types by default.
Select Document	A field used to upload a document that is relevant to this activity. This optional field is created by default but isn't necessarily present in all Activity Types.
Select Ballot	A field used to select a ballot to associate with this activity. This optional field is created by default but isn't necessarily present in all Activity Types. It is generally used for balloting activities only.
Select Group	A field used to select a group with which this activity is associated. This optional field is created by default but isn't necessarily present in all Activity Types.

Done

You've just added a new project and the Activity Details page is displayed so you can review your new activity.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Schedule Activities
- Project Activities
- Activity Details
- Edit Activity Details

Chapter 15. Activity Details

Overview

Use the Activity Details page to view all the details about an activity. Click the link to the Edit Activity Details tool if you want to update the activity dates or other data.

Use Activity Details to:

View activity data and access tools used to manage this activity.

How to Use the Activity Details Page

All available activity data is displayed, including the Date Scheduled and Date Occurred.

To update the activity, information, click the Edit Activity button.

Name	The name of this project.
Activity Type	The Activity Type on which this activity is based.
Date Scheduled	The date this activity is scheduled to occur. This field is usually only populated if an activity is scheduled in advance. In MM/DD/YYYY format.
Date Occurred	The date this activity actually occurred. This field is populated when the activity is recorded. If the activity was not scheduled in advance, the Date Occurred field is set when the activity is added and the Date Scheduled field remains empty. If the activity is scheduled in advance, this field is left blank until the activity is recorded. In MM/DD/YYYY format.
Last Modified	The Last Modified Date for this activity. Set automatically by Kavi Status Tracker.
Submitter	The Submitter of this activity. Required by default.
Summary	A short summary of this activity. This optional field is present in all Activity Types by default.
Note	A field used to store notes about this activity. This optional field is present in all Activity Types by default.

Select Document	A field used to upload a document that is relevant to this activity. This optional field is created by default but isn't necessarily present in all Activity Types.
Select Ballot	A field used to select a ballot to associate with this activity. This optional field is created by default but isn't necessarily present in all Activity Types. It is generally used for balloting activities only.
Select Group	A field used to select a group with which this activity is associated. This optional field is created by default but isn't necessarily present in all Activity Types.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Schedule Activities
- Project Activities
- Add an Activity
- Edit Activity Details

Chapter 16. Edit Activity Details

Overview

The Edit Activity Details tool is used to edit activity data as new information becomes available, such as when a task associated with the activity is completed or the activity itself is ready to be recorded.

> **Note**
>
> Once an activity is scheduled, you cannot use Member Area tools to delete it or switch it to a different Activity Type. If you need to do either of these things, contact an administrator.

Use Edit Activity Details to:

Edit activity data.

How to Edit Activity Details

Set values for all required fields, plus any optional fields for which you have data. An asterisk indicates that a field is required.

To set the Date Scheduled or Date Occurred fields, click the calendar icons or enter text in MM/DD/YYYY format. If the activity has already occurred and you just want to record it, you may enter the date in the Date Occurred field only and leave the Date Scheduled field blank. If you want to schedule an activity for the future, you may enter the date in the Date Scheduled field only and leave the Date Occurred field blank for now. You may enter dates for both fields if you are recording an activity that occurred in the past and you want the Date Scheduled to appear in Project Data Reports.

When you are satisified with your edits, click the Save button. The Activity Details page is displayed so you can review the results.

Name	The name of this project.
Activity Type	The Activity Type on which this activity is based.
Date Scheduled	The date this activity is scheduled to occur. This field is usually only populated if an activity is scheduled in advance. In MM/DD/YYYY format.

Date Occurred	The date this activity actually occurred. This field is populated when the activity is recorded. If the activity was not scheduled in advance, the Date Occurred field is set when the activity is added and the Date Scheduled field remains empty. If the activity is scheduled in advance, this field is left blank until the activity is recorded. In MM/DD/YYYY format.
Last Modified	The Last Modified Date for this activity. Set automatically by Kavi Status Tracker.
Submitter	The Submitter of this activity. Required by default.
Summary	A short summary of this activity. This optional field is present in all Activity Types by default.
Note	A field used to store notes about this activity. This optional field is present in all Activity Types by default.
Select Document	A field used to upload a document that is relevant to this activity. This optional field is created by default but isn't necessarily present in all Activity Types.
Select Ballot	A field used to select a ballot to associate with this activity. This optional field is created by default but isn't necessarily present in all Activity Types. It is generally used for balloting activities only.
Select Group	A field used to select a group with which this activity is associated. This optional field is created by default but isn't necessarily present in all Activity Types.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Project Activities
- Schedule Activities
- Add an Activity
- Activity Details

Part III. Kavi Status Tracker Reports

Kavi Status Tracker provides project and activity data reports plus a full log.

Chapter 17. Run a Report

Overview

Use the Run a Report tool to generate reports for your organization with up-to-the-minute content from the Kavi Status Tracker database. Set your search criteria then view the displayed results. If the download option is available, download the report to your desktop to view the complete results.

Report Types

Each of the subheadings under the Reports and Download section of the Report Tools menu corresponds to a Report Type. The Report Type determines what database tables are queried for the report and what kinds of data are available. For more information, see Kavi Status Tracker Report Types in the Appendix.

Prefixed Column Headings

In report results, column headings (i.e., field names) are prefixed to differentiate data fields with identical names that appear in different tables in the database. Project data fields can be prefixed with 'project_' and activity data fields with 'activity_'.

Custom Fields

Reports are likely to include custom fields, which are displayed in the context of their data type (project or activity), following the default fields in that category.

Tips

Tips for running reports:

- Searches that return a smaller set of results are quicker to process and are less taxing on system resources than searches that return a broad set of results. For optimal tool and site performance, devise elegantly restrictive search criteria that returns the results you need without a lot of extraneous data.
- If more than 15 columns are displayed on the Results step, the columns aren't sortable.
- Check box fields don't have operators that you can set. If you select more than one checkbox, the search returns a value for each box that was checked (i.e., an "or" operator is implied).

- Some reports don't include a search form. Simply click Run Report to generate this kind of report.
- Some report results are designed to be viewed online only, in which case the Download button isn't displayed because the results aren't downloadable.

Use the Run a Report tool to:

Generate reports for your organization.

How to Run a Report

Search

Set criteria to select the records you need or run the report without setting search criteria. Depending on the type of search field, you may be able to specify field values and set operators to determine whether the results include the specified value, exclude the value, etc. If this is a date field, operators such as 'is before' or 'is after' allow you to set date ranges. Field types are described in the following list.

Field Types:

check boxes	Click one or more checkboxes to set search criteria. An 'or' operator is implied, so if you select multiple boxes, the results will include records that match any of your selections. If you select all checkboxes (or none of them), the results will be unrestricted by values in this field.
text box	Enter the search value in the text box and select your operator from the pulldown list. Available operators: 'is', 'is not', 'contains', 'does not contain'.
list box	Select the search value from the pulldown list, then select your operator. Available operators: 'is', 'is not'.
date	Set the Month, Day and Year, then set your operator. Available operators: 'is', 'is not', 'is before', 'is after'.
Boolean pulldown list	Boolean values consist of a pair of mutually exclusive states, such as 'Active' or 'Inactive' status, plus a value that returns either status. Select the search value from the pulldown list, then select the operator. Available operators: 'is', 'is not'.

Done

Report results are displayed (providing the report has been configured to present viewable results). If the Download button is displayed, you may download the results. The number of columns included in the viewable results tends to be limited by space considerations, so it is usually necessary to download the report to view the complete results.

Related Topics

- Concepts: Reports and Views
- Appendix: Kavi Status Tracker Report Types
- Activity Data Fields
- Appendix: Project Data Fields
- Page Help: Report Builder
- Full Logs
- Edit a Report

Chapter 18. Full Logs

Overview

The Full Logs tool is used by Report Admins to retrieve information from the Full Logs by create customized views. Every change that occurs in the Kavi Status Tracker database is automatically recorded in the Full Logs. Log entries include when the change occurred, who initiated the change, which fields were affected and the new field values. The Full Logs are highly detailed and some of the information is technical and may not be immediately meaningful to all users. If you encounter information that you don't understand, you may want to consult an administrator.

- The Full Logs show the data object (i.e., dataskin) that changed, rather than the specific project or activity whose information changed.
- The Full Logs show the new values of changed fields.
- The Full Logs offer search capabilities that are not available with other tools, such as the ability to search by item key.

Use the Full Logs tool to:

- Generate a detailed view of real-time changes made to all data fields in the Kavi Status Tracker database.
- Search by item key.
- View the value of a changed field.
- Download this information.

How to Use the Full Logs

Search Log

Set your search criteria using any combination of the available fields. The logs are extensive, so it's best to set your search criteria to narrow the results as much as possible. Set a bounded date range and enter values in text boxes whenever you can. This helps retrieve optimal results in the shortest possible time, with the least drain on system resources.

Note that you can enter full or partial values in the text fields because this tool will perform partial matches. If your first search doesn't return the information you need, see if a partial match will work. This helps eliminate mismatches due to minor variations in the way a name is entered, etc.

Options

After This Time
: Use this field to set a point in time. The Full Logs will include only those changes logged after the time specified.

Before This Time
: Use this field to set a point in time. The Full Logs will include only those changes logged before the time specified.

Note

The time fields can be used together to specify a bounded time range beginning at the time set in the After This Time field and ending at the time set in the Before This Time field.

Who Initiated Action
: Specify a username to search by the user initiating the change.

What Action Was Taken
: Specify an action to search for changes of a specific type (e.g., 'added,' 'edited,' 'deleted,' 'email'), or enter the name of a specialist (i.e., the DataSkin that performs the kind of action that you are trying to locate in the log).

Action Details
: Enter an action detail to search for changes related to that detail (e.g., field name, field value, etc.). The search capabilities provided by this versatile field include the ability to search for email addresses, item key and myriad other details, including partial matches.

Done

Information from the Full Logs is displayed according to the search criteria you provided. Click the Download button if you want to download this information.

You will often see more than one entry (i.e. row) in the report for a single project or activity where each entry has the same exact time. This shows that the data change affected more than one database table.

Note

Because the Full Logs can be extremely long, the length of the results table is limited to 1000 entries. If you have reason to believe that your search results may exceed this limit, try setting more restrictive search criteria.

The report displays the following columns:

When	The date and time of the change.
Who Initiated Action	The username of the user initiating the change. The username 'system' indicates an automated or uploaded change. If this is 'Anonymous User,' the change was made from a publicly accessible page.
What	The type of activity, the database table and the unique item key identifying the data object affected by the change.
Details	The names of fields affected by the change and the new field values.

Related Topics

- Page Help: Edit a Report
- Full Logs

Part IV. Kavi Status Tracker Admin Tools

Tools that Status Tracker Admins use to add, view and manage projects and project activities.

Chapter 19. Projects

Overview

The Projects page is used to view all projects tracked in the Kavi Status Tracker and access tools used to manage existing projects or add new ones.

Use the Projects page to:

- View all existing projects.
- Access tools to add a new project or view and manage existing projects.
- Access tools used to view and manage a project's activities.

Options

View all existing projects or search for specific projects by name or Project Type. Change the number of projects displayed per page if desired. If you want to add a project, click the link to Add a New Project. To view or manage an existing project, click the Details link. To view or update a project's activity schedule, click the Project Activities link.

Name	The name of this project.
Project State	The Project State currently assigned to this project.
Project Type	The Project Type on which this project is based.
Action	Click Details to go to the Project Details page where you can view more information about a project and access tools that let you edit project details, project activities and Change Project Type. If You may also be able to delete a project, depending on configuration. If the Submissions module is installed, a link to the Project Submissions tool is displayed.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State

- Page Help: Add a Project
- Project Details
- Project Submissions
- Project Activities
- Edit Project Details
- Change Project Type
- Delete a Project

Chapter 20. Project Details

Overview

The Project Details page is used to view project data and activities and access tools used to manage this data.

Use Project Details to:

View project data and access tools to .

How to Use Project Details

View project data fields and access tools used to track project activities. To view or edit project data, click Edit Project Details. To view or manage scheduled activities, click the Project Activities link. To switch to a different Project Type, click Change Project Type.

Here are descriptions of some default project data fields. Your project may not include all these fields and is likely to include additional fields that are specific to your organization.

Name	The name of this project.
Project Type	The Project Type on which this project is based.
Project State	The Project State currently assigned to this project.
Last Modified	The Last Modified datestamp, set the last time that project data changed.
Project Editor	A default lookup field that stores the name of an individual from the Kavi Members database who is associated with the project. The field creates a person-to-project relationship that may be semantic only, or may be used to confer Project Recorder privileges. The default Project Editor field is used to identify the individual who is responsible for editing the draft standard or other project document deliverable. Your project may not use this field or may have similar fields with somewhat different definitions and uses.
Owning Group	A default lookup field that stores the name of a group from the Kavi Groups database that is associated with the project. The field creates a group-to-project relationship that may be semantic only, or may be used to confer Project Recorder privileges on the Group Chair and Document Managers. The default definition of Owning Group is the group responsible for the development of the standard or other project document deliverable. Your

	project may not use this field or may have similar fields with somewhat different definitions and uses.
Consensus Body	A default lookup field that stores the name of a group from the Kavi Groups database that is associated with the project. The field creates a group-to-project relationship that may be semantic only, or may be used to confer Project Recorder privileges on the Group Chair and Document Managers. The default definition of Consensus Body is the group that is responsible for final approval of the standard or other project document deliverable. Your project may not use this field or may have similar fields with somewhat different definitions and uses.
Designation	The designation field is used to store an ANSI or other designation assigned when the standard is approved. This default field is only used for standards projects.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects tool
- Project Details
- Edit Project Details
- Delete a Project
- Project Activities
- Project Submissions
- Project Activities
- Change Project Type

Chapter 21. Add a Project

Overview

The Add a Project tool is used to add a new Project to the Kavi Status Tracker. All available Project Types are displayed. Select the one on which your project should be based. You will be taken to the Project Details tool, which displays the data collection fields associated with this Project Type. Set the Project State and enter other available data. An asterisk indicates that the field is required. As soon as you're done adding project details you can begin to schedule and record activities.

Use Add a Project to:

Add a project so it's status can be tracked.

How to Add a Project

Select the Project Type on which your new project should be based, then enter the project name and set the values of all required fields and any optional fields for which data is available at this time. When you are satisfied with your settings, click the Add button.

Add

There are only two fields required by default. Most of the data fields will be custom to your organization.

Name	Enter a name for this new project.
Project State	Set the initial value of the Project State (e.g., 'Proposal').

Done

You've just added a new project and the Project Details page is displayed so you can set the Project State and other details. Once this is done, project activities can be scheduled at any time.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects tool
- Project Details
- Edit Project Details
- Delete a Project
- Change Project Type
- Project Submissions
- Project Activities

Chapter 22. Edit Project Details

Overview

The Edit Project Details tool is used to edit project metadata as new information becomes available over the course of the project. These data fields may include those that are already populated, but have changed, and those for which information was not previously available. The most important of these fields is Project State, which has to be reset as the project progresses through its lifecycle. Data that may not be available in early stages of the project includes the document title, URL and price.

Use the Change Project Type tool if you want to switch to a different Project Type.

Use Edit Project Details to:

Edit Project State and other project data.

How to Edit Project Details

Edit

Edit the Project State and other project data fields as desired. When you are satisfied with your settings, click the Edit button.

There are only two fields required by default. Most of the data fields will be custom to your organization.

Name	Enter a name for this new project.
Project State	Set the Project State as desired. As the Project State changes, the project may become eligible for inclusions in different kinds of displays (e.g., if the state changed to 'Published' the project might be included in a display of published standards.

Done

You've just edited a project and the Project Details page is displayed so you can review project configuration and data.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects page
- Project Details
- Add a Project
- Delete a Project
- Project Activities
- Change Project Type
- Project Submissions

Chapter 23. Delete a Project

Overview

The Delete a Project tool is used to permanently delete a project and all project and related activity data from the Kavi Status Tracker. This tool is only available if the Project Deletion option is enabled in Configure Kavi Status Tracker..

> **Important**
>
> Deleting a project permanently deletes all records of the project and its activities from the Kavi Status Tracker database. If you would prefer to have these records archived, do NOT delete the project. Instead, you should contact Kavi to have the records archived before the project is removed.

Use Delete a Project to:

Permanently delete a project from the Kavi Status Tracker.

How to Delete a Project

Delete

Project details are displayed for you to review. If you are sure you want to permanently remove this project and all its activities from the Kavi Status Tracker database, click the Delete button.

Done

You've just permanently deleted this project!

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects tool

- Project Details
- Add a Project
- Edit Project Details
- Project Activities

Chapter 24. Change Project Type

Overview

The Change Project Type tool is used to change the underlying Project Type on which a project is based. When Project Type is changed, data fields that exist in the original Project Type, but not in the new one, are no longer displayed in project tools used to edit the project or schedule activities. The data in these obsolete fields is retained in the Kavi Status Tracker database and can be retrieved through downloaded reports, if desired. New data fields may become available, along with a different set of Project States and Activity Types.

Use Change Project Type to:

Switch a project to a more appropriate Project Type.

How to Change Project Type

Change

All available Project Types are displayed. Select the preferred type and click the Change Type button. If you are a Status Tracker Super Admin and would like more information about the available Project Types, see the Project Types tool in the Super Admin menu.

Done

You've just changed the Project Type for this project! Any differences in available data fields, Project States and Activity Types go into effect immediately. The Edit Project Details tool is displayed so you can add information to any new project data fields.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects tool

- Project Details
- Add a Project
- Edit Project Details
- Project Activities

Chapter 25. Project Submissions

Overview

The Project Submissions tool is used to view built-in forms that can be completed online then submitted via email to the appropriate recipient, such as ANSI. This tool is only available if the Kavi Submissions module is enabled on your website and the Submissions option was selected for use in projects of this Project Type.

For Kavi Status Tracker 1.0, only the ANSI BSR-9 Submission Form is available by default. Your organization may have one or more additional built-to-suit submission forms that make it easy to submit project information to an organization or publisher.

The Project Submissions page is accessible through a button at the top of the Project Details page.

Use Project Submissions to:

View all available submission options and select the one you want to submit.

How to Use Project Submissions

The Project Submissions page lists the ANSI BSR-9 Submission form plus any additional online submission forms specific to your organization. Click the Submit link for the form you wish to submit.

You will be taken through a series of webforms that you can complete and send, along with any attachments, to the appropriate recipient. Submissions sent from Kavi Status Tracker Submissions tools are recorded in the project activity schedule and automatically archived via mailing list archives.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects tool

- Project Details
- Add a Project
- Edit Project Details
- Project Activities

Chapter 26. Submit the BSR-9

Overview

The Submit the BSR-9 tool provides a built-in version of the ANSI BSR-9 that you complete online, then submit to ANSI (along with all the appropriate attachments) with the click of a button. The built-in ANSI BSR-9 has been verified as a faithful replica of the current ANSI BSR-9 form by ANSI. The email sent to ANSI presents information in an easy-to-read tabular format that faithfully follows the structure of the ANSI BSR-9 form.

This form is accessed through the Project Submissions page. It is only available if the Kavi Submissions module is installed on your site and submissions are enabled in the underlying Project Type on which this project is based.

When you submit the form, the event is automatically recorded as an activity in the Activity Schedule. A copy of the submission form email is sent to a mailing list created specifically for this purpose, so that the submission forms email and it's attachments are automatically archived. The mailing list address takes the general form 'status_tracker@example.org'. A link to the status_tracker mailing list appears on the Admin Home page in the Mailing Lists section. Click this link to visit the status_tracker Mailing List Home page. This is a moderated mailing list, so the message must be approved by a moderator before it will be posted. Once posted, administrators can view the message and its attachments in the archives.

Use Submit the BSR-9 to:

Complete the ANSI BSR-9 form online and submit it to ANSI via email.

How to Submit the BSR-9

After clicking the Submit link on the Project Submissions page, you are taken to the ANSI BSR-9 Submission tool.

Submit Project

Forms are displayed to collect the information you need to submit to ANSI. Enter detailed information about the project, including the Project Intent, which is required. Enter all available information, even if the field is not required. Project Intent is used to determine which form fields are displayed as required or optional on the following step, and filters out any fields that are irrelevant to the selected Project Intent.

Submit Details

The main sections of the BSR-9 form is displayed to collect the detailed information you need to submit to ANSI. You will see fields that allow you to upload supporting documentation such as ballot results, rosters, evidence of balance in the consensus body, the PINS Deliberation Document and other information stored in Kavi Groups. When the form is emailed, these documents will be added as attachments.

When you have completed the form, click the Preview BSR-9 Email button. You will be taken to a page where you can review your edits or perform a test run before submitting this form to ANSI.

Review

The completed BSR-9 form is displayed for you to review. If you want to make any changes, click the Back button. To perform a test run, use the Test Submission field. Enter the email address where you would like the form and attachments sent, then click the Test Submit button. It may take a few minutes for the email to appear in your mailbox, depending on the volume of email currently being processed by the mail servers. When you are ready to send the completed form to ANSI, click the Submit BSR-9 to ANSI button.

Done

Confirmation of the successful submission of the form is displayed. A copy of the submission email has been sent to the status_tracker mailing list and can be viewed as soon as the mailing list archives are updated.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Projects tool
- Project Details
- Add a Project
- Edit Project Details
- Project Activities

Chapter 27. Project Activities

Overview

The Project Activities page is used to view the project activity schedule and access tools used to manage these activities in bulk or singly. You can record activities that were previously scheduled but have not yet been recorded or click a link to view and manage activity details. There is also a link to the Project Details tool.

Use Project Activities to:

View this project's activity schedule and access tools to manage it.

How to Use the Project Activities Page

View all activities for this project or search for activities by Activity Type. You may change the number of activities displayed in this activities list if desired, or sort activities by date scheduled or date occurred.

Tools

- To view or edit project metadata, click the Project Details button.
- To add a new activity, click the Add an Activity button.
- To view or edit project activies in bulk, click the Schedule Activities button.
- To view activity details, click Manage Details in the Action column.
- To record a scheduled activity, click Record Activity in the Date Occured column.

Project Fields

Name	The name of this project.
Project State	The Project State currently assigned to this project.
Last Modified	The Last Modified datestamp, set the last time that project data changed.

Activity Fields

Date	TBD--What does this do? What are the rules for setting this value?
Date Scheduled	The date this activity is scheduled to occur. This field may be empty if the activity wasn't scheduled in advance.
Date Occurred	The date recorded as the actual date that the activity occurred.
Activity Type	The Activity Type on which this activity is based.
Action	Use the Manage Details link in this column to view and manage activity data.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Schedule Activities
- Add an Activity
- Activity Details
- Edit Activity Details
- Change Activity Type
- Delete an Activity

Chapter 28. Schedule Activities

Overview

The Schedule Activities page is used to view and schedule project activities in bulk. This is especially useful when setting up a project schedule or when you have to revise a series of scheduled activities.

Note

You cannot record an activity or edit activity details through this tool. When you are done editing the schedule you are taken to the Project Activities page where you can use the Record Activity link to access the Edit Activity Details tool. When you use the Edit Activity Details page, the current date is automatically entered in the Date Occurred field. If you do not wish to record the activity at this time, delete the value in the Date Occurred field.

Use Schedule Activities to:

View this project's activity schedule and schedule or revise as activities as necessary.

How to Schedule Activities

View all scheduled and recorded activities for this project. You may sort activities by Activity Type, by date scheduled or by date occurred. You may use the 'Results per page' pull-down list and Change button if you want to have a different number of activities displayed.

To schedule a new activity or change the date on an activity that is already scheduled, enter a date in MM/DD/YYYY format.

When are satisified with your settings click the Save button. You are taken to the Project Activities page to review the schedule. Click the Record Activity link if you want to Edit Activity Details.

Project Fields

Name	The name of this project.
Project State	The Project State currently assigned to this project.
Last Modified	The Last Modified datestamp, set the last time that project data changed.

Activity Fields

Activity Type	The Activity Type on which this activity is based.
Timeline	The timeline shows the date that an activity occurred. If the activity has been scheduled but not recorded, this field shows the date on which the activity is scheduled to occur.
Date Scheduled	The date this activity is scheduled to occur. This field may be empty if the activity wasn't scheduled in advance.
Date Occurred	The date recorded as the actual date that the activity occurred.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Project Activities
- Add an Activity
- Activity Details
- Edit Activity Details
- Change Activity Type
- Delete an Activity

Chapter 29. Add an Activity

Overview

The Add an Activity tool is used to add a new activity to a project in the Kavi Status Tracker. Use the Add an Activity tool when you have only one activity to add or when there is detailed information that should be entered as the activity is added. If you want to add multiple activities at once, use the Schedule Activities tool instead.

All available Activity Types are displayed. Select the one on which your activity should be based.

On the next step, a form displays instructions for adding an activity of this type, plus data collection fields associated with this type of activity. An asterisk indicates that a field is required. Set the Submitter and enter other available data.

Click the calendar icons to set the Date Scheduled or Date Occurred fields (or enter text in MM/DD/YYYY format). If the activity has already occurred and you just want to record it, you may enter the date in the Date Occurred field only and leave the Date Scheduled field blank. If you want to schedule an activity for the future, you may enter the date in the Date Scheduled field only and leave the Date Occurred field blank for now.

As soon as you're done adding the activity details, this activity will appear in the activity schedule.

Use Add an Activity to:

Add an activity to this project's activity schedule.

How to Add an Activity

Select the Activity Type on which this activity will be based. Set the Submitter and values for any other required fields, plus the Date Scheduled or Date Occurred and any optional fields for which data is available at this time.

Select Activity Type

All Activity Types associated with this project are displayed. Select the appropriate type of activity, then click the Select button to proceed to the next step.

Add

Set values for all required fields, plus any optional fields for which you have data. An asterisk indicates that a field is required.

To set the Date Scheduled or Date Occurred fields, click the calendar icons or enter text in MM/DD/YYYY format. If the activity has already occurred and you just want to record it, you may enter the date in the Date Occurred field only and leave the Date Scheduled field blank. If you want to schedule an activity for the future, you may enter the date in the Date Scheduled field only and leave the Date Occurred field blank for now. You may enter dates for both fields if you are recording an activity that occurred in the past and you want the Date Scheduled to appear in Project Data Reports.

Name	The name of this project.
Activity Type	The Activity Type on which this activity is based.
Date Scheduled	The date this activity is scheduled to occur. This field is usually only populated if an activity is scheduled in advance. In MM/DD/YYYY format.
Date Occurred	The date this activity actually occurred. This field is populated when the activity is recorded. If the activity was not scheduled in advance, the Date Occurred field is set when the activity is added and the Date Scheduled field remains empty. If the activity is scheduled in advance, this field is left blank until the activity is recorded. In MM/DD/YYYY format.
Last Modified	The Last Modified Date for this activity. Set automatically by Kavi Status Tracker.
Submitter	The Submitter of this activity. Required by default.
Summary	A short summary of this activity. This optional field is present in all Activity Types by default.
Note	A field used to store notes about this activity. This optional field is present in all Activity Types by default.
Select Document	A field used to upload a document that is relevant to this activity. This optional field is created by default but isn't necessarily present in all Activity Types.
Select Ballot	A field used to select a ballot to associate with this activity. This optional field is created by default but isn't necessarily present in all Activity Types. It is generally used for balloting activities only.
Select Group	A field used to select a group with which this activity is associated. This optional field is created by default but isn't necessarily present in all Activity Types.

Done

You've just added a new project and the Activity Details page is displayed so you can review your new activity.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Project Activities
- Schedule Activities
- Add an Activity
- Activity Details
- Edit Activity Details
- Change Activity Type
- Delete an Activity

Chapter 30. Activity Details

Overview

The Activity Details page is used to view all the details about an activity and access tools used to manage the activity.

Use Activity Details to:

View activity data and access tools used to manage this activity.

How to Use the Activity Details Page

View all activity data, including the Date Scheduled and Date Occurred. To update the activity, information, click the Edit Activity button. You can also use the Change Activity Type button if you want to switch to a different Activity Type or the Delete Activity button to permanently remove this activity.

Name	The name of this project.
Activity Type	The Activity Type on which this activity is based.
Date Scheduled	The date this activity is scheduled to occur. This field is usually only populated if an activity is scheduled in advance. In MM/DD/YYYY format.
Date Occurred	The date this activity actually occurred. This field is populated when the activity is recorded. If the activity was not scheduled in advance, the Date Occurred field is set when the activity is added and the Date Scheduled field remains empty. If the activity is scheduled in advance, this field is left blank until the activity is recorded. In MM/DD/YYYY format.
Last Modified	The Last Modified Date for this activity. Set automatically by Kavi Status Tracker.
Submitter	The Submitter of this activity. Required by default.
Summary	A short summary of this activity. This optional field is present in all Activity Types by default.
Note	A field used to store notes about this activity. This optional field is present in all Activity Types by default.

Select Document	A field used to upload a document that is relevant to this activity. This optional field is created by default but isn't necessarily present in all Activity Types.
Select Ballot	A field used to select a ballot to associate with this activity. This optional field is created by default but isn't necessarily present in all Activity Types. It is generally used for balloting activities only.
Select Group	A field used to select a group with which this activity is associated. This optional field is created by default but isn't necessarily present in all Activity Types.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Schedule Activities
- Add an Activity
- Project Activities
- Edit Activity Details
- Change Activity Type
- Delete an Activity

Chapter 31. Edit Activity Details

Overview

The Edit Activity Details tool is used to edit activity data as new information becomes available, such as when a new document becomes available or a scheduled activity is complete and ready to be recorded.

> **Important**
>
> When editing activity details, pay special attention to the Date Scheduled and Date Occurred fields. If the the Date Occurred field hasn't been set already, the value of this field is automatically set to the current date when this activity is edited. If you aren't ready to set the Date Occurred at this time, delete the value in this field so that the field is empty. You may also manually set a different date if desired.

If you want to switch to a different Activity Type, use the Change Activity Type tool instead.

Use Edit Activity Details to:

Edit Date Scheduled or Date Occurred and other activity data.

How to Edit Activity Details

Only the Submitter field is required by default, but additional fields may be required by your organization. You should pay special attention to the Date Scheduled and Date Occurred fields. As previously discussed, the current date is automatically added to the Date Occurred field. If you don't want this date recorded, delete or overwrite the value in this field, entering a date in MM/DD/YYYY format.

When you are satisified with your edits, click the Save button. The Activity Details page is displayed so you can review the results.

Name	The name of this project.
Activity Type	The Activity Type on which this activity is based.
Date Scheduled	The date this activity is scheduled to occur. This field is usually only populated if an activity is scheduled in advance. In MM/DD/YYYY format.
Date Occurred	The date this activity actually occurred. This field is populated when the activity is recorded. If the activity was not scheduled in advance, the Date

	Occurred field is set when the activity is added and the Date Scheduled field remains empty. If the activity is scheduled in advance, this field is left blank until the activity is recorded. In MM/DD/YYYY format.
Last Modified	The Last Modified Date for this activity. Set automatically by Kavi Status Tracker.
Submitter	The Submitter of this activity. Required by default.
Summary	A short summary of this activity. This optional field is present in all Activity Types by default.
Note	A field used to store notes about this activity. This optional field is present in all Activity Types by default.
Select Document	A field used to upload a document that is relevant to this activity. This optional field is created by default but isn't necessarily present in all Activity Types.
Select Ballot	A field used to select a ballot to associate with this activity. This optional field is created by default but isn't necessarily present in all Activity Types. It is generally used for balloting activities only.
Select Group	A field used to select a group with which this activity is associated. This optional field is created by default but isn't necessarily present in all Activity Types.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Schedule Activities
- Add an Activity
- Project Activities
- Activity Details
- Change Activity Type
- Delete an Activity

Chapter 32. Change Activity Type

Overview

The Change Activity Type tool is used to change the underlying Activity Type on which an activity is based. When Activity Type is changed, data fields that exist in the original Activity Type, but not in the new one, are no longer displayed in tools used to view or edit activity details. The data in these obsolete fields is retained in the Kavi Status Tracker database and can be retrieved through downloaded reports, if desired. New data fields may also become available.

Use Change Activity Type to:

Switch an activity to a more appropriate Activity Type.

How to Change Activity Type

Change

All available Activity Types are displayed. Select the preferred type and click the Change Type button. If you are a Status Tracker Super Admin and would like more information about the available Activity Types, see the Activity Types tool in the Super Admin menu.

Done

You've just changed the Activity Type for this activity! Any differences in available data fields go into effect immediately. The Edit Activity Details tool is displayed so you can add information to any new activity data fields.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Schedule Activities

- Add an Activity
- Project Activities
- Activity Details
- Edit Activity Details
- Delete an Activity

Chapter 33. Delete an Activity

Overview

The Delete an Activity tool is used to permanently remove an activity from a specific project. The activity data record is removed from the Kavi Status Tracker database.

Use Delete an Activity to:

Remove an activity from this project.

How to Delete an Activity

Activity details are displayed for you to review. If you are sure you want to permanently remove this activity record from the Kavi Status Tracker database, click the Delete button.

Name	The name of this project.
Activity Type	The Activity Type on which this activity is based.
Date Scheduled	The date this activity is scheduled to occur. This field is usually only populated if an activity is scheduled in advance. In MM/DD/YYYY format.
Date Occurred	The date this activity actually occurred. This field is populated when the activity is recorded. If the activity was not scheduled in advance, the Date Occurred field is set when the activity is added and the Date Scheduled field remains empty. If the activity is scheduled in advance, this field is left blank until the activity is recorded. In MM/DD/YYYY format.
Last Modified	The Last Modified Date for this activity. Set automatically by Kavi Status Tracker.
Submitter	The Submitter of this activity. Required by default.
Summary	A short summary of this activity. This optional field is present in all Activity Types by default.
Note	A field used to store notes about this activity. This optional field is present in all Activity Types by default.

Select Document	A field used to upload a document that is relevant to this activity. This optional field is created by default but isn't necessarily present in all Activity Types.
Select Ballot	A field used to select a ballot to associate with this activity. This optional field is created by default but isn't necessarily present in all Activity Types. It is generally used for balloting activities only.
Select Group	A field used to select a group with which this activity is associated. This optional field is created by default but isn't necessarily present in all Activity Types.

Related Topics

- Concepts: Activity Types and Metadata
- Managing Project State
- Page Help: Schedule Activities
- Add an Activity
- Project Activities
- Activity Details
- Edit Activity Details
- Change Activity Type

Part V. Kavi Status Tracker Super Admin Tools

Page help for Super Admin tools used to configure Kavi Status Tracker and define project and activity access, types, states and custom reports.

Chapter 34. Configure Kavi Status Tracker

Overview

Status Tracker Super Admins use this tool to configure the Kavi Status Tracker during the setup process and to edit settings as needed after setup. Options include the administrative and ANSI email addresses plus access-control settings.

Use the Configure Kavi Status Tracker tool to:

View and edit Kavi Status Tracker settings.

How to Configure Kavi Status Tracker

View the current settings and edit any that should be changed. When you are satisfied with your edits, click the Update Kavi Status Tracker button. It takes a few moments for the application to update. When the update is complete, any changes you made are in effect.

Set Options

Administrative Email Address

The address of the email alias to which all administrative email is sent. Automated email messages sent from the application use this as the return address by default. This address must include the domain (e.g., admin@example.org).

ANSI Submission Email

The email address to which ANSI forms are sent. This address must not be edited except during site setup and testing. If you do edit this address, be sure to set it back to the ANSI email address as described in the instructions on the webpage.

Project Deletion

Set whether a Status Tracker Admin can delete a project through Kavi Status Tracker webtools.

To protect against inadvertent deletion of project data at the end of the project lifecycle, the ability to delete a project may be removed from the UI. This allows the Kavi Status Tracker project record to be archived by a Kavi administrator before a project is deleted.

It isn't possible to delete a project by accidentally clicking the Delete button, since you have to click a second button on the Delete tool form to confirm that you really do want to delete the project, but an administrator might mistakenly select the wrong project or assume that project data is automatically archived rather than permanently removed. If the organization has its own Status Tracker Super Admin or Super Admin on staff, the Super Admin can set this to 'Yes' to temporarily enable deletion while unwanted projects are carefully removed, then set it back to 'No'.

Yes Select the 'Yes' option to allow Status Tracker Admins to delete projects.

No Select the 'No' option if Status Tracker Admins should NOT be allowed to delete projects. When this option is selected, only Kavi administrators can delete projects.

Access by Person

The Status Tracker Admin has administrative access to all the organization's projects, but permission to view and edit project data can be shared with other kinds of users if desired. This field displays types of users who have an individual-to-project relationship (e.g., 'Project Editor'). Select any type of user who should be designated as a 'Project Recorder' and granted access to projects with which the user has a relationship through Member Area tools.

Each option listed here corresponds to a project data lookup field. When a project is added, each lookup field is used to select an individual from the Kavi Members database. The selected users will have Project Recorder access to this project.

Access by Group

These fields display types of groups that have a group-to-project relationship (e.g., 'Owning Group', 'Consensus Body'). Select any type of group whose Chair and Document Managers should be designated as 'Project Recorders' and granted access to a project with which it has a relationship through Member Area tools.

Each option listed here corresponds to a project data lookup field. When a project is added, each lookup field is used to select a group from the Kavi Groups database. Chairs and Document Managers from the selected group will have Project Recorder access to this project.

Done

The administrative email address and access settings are displayed for you to review. If you made any changes, they are now in effect.

Related Topics

- Concepts: Kavi Status Tracker Setup
- Access Control
- Appendix: Default User Types and Project Relationships

Chapter 35. Project Types

Overview

The Project Types tool is used to view all the organization's Project Types and access tools to manage existing types or add new ones.

Project Types are templates used for projects in the Kavi Status Tracker. Each Project Type has a configured set of data fields, Project States and Activity Types. When a project is added, it is based a Project Type so that the appropriate states, activities and fields are available to collect and track the project.

Use the Project Types page to:

- View all existing Project Types.
- Use the Manage link to view Project Type details or access tools used to clone, edit or delete a Project Type.
- Click the Add a Project Type link if you want to add a new Project Type.

How to Use the Project Types Page

Options

Add a Project Type	Click the Add a Project Type link if you want to add a new Project Type.
Manage	Click Manage to go to the Project Type Details page where you can view more information about a Project Type or add, edit, delete or clone a Project Type, or edit the associated Activity Types.

Fields

Name	The name of the Project Type.
Description	The description of the Project Type.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Add a Project Type
- Project Type Details
- Edit a Project Type
- Delete a Project Type

Chapter 36. Project Type Details

Overview

The Project Type Details page is used to view all the information about a specific Project Type, including the Project States, Activity Types and Fields that are associated with this type. This page provides links to tools used to Clone, Edit or Delete this Project Type or to Edit Associated Activity Types. This page is displayed as a results page when a Project Type is added or edited, and when the Manage link on the Project Types page is clicked.

Project Types are templates used for projects in the Kavi Status Tracker. Each Project Type has a configured set of data fields, Project States and Activity Types. When a project is added, it is based a Project Type so that the appropriate states, activities and fields are available to collect and track the project.

Use the Project Type Details page to:

- View all information about this Project Type.
- Access links to edit, clone or delete this Project Type, or edit its associated Activity Types.

How to Use the Project Type Details Page

Options

Edit Type	Click this link to the Edit a Project Type tool if you want to edit Project Type details, including the title, description, available Project States, Submissions or custom fields. To edit the Activity Types, click the Edit Associated Activity Types link instead.
Edit Associated Activity Types	Click this link to the Edit Associated Activity Types tool if you want to edit the set of Activity Types that are available in projects based on this Project Type.
Delete Type	Click this link to the Delete a Project Type tool if you want to permanently delete this Project Type. This link is only displayed if this Project Type is not currently in use by a project.

Clone Type	Click this link if you want to make a copy of this Project Type. You will be taken to the Add a Project Type tool with all the field values prefilled, and you can edit these as desired. If you want to edit the available Activity Types, you'll have to do this as a separate step through Edit Associated Activity Types.

Fields

Name	The name of the Project Type.
Description	The description of the Project Type.
Project States	The Project States selected for this Project Type.
Available Submissions	Submissions available for this Project Type (e.g., 'ANSI BSR-9').
Fields	The activity data fields selected for this Project Type.
Activity Types	The Activity Types associated with this Project Type. These will be available in all projects based on this type.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Configuring Activity Types
- Page Help: Project Types
- Add a Project Type
- Edit a Project Type
- Delete a Project Type

Chapter 37. Add a Project Type

Overview

The Add a Project Type tool is used to create a new Project Type. If your new type is similar to an existing Project Type and you would like to use the existing type as a model for your new type, use the Clone link to initiate the process. If you do use the Clone link, the Add a Project Type form is prefilled with values from the type you cloned, so all you have to do is change the name and edit the details as needed.

Project Types are templates used for projects in the Kavi Status Tracker. Each Project Type has a configured set of data fields, Project States and Activity Types. When a project is added, it is based a Project Type so that the appropriate states, activities and fields are available to collect and track the project.

Use Add a Project Type to:

Add a Project Type.

How to Add a Project Type

Add

Provide a name and description for the Project Type you want to add and select which states and custom fields will be available in projects based on this type. When you are satisfied with your settings, click the Add button.

> **Note**
>
> After adding a Project Type, you need to finish the configuration process by selecting which Activity Types will be available in projects based on this type. To do this, use the Edit Associated Activity Types tool.

Name	Enter a name for your new Project Type.
Description	Enter a textual description for your Project Type.
Project States	A list of available Project States is displayed. Select those that apply to this Project Type. The selected Project States will be available in all projects based on this Project Type.

Submissions	This option is displayed if the Kavi Submissions module is enabled. Select the ANSI BSR-9 Submission if this is a standards project that will be submitted to ANSI. Selection of this option makes the ANSI BSR-9 webform and related components available in projects based on this Project Type. Your organization may have additional built-to-suit submissions available. Select any that should be available in this type of project.
Fields	A list of additional Project Data Fields is displayed. Select those that are appropriate for projects of this type. Projects based on this Project Type will have these fields in addition to the default Project Data Fields.

Done

You've just added a new Project Type and the Project Type Details page is displayed for you to review your settings. You'll need to use the Edit Associated Activity Types tool to add Activity Types before this Project Type will be usable.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Project Types
- Project Type Details
- Edit a Project Type
- Delete a Project Type

Chapter 38. Edit a Project Type

Overview

The Edit a Project Type tool is used to edit a Project Type. If this type is already in use, the changes affect all projects based on this type. You may edit the name, description, associated Project States, Submissions and additional project data fields.

If you want to change which Activity Types are available in projects based on this Project Types, use the Edit Associated Activity Types tool.

Project Types are templates used for projects in the Kavi Status Tracker. Each Project Type has a configured set of data fields, Project States and Activity Types. When a project is added, it is based a Project Type so that the appropriate states, activities and fields are available to collect and track the project.

Use Edit a Project Type to:

Edit a Project Type.

How to Edit a Project Type

Edit

Edit this Project Type as desired. When you are satisfied with your settings, click Save.

Name	The name of this Project Type.
Description	The description of this Project Type.
States	The global list of available Project States is displayed. Project States that are checked are associated with this Project Type, and are available in projects based on this type. You may edit the associated Project States by adding or removing checks as desired.
Submissions	This option is displayed if the Kavi Submissions module is enabled for your website. The ANSI BSR-9 Submission should be selected if this is a standards project that will be submitted to ANSI. Selection of this option makes the ANSI BSR-9 online form and related components available in projects based on this Project Type. Your organization may also have custom submission forms available.

Fields	All additional Project Data Fields are displayed. Those that are checked are currently associated with this Project Type. Projects based on this Project Type will have these fields in addition to the default Project Data Fields. You may edit this selection by adding or removing checks as desired.

Done

You've just edited a Project Type and the Project Type Details page is displayed for you to review your settings. Your changes will go into effect immediately!

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Project Types
- Project Type Details
- Add a Project Type
- Delete a Project Type

Chapter 39. Edit Associated Activity Types

Overview

Edit Associated Activity Types is used to edit the set of Activity Types that are associated with a Project Type. These associated Activity Types are available in all projects based on this Project Type. Your changes will affect all projects based on this Project Types.

Activity Types are used to classify the kinds of activities that occur in the organization's projects. Each Activity Type is associated with a set of activity data fields that store information about this type of activity. Activity Types that are needed for audit purposes are flagged as auditable. When configuring a Project Type, the Super Admin selects all the Activity Types that will be available for use in projects of this type. For more information, see the Concepts document Managing Activity Types.

Use Edit Associated Activity Types to:

Edit the Activity Types associated with this Project Type.

How to Edit Associated Activity Types

All available Activity Types are displayed. Checkmarks indicate which Activity Types are currently selected. Check or uncheck the check boxes to select which Activity Types should be associated with this Project Type. When you are done, click the Save button. The selected Activity Types will be available in all projects based on this Project Type.

Related Topics

- Concepts: Project Types and Metadata
- Configuring Activity Types
- Scheduling and Recording Activities
- Page Help: Activity Types
- Activity Type Details

- Add an Activity Type
- Delete an Activity Type

Chapter 40. Delete a Project Type

Overview

The Delete a Project Type tool is used to permanently delete a Project Type that is no longer needed. The link to this tool is only available if this Project Type is not currently in use by a any projects.

If you want to delete a Project Type that is currently in use, use the Project Data Report and select this Project Type from the pull-down Project Type list. Switch these projects to a compatible type before deleting this. Once all these projects are switched to a different type, you can go ahead and delete this Project Type.

Project Types are templates used for projects in the Kavi Status Tracker. Each Project Type has a configured set of data fields, Project States and Activity Types. When a project is added, it is based a Project Type so that the appropriate states, activities and fields are available to collect and track the project.

Use Delete a Project Type to:

Delete a Project Type.

How to Delete a Project Type

Delete

Project Type details are displayed for you to review. If you are certain you want to remove this Project Type, click the Delete button.

Name	The name of the Project Type.
Description	The description of the Project Type.
Project States	The Project States selected for this Project Type.
Available Submissions	Submissions available for this Project Type (e.g., 'ANSI BSR-9').
Fields	The activity data fields selected for this Project Type.
Activity Types	The Activity Types associated with this Project Type. These will be available in all projects based on this type.

Done

You've just permanently deleted a Project Type! The Project Types page is displayed to show that the deleted Project Type is no longer available.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project State
- Page Help: Project Types
- Project Type Details
- Add a Project Type
- Edit a Project Type

Chapter 41. Project States

Overview

The Project States tool is used to view and manage the organization's Project States. This is a global list of all available Project States. When configuring a Project Type, the Super Admin selects which of these Project States will be available in projects based on this Project Type.

Project States are an ordered series of states that are assigned to a project sequentially as the project passes from one phase to another or crosses significant thresholds during its lifecycle (e.g., 'Proposal', 'In Development', 'At Ballot', etc.). For more information, see the Concepts document Managing Project States.

Use the Project States page to:

- View existing Project States.
- Change the order of the Project States.
- Edit or delete existing Project States or add a new one.

How to Use the Project States Page

Options

Add a State	Click this button if you want to Add a Project State.
Move	This column displays arrows that are used to set the Project States in the order in which they are displayed when adding or editing projects. This list includes all of the organization's Project States for all its Project Types, so changes in the order of Project States affect all Project Types that use these states.
Edit	Click the Edit to see more information about a Project State and edit it if desired. If you edit a Project State, any changes that you make will affect all Project Types and Projects that currently use this Project State.
Delete	Click the Delete link to permanently remove a Project State. If you delete a Project State, this Project State will be removed from all Project Types and Projects that currently use this Project State. This won't affect records that are already in the database.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project States
- Page Help: Add a Project State
- Edit a Project State
- Delete a Project State

Chapter 42. Add a Project State

Overview

The Add a Project State tool is used to create a new Project State for the organization.

Project States are an ordered series of states that are assigned to a project sequentially as the project passes from one phase to another or crosses significant thresholds during its lifecycle (e.g., 'Proposal', 'In Development', 'At Ballot', etc.). For more information, see the Concepts document Managing Project States.

Use Add a Project State to:

Add a new Project State.

How to Add a Project State

Enter information about this Project State, then click the Add button to save your new Project State.

Add

Provide a name for this Project State and set the order in which it will appear in the global list of Project States.

Name The name of your new Project State.

Order Use the pull-down list in the Order field to view other Project States and set the order in which your new Project State will appear in the global list of Project States.

Done

You've just added a new Project State and it is now available in the global list of Project States! You may associate this with the appropriate Project Types by editing these Project Types. Once the new Project State is associate with a Project Type it becomes instantly available in all projects based on this Project Type.

Related Topics

- Concepts: Project Types and Metadata
- Managing Project States
- Page Help: Project States
- Edit a Project State
- Delete a Project State

Chapter 43. Edit a Project State

Overview

The Edit a Project State tool is used to edit a Project State's name or the order in which it is displayed. Edits made through this tool go into effect immediately and apply to every Project Type that uses this Project State.

Project States are an ordered series of states that are assigned to a project sequentially as the project passes from one phase to another or crosses significant thresholds during its lifecycle (e.g., 'Proposal', 'In Development', 'At Ballot', etc.). For more information, see the Concepts document Managing Project States.

Use Edit a Project State to:

Edit a Project State's name or the order in which it appears in the global list of Project States.

How to Edit a Project State

Make your edits, then click the Save button to save your changes.

Edit

You may edit Project State name or the order in which it appears in the global Project States list.

Name The name of the Project State.

Order The pull-down list shows the order in which this Project State appears in the global Project States list. It will appear in the same relative order when a Project States list is displayed in Project Types that use this Project State. For more information, see the Concepts document Managing Project States.

To edit the order, select 'Top', 'Bottom' or the Project State that you want to proceed your Project State in the global list. For example, if you are editing a Project State named 'In Development' and you want it to follow a Project State named 'Proposal', you would select 'Proposal' in the pull-down list.

Done

You've just edited this Project State!

Related Topics

- Concepts: Managing Project States
- Page Help: Project States
- Add a Project State
- Delete a Project State

Chapter 44. Delete a Project State

Overview

The Delete a Project State tool is used to remove a Project State that isn't needed by the organization.

Project States are an ordered series of states that are assigned to a project sequentially as the project passes from one phase to another or crosses significant thresholds during its lifecycle (e.g., 'Proposal', 'In Development', 'At Ballot', etc.). For more information, see the Concepts document Managing Project States.

Use Delete a Project State to:

Permanently delete a Project State.

How to Delete a Project State

Delete

The Project State name and order are displayed for you to review. If you are sure you want to delete this Project State, click the Delete button.

Done

You've just permanently deleted this Project State!

Related Topics

- Concepts: Project Types and Metadata
- Managing Project States
- Page Help: Project States
- Add a Project State

- Edit a Project State

Chapter 45. Activity Types

Overview

The Activity Types tool is used to view and manage the organization's Activity Types. This is a global list of all available Activity Types. When configuring a Project Type, the Super Admin selects which of these Activity Types will be available in projects based on this Project Type.

Activity Types are used to classify the kinds of activities that occur in the organization's projects. Each Activity Type is associated with a set of activity data fields that store information about this type of activity. Activity Types that are needed for audit purposes are flagged as auditable. When configuring a Project Type, the Super Admin selects all the Activity Types that will be available for use in projects of this type. For more information, see the Concepts document Managing Activity Types.

Use the Activity Types page to:

- View existing Activity Types.
- Use the Manage link to view Activity Type Details or if you want to edit or clone an Activity Type.
- Use the Add a Activity Type link if you want to add a new Activity Type.

How to Use the Activity Types Page

Options

Move	You can use the arrows to change the order in which this Activity Type appears when the list of Activity Types is displayed.
Add an Activity Type	Click this link if you want to Add a new Activity Type.
Manage	Click the Manage link to view more information about a Activity Type or if you want to clone, edit or delete an Activity Type.

Fields

Name	A number representing the order in which the Activity Type appears in the global Activity Types list, followed by the name of the Activity Type.
Auditable Activity	Indicates whether this Activity Type is auditable or not. This flag can be used in reports.

Related Topics

- Concepts: Scheduling and Recording Activities
- Configuring Activity Types
- Page Help: Activity Type Details
- Add an Activity Type
- Edit an Activity Type
- Delete an Activity Type

Chapter 46. Activity Type Details

Overview

The Activity Type Details page displays information about a specific Activity Type, plus links to tools used to Clone, Edit or Delete this type.

Activity Types are used to classify the kinds of activities that occur in the organization's projects. Each Activity Type is associated with a set of activity data fields that store information about this type of activity. Activity Types that are needed for audit purposes are flagged as auditable. When configuring a Project Type, the Super Admin selects all the Activity Types that will be available for use in projects of this type. For more information, see the Concepts document Managing Activity Types.

Use Activity Type Details to:

- View detailed information about an Activity Type.
- Access tools used to manage this Activity Type.

How to Use the Activity Type Details Page

Options

Edit Type
: Click this link to the Edit an Activity Type tool if you want to edit Activity Type information, including the order in which this type appears in the global Activity Types list, the description, instructions or data fields it uses.

  To edit the Project Types that use it, use the Project Types tools.

Delete Type
: The Delete link is only displayed if an Activity Type is not in use. Click this link to the Delete an Activity Type tool if you want to permanently delete an unused Activity Type.

Clone Type
: Click this link if you want a copy of this Activity Type to use as the basis for a new Activity Type. You will be taken to the Add an Activity Type tool with all the field values prefilled, which you can then edit as desired.

Fields

Name	A number representing the order in which the Activity Type appears in the global Activity Types list, followed by the name of the Activity Type.
Description	A textual description for this Activity Type, which may include instructions for performing this activity.
Auditable Activity	Indicates whether this Activity Type is auditable or not. This flag can be used in reports.
Used by Project Types	A list of Project Types that use this Activity Type.
Fields	All default and custom fields used for this Activity Type are displayed.

Related Topics

- Concepts: Project Types and Metadata
- Configuring Activity Types
- Scheduling and Recording Activities
- Page Help: Activity Types
- Add an Activity Type
- Edit an Activity Type
- Delete an Activity Type

Chapter 47. Add an Activity Type

Overview

Add an Activity Type is used to create a new Activity Type. You can create your new type from scratch or, if you would like to use an existing Activity Type as a model for your new type, clone an existing type.

- To add a new Activity Type, go to the Activity Types page and click the Add a Type link.
- To clone an Activity Type, go to the Activity Types page and click the Manage link for the Activity Type you want to clone. The Activity Type Details page is displayed. Click the Clone Type link and the Add an Activity Type form is displayed with all of the fields prefilled. Edit the fields as desired.

Activity Types are used to classify the kinds of activities that occur in the organization's projects. Each Activity Type is associated with a set of activity data fields that store information about this type of activity. Activity Types that are needed for audit purposes are flagged as auditable. When configuring a Project Type, the Super Admin selects all the Activity Types that will be available for use in projects of this type. For more information, see the Concepts document Managing Activity Types.

Use Add an Activity Type to:

Add an Activity Type.

How to Add an Activity Type

Add

Provide the name, order, description and instructions for your new Activity Type, and select which activity data fields will be available for activities of this type. When you are satisfied with your settings, click the Save button.

Name	Enter a name for this new Activity Type.
Order	Set the order in which you want your new Activity Type to be displayed in the global Activity Types list. This helps determine its relative position in project-level Activity Types lists.
Description	Enter a textual description for this Activity Type.

Instructions	Enter instructions for scheduling and recording this activity. These instructions are displayed to administrators and Project Recorders when adding or editing activities of this type.
Auditable Activity	If this Activity Type needs to be included in the audit trail, set this option to 'Yes'. If it isn't needed in the audit trail, set it to 'No'. If set to 'Yes', this type of activity can be retrieved in searches that use this criteria.
Additional Fields	Activity Data Field that are specific to this organization are displayed. Select those that apply to this Activity Type. These will be installed in addition to the default Activity Data Fields that are preselected for all Activity Types: 'Project', 'Type', 'Date Scheduled', 'Date Occurred', 'Submitter', 'Summary' and 'Note'.

Done

You've just added a new Activity Type and it is now available when configuring Project Types! The Activity Type Details page is displayed so you can review your new Activity Type.

Related Topics

- Concepts: Project Types and Metadata
- Configuring Activity Types
- Scheduling and Recording Activities
- Page Help: Activity Types
- Activity Type Details
- Edit an Activity Type
- Delete an Activity Type

Chapter 48. Edit an Activity Type

Overview

Edit an Activity Type is used to edit an existing Activity Type. You may edit the name, description, instructions, audibility, additional data fields or the order in which this Activity Type appears in the global Activity Types list. Your edits will affect all Project Types that use this Activity Type.

Activity Types are used to classify the kinds of activities that occur in the organization's projects. Each Activity Type is associated with a set of activity data fields that store information about this type of activity. Activity Types that are needed for audit purposes are flagged as auditable. When configuring a Project Type, the Super Admin selects all the Activity Types that will be available for use in projects of this type. For more information, see the Concepts document Managing Activity Types.

Use Edit an Activity Type to:

Edit an Activity Type.

How to Edit an Activity Type

Edit

Edit this Activity Type as desired. When you are satisfied with your settings, click Save.

Name	The Activity Type name.
Order	The pull-down list shows the order in which this Activity Type appears in the global Activity Type list. To edit the order, select 'Top', 'Bottom' or the Activity Type that you want to proceed your Activity Type in the list. For example, if you are editing an Activity Type named 'In Development' and you want it to follow an Activity Type named 'Proposal', you would select 'Proposal' in the pull-down list.
Description	A textual description for this Activity Type. The description may include instructions for performing this activity.

Instructions	Enter instructions for scheduling and recording this activity. These instructions are displayed to administrators and Project Recorders when adding or editing activities of this type.
Auditable Activity	If this Activity Type needs to be included in the audit trail, set this option to 'Yes'. If it isn't needed in the audit trail, set it to 'No'. If set to 'Yes', this type of activity can be retrieved in searches that use this criteria.
Additional Fields	Activity Data Field that are specific to this organization are displayed. Select those that apply to this Activity Type. These will be installed in addition to the default Activity Data Fields that are preselected for all Activity Types: 'Project', 'Type', 'Date Scheduled', 'Date Occurred', 'Submitter', 'Summary' and 'Note'.

Done

You've just edited this Activity Type and your changes have been applied to all Project Types that use this Activity Type! The Activity Type Details page is displayed so you can review your Activity Type settings.

Related Topics

- Concepts: Project Types and Metadata
- Configuring Activity Types
- Scheduling and Recording Activities
- Page Help: Activity Types
- Activity Type Details
- Add an Activity Type
- Delete an Activity Type

Chapter 49. Delete an Activity Type

Overview

Delete an Activity Type is used to permanently delete an Activity Type that is no longer needed. The link to this tool is only available if the Activity Type is not associated with any Project Types.

If you want to delete an Activity Type that is currently in use, go to the Activity Type Details page and see which Project Types are listed in the Used By Project Types field. For each Project Type that uses this Activity Type, use the Edit Associated Activity Types tool to deselect the Activity Type. Once all these associations are removed the Delete link is displayed and you can go ahead and delete the Activity Type.

Use Delete an Activity Type to:

Permanently delete an Activity Type.

How to Delete an Activity Type

The Activity Type details are displayed for you to review. If you are sure you want to delete this Activity Type, click the Delete button.

Fields

Review detailed information about this Activity Type.

Name	A number representing the order in which the Activity Type appears in the global Activity Types list, followed by the name of the Activity Type.
Description	A textual description for this Activity Type, which may include instructions for performing this activity.
Auditable Activity	Indicates whether this Activity Type is auditable or not. This flag can be used in reports.
Used by Project Types	A list of Project Types that use this Activity Type.
Fields	All default and custom fields used for this Activity Type are displayed.

Done

You've just permanently deleted this Activity Type! The Activity Types page is displayed to confirm the deletion.

Related Topics

- Concepts: Project Types and Metadata
- Configuring Activity Types
- Scheduling and Recording Activities
- Page Help: Activity Types
- Activity Type Details
- Add an Activity Type
- Edit an Activity Type

Chapter 50. Report Builder

Overview

Use the Report Builder tool to view, create and test your organization's reports. Information about each report is displayed, including the Report Type on which the report is based. There is a default report based on each available Report Type, and any number of custom reports can be created.

Once a report has been added and activated, it immediately becomes available in the Reports Area for Report Admins and Organization Admins to use when running reports. See the Run a Report tool page help for instructions on how to use reports.

Default reports cannot be deleted or edited, but they can be deactivated if they are not needed or cloned to create custom reports. Inactive reports are displayed in the Report Builder, but they are not available in the Reports Area.

Report Types

Underlying each report is a Report Type that is calibrated to return the broadest possible set of data fields related to a specific topic. You may narrow the set of fields available in your report (to streamline use and improve performance), but you cannot add more fields. For more information, see Appendix: Report Types.

Use the Report Builder tool to:

- View and run available reports.
- Click the link to the Manage a Report tool to view report configuration and access tools used to clone, edit, delete and change report status.
- Click the link to the Add a Report tool to create a custom report.

How to Use the Report Builder

All existing reports are displayed. Click the 'Manage' link adjacent to any report you'd like to manage, view in detail, manage or clone. If you want to create a new report based on an existing report, use the 'Manage' link rather than the 'Add a New Report' link. Once you're on the Manage a Report page, click the 'Clone' link to gain access to the Clone a Report tool.

Name	The name of the report.

Description	A brief textual description of the report.
Type	The Status Tracker Report Type on which this report is based. The Report Type determines which database tables are queried and which fields are available in the report. For more information, see Report Types.
Default or Custom	Indicates whether this is a default report or a custom report created specifically for your organization. Default reports cannot be edited or deleted, but they can be deactivated.
Status	This is either 'Active' or 'Inactive'. If 'Active', the Report is available to administrators in the Report Area. If 'Inactive', the Report is unavailable in the Reports Area and cannot be used to run reports. When a report is inactive, the 'Run' button isn't displayed.
Action	Click a link if you want to run or manage a report. From the Manage a Report tool you can view the report in detail, and access tools to activate or deactivate, clone or edit this report.

Related Topics

- Kavi Members Concepts: Creating Custom Reports in Report Builder
- Appendix: Report Types
- Page Help: Manage a Report
- Add a Report
- Clone a Report
- Edit a Report
- Delete a Report
- Change Report Status
- Run a Report

Chapter 51. Manage a Report

Overview

Use the Manage a Report tool to view a report and access tools to manage it. This includes links to the following tools: Edit a Report, Delete a Report, Change Report Status, Run a Report and Clone a Report.

If the 'Edit' link isn't displayed, this is a default report and can't be edited. If the 'Run' link isn't displayed, this is an inactive report. If you want to run an inactive report, click the 'Activate' button.

For more information on using the Report Builder tool, see the Concepts document Creating Custom Reports in Report Builder.

Use the Manage a Report tool to:

- View, manage and run a report.
- Use the Change Report Status tool so you can activate or deactivate a report to control its availability.
- Clone a report so you can add a similar report quickly and easily.

How to Manage a Report

View information about your report and access tool links that allow you to manage or run the report.

Fields

Name	The name of the report.
Description	A textual description of the report.
Type	The Report Type on which this report is based. The Report Type determines which database tables are queried when the report is run.
Download Filename	The name of the downloadable results file created when the report is run.

Status	This is either 'Active' or 'Inactive'. If 'Active', the Report is available in the list of reports displayed to administrators through Report Area tools. If 'Inactive', the Report is unavailable and hidden from this list so no one can run it. When a report is inactive, the 'Run' button isn't displayed.
Fixed	Any fixed fields used in this report are displayed. The fixed field value restricts the preliminary query.
Search Form	Searchable fields from the Search Form are displayed, along with the field's default operator and default value, if set.
Results Form	Viewable results fields are listed. These fields are displayed in the online results when the report is run.
Download Form	Downloadable results fields are listed. These fields are all present in the downloaded report results.

Related Topics

- Kavi Members Concepts: Creating Custom Reports in Report Builder
- Appendix: Report Types
- Page Help: Manage a Report
- Clone a Report
- Add a Report
- Edit a Report
- Delete a Report
- Change Report Status
- Run a Report

Chapter 52. Add a Report

Overview

Use the Add a Report tool to build custom reports for your organization. There are two Report Types on which reports can be based: Project Data and Activity Data. Each Report Type correlates to a database query that retrieves a certain type of data. If you set the status of your new report to 'active' it becomes available immediately in the Reports Area under the heading that matches the Report Type you've selected.

For more information on using the Report Builder tool, see the Concepts document Creating Custom Reports in Report Builder.

Use the Add a Report tool to:

Build a custom report for your organization.

How to Add a Report

Report Type

Select the Report Type based on the data you need for your report. The Report Type determines which data fields are available for inclusion in your report.

Fields

Set details such as the report name, description and a filename for the downloadable results, then select the fields for your report. You may use the 'Select All' button as a shortcut when you want to select all or most of the fields in a column, then uncheck those that you don't want. Conversely, you can use the 'Deselect All' button when you want to remove all the checkmarks in a column, then select just the fields you actually want in your report.

There may be some restrictions on field availability. Fields that display static values rather than a checkbox cannot be selected. Custom fields are displayed after default fields on this step, but this doesn't determine the order in which these fields are displayed on the report or report results. You can set the field order as desired on the next step.

Details:

Name	Enter a name for your report. This is the name that will be displayed on the report and the Reports Area Menu.
Description	Enter a short description for your report.
Type	The Report Type you selected on the previous step is displayed.
Download Filename	Set the name for the file containing the Downloadable Results. Standard best practices suggest the filename should be all lowercase and contain no spaces. Your filename should NOT include an extension, because the application automatically adds the extension when the file is created. You may opt to have the date of the report or the username of the user who runs the report appended to the filename. This makes it easier to track when the report was run and who created it.

Fields:

Fixed	Select the field that you want to have a fixed value, if any. If you do select a fixed field, you will set the value of the fixed field on the next step.
Searchable	Select the fields to be displayed to users on the Search Form. This should include whatever fields need to be searched on when running reports.
Viewable	Select the fields to be displayed in the Viewable Results. If you limit the number of viewable fields to 15 or less, the Viewable Results can be sorted by field. If the number of fields in the Viewable Results exceeds 15, the fields won't be sortable.
Downloadable	Select the fields to be included in the Downloadable Results. This can be a much more extensive set of fields than those in the Viewable Results, and may include fields that aren't selected in any other column.

Fixed Criteria

If you selected a fixed field in the previous step, select the operator (if available) and value for the fixed field. Press Next when you have finished configuring your fixed fields.

Ordering

Configure your report forms by setting the order in which fields are displayed on the Search Form, Viewable Results and Downloadable Results, and setting default values and operators for applicable fields.

When configuring the Search Form, set the order in which you would like fields to appear on the form, and set default values and operators to the settings most commonly needed by Report

Admins. If some of these values or operators need to be reset later to reflect real world usage, you can do so through the Edit a Report tool.

Display Order	Set the order in which these fields will appear on the Search Form displayed to administrators when they run reports.
Default Operator	If you set a default value for a field, you should also select a default operator to finish configuring the preset search parameters for this field. The Report Admin can reset this operator when running a report. The set of operators displayed for any given field depends on the valid values for that field. These may include 'is' or 'is not', or 'contains' or 'does not contain'. If the specified value is a date, operators may also include 'is before' and 'is after'. When you designate a field as searchable and it displays 'Show results for' as an operator, the values will be displayed as a set of checkboxes on the Search Form. Any checkboxes you select while configuring the Search Form will be prechecked when they are displayed to the Reports Admin. These fields are in an 'or' relationship, so when a report is run, the results will include records that contain any of the selected values. If none of the checkboxes are preselected by the Super Admin and the Report Admin doesn't check any when running the report, the field will be ignored (i.e., the results will not be restricted by the values in this field). Ironically, the result of running a report with all the field values selected is the same as the result of running a report with none of the field values selected.
Default Value	Set a default value for any field where a Report Admin commonly inputs a certain value on the Search Form. The Report Admin can set a different value when running a report.

Preview

Details of your report are displayed for you to preview. If you are satisfied with your settings, press Save. If not, use the Back buttons to navigate back to the step where you want to reset options, then preview and save your settings.

Done

You've just added a new report! If you would like to run this report, click Run Report. If you would like to add another report, click Add Another.

> **Note**
>
> Your new report is automatically set to 'active' and is immediately available in the Reports Area. If you want to hide this report, click the Back to Report Builder button, then

click the Manage link and deactivate the report. The report must be active if you want to run it and test it's behavior.

Related Topics

- Kavi Members Concepts: Creating Custom Reports in Report Builder
- Appendix: Report Types
- Page Help: Manage a Report
- Manage a Report
- Clone a Report
- Edit a Report
- Delete a Report
- Change Report Status
- Run a Report

Chapter 53. Clone a Report

Overview

The Clone a Report tool provides a quick and easy way to create a new report based on a report that already exists. In the Report Builder tool, select whichever default or custom report is most similar to the report you want to create, then click 'Clone'. Once you've cloned the report, use the Edit a Report tool to customize it according to your requirements.

For more information, see the Kavi® Members Concepts document Creating Custom Reports in Report Builder.

Use the Clone a Report tool to:

Copy an existing report to serve as the basis for a new report.

How to Clone a Report

Clone

Select the Report you want to clone from the list displayed in the Report Builder and click the 'Clone' link. You've just added a cloned report! Click Back to Report Builder and find your cloned report in the list. It will be named after the report you cloned, with the words 'Clone of' inserted in front of the base report name. For example, if you cloned the Activity Data Report, the clone would be named 'Clone of Activity Data Report'. Click the 'Manage' link adjacent to the report to be taken to the Manage a Report tool, then click the 'Edit' link, give the report a more appropriate name and begin customizing it as desired.

Related Topics

- Kavi Members Concepts: Creating Custom Reports in Report Builder
- Appendix: Report Types
- Page Help: Manage a Report
- Manage a Report

- Add a Report
- Edit a Report
- Delete a Report
- Change Report Status
- Run a Report

Chapter 54. Edit a Report

Overview

Use the Edit a Report tool to edit custom reports created for your organization. Once a report has been created you may find you want to fine-tune fields or default settings in the Search Form, or remove or add fields to the Viewable Results or Downloadable Results. There are certain settings you cannot change, such as the underlying Report Type. Kavi Members default reports cannot be edited, so the edit button isn't displayed for default reports.

For more information on using the Report Builder tool, see the Concepts document Creating Custom Reports in Report Builder.

Use the Edit a Report tool to:

Edit custom reports.

How to Edit a Report

Clicking the Edit link on the Manage Reports page takes you to the Fields step where you can edit report details and field configuration.

Fields

Set details such as the report name, description and a filename for the downloadable results, then select the fields for your report. You may use the 'Select All' button as a shortcut when you want to select all or most of the fields in a column, then uncheck those that you don't want. Conversely, you can use the 'Deselect All' button when you want to remove all the checkmarks in a column, then select just the fields you actually want in your report.

There may be some restrictions on field availability. Fields that display static values rather than a checkbox cannot be selected. Custom fields are displayed after default fields on this step, but this doesn't determine the order in which these fields are displayed on the report or report results. You can set the field order as desired on the next step.

Details:

Name	Enter a name for your report. This is the name that will be displayed on the report and the Reports Area Menu.

Description	Enter a short description for your report.
Type	The Report Type you selected on the previous step is displayed.
Download Filename	Set the name for the file containing the Downloadable Results. Standard best practices suggest the filename should be all lowercase and contain no spaces. Your filename should NOT include an extension, because the application automatically adds the extension when the file is created. You may opt to have the date of the report or the username of the user who runs the report appended to the filename. This makes it easier to track when the report was run and who created it.

Fields:

Fixed	Select the field that you want to have a fixed value, if any. If you do select a fixed field, you will set the value of the fixed field on the next step.
Searchable	Select the fields to be displayed to users on the Search Form. This should include whatever fields need to be searched on when running reports.
Viewable	Select the fields to be displayed in the Viewable Results. If you limit the number of viewable fields to 15 or less, the Viewable Results can be sorted by field. If the number of fields in the Viewable Results exceeds 15, the fields won't be sortable.
Downloadable	Select the fields to be included in the Downloadable Results. This can be a much more extensive set of fields than those in the Viewable Results, and may include fields that aren't selected in any other column.

Fixed Criteria

If you selected a fixed field in the previous step, select the operator (if available) and value for the fixed field. Press Next when you have finished configuring your fixed fields.

Ordering

Configure your report forms by setting the order in which fields are displayed on the Search Form, Viewable Results and Downloadable Results, and setting default values and operators for applicable fields.

When configuring the Search Form, set the order in which you would like fields to appear on the form, and set default values and operators to the settings most commonly needed by Report Admins. If some of these values or operators need to be reset later to reflect real world usage, you can do so through the Edit a Report tool.

Display Order	Set the order in which these fields will appear on the Search Form displayed to administrators when they run reports.

Default Operator	If you set a default value for a field, you should also select a default operator to finish configuring the preset search parameters for this field. The Report Admin can reset this operator when running a report. The set of operators displayed for any given field depends on the valid values for that field. These may include 'is' or 'is not', or 'contains' or 'does not contain'. If the specified value is a date, operators may also include 'is before' and 'is after'. When you designate a field as searchable and it displays 'Show results for' as an operator, the values will be displayed as a set of checkboxes on the Search Form. Any checkboxes you select while configuring the Search Form will be prechecked when they are displayed to the Reports Admin. These fields are in an 'or' relationship, so when a report is run, the results will include records that contain any of the selected values. If none of the checkboxes are preselected by the Super Admin and the Report Admin doesn't check any when running the report, the field will be ignored (i.e., the results will not be restricted by the values in this field). Ironically, the result of running a report with all the field values selected is the same as the result of running a report with none of the field values selected.
Default Value	Set a default value for any field where a Report Admin commonly inputs a certain value on the Search Form. The Report Admin can set a different value when running a report.

Preview

Details of your report are displayed for you to preview. If you are satisfied with your settings, press Save. If not, use the Back buttons to navigate back to the step where you want to reset options, then preview and save your settings.

Done

You've just edited a report, and the information you provided is displayed for you to review. If you would like to run this report, click Run Report. If you would like to edit another report, click Edit Another. If you would like to perform more edits on this report, click Back to Report Builder.

Related Topics

- Kavi Members Concepts: Creating Custom Reports in Report Builder
- Appendix: Report Types

- Page Help: Manage a Report
- Manage a Report
- Clone a Report
- Add a Report
- Delete a Report
- Change Report Status
- Run a Report

Chapter 55. Delete a Report

Overview

The Delete a Report tool is used to remove a custom report when it is no longer required. Default reports cannot be deleted, so no 'Delete' link is displayed for these reports. Deleting a report is permanent. Once a report is deleted, it is no longer available in the Super Admin or Reports Areas.

Note

If all you want to do is remove a report from the Reports Area temporarily, you may deactivate the report through the Change Report Status tool instead of permanently deleting it.

Use the Delete a Report tool to:

Delete a custom report.

How to Delete a Report

Delete

Information about the report you selected is displayed for you to review. If you are sure you want to permanently delete this report, click Delete.

Done

This report has been permanently deleted!

Related Topics

- Kavi Members Concepts: Creating Custom Reports in Report Builder
- Appendix: Report Types
- Page Help: Manage a Report

- Manage a Report
- Add a Report
- Edit a Report
- Clone a Report
- Change Report Status
- Run a Report

Chapter 56. Change Report Status

Overview

Use the Change Report Status tool to activate or deactivate a report. Active reports are available in the Reports Area, whereas inactive reports are not. To access this tool from the Report Builder, click the 'Manage' link to go to the Manage a Report tool, then click 'Activate' or 'De-activate'.

Use the Change Report Status tool to:

Activate or deactivate a report.

How to Change Report Status

Change Status

Information about the report you selected is displayed for you to review. If you are sure you want to change the report status, click Change Status.

Done

The report status has been changed!

Related Topics

- Kavi Members Concepts: Creating Custom Reports in Report Builder
- Appendix: Report Types
- Page Help: Manage a Report
- Manage a Report
- Clone a Report
- Add a Report

- Edit a Report
- Delete a Report
- Run a Report

Chapter 57. Member Accessible Reports

Overview

The Member Accessible Reports tool is used to set which reports are displayed in the Kavi Status Tracker Member Area. Any Kavi Status Tracker report can be selected. Once selected, reports in the Member Area are available to all account holders.

Use the Member Accessible Reports tool to:

Set which reports, if any, are available in the Kavi Status Tracker Member Area.

How to Use the Member Accessible Reports Tool

Select

All Kavi Status Tracker reports are displayed. Use the check boxes to select those that should be available in the Member Area. When you are satisified with your selections, click the Save button.

Done

Any report you've selected is now available in the Kavi Status Tracker Member Area! A list of selected reports is displayed for you to review.

Related Topics

- Kavi Members Concepts: Creating Custom Reports in Report Builder
- Kavi Status Tracker Concepts: Reports and Views
- Appendix: Report Types

- Page Help: Manage a Report
- Manage a Report
- Add a Report
- Edit a Report
- Clone a Report
- Change Report Status
- Run a Report

Part VI. Appendix

Table of Contents

Appendix A. Predefined Activity Data Fields

How to Read this Table

Kavi Status Tracker stores project and activity data. Data may be added to the Kavi Status Tracker database by administrators using Admin Area tools and group participants using Member Area tools. Kavi Status Tracker is highly customizable and includes only a slim set of predefined data fields. Your site is likely to include many custom fields that can't be documented in the help.

Data fields, both default and custom, appear in multiple forms in Kavi Status Tracker, and the form depends on the context. Labeled data fields in the UI are displayed as proper nouns. Data fields displayed in Report Builder interfaces are always preceded by the word 'Project' or 'Activity', to indicate the type of data, since a project data field and activity data field may both have the same name, such as, er, 'Name'. To differentiate between these fields, report tools would display these fields as 'Project Name' and 'Activity Name' respectively. Slightly different versions of these variables are used for column headings in downloaded reports and email template variables. In the data reports project field names are prepended by 'activity_' to distinguish them from similarly named activity fields. Email template variables are prepended by '$a_'.

Table A.1. Activity Data Fields

Field	Example	Description
Date Occurred	11/9/2007	The actual date that an activity occurred. This may be blank if an activity is scheduled but has not yet occurred. In MM/DD/YYYY format.
Date Scheduled	11/8/2007	The date on which an activity is scheduled to occur. This may be blank if the activity was simply recorded when it occurred rather than scheduled in advance. In MM/DD/YYYY format.
Activity Type	Proposal	An Activity Type is a template on which actual activities are based. The Activity Type determines which activity data fields are available in activities based upon it.
Last Modified	14 Nov 2007 16:55:59 US/Pacific	A date stamp set by the server whenever project data changes. The value shows the time in the server's local time zone.
Note	Added URI of supporting document. K.M.	This is a free-text field that can be used to collect notes about the activity. The notes can be edited. If project status tracking is distributed among project participants, participants might add their initials to distinguish one person's notes from anothers.
Summary	New Widget Interoperability standard based on older Widget Compatibility standard.	Short summary of the project. This is a good place to enter information that can be used to characterize and distinguish this project from others when it is displayed to the public, etc.
Submitter	Kim Miller	The full name of the person who added an activity to a project's activity schedule. When a Status Tracker Admin adds an activity, the administrator can select their own name or the name of the person who asked that the activity be added. If distributed administration is enabled in Kavi Status Tracker and the activity was added by a Project Recorder, the full name of the Project Recorder who added the activity is automatically entered in the Submitter activity data field.

Appendix B. Predefined Project Data Fields

How to Read this Table

Kavi Status Tracker stores project and activity data. Data may be added to the Kavi Status Tracker database by administrators using Admin Area tools and group participants using Member Area tools. Kavi Status Tracker is highly customizable and includes only a slim set of predefined data fields. Your site is likely to include many custom fields that can't be documented in the help.

Data fields, both default and custom, appear in multiple forms in Kavi Status Tracker, and the form depends on the context. Labeled data fields in the UI are displayed as proper nouns. Data fields displayed in Report Builder interfaces are always preceded by the word 'Project' or 'Activity', to indicate the type of data, since a project data field and activity data field may both have the same name, such as, er, 'Name'. To differentiate between these fields, report tools would display these fields as 'Project Name' and 'Activity Name' respectively. Slightly different versions of these variables are used for column headings in downloaded reports and email template variables. In the data reports, project field names are prepended by 'project_' to distinguish them from similarly named activity fields. Email template variables are prepended by '$p_'.

Table B.1. Project Data Fields

Field	Example	Description
Creation Date	14 Nov 2007 16:55:59 US/Pacific	A date stamp set automatically when the Project is created in Kavi Status Tracker.
Designation	ANSI 123:2000	A code (often alphanumeric) assigned to a standard under a standards accreditation body's formal designation system. The designation classifies each standard according to the place it occupies in the larger body of standards coordinated by the accreditation body. ANSI standard designations take the general form 'ANSI nnn:YYYY' where nnn is some whole number and YYYY is the 4-digit year.
Last Modified	14 Nov 2007 16:55:59 US/Pacific	A date stamp set by the server whenever project data changes in the server's local time zone.
Name	Widget Compatibility	The name of this project. This is often the same as the title of the specification or deliverable document.
Project State	Published	The Project State assigned to this project to indicate where it is in the project life cycle.
Project Type	Standard	A Project Type is a template on which actual projects are based. The Project Type determines which Project States, Activity Types, and data fields are available in projects based on it.

Appendix C. Default Project States

Kavi Status Tracker installs a thin set of Project States to serve as examples. Your organization will add any number of custom Project States in addition to these defaults, and may edit or delete the defaults.

How to Read this Table

This table shows the default Project States in the order in which they appear when installed. Project States reflect the general path that a project will take through the various states during its lifecycle.

Table C.1. Default Project States

Project State	Description
Proposal	The 'Proposal' Project State covers the preparatory phase of project development. The project enters this state the date that the organization receives the proposal, and leaves this state when the organization approves the proposal and okays work on the project.
In Draft	The 'In Draft' state covers the initial phase of project development. The project enters this state the date that the organization approves the proposal, and leaves this state when the draft is ready for trial use.
Draft Standard for Trial Use	The 'Trial Use' state covers the phase of the project from the time that the draft standard is released for trial use until the trial period ends.
At Ballot	The duration of the 'At Ballot' state can vary quite a lot, depending on the organization's policies and bylaws. Generally it covers the phase of the project from the time that the draft standard is scheduled for balloting until the ballot is voted and the draft has either been approved or rejected. Balloting is usually held in conjunction with internal comment-collecting and response. The comment period may begin and end before balloting occurs or may be conducted in parallel with balloting. If the draft needs to be approved at multiple levels within the organization or is submitted to an outside accreditation organization, custom Project States can be added and the project can pass through an escalating series of 'At Ballot' states. For example, it might go through 'Workgroup Ballot', then 'Organization-wide Ballot'.
Under Revision	Depending on policies and bylaws, a draft standard may enter the 'Under Revision' state if it fails to pass a ballot, if there are unresolved comments or if it is appealed after approval. The project may remain in this state until it is ready to go back to ballot.
Public Review	The draft standard enters the 'Public Review' state when it is released for public review and remains in this state while public comments are collected and responses filed.
Approved	When the draft standard has passed all the hurdles required by the organization's bylaws, it enters the 'Approved' state which makes it eligible for release as an approved standard. If the draft needs to be approved at multiple levels within the organization or is submitted to an outside accreditation organization, custom Project States can be added and the project can pass through an escalating series of 'Approved' states. For example, it might go through 'Approved by Workgroup', then 'Approved by Board' before it is published by the organization. Before it can be published as an ANSI-certified standard it would have to pass the 'Approved by ANSI' state.

Project State	Description
Under Appeal	If a formal challenge to an approved standard is filed, the standard enters the 'Under Appeal' state. A standard remains in this state until the organization responds to the appeal. Conversely, a project will go into the 'Under Appeal' state if it is rejected and the rejection is appealed. This state may also apply to a standard that has been submitted to an accreditation organization and met with an appeal in this part of the process. In this case the standard remains in the 'Under Appeal' state until the accreditation organization responds to the appeal. A project that is appealed usually goes to the 'Under Revision' state. If the revisions are simple, the project may then move to the 'Approved' state without further formal review or balloting.
Published	An approved standard enters the 'Published' state when it is published and remains in this state indefinitely.
Withdrawn	At the end of the project lifecycle, a project that is no longer relevant or has been superseded by a newer standard is set to the 'Withdrawn' Project State. It can also apply to a standard that has met with objections that cannot be reconciled, such as when a proposed standards project is found to overlap a standards project that is currently underway elsewhere.

Appendix D. Default Activity Types

Kavi Status Tracker installs a slim set of Activity Types to serve as examples. Your organization will add any number of custom Activity Types in addition to these defaults, and may edit or delete the defaults.

How to Read this Table

This table shows the default Activity Types in the order in which they appear when installed. The global list of Activity Types is ordered so that activities that occur during the early stages of project development are at the top of the Activity Types list, and activities that occur towards the end of the project are at the bottom of the list.

Table D.1. Default Activity Types

Activity Type	Projects	Description
ANSI PINS Submission	ANSI Standards	The ANSI PINS form is scheduled for submission, and the actual date of the submission is recorded. A data field might store a copy of the completed form.
Working Draft	General	Work on the draft standard, white paper or other document deliverable is scheduled to begin, and the actual date that work begins is recorded. Simple instructions could refer to the next step in the process and a data field might collect the URI of the working draft.
Committee Draft	General	The draft is scheduled for submission to the committee for review, and the actual submission date is recorded. The description might focus on the committee review process and a data field might collect the URI of the committee draft.
Committee Ballot	General	The committee ballot on the draft is scheduled, and the actual date of the ballot is recorded. The activity description might include balloting instructions. Data collection could include documentation that quorum was acheived.
Draft Standard for Trial Use	All Standards	The scheduled and actual date that the draft standard is released for trial use. The description might include a reference to instructions on the trial use process.
ANSI BSR-8 Submission	ANSI Standards	The scheduled and actual date that the ANSI BSR-8 form is submitted. The description could provide hints for filling out the form. A data field might store a copy of the completed form.
Public Comment Begins	All Standards	The scheduled and actual date that the draft standard is released for public comment.
Public Comment Ends	All Standards	The scheduled and actual date that the public comment period ends.
Consensus Ballot	General	The scheduled and actual date of the consensus ballot. The activity description might include balloting instructions.
ANSI BSR-9 Submission	ANSI Standards	The scheduled and actual date that the ANSI BSR-8 form is submitted. The description could provide hints for filling out the form. A data field might store a copy of the completed form.
Publication	General	The scheduled and actual date that an approved document is published.

Activity Type	Projects	Description
Periodic Review Due Date	Standards	This is added as the scheduled date by which periodic review should occur. This activity will remain as an open item until the date of the actual review. The description can reference instructions on the review process. A data field can collect the URI of the written review.
Continuous Maintenance Due Date	Standards	If a project is on a continuous maintenance plan, this is the date that the next maintenance is scheduled to occur.
Five-Year Review Date	Standards	This is added as the scheduled date by which five-year review should occur. This activity will remain as an open item until the date of the actual review. The description can reference instructions on the review process. A data field can collect the URI of the written review.
Stabilized Date	All Standards	The date on which a project became stable. Once a project stabilizes, ongoing development is discontinued and work on the project ceases, except for periodic maintenance.
Standard Withdrawn Date	All Standards	This records the actual date that the standard is withdrawn.

Appendix E. Kavi Status Tracker Default Project Types

Overview

These tables include all the Project Types installed by Kavi Status Tracker by default. A Project Type is a template on which actual projects are based. The Project Type determines which Project States, Activity Types, and data fields are available in projects based on it. All the default Project Types have the same configuration. Each uses all the default Project States, Activity Types, project data fields and activity data fields. The default Project Types are added merely to expedite the setup process and can be edited or deleted as needed.

- Standard
- Revise Operating Procedures
- Technical Report

Appendix F. Kavi Status Tracker Report Types

These tables include all the Report Types available in Kavi Status Tracker.

Table F.1. Default Report Types

Name	Description
Project	Returns project data, with one project record per line.
Activity	Returns activity data, with one activity record per line. The data includes project data.

Appendix G. Kavi Status Tracker Default Roles

These tables include all the roles installed by Kavi Status Tracker by default. Roles that are required by the application cannot be deleted, but their descriptions can be edited.

These tables include the Kavi Status Tracker default roles and roles installed by Kavi® Members that provide access to this application.

Roles are managed in Kavi Members tools, and described in detail the Kavi Members Concepts. For more information on roles, see Kavi Members help.

To see all roles, including custom roles as well as those installed by default, Super Admins can use the Kavi Members Manage Roles Tool [../../../../kmlm/admin/super/manage_roles].

Default Roles

These roles grant access to specific areas of the Status Tracker. They are associated with default Kavi Status Tracker User Types, but can be associated with custom types.

Table G.1. Default Roles

Name	Description	Default Type(s)
status_tracker_super_admin	Confers access to all Kavi Status Tracker Super Admin, Admin and Reports area tools and data managed through these tools.	Status Tracker Super Admin
status_tracker_admin	Confers access to all Kavi Status Tracker Admin and Reports area tools and data managed through these tools.	Status Tracker Admin

Kavi Members Default Roles

Table G.2. Kavi Members default roles

Role Name	Description	Default Type(s)
org_admin	The Kavi Members default 'org_admin' role grants access to the Admin Area and Report Area tools for all installed applications. For more information, see 'org_admin'.	Organization Admin
super_admin	The Kavi Members default 'super_admin' role grants access to Super Admin, Admin and Report Areas and tools for all installed applications. For more information, see 'super_admin'.	Super Admin

Appendix H. Default User Types and Project Relationships

These tables describe all the Relationships and User Types that provide access to Kavi Status Tracker tools. This includes Project Relationships and User Types installed by Kavi Status Tracker by default, and default User Types installed by Kavi® Members that provide access to Kavi Status Tracker tools.

A Project Relationship is a relationship between a user or a group of users. Project Relationships are added through the Kavi Status Tracker tool.

User Types and roles are managed and assigned through Kavi Members tools, and the Kavi Members Concepts documents provide extensive information on types and how types can be used to confer roles and access privileges. Types that are required by the application cannot be deleted or edited. For more information, see Kavi Members help.

Kavi Status Tracker Project Relationships

Individual-to-project or group-to-project relationships are established through project data lookup fields. The following table presents the default relationships, but these are not necessarily in use by your organization. Your organization may have other lookup fields that define individual-to-project or group-to-project relationships. They are likely to share many of the characteristics and behavior of the default project relationships.

Table H.1. Project Relationships

Name	Relationship	Description
Project Recorder	An individual-to-project or group-to-project relationship	Options available in the Configure Kavi Status Tracker Super Admin tool allow status tracking tasks to be shared with users who have some kind of of relationship to a project. This kind of user is known as a Project Recorder. Project Recorders have access to Member Area tools used to track a project and project activities. They have permission to set the Project State and other project data, and manage the project's activity schedule. To enable distributed management, an individual-to-project or group-to-project relationship must be established by the addition of a project data lookup field. The default examples are the individual-to-project relationship 'Project Editor' and the group-to-project relationships 'Owning Group' and 'Consensus Body'. An individual-to-project relationship gives Project Recorder access to an individual selected from the Kavi Members database. In a group-to-project-relationship, the 'Group Chair' and 'Document Manager' (i.e., any group member with document management privileges) of a group selected from the Kavi Groups database are given Project Recorder access. On sites where no individual-to-project or group-to-project relationship is enabled, only the Status Tracker Admin and Status Tracker Super Admin have administrative access to projects.
Project Editor	An individual-to-project relationship	This relationship is established through a data lookup field that is tied to the Kavi® Members database. The 'Project Editor' is the person who is allowed to edit the project specification or other document deliverable. This designation may be merely semantic in Kavi Status Tracker or the 'Project Editor' may be designated as a 'Project Manager' in the Configure Kavi Status Tracker tool.
Owning Group	A group-to-project relationship	This relationship is established through a data lookup field that is tied to the Kavi® Groups database. The 'Owning Group' is the group in which project work is being performed. This designation may be merely semantic in Kavi Status Tracker or the 'Group Chair' and 'Document Manager' of the 'Owning Group may be designated as 'Project Managers' in the Configure Kavi Status Tracker tool.
Consensus Body	A group-to-project relationship	This relationship is established through a data lookup field that is tied to the Kavi® Groups database. The 'Consensus Body' is the group responsible for final approval of the project by the organization. Depending on the organization, this may be the technical committee, all voting members or the board. This designation may be merely semantic in Kavi Status Tracker or the 'Group Chair' and 'Document Manager' of the 'Consensus Body' may be designated as 'Project Managers' in the Configure Kavi Status Tracker tool.

Kavi Status Tracker User Types

Kavi Status Tracker User Types confer roles that grant administrative access. These types can be assigned through Kavi Members Add a User and Edit a User tools.

Table H.2. Default User Types

Name	Default roles	Category	Description
Status Tracker Admin	status_tracker_admin	admin	The 'Status Tracker Admin' User Type is assigned to a person who manages the Kavi Status Tracker for the organization. This type is associated with the 'status_tracker_admin' role, which confers access to the Kavi Status Tracker Admin and Reports Areas and tools. 'Status Tracker Admins' can add, edit and delete projects and activities, and generate reports.
Status Tracker Super Admin	status_tracker_super_admin	admin	The 'Status Tracker Super Admin' User Type is assigned to administrators who have received Kavi training for Super Admins. The 'Status Tracker Super Admin' type conveys the 'status_tracker_super_admin' role, which confers access to all Kavi Status Tracker Super Admin, Admin and Reports area tools and data managed through these tools. Super Admin tools are used to configure the application.

Kavi Members Default Types with Kavi Status Tracker Access

These User Types and Contact Types are automatically added by Kavi Members and can be viewed and assigned to users though Kavi Members tools.

Table H.3. Kavi Members types with Kavi Status Tracker access

Type	Default role	Description
Organization Admin	org_admin	The Kavi Members User Type 'Organization Admin' has access to the Admin and Reports Areas and tools in all applications, including the Kavi Status Tracker. 'Organization Admins' can add, edit and delete projects and activities, and generate reports.
Report Admin	report_admin	The Kavi Members User Type 'Report Admin' has access to the Report Areas of all Kavi applications including the Kavi Status Tracker Reports Area and tools.
Super Admin	super_admin	This User Type has complete administrative access to the website, including Kavi Status Tracker Super Admin, Admin and Reports Areas. 'Super Admins' can configure Kavi Status Tracker; add, edit and delete projects and activities; and generate reports.

Appendix I. Organization-Wide Project Views

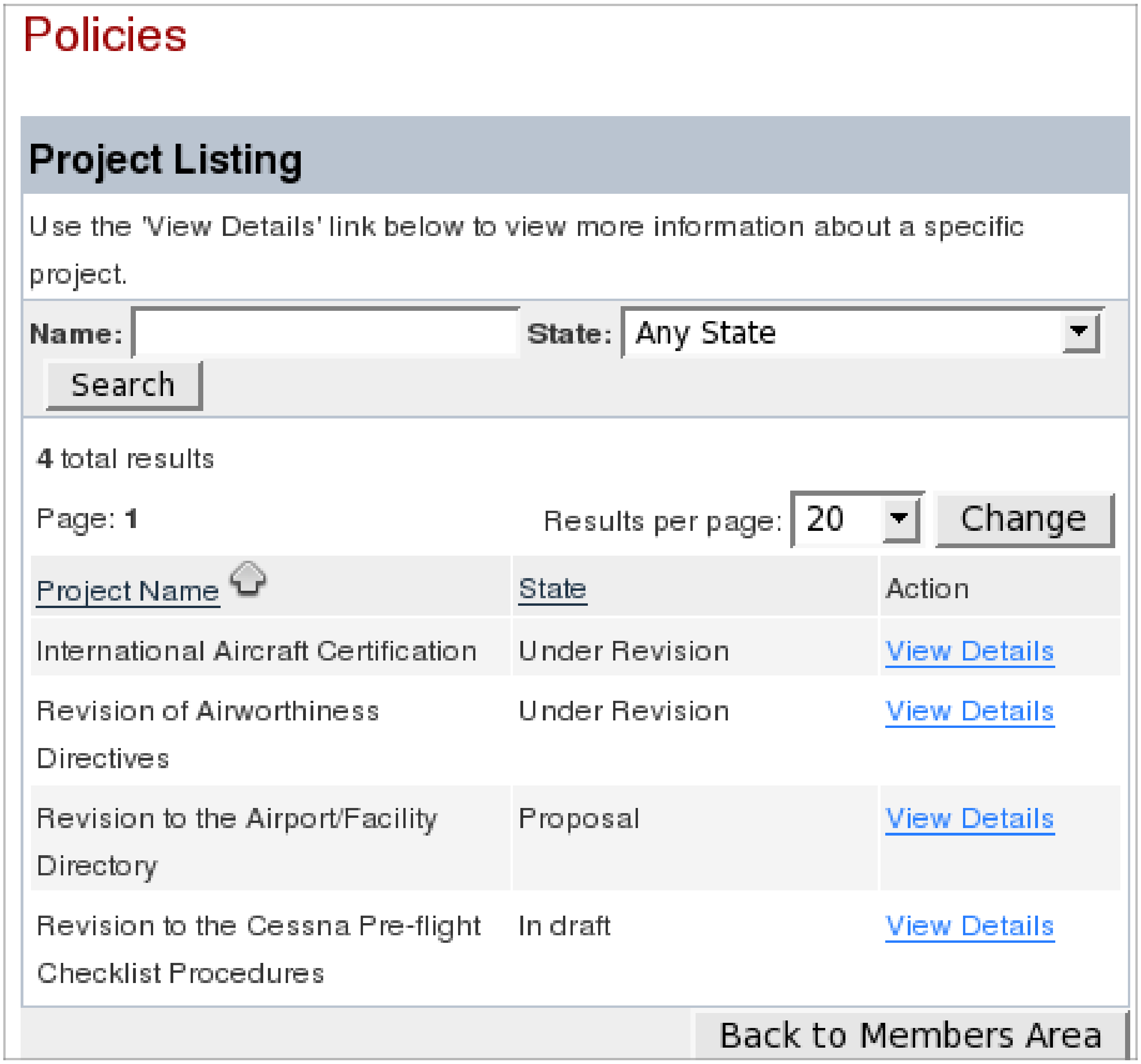
These are default views of projects and activities that may be installed in the Member Area or Public Area of your organization's website. Though these views are default, they must be installed by Kavi or an authorized channel partner so the exact location and configuration of the view can be tailored to suit the organization. These screenshots are from the Kavi Demo site. Views on your website will reflect your site's branding and may include fields or options that aren't present in the default examples.

Views displayed to the public or general membership may be simpler than the detailed views displayed to group members, such as the examples shown in the Concepts document Group Project Views. Public-facing views are sometimes filtered on Project State to prevent project details from being disclosed prematurely, but this has to be balanced with appropriate level of openness for compliance with the requirements of accreditation organizations such as ANSI.

Projects List View

This default view is used to display a list of projects. It is installed in the Members Area and configured to retrieve projects based on Project Type.

Figure I.1. Sample View of Projects Selected by Project Type

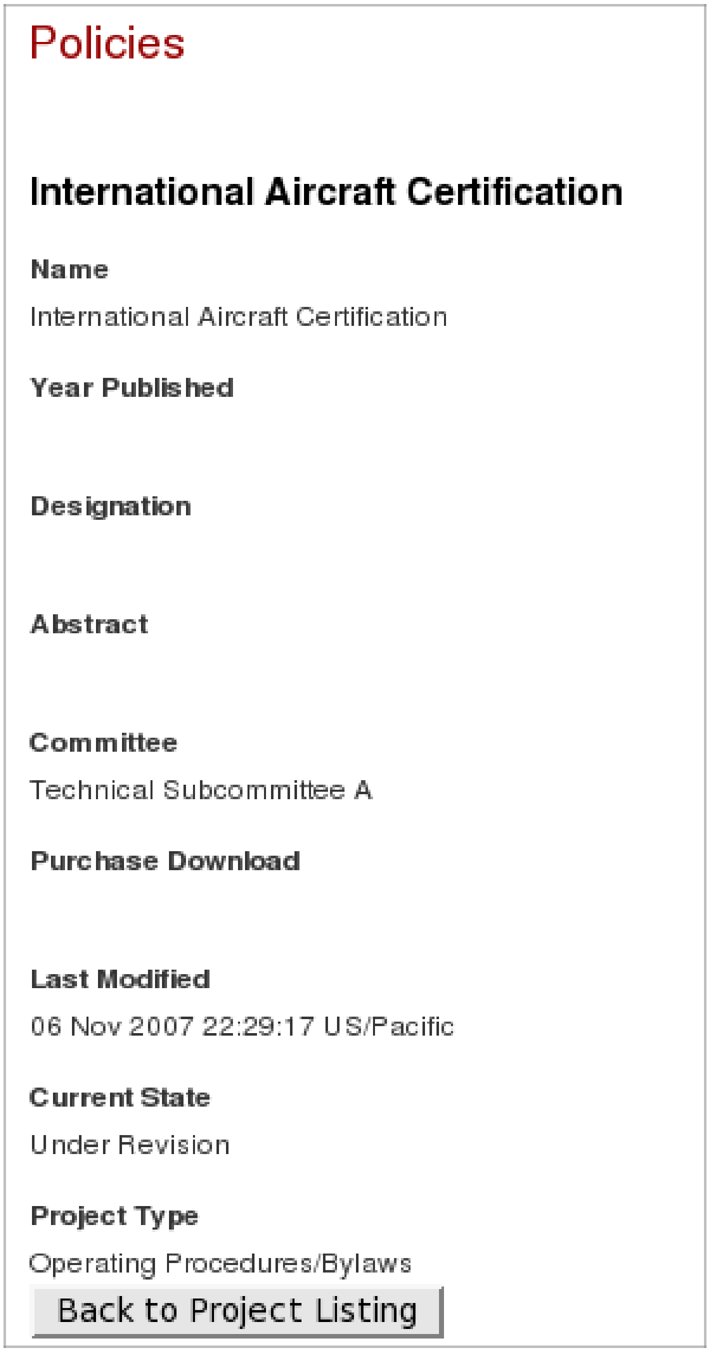


Kavi Status Tracker is a convenient way to manage and display organization bylaws, policies and operating procedures. This view displays all projects that have the 'Policies' Project Type. Project information is kept quite simple, showing the Project Name, Project State and an Action link that the viewer can click for more information.

Single Project View

A single project view is usually accessed by clicking an Action column link on the Projects List View. Single project views are built-to-suit, and may display both default and additional project data fields.

Figure I.2. Single Project View Example



In this example from the Kavi SDO Demo site, a single Policies project is displayed. The name of the Policies project is used for the page title, followed by the set of data fields that the organization selected for display. In a real world instance, a view like this could include a link to an HTML or PDF version of the policy document.

Appendix J. Group Project Views

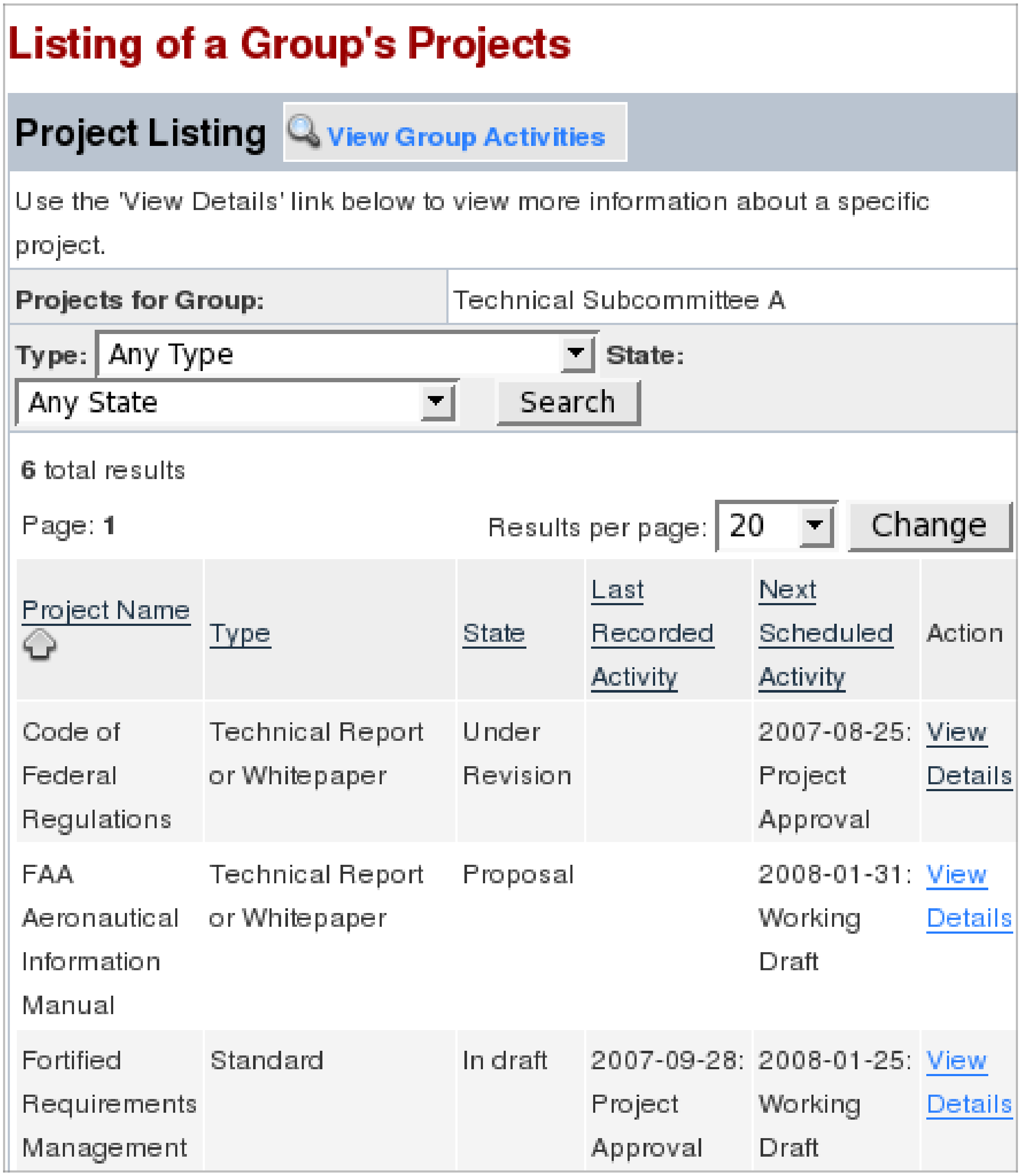
These are default views of a group's projects and activities from the Kavi Demo Site. Group-centric views on your website are most likely to be installed on a Kavi® Groups tab accessible from the Group Home page. The view will be tailored to fit your organization's requirements.

Views displayed to group members may be more detailed than views displayed to the public or general membership, such as the examples shown in the Concepts document Organization-Wide Project Views. The full details of projects in proposal or draft development states are usually included in group views, whereas projects or certain project details may be withheld from views displayed to the public until the project is ready for public review.

Group Projects Listing

This default Projects Listing view is usually displayed on a tab available on the Group Home page of a group associated with the project, such as the Owning Group or Consensus Body. It provides a quick overview of all the group's projects, plus links to view project details or group activities.

Figure J.1. Group Projects List Example


Listing of a Group's Projects

Project Listing View Group Activities

Use the 'View Details' link below to view more information about a specific project.

Projects for Group: Technical Subcommittee A

Type: Any Type **State:** Any State Search

6 total results

Page: **1** Results per page: 20 Change

Project Name	Type	State	Last Recorded Activity	Next Scheduled Activity	Action
Code of Federal Regulations	Technical Report or Whitepaper	Under Revision		2007-08-25: Project Approval	View Details
FAA Aeronautical Information Manual	Technical Report or Whitepaper	Proposal		2008-01-31: Working Draft	View Details
Fortified Requirements Management	Standard	In draft	2007-09-28: Project Approval	2008-01-25: Working Draft	View Details

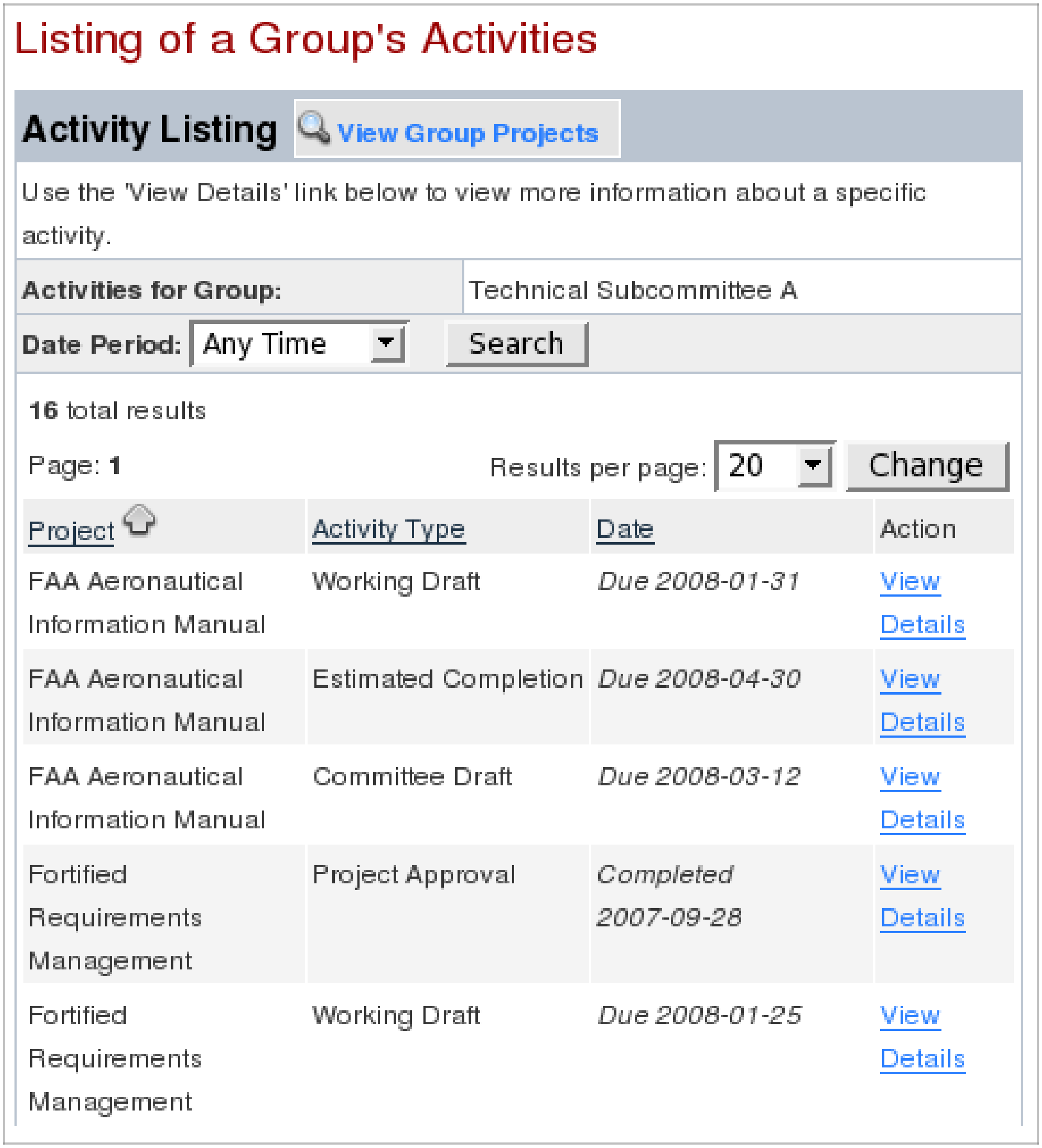
This view provides a snapshot of current group projects by listing the project name, Project Type, Project State, Last Recorded Activity and Next Scheduled Activity. The viewer can click the View Details link in the Action column for more information on that project, or click the

View Group Activities button to see all scheduled activities for all the group's projects. Since the Projects Listing could be long, especially for the top-level Consensus Body, the user can customize the view through the use of search filters or the 'Results per page' option, and column headings can be clicked to sort on different columns as desired.

Group Activities Listing

This default Activities Listing view is usually displayed on a tab available on the Group Home page of a group associated with the project, such as the Owning Group or Consensus Body. It provides an overview of all the activity going on in the group's various projects.

Figure J.2. Group Activities Listing Example



Listing of a Group's Activities

Activity Listing View Group Projects

Use the 'View Details' link below to view more information about a specific activity.

Activities for Group: Technical Subcommittee A

Date Period: Any Time Search

16 total results

Page: **1** Results per page: 20 Change

Project	Activity Type	Date	Action
FAA Aeronautical Information Manual	Working Draft	*Due 2008-01-31*	View Details
FAA Aeronautical Information Manual	Estimated Completion	*Due 2008-04-30*	View Details
FAA Aeronautical Information Manual	Committee Draft	*Due 2008-03-12*	View Details
Fortified Requirements Management	Project Approval	*Completed 2007-09-28*	View Details
Fortified Requirements Management	Working Draft	*Due 2008-01-25*	View Details

This default view presents a rollup of all the activities from all the group's projects in one Activity Schedule. Each row contains a single activity, including the name of the project to which the activity belongs, the Activity Type and a Date field that presents the date complete, or the due date by which the activity is scheduled to occur. The Date Period search field can be used to narrow the displayed results, column headings can be clicked to change the sort order, and the viewer can also set the 'Results per page'. The last column in the table, Action, contains the View Details link that can be clicked for more information on a specific activity.