MITS Score Card Training Manual
USDA

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CONTENTS

FIGURES

1. Introduction

This training manual has been prepared as a guide to assist in-person hands-on USDA staff training for the Score Card Module. The Score Card Module is a component of the MITS (Management Initiatives Tracking System) web application. The MITS Score Card is an online web application that allows the USDA to prepare, review, and submit an electronic score card for the Presidential Management Agenda (PMA) initiatives. Key components of the Score Card include the following:

A) User account creation and account management (e-authentication)

B) Initiative criteria and metric set up

C) Agency self scoring and evidence submission

D) Score card review, revision, and approval

E) Score card submission to the PMA Coordinator

F) Automatic email reminders for items/milestones due

G) Online score card summary and custom reporting

1.1. Training Manual Tips

This training manual includes a series of standard Tips and Visual Cues that are designed to notify and/or alert users about important items or items that require user actions. These tips are included throughout this help manual and are explained as follows:

Icon	Description
	TIP Icon: this icon alerts you to an important note or tip. Generally, there is tip text associated with this icon.
	INFO Icon: this icon alerts you to a text box with more information. This tip usually includes more specific in-depth information.
	STOP Icon: this icon alerts you stop what you are doing. This tip usually includes information you need to read before you proceed.
	CHECK Icon: this icon alerts you check your data entry. This tip usually includes information you need to check before you proceed.

1.2. Training Manual Organization

This training manual is organized into 11 Chapters. Each Chapter covers one general topic or a group of similar topics. The first chapter (this chapter) includes this introduction and general training instructions. Chapters 2-8 include training based on user roles (for example: Security Officers, Agency Users, Initiative Owners, etc.). Chapter 9 includes training information for the online calendar component of the scorecard. Chapter 10 includes training information for the online reporting functions available in the scorecard and Chapter 11 includes a training summary/conclusion. As such, this manual can be used to train all users or any single type of user. Chapters 1, 9-11 should be covered by all users whereas chapters 2-8 can be tailored to the specific user to be trained.

1.3. Hands-On Training Process

For the purposes of the present USDA training session, each chapter will be covered by the instructors. The training will include the following general process:

A) Introduction of the Instructors

B) Trainee sign in and introduction

C) Instructor description of the general purpose of the training

D) Instructor description of the overall training process

    a. Instructor introduces topic and displays score card on classroom screen

    b. Trainees are guided through the topic on their own computer workstations

    c. Instructors work with trainees to ensure each trainee can perform the topic

    d. Instructor summarizes topic and elicits feedback from the trainees

E) Instructor summary topics covered

F) Open discussion and feedback

During the training process, the instructor will encourage the interaction of the classroom trainees with each other and with the instructors and instructor as-

sistants. The training is a learning process and open discussion during practice exercises and lessons is encouraged.

1.4. Accessing the Score Card

In order to access the Score Card online application for training, the instructor will provide students with the URL for the Score Card.

> Trainees: You should write down the URL to the Score Card Online Training web page here. Make sure you include the https:// at the start of the URL. This is to ensure that Security is turned on. Also, your instructor should provide you with a Training User ID and Training Password for you to access this training session. **DO NOT** write down your ID and Password.

Training URL: _____

Once you have written down the URL to access the Score Card, trainees will be given a User ID and Password for access. Trainees will be directed to the USDA e-authentication portal and required to enter the User ID and Password just provided. If authenticated, the trainee web browser is redirected to the Score Card Home page or Security Officer Home page, depending on the User ID.

1.5. Score Card Home Page Navigation Overview

Once trainees have been authenticated and are logged in to the Score Card home page, there are two different views available:

1) Security Officer View
2) Score Card View (this view will be slightly different based on your user role. For this training, we will view the PMA Coordinator's home page)

> Please Note: the security officer role is that of an account manager responsible for creating all user account levels for the Score Card module.

In order to acquaint trainees with the Score Card Navigation, an overview of these two views and the navigation items are presented as follows:

Figure 1: Security Officer Home Page

MITS Executive DashBoard

My Details: Security Officer | FSA | Current Module: Security Officer

Security Officer Home | Add a New User | Logout

Existing Accounts: 295

Delete	Agency	Name	Email	Phone	e-Authentication ID
	USDA	Account, Developer	support@espherical.com	202-787-1935	28200601240011256292959
	FS	Official, Approving	support@espherical.com	202-787-1935	28200601240011254172958
	FS	User, Agency	support@espherical.com	202-787-1935	28200601240011252172957
	RD	Riger, Alex	alex.riger@wdc.usda.gov	(202) 555-0000	28200601240011252172000
	FNS	Owner, Initiative	support@espherical.com	202.787.1935	28200601240011249302956
	USDA	Coordinator, PMA	support@espherical.com	202.787.1935	28200601240011245032954
	USDA	schmoe, joseph	joe.schmoe@usda.gov	720-0000	28200601240011241422955
	FSA	Officer, Security	support@espherical.com	202-787-1935	28200601240011241422952
	NASS	Stewart, Keith	webmaster@espherical.com	202.257.5647	28200601180011410012944
	USDA	Roccaforte, John	john.roccaforte@usda.gov	970 295-5168	28200402060010000004576
	USDA	Claybaker, Elizabeth	Elizabeth.claybaker@usda.gov	2026900653	00000000000000000000001

The Security Officer Home Page sample is shown in Figure #1. This image is in Landscape View and will require you to turn your Training Manual to view it properly. Please turn your Manual now as the instructor explains the navigation elements.

For this training exercise, we will practice scrolling on several of the user table columns to learn how to quickly locate users. We will also learn about using some of the icons on the page as visual cues to quickly perform various tasks.

Figure 2: Score Card Homepage View

The Score Card Home Page sample is shown in Figure #2 above. This image is a sample view that the PMA Coordinator will see. Please follow the image on the projector screen as the instructor explains the Score Card home page navigation elements.

For this Training exercise, we will learn about the page navigation icons and how they can assist us in performing tasks and locating information quickly.

1.6. Score Card User Roles Overview

For this section of the training, a quick overview of the 7 User Roles within the Score Card module is presented for reference:

1. **Security Officers:** Security Officers are essentially account managers and can create all user account levels for the Scorecard Module.

2. **PMA Coordinator:** The PMA Coordinator can review scorecards and generate final summary reports and custom reports. The PMA Coordinator can edit and change all data.

3. **Executive Officers:** Executive Officers include the Deputy Secretary, senior management officials, and sub-cabinet officials. Executive Officers can retrieve the final scorecard reports and view trend analysis and generate custom re-ports from the system

4. **Initiative Owners:** Initiative Owners will have access to all agencies' scorecards under their initiatives. They can also overwrite scores, evidence, files, deliverables status, and comments submitted by agencies. The Initiative Owners can import, add, edit, and delete criteria/metrics/check lists within their initiatives.

5. **Agency Users:** Agency Users can enter data for self-evaluations such as scores, evidence data, status, and actions.

6. **Approving Officials:** Approving Officials can review and overwrite the scorecard information for their agencies prior to submitting the scorecards to Initiative Owners. Agency Users cannot be Approving Officials; however, Approving Officials can act as Agency Users.

7. **Developer Account Users:** Developer Account Users can create all user account levels for the Scorecard Module. They will have read/write access to all score-cards of all agencies/initiatives. Developer Account Users can also have access to all evaluation criteria/metrics for all initiatives and can overwrite all data. These accounts will be limited to G&B and eSpherical.com software developers.

-----------============ **END OF CHAPTER 1** ============----------

Chapter 2

2. Security Officer Training

Security Officers are responsible for creating, managing, and deleting user ac-
counts for the MITS software application. In order to create a user in MITS, Secu-
rity officers should receive a completed AD1143 Form with all the required user de-
tails and authorities within MITS. Security Officers do not have access to the Score
Card; they can only manage user accounts.

2.1. Training Objectives

The primary objectives for the security officer training include the following user
management functions:

A. Login and get to know the Security Officer home page
B. Create a new user
C. Edit an existing user details
D. Delete an existing user

For each objective above, we will confirm that the security officer was able to
successfully accomplish the task.

	Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the Security Officer home page.

2.2. Step 1: Login

The first step in this training process is to login as the Security Officer. Using
the User ID and the Password provided to you by the instructor, please go to
the Training URL and login. Once you login, please confirm that your login was
successful and you are on the Security Officer home page.

	Check to ensure that you have logged into the Security Officer Home page. You should see a list of user accounts (similar to Figure #1). If you are unable to login, please notify the instructor now.

2.3. Step 2: Create a New User

The second step for Security Officer training is to create a new user account. To create a new user account, from the Security Officer Home page, click on the Add a New User link at the top of the page. This will take you to the New User page.

	STOP: when creating a new user, you cannot use an existing e-authentication ID; each user must have a Different and Unique e-authentication ID. Your Instructor will provide you with a temporary e-authentication ID to use for this training.

To create a new user, you will need to enter all the information on the form. Each item will be discussed by your instructor. Also, please note that for this training, you do NOT need to select a PART Access level.

	INFO: when you create a new user, you have the choice of selecting multiple Initiatives for the user. Multiple Initiatives can be selected for all user types except Initiative Owners. For Initiative Owners, you need to select only one Initiative. Also, the email frequency radio button refers to the frequency which users will be notified of upcoming milestones and/or events in MITS.

Once you have entered all the information for the new user, click the submit button and your new user has been created. Your browser is directed back to the Security Officer home page and your new user will be highlighted in light yellow color. Please scroll to find the user you just created. If you receive any error or warning message or if you cannot locate the user you just created, please alert your Instructor.

	Note: remember the user account you just created, you may want to write it down for your reference. You will use this account in the next two training steps.

New User Account (Name): _____

2.4. Step 3: Edit Existing User

The third step for Security Officer training is to edit information in a user account. To edit user information, from the Security Officer Home page, find the user you wish to edit and click on the user's name. This will take you to the manage user page.

Stop	STOP: for this step, please use the new account you created in the previous step.

You can edit any of the information in this user's account. When you are finished editing, please click on the Edit button at the bottom of the page to save your edits. Your browser will be redirected to the Security Officer home page and the account you just edited will be highlighted in light yellow color. Please verify that the edits you made for the account were successful.

2.5. Step 4: Delete Existing User

The fourth and final step for the Security Officer training is to delete a user account. To delete a user account, from the Security Officer home page, find the user to be deleted.

Stop	STOP: for this step, please use the new account you created in the previous step.

Once you have located the user for deletion, click on the trash can icon next to the user name. This will redirect your web browser to the Confirm Deletion page. The purpose of the confirm deletion page is to provide the Security Officer with an additional confirmation step before a user is deleted.

ⓘ	INFO: when a user is deleted from the MITS system, there is NO undo for this deletion. All deletions are final.

2.6. Conclusion and Wrap-Up

This ends the Security Officer Training for the Score Card Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Chapter 2

Security Officer Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: Security Officer home page navigation
		STEP 2: Create new user
		STEP 3: Edit existing user
		STEP 4: Delete existing user

Trainee, please complete the table above for your records.

The Instructor will provide a few minutes for open discussion, questions and answers from the trainees.

--------=========== END OF CHAPTER 2 ===========---------

3. Agency User Training

Agency users are the core system users responsible for entering most of the data in the Score Card system. Agency users enter self-scores, provide criteria/metric evidence in support of their scores, upload evidence files, submit scores for approval, and follow-up on checklist milestones. Each of these responsibilities will be covered in this training chapter.

3.1. Training Objectives

The primary goal for the Agency User training includes completing each of the following tasks:

1) Login to the Agency User homepage for the Score Card
2) Review the Agency User home page navigation
3) Perform an Agency Self-Score for a given initiative
4) Enter criteria and metric evidence information
5) Upload an evidence file (.PDF format) for a given criteria/metric
6) Submit Agency Self-Score to Approving Official
7) Follow-up on checklist milestones

For each task above, we will confirm that the Agency User was able to successfully accomplish the task.

> Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the Agency User Score Card home page.

3.2. Step 1: Login

The first step in this training process is to login as an Agency User. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the Agency User home page.

3.3. Step 2: Agency User Home Page Navigation

The Agency User Score Card sample view is shown in Figure #3 below. This image is a sample view that an Agency User with the Forest Service will see. Please follow the image on the projector screen as the instructor explains the Score Card home page navigation elements.

Figure 3: Agency User Score Card Sample

For this Training exercise, we will focus on the four general areas of the Agency User homepage screen (see Figure #3 and follow along with the Instructor):

1. Area 1: Top Menu Bar, module access, support and feedback
2. Area 2: Upper left Navigation Box
3. Area 3: Calendar area, events listing
4. Area 4: Score Card area

Each of these navigational areas provides you with quick access to various parts of the Score Card and/or other MITS application areas.

3.4. Step 3: Agency Self Score

The major function of the MITS Score Card module is to allow Agency Users to enter Self Scores and evidence information for PMA (Presidential Management Agenda) initiatives. Scoring is based on a set of metrics and a summary metric for each initiative criteria. Furthermore, each metric has a series of conditions for reaching a Green score, a Yellow score or a Red score. The Agency User is expected to select the most appropriate metric condition for a self-score and then provide evidence for the self-score. Each criteria and summary criteria must be scored.

To begin the Agency User Self score, from the Agency User Score Card home page, click on the link in the Self Score Column and the Row corresponding to the initiative you wish to score.

> Please Note: for this training exercise, the Instructor will assist you with the practice Initiative that will be scored. The practice initiative has been preloaded for this training exercise.

When you click on the Agency Score Card above, you will be directed to the Agency Self Score Home page. To begin scoring a criteria, in the criteria list table at the bottom of the page, click on the criteria you wish to score.

> INFO: the scoring table list all criteria and agency self-scores and final scores. You can click on any item in this table to see the data for that item; however, you will not be able to score items that have already received a final score or items which are locked by other users. Items could be locked by Initiative Owners or the PMA coordinator.

Once you click on the criteria or Agency Self Score you wish to score, you are directed to the scoring page. At the top right of this page, you will see a button entitled "I want to work on this record".

	STOP: for this agency scoring, please follow the directions from your instructor. So that each trainee can work on a record, the instructor will assign each trainee with a criteria and metric to score so that records are available (unlocked) for each trainee.

In order to begin scoring this criterion, you must click on this button. Once you click on the button, you can begin entering information in the scoring table below. The first task is to review the metrics in the table and select which metric best matches your current score. Once you have made the score determination, click the "Yes" radio button in the metric area (red metrics, yellow metrics, or green metrics) that corresponds to your score. After you click the metric score, click the OK button at the bottom of the metric table. You will be redirected to the Agency Self Score home page. You should now see a small lock icon next to the criteria you just scored and the criteria should have a colored score in the Agency Self Score column; this is the score you just entered.

	CHECK: please confirm the lock icon and self-score are present. If you do NOT see the lock icon and/or you do NOT see the self-score you just entered, please contact the instructor and/or instructor assistants.

3.5. Step 4: Criteria/Metric Evidence

This step of the Agency User training involves typing in some evidence information for an Agency criteria self-score. To begin, you should be on the Agency Self-Score home page from the previous step. You should see a lock icon for the record you scored in Step 3 above. Click on this record; you will be redirected to the Scoring Page. Since this is the record you are working on from Step 3, the record is already locked by you so you can continue working on the record. For this step, you will type in some text in the Evidence Box just below the metric score. This is a text description of your scoring evidence, if any.

Once you have completed typing your evidence information in the Evidence Box, click on the Ok button to save your information. Once you click the OK button, you are redirected to the Agency Self Score home page.

✔ CHECK: please confirm the evidence information you just entered is visible on the Agency Self Score home page in the Evidence Column in your Criteria table. If you do NOT see the evidence information you just entered, please contact the instructor and/or instructor assistants.

3.6. Step 5: Upload Criteria/Metric Evidence File

This step of the Agency User training involves uploading an evidence file that supports your Agency Self-score.

Please Note: you are allowed to upload ONE evidence file for each criterion. Your file MUST be in .PDF format. In addition, if you edit the evidence information and you upload a new .PDF file, the new .PDF file will overwrite (replace) the previous .PDF file you uploaded.

To begin, you should be on the Agency Self-Score home page from the previous step. You should see a lock icon for the record you scored in Steps 3 and 4 above. Click on this record; you will be redirected to the Scoring Page. Since this is the record you are working on from Steps 3 and 4, the record is already locked by you so you can continue working on the record. For this step, you will upload a .PDF file in support of your self-score. The .PDF evidence upload area is just below the Evidence Box you typed in for Step 4; the file upload area has a .PDF icon for a visual cue. Once you find the icon, click the Browse button to browse your computer and locate the .PDF file you wish to upload.

Please Note: for this training exercise, the Instructor will provide you with the location for you to browse on your training computer. You will upload a sample PDF file from your training computer.

Once you have completed uploading your evidence file, you are redirected to the Agency Self Score home page. Your uploaded file should now be shown in the evidence column of your Criteria table.

✔️ CHECK: please confirm the evidence file you just uploaded is visible on the Agency Self Score home page in the Evidence Column in your Criteria table (PDF icon 📄). If you do NOT see the PDF icon you just uploaded, please contact the instructor and/or instructor assistants.

3.7. Step 6: Checklist Milestone Follow-up

This step of the Agency User training involves checklist milestone follow-up. Generally this requires the Agency User to update the milestone target due date and enter status comments for checklist items. There are two ways to access Checklist milestone data for follow-ups:

1. From the Agency User Score Card home page, due milestones are shown in your calendar detail in the upper right of your page
2. Inside your Scoring Page for the individual criteria for which the checklist applies

To update the checklist, click on either of the two links above. For this exercise, we will attempt to update the checklist from the criterion in the previous Step (5). As such, from your Agency Self-Score page, click on the Criteria Self Score you have been working on in Steps 3-5 above. This criterion should still be locked since you are still working on the record. Once you click on this criterion, you are redirected to the Scoring Page. You should see your Score, Evidence, and Uploaded .PDF evidence file from Steps 3-5 you just completed. At the top of the Scoring table, you will see any checklist items associated with your criteria. The checklist item will show the title of the item and the target due date. For this exercise, we will enter a completion date (Actual Date) and a few comments. To enter a completion date, click the small calendar icon next to the Actual date field. Select the completion date from the calendar icon.

ⓘ INFO: the calendar icon will open a new small window that will allow you to select an actual completion date. You can use the red arrows in the calendar to scroll backwards or forwards a month at a time. You can also use the double red arrows to scroll backwards or forwards a Year at a time. When you are on the year and month you need, click the link for the day you wish to select in the calendar. Your Actual date will be filled in the checklist and your calendar window closed.

Once you select the completion date, it will pre-fill the checklist actual date for you and the calendar window will close. Enter a few comments into the comment area for the checklist item and when you are finished, click the Save button for the checklist item. Your checklist update is now saved and shown in the checklist area for your criteria.

✓ CHECK: please confirm that the actual date and comments were updated for your checklist item. If the actual date and/or comments are NOT updated, please contact one of the instructors/assistants for help.

3.8. Step 7: Score Card Submission to Approving Official

This step of the Agency User training involves completing all of the Agency Self-Scores for each criteria and submitting the scores electronically to the approving official. To begin, you should be on the Agency Self-Score home page from the previous step. If you are NOT on the Agency Self-Score home page, click in the navigation box on Score Card Home, and then click on the Criterion in the Score Table which you have been working on for this training.

You should see a lock icon for the record you scored in Steps 3-6 above. Before you can submit scores to your approving official, all records must be unlocked and all criteria must be scored. To proceed, we will perform two tasks:

1. Unlock any locked records
2. Check to ensure all criteria have been scored

Click on the record to unlock; you will be redirected to the Scoring Page. Click the button entitled "I am finished working on this record" located in the top right of the page. This will unlock the record. Once you click this button, you are redirected to the Agency Self-Score page. Perform this task again for ANY/ALL records you have locked (you should have only this record).

Each trainee should complete this task now. Once completed, perform a visual check from the Agency Self-Score page to determine that ALL criteria have been scored. To check this, each criterion in the Criteria Table should have a Red, Yellow or a Green icon in the Agency Self Score column; this also includes the summary score criterion. When all criteria are unlocked and have been scored, click the button entitled "Submit to Approving Official" located below the criteria table. You will receive a message indicating that your Score Card has been submitted to your approving official. Click the OK button to acknowledge. You have completed the Agency Scoring.

ⓘ INFO: if your correct email is listed for your account, you should receive an email from the Score Card application that acknowledges that your Score Card has been submitted to the approving official. In addition, your instructor will demonstrate what happens if you attempt to submit a Score Card to your approving office before you have unlocked all records and/or before you have scored all records. You will receive an on-screen notice that you must unlock all records and score all criteria before you can submit your Score Card. Please follow along with your instructor to see this demonstration.

3.9. Conclusion and Wrap-up

This ends the Agency User Training for the Score Card Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Agency User Training Table		
Completion		Skill
Yes	No	
		STEP 1: Agency User login
		STEP 2: Agency User home page navigation
		STEP 3: Perform an Agency Self Score
		STEP 4: Add Criteria/Metric Evidence
		STEP 5: Upload a .PDF Evidence file
		STEP 6: Update a Checklist Milestone
		STEP 7: Submit Score Card to Approving Official

Chapter 3

Trainee, please complete the table above for your records.

The Instructor will provide a few minutes for open discussion, questions and answers from the trainees.

--------========== **END OF CHAPTER 3** ==========--------

Chapter 4

4. Approving Official Training

Approving Officials are the system users responsible for reviewing agency self-scores and determining if the agency self-scores are appropriate and that evidence is complete and accurate. Each of these responsibilities will be covered in this training chapter.

4.1. Training Objectives

The primary goal for the Approving Official training includes completing each of the following tasks:

1) Login to the Approving Official homepage for the Score Card
2) Review the Approving Official home page navigation
3) Revise an Agency Self-Score
4) Return an Agency Self-Score to Originating Agency
5) Approve Agency Self-Score

For each task above, we will confirm that the Approving Official was able to successfully accomplish the task.

> Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the Approving Official Score Card home page.

4.2. Step 1: Login

The first step in this training process is to login as an Approving Official. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the Approving Official home page.

4.3. Step 2: Approving Official Home Page Navigation

The Approving Official Score Card sample view is shown in Figure #4 below. This image is a sample view that an Approving Official with the NASS will see.

Chapter 4

Please follow the image on the projector screen as the instructor explains the Score Card home page navigation elements.

Figure 4: Approving Official Home Page Sample

For this Training exercise, we will focus on the four general areas of the Approving Official homepage screen (see Figure #4 and follow along with the Instructor):

1. Area 1: Top Menu Bar, module access, support and feedback
2. Area 2: Upper left Navigation Box
3. Area 3: Calendar area, events listing
4. Area 4: Score Card area

Each of these navigational areas provides you with quick access to various parts of the Score Card and/or other MITS application areas.

> Please Note: the Title in the Navigation Box is listed as Agency Score Card. This is because the Approving Official is Viewing the Agency Score Card which "belongs" to the Agency User.

4.4. Step 3: Revise Agency Self-Score

This step of the Approving Official Score Card training involves the revision of an agency self-score by an Approving Official. Approving Officials have the authority to approve, return, or revise an agency self-score. For this case, the Approving Official will directly revise an agency self-score.

To begin, from the Approving Official home page, click on the Self-Score link in the Score table for the desired initiative. You will be redirected to the Agency Self-Score home page for the Initiative you just clicked

> Please Note: Approving Officials can see/click on any self score; however, Approving Officials can only revise/approve/submit Score Cards for their Own Agency and Own Initiative. Additionally, Approving Officials may not revise/approve/submit score cards until the Agency User has completed the score card and submitted for Approving Official Review. Accordingly, from the Agency Self Score Home page, Approving Officials can quickly see which Score Cards have been submitted for their review: the Status Column in the Scoring Table will show: Under Review

From this page, click on the criteria link or self-score link you wish to revise (see information box above). Click on the "I want to work on this record" button located in the upper right of the page and begin revising the score. You can revise the actual self-score, the evidence data, and upload a new evidence .PDF file. The approving Official can also edit checklist actual dates and comments, if any. When finished, click the OK button and the edits are saved. You have completed the revisions.

> Please Note: the Approving Official Score Card allows you to directly revise an Agency self-score. After you have revised the score and evidence, you can submit the score to the Initiative Owner, or you can return the Score Card to the Agency User. In the event you wish to Return the Score Card to the Agency User for revision, you should select the "Revise" button instead of the OK button. This will notify the Agency User that they must revise this criterion. Generally, an Approving Official would NOT click the Revise button and then submit the Score to the Initiative Owner. The revise button is meant to notify the Agency User that the particular Metric/Criterion should be revised.

4.5. Step 4: Return Agency Self-Score to Originating Agency

This step of the Approving Official Score Card training involves Returning the Agency Self-Score to the Agency User for revision. This step provides some flexibility for the Approving Official:

1. The Approving Official can return all score card items at once
2. The Approving Official can selectively click on each criterion and metric and request that the Agency User revise individual criterion

For item #2 above, it should be noted that even though one or more items have been returned for Agency User revision, the score card cannot be submitted to the initiative owner until all items are approved.

To complete this step and return the Score Card to the Agency User for revision, first finish any revisions to the metrics/criteria and evidence and click either the OK button or the Revise button (as described above). When you click the OK button, you will be redirected to the Agency Self Score page. Ensure that all records have been unlocked and then click the "Return to Agency for Revision" button located below the Criteria Table. You will receive an online notice that the Score Card has been returned to the Agency User for revision. Click the OK button to acknowledge. The Agency User will receive an email indicating that the Score Card has been returned for revision. This step is now completed.

4.6. Step 5: Approve Agency Self-Score

This step of the Approving Official Score Card training involves Approving the Agency Self-Score. This step is very straightforward and involves only one primary action from the Approving Official. Principally, from the Approving Official Home Page, click on the Agency Self-Score column for the selected initiative with the status column indicating "Under Review". You will be redirected to the Agency Self-Score home page. Ensure that all items have been scored. Review

each Agency Self-Score. When completed with your review, click the "Submit to Initiative Owner" button located below the Criteria Table. You will receive an online message indicating that the Score Card has been submitted to the Initiative Owner. Click the OK button to acknowledge. The associated Initiative Owner will receive an email notification that an Approved Score Card has been submitted. This step is now completed.

4.7. Conclusion and Wrap-up

This ends the Approving Official Training for the Score Card Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Approving Official Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: Approving Official User login
		STEP 2: Approving Official home page navigation
		STEP 3: Revise Agency Self Score
		STEP 4: Return Agency Self Score to Originating Agency
		STEP 5: Approve Agency Self-Score

---------=========== **END OF CHAPTER 4** ==========---------

5. Initiative Owner Training

Initiative Owners are the core system managers responsible for setting up key data in the Score Card system. Initiative Owners enter criteria and metric data for Initiatives and/or individual agencies, provide checklists, and have overall management approval for Score Cards within their Initiatives. Each of these responsibilities will be covered in this training chapter.

5.1. Training Objectives

The primary goal for the Initiative Owner training includes completing each of the following tasks:

1) Login to the Initiative Owner homepage for the Score Card
2) Review the Initiative Owner home page navigation
3) Create a new criterion
4) Add a Deliverable Checklist Item
5) Modify an existing criterion
6) Import criteria from one quarter to another quarter
7) Return a Score Card to Agency User
8) Approve Score Cards

For each task above, we will confirm that the Initiative Owner was able to successfully accomplish the task.

> Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the Initiative Owner Score Card home page.

5.2. Step 1: Login

The first step in this training process is to login as an Initiative Owner. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the Initiative Owner home page.

5.3. Step 2: Initiative Owner Home Page Navigation

The Initiative Owner Score Card sample view is shown in Figure #5 below. This image is a sample view that an Initiative Owner for Improper Payments will see. Please follow the image on the projector screen as the instructor explains the Score Card home page navigation elements.

Figure 5: Initiative Owner Home Page Sample

Chapter 5

For this Training exercise, we will focus on the four general areas of the Initiative Owner homepage screen (see Figure #5 and follow along with the Instructor):

1. Area 1: Top Menu Bar, module access, support and feedback
2. Area 2: Upper left Navigation Box
3. Area 3: Calendar area, events listing
4. Area 4: Score Card area

Each of these navigational areas provides you with quick access to various parts of the Score Card and/or other MITS application areas.

5.4. Step 3: Create a New Criterion

This step of the Initiative Owner Score Card training involves creating a new criterion. To create a new criterion, from the Initiative Owner home page, click on the Scoring Criteria link in the Navigation Box located in the upper left of the page. You will be directed to the Scoring Criteria Management Page. By default, scoring criteria for your Initiative and the current year and quarter are displayed. On the Scoring Criteria Management Page, you will see a Criteria Management table with all the current Initiative criteria, the metrics for Green, Yellow and Red scores, applicable agencies for the criteria and links to checklists. At the bottom of the table is the Summary Criteria.

To create a new criterion, ensure that your Initiative is selected in the Select List box in the Navigation Box, select your desired Year and Quarter, and then choose an agency or All from the select list. When you have made your selections, click the button entitled "New Criteria" located towards the bottom of the Navigation Box. When you click the New Criteria button, you are redirected to the Individual Score Criteria Management page. The Individual Score Criteria

Management page includes a table where you can enter the following criteria and metric information:

1. Scoring Criteria Metric (Criteria Title)
2. Criteria for Green
3. Criteria for Yellow
4. Criteria for Red
5. Comments
6. Agency Selection area

> ✔ CHECK: in the navigation box, please confirm that your selected quarter and year are shown correctly. If you need to change your quarter or year, use the back button to change. Also, remember that you are adding a New Criterion for the period (Year and Quarter) you just selected.

To add a new Criterion, fill in each of the areas in 1-4 above. The comment area is optional and serves as a place to enter criteria notes. Once you have finished entering the criteria/metric information, check the agency or agencies to which the new criterion applies. When you are finished, click the Submit button and your new criterion is saved. You will then be redirected to the Scoring Criteria Management home page; you will see your new Criterion listed at the bottom of the criteria table just above the Summary criteria. You have now completed this step.

> Stop STOP: please do NOT navigate to another page. You should remain on the current page (Scoring Criteria Management Page) for the next step.

5.5. Step 4: Add a Deliverable Checklist Item

This step of the Initiative Owner training involves adding a new deliverable Checklist item to a criterion. To add a new deliverable checklist, your web browser should be on the Scoring Criteria Management page from the previous step (Step 3). If your browser is NOT on the Scoring Criteria Management page, please click the Scoring Criteria Home link in the navigation box.

Scroll to the criteria table on the Scoring Criteria Management page. Locate the criteria for which you wish to add a new deliverable checklist item. In the far right "Check List" column in the Criteria table, click the icon to view/add a new checklist item. Your web browser will be redirected to the Deliverable Checklist Management page.

✔	CHECK: in the navigation box, please confirm that your selected Initiative, Agency, Year Quarter and Criterion are shown correctly. If you need to change any of this information, please use the select boxes to change your selections.

Your selected Checklist parameters are indicated in the Navigation box. To change any of these parameters, see the ✔ note above.

Using the Deliverable Checklist table, type in the title of your new Deliverable Item, any Status or Comments you may have, use the calendar icon to enter a target completion date for the checklist item, and then select the agency or agencies to which this checklist applies. Once you have completed adding this checklist information, click the Add New button located at the bottom of the Checklist Table and your new Deliverable Checklist item is added and now appears at the top of the Checklist Table. Please note: you can also modify an existing Checklist item from this same table. Simply edit the checklist you wish to modify and click the Save button for the selected checklist item.

ⓘ	INFO: Deliverable checklist items will appear in two places: first, they will appear on the Score Card home page in the Due Items area next to the calendar. This appearance is controlled by the item due date. For example, if an item is due in March 2006, when March arrives, it will appear in the Calendar area. Note, the checklist item appears only for Agency users to which the checklist items apply.
	Secondly, the Checklist item will appear whenever a user accesses the individual criteria. For example, if an Agency User is performing a Self Score, when the criterion is accessed for scoring, any associated deliverable checklist items will appear in the scoring table.

5.6. Step 5: Modify an Existing Criterion

To edit or modify existing criteria, click on the Scoring Criteria Home link in the navigation box. Use the select list boxes to choose your initiative, period and agency/agencies. Once you have made your choices, click the Go button next to

the Agency select list. Selected criteria associated with your choices will appear in the criteria table. Click the list for the Criteria you wish to modify. You will be redirected to the Individual Scoring Criteria Management page. Existing criteria information is pre-filled in the criteria table. To edit, simply type in any new information you wish. You may also uncheck and/or check new agencies in the Agency table column. The agencies column refers to the agencies for which this criterion applies. As a reminder, the areas you can edit include the following:

1. Scoring Criteria Metric (Criteria Title)
2. Criteria for Green
3. Criteria for Yellow
4. Criteria for Red
5. Comments
6. Agency Selection area

When you are finished, click the Submit button and the edits to your Criterion are saved. You will then be redirected to the Scoring Criteria Management home page; you will see your modified Criterion listed in the criteria table. You have now completed this step.

5.7. Step 6: Import Criteria from Quarter to Quarter

This step of the Initiative Owner Score Card training involves importing criteria from one quarter to another quarter. This functionality allows Initiative Owners to copy criteria from their initiative to a new time period (year and quarter).

To being the criteria import, click on the Scoring Criteria Home page link in the navigation box. There are four basic Navigation Box tasks to begin the import; these tasks are explained as follows:

Task 1: Inside the navigation box, select the Period you want to import criteria to. The period includes the Year and the Quarter.

Task 2: Select the Initiative you want to import criteria <u>to</u>. NOTE: unless you are the owner for more than one initiative, you will ONLY see your initiative in this select list.

Task 3: Select the Agency (or All Agencies) you wish to import criteria <u>to</u>.

Task 4: Click the Go button

After you have completed the above 4 tasks and clicked the Go button, any existing criteria for the Period, Initiative, and Agency (Agencies) you selected will appear in the Criteria table.

> Please Note: if this is your first import for the selected Period, your Criteria table will be empty.

To continue with the import, click the Import Criteria button. You will be redirected to the Import Criteria Screen. From this screen, select the Initiative and Period where you wish to import criteria <u>from</u>. Remember, if you are the initiative owner for more than one initiative, you can select other initiatives; otherwise, you can only import from your own initiative. Once you have selected the Initiative and Period (Year and Quarter) to import criteria <u>from</u>, click the Get Criteria button. If the Initiative and Period you selected has available criteria, they will be displayed in the Criteria table. If there are NO available criteria based on your Initiative and Period selections, try selecting a different period.

To complete the Criteria Import process, after you have clicked the Get Criteria button in the process above, you will see a listing of the available criteria in the criteria table. At the top of the table, you will see the following two indicators:

1. **Criteria Destination**: this is the destination or "<u>to</u>" location where your criteria will be <u>imported</u>. Please confirm that this is the correct destination. If this is incorrect, use your back button and reselect the Period and Initiative.

2. ⟳ Criteria Source: this is the source or "from" location where your criteria will be <u>exported</u>. Please confirm that this is the correct Initiative and Period. If it is incorrect, simply use the selection lists in the Navigation Box at the top of the page and choose the correct Criteria Source. Once you have selected, click the Get Criteria button. Your criteria will be displayed in the Criteria table.

To finish the Criteria Import process, review the criteria in the criteria table. Each criterion has a Check Box in the right hand column; check this box for each criterion you wish to import. When you are finished reviewing the criteria and have checked the ones you wish to import, click the Import button located at the bottom of the criteria table. Your Criteria will be imported and you are returned to the default Period Scoring Criteria Home page. To ensure that your criteria have been imported, select the Period, Initiative, and Agency (All Agencies) and click the Go button. Your imported Criteria will be listed. From this page, you can modify any criteria (Step 5), add checklists (Step 4), and/or add new criteria (Step 3). You can also delete criteria by clicking on the Trash Can icon next to the Criteria.

> ⓘ INFO: if you are importing criteria and you receive the message "Criteria already in Database", this message means that one or more of the criteria you are trying to import is already present. If you receive this message, please make sure that you are not trying to import criteria into a period that already has the same criteria.
>
> Also, if you are trying to delete a criterion and you receive a message "There are Score Cards In Process with the Criterion, Are you sure you want to delete" , this message is a warning message that you are about to delete criteria which are currently being used (scored) within an existing score card. If you proceed to delete criteria when you get this message, please be aware that existing score cards in process will no longer have the criteria available and also score cards which have already been scored with the criteria will have their score for the criteria you are about to delete removed from the database.

5.8. Step 7: Return Agency Self-Score to Originating Agency

This step of the Initiative Owner Score Card training involves Returning the Agency Self-Score to the Agency User for revision. This step provides some flexibility for the Initiative Owner:

1. The Initiative Owner can return all score card items at once
2. The Initiative Owner can selectively click on each criterion and metric and request that the Agency User revise individual criterion

For item #2 above, it should be noted that even though one or more items have been returned for Agency User revision, the score card cannot be approved until all items have been scored and submitted back from the Agency User to the Approving Official to the Initiative Owner.

To complete this step and return the Score Card to the Agency User for revision, first finish any revisions to the metrics/criteria and evidence and click either the OK button or the Revise button (as described above). When you click the OK button, you will be redirected to the Agency Self Score page. Ensure that all records have been unlocked and then click the "Return to Agency for Revision" button located below the Criteria Table. You will receive an online notice that the Score Card has been returned to the Agency User for revision. Click the OK button to acknowledge. The Agency User will receive an email indicating that the Score Card has been returned for revision. This step is now completed.

5.9. Step 8: Approve Agency Self-Score

This step of the Initiative Owner Score Card training involves approving the Agency Self-Score. This step is very straightforward and involves only one primary action from the Initiative Owner. Principally, from the Initiative Owner Home Page, click on the Current column for the selected initiative with the status indicating "Finalizing". You will be redirected to the Agency Self-Score home page. Ensure that all items have been scored. Review each Agency Self-Score. You must provide a Final Score for each item. When completed with your review and Final Score, click the "Approve" button located below the Criteria Table. You will receive an online message indicating that the Score Card has

been submitted to the PMA Coordinator. Click the OK button to acknowledge. The PMA Coordinator will receive an email notification that a Score Card has been Approved. This step is now completed.

5.10. Conclusion and Wrap-up

This ends the Initiative Owner Training for the Score Card Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Approving Official Training Table		
Completion		Skill
Yes	No	
		STEP 1: Initiative Owner user login
		STEP 2: Initiative Owner home page navigation
		STEP 3: Create a new initiative
		STEP 4: Add a Deliverable Checklist Item
		STEP 5: Modify an existing initiative
		STEP 6: Import initiatives from quarter to quarter
		STEP 7: Return Agency Self Score to originating agency
		STEP 8: Approve Agency Self-Score

--------========== END OF CHAPTER 5 ==========--------

Chapter 6

6. Executive Officers Training

Executive Officers are senior management-level officials within the USDA. Executive officers have the responsibilities of reviewing and printing Score Card data. Each of these responsibilities will be covered in this training chapter.

6.1. Training Objectives

The primary goal for the Executive Officer training includes completing each of the following tasks:

1) Login to the Executive Officer homepage for the Score Card
2) Review the Executive Officer home page navigation
3) View Summary Score Cards
4) Print Summary Score Cards

For each task above, we will confirm that the Executive Officer was able to successfully accomplish the task.

> Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the Executive Officer Score Card home page.

6.2. Step 1: Login

The first step in this training process is to login as an Executive Officer. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the Initiative Owner home page.

6.3. Step 2: Executive Officer Home Page Navigation

The Executive Officer Score Card sample view is shown in Figure #6 below. Please follow the image on the projector screen as the instructor explains the Score Card home page navigation elements.

Chapter 6

Figure 6: Executive Officer Home Page Sample

For this Training exercise, we will focus on the four general areas of the Executive Officer homepage screen (see Figure #6 and follow along with the Instructor):

1. Area 1: Top Menu Bar, module access, support and feedback
2. Area 2: Upper left Navigation Box
3. Area 3: Calendar area, events listing
4. Area 4: Score Card area

Each of these navigational areas provides you with quick access to various parts of the Score Card and/or other MITS application areas.

6.4. Step 3: Executive Officer View Summary Score Cards

This step of the Executive Officer training involves viewing summary score cards. By default, the summary score card is presented on the Executive Officer home page (in the Navigation Box, this is entitled "Internal Score Card Summary"). At any time, the Executive Officer can view the Summary Score Card by clicking on the Score Card Home link in the Navigation box.

Executive Officers can also view detailed score card information by clicking on any of the scoring links in the Summary Score Card. These links will allow Executive Officers to see the individual scoring metrics and the resulting summary score for any Agency and/or initiative. Additionally, Executive Officers can view Scoring Criteria for any initiative. To view scoring criteria, click on the Scoring Criteria link in the Navigation Box and/or click on the Scoring Criteria icon on any Scoring page.

> ⓘ INFO: While Executive Officers may view individual Agency scores and criteria, Executive Officers permission levels do not allow editing, modification, importing or any other changes for scores or criteria. Principally, Executive Officers are presented with summary score card views for overall USDA performance.

6.5. Step 4: Executive Officer Print Summary Score Cards

This step of the Executive Officer training involves printing of Summary Scores. To print summary scores, click on the Print Version link in the Navigation box. This will open a New web browser window with the printable summary score card. The print version is formatted for both color print and black and white print. For black and white printing, each score bubble has its corresponding color notation: 🟢 G for Green score; 🟡 Y for Yellow score; and 🔴 R for Red score. Additionally, the print version is designed for portrait orientation printing on a single page.

6.6. Conclusion and Wrap-up

This ends the Executive Officer Training for the Score Card Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Executive Officer Training Table		
Completion		Skill
Yes	No	
		STEP 1: Executive Officer User login
		STEP 2: Executive Officer home page navigation
		STEP 3: View Summary Score Cards
		STEP 4: Print Summary Score Cards

--------=========== END OF CHAPTER 6 ===========--------

7. PMA Coordinator Training

PMA Coordinators are responsible for overall management and oversight for the PMA Score Card. Accordingly; PMA Coordinators have complete control over all functions within the Score Card module. PMA Coordinators can enter/edit self-scores for any/all agencies, provide criteria/metric evidence in support of scores, upload evidence files, manage criteria, manage checklist, return scores to Agencies for revision, and approve score cards. Each of these responsibilities has been explained in various chapters and will be summarized in this training chapter for the PMA Coordinator.

7.1.   Training Objectives

The primary goal for the PMA Coordinator training includes completing each of the following tasks:

1)   Login to the PMA Coordinator homepage for the Score Card
2)   Review the PMA Coordinator home page navigation
3)   Perform an Agency Self-Score for a given initiative
4)   Enter criteria and metric evidence information
5)   Upload an evidence file (.PDF format) for a given criteria metric
6)   Create a new criterion
7)   Add a Deliverable Checklist Item
8)   Modify an existing criterion
9)   Import criteria from one quarter to another quarter
10)   Return a Score Card to Agency User
11)   Approve Score Cards

For each task above, we will confirm that the PMA Coordinator was able to successfully accomplish the task.

> Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the PMA Coordinator Score Card home page.

7.2. Step 1: Login

The first step in this training process is to login as a PMA Coordinator. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the Agency User home page.

7.3. Step 2: PMA Coordinator Home Page Navigation

The PMA Coordinator Score Card sample view is shown in Figure #7 below. This image is a sample view that the PMA Coordinator will see. Please follow the image on the projector screen as the instructor explains the Score Card home page navigation elements.

Figure 7: PMA Coordinator Home Page Sample

For this Training exercise, we will focus on the four general areas of the PMA Coordinator homepage screen (see Figure #7 and follow along with the Instructor):

1. Area 1: Top Menu Bar, module access, support and feedback
2. Area 2: Upper left Navigation Box
3. Area 3: Calendar area, events listing
4. Area 4: Score Card area

Each of these navigational areas provides you with quick access to various parts of the Score Card and/or other MITS application areas.

7.4.   Step 3: Perform an Agency Self-Score

The major function of the MITS Score Card module is to allow Agency Users to enter Self Scores and evidence information for PMA (Presidential Management Agenda) initiatives. Scoring is based on a set of metrics and a summary metric for each initiative criteria. Furthermore, each metric has a series of conditions for reaching a Green score, a Yellow score or a Red score. The Agency User is expected to select the most appropriate metric condition for a self-score and then provide evidence for the self-score. Each criteria and summary criteria must be scored.

PMA Coordinators can also enter Agency Self-Scores for any Agency. To begin the Agency User Self score, from the PMA Coordinator Score Card home page, click on the link in the Self Score Column and the Row corresponding to the initiative you wish to score.

> Please Note: for this training exercise, the Instructor will assist you with the practice Initiative that will be scored. The practice initiative has been preloaded for this training exercise.

When you click on the Agency Score Card above, you will be directed to the Agency Self Score Home page. To begin scoring a criteria, in the criteria list table at the bottom of the page, click on the criteria you wish to score.

> ⓘ INFO: the scoring table lists all criteria, agency self-scores, and final scores. You can click on any item in this table to see the data for that item; however, you will not be able to score items that are locked by other users.

Once you click on the criteria or Agency Self Score you wish to score, you are directed to the scoring page. At the top right of this page, you will see a button entitled "I want to work on this record".

> Stop STOP: for this agency scoring, please follow the directions from your instructor. So that each trainee can work on a record, the instructor will assign each trainee with a criteria and metric to score so that records are available (unlocked) for each trainee.

In order to begin scoring this criterion, you must click on this button. Once you click on the button, you can begin entering information in the scoring table below. The first task is to review the metrics in the table and select which metric best matches your current score. Once you have made the score determination, click the "Yes" radio button in the metric area (red metrics, yellow metrics, or green metrics) that corresponds to your score. After you click the metric score, click the OK button at the bottom of the metric table. You will be redirected to the Agency Self Score home page. You should now see a small lock icon next to the criteria you just scored and the criteria should have a colored score in the Agency Self Score column; this is the score you just entered.

> ✓ CHECK: please confirm the lock icon and self-score are present. If you do NOT see the lock icon and/or you do NOT see the self-score you just entered, please contact the instructor and/or instructor assistants.

7.5.   Step 4: Enter Criteria and Metric Evidence

This step of the PMA Coordinator training involves typing in some evidence information for an Agency criteria self-score. To begin, you should be on the Agency Self-Score home page from the previous step. You should see a lock icon for the record you scored in Step 3 above. Click on this record; you will be redirected to the Scoring Page. Since this is the record you are working on from

Step 3, the record is already locked by you so you can continue working on the record. For this step, you will type in some text in the Evidence Box just below the metric score. This is a text description of your scoring evidence, if any.

Once you have completed typing your evidence information in the Evidence Box, click on the Ok button to save your information. Once you click the OK button, you are redirected to the Agency Self Score home page.

✔ CHECK: please confirm the evidence information you just entered is visible on the Agency Self Score home page in the Evidence Column in your Criteria table. If you do NOT see the evidence information you just entered, please contact the instructor and/or instructor assistants.

7.6. Step 5: Upload an Evidence File

This step of the PMA Coordinator training involves uploading an evidence file that supports an Agency Self-score.

📄 Please Note: you are allowed to upload ONE evidence file for each criterion. Your file MUST be in .PDF format. 📄 In addition, if you edit the evidence information and you upload a new .PDF file, the new .PDF file will overwrite (replace) the previous .PDF file you uploaded.

To begin, you should be on the Agency Self-Score home page from the previous step. You should see a lock icon for the record you scored in Steps 3 and 4 above. Click on this record; you will be redirected to the Scoring Page. Since this is the record you are working on from Steps 3 and 4, the record is already locked by you so you can continue working on the record. For this step, you will upload a .PDF file in support of your self-score. The .PDF evidence upload area is just below the Evidence Box you typed in for Step 4; the file upload area has a .PDF 📄 icon for a visual cue. Once you find the icon, click the Browse button to browse your computer and locate the .PDF file you wish to upload.

📄 Please Note: for this training exercise, the Instructor will provide you with the location for you to browse on your training computer. You will upload a sample PDF file from your training computer.

Once you have completed uploading your evidence file, you are redirected to the Agency Self Score home page. Your uploaded file should now be shown in the evidence column of your Criteria table.

> ✓ CHECK: please confirm the evidence file you just uploaded is visible on the Agency Self Score home page in the Evidence Column in your Criteria table (PDF icon 📕). If you do NOT see the PDF icon you just uploaded, please contact the instructor and/or instructor assistants.

7.7.   Step 6: Create a New Criterion

This step of the PMA Coordinator Score Card training involves creating a new criterion. To create a new criterion, from the PMA Coordinator home page, click on the Scoring Criteria link in the Navigation Box located in the upper left of the page. You will be directed to the Scoring Criteria Management Page. By default, scoring criteria for the Competitive Sourcing Initiative and the current year and quarter are displayed. On the Scoring Criteria Management Page, you will see a Criteria Management table with all the current Initiative criteria, the metrics for Green, Yellow and Red scores, applicable agencies for the criteria and links to checklists. At the bottom of the table is the Summary Criteria.

To create a new criterion, select an Initiative from the Select List in the Navigation Box, select your desired Year and Quarter, and then choose an agency or All from the select list. When you have made your selections, click the button entitled "New Criteria" located towards the bottom of the Navigation Box. When you click the New Criteria button, you are redirected to the Individual Score Criteria Management page. The Individual Score Criteria Management page includes a table where you can enter the following criteria and metric information:

1. Scoring Criteria Metric (Criteria Title)
2. Criteria for Green
3. Criteria for Yellow
4. Criteria for Red

5. Comments

6. Agency Selection area

✓ CHECK: in the navigation box, please confirm that your selected quarter and year are shown correctly. If you need to change your quarter or year, use the back button to change. Also, remember that you are adding a New Criterion for the period (Year and Quarter) you just selected.

To add a new Criterion, fill in each of the areas in 1-4 above. The comment area is optional and serves as a place to enter criteria notes. Once you have finished entering the criteria/metric information, check the agency or agencies to which the new criterion applies. When you are finished, click the Submit button and your new criterion is saved. You will then be redirected to the Scoring Criteria Management home page; you will see your new Criterion listed at the bottom of the criteria table just above the Summary criteria. You have now completed this step.

Stop STOP: please do NOT navigate to another page. You should remain on the current page (Scoring Criteria Management Page) for the next step.

7.8. Step 7: Add a Deliverable Checklist Item

This step of the PMA Coordinator training involves adding a new deliverable Checklist item to a criterion. To add a new deliverable checklist, your web browser should be on the Scoring Criteria Management page from the previous step (Step 6). If your browser is NOT on the Scoring Criteria Management page, please click the Scoring Criteria Home link in the navigation box.

Scroll to the criteria table on the Scoring Criteria Management page. Locate the criteria for which you wish to add a new deliverable checklist item. In the far right "Check List" column in the Criteria table, click the icon to view/add a new checklist item. Your web browser will be redirected to the Deliverable Checklist Management page.

✓ CHECK: in the navigation box, please confirm that your selected Initiative, Agency, Year Quarter and Criterion are shown correctly. If you need to change any of this information, please use the select boxes to change your selections.

Your selected Checklist parameters are indicated in the Navigation box. To change any of these parameters, see the ✔ note above.

Using the Deliverable Checklist table, type in the title of your new Deliverable Item, any Status or Comments you may have, use the calendar icon to enter a target completion date for the checklist item, and then select the agency or agencies to which this checklist applies. Once you have completed adding this checklist information, click the Add New button located at the bottom of the Checklist Table and your new Deliverable Checklist item is added and now appears at the top of the Checklist Table. Please note: you can also modify an existing Checklist item from this same table. Simply edit the checklist you wish to modify and click the Save button for the selected checklist item.

> ⓘ INFO: Deliverable checklist items will appear in two places: first, they will appear on the Score Card home page in the Due Items area next to the calendar. This appearance is controlled by the item due date. For example, if an item is due in March 2006, when March arrives, it will appear in the Calendar area. Note: the checklist item appears only for Agency users for which the checklist items apply.
>
> Secondly, the Checklist item will appear when ever a user accesses the individual criteria. For example, if an Agency User is performing a Self Score, when the criteria are accessed for scoring, any associated deliverable checklist items will appear in the scoring table.

7.9. Step 8: Modify an Existing Criterion

The PMA Coordinator can modify existing criteria. To edit or modify existing criteria, click on the Scoring Criteria Home link in the navigation box. Use the select list boxes to choose your initiative, period and agency/agencies. Once you have made your choices, click the Go button next to the Agency select list. Selected criteria associated with your choices will appear in the criteria table. Click the list for the Criteria you wish to modify. You will be redirected to the Individual Scoring Criteria Management page. Existing criteria information is pre-filled in the criteria table. To edit, simply type in any new information you wish. You may also uncheck and/or check new agencies in the Agency table column. The agencies column refers to the agencies for which this criterion applies. As a reminder, the areas you can edit include the following:

1. Scoring Criteria Metric (Criteria Title)
2. Criteria for Green
3. Criteria for Yellow
4. Criteria for Red
5. Comments
6. Agency Selection area

When you are finished, click the Submit button and the edits to your Criterion are saved. You will then be redirected to the Scoring Criteria Management home page; you will see your modified Criterion listed in the criteria table. You have now completed this step.

7.10. Step 9: Import Criteria

This step of the PMA Coordinator Score Card training involves importing criteria from one quarter to another quarter. This functionality allows PMA Coordinators and Initiative Owners to copy criteria from their initiative to a new time period (year and quarter).

To begin the criteria import, click on the Scoring Criteria Home page link in the navigation box. There are four basic Navigation Box tasks to begin the import; these tasks are explained as follows:

Task 1: Inside the navigation box, select the Period you want to import criteria <u>to</u>. The period includes the Year and the Quarter.

Task 2: Select the Initiative you want to import criteria <u>to</u>.

Task 3: Select the Agency (or All Agencies) you wish to import criteria <u>to</u>.

Task 4: Click the Go button

After you have complete the above 4 tasks and clicked the go button, any existing criteria for the Period, Initiative, and Agency (Agencies) you selected will appear in the Criteria table.

Chapter 7

> Please Note: if this is your first import for the selected Period, your Criteria table will be empty.

To continue with the import, click the Import Criteria button. You will be redirected to the Import Criteria Screen. From this screen, select the Initiative and Period where you wish to import criteria from. As the PMA Coordinator, you can select any initiative. Once you have selected the Initiative and Preiod (Year and Quarter) to import criteria from, click the Get Criteria button. If the Initiative and Period you selected has available criteria, they will be displayed in the Criteria table. If there are NO available criteria based on your Initiative and Period selections, try selecting a different period.

To complete the Criteria Import process, after you have clicked the Get Criteria button in the process above, you will see a listing of the available criteria in the criteria table. At the top of the table, you will see the following two indicators:

3. **Criteria Destination**: this is the destination or "to" location where your criteria will be imported. Please confirm that this is the correct destination. If this is incorrect, use your back button and reselect the Period and Initiative.

4. Criteria Source: this is the source or "from" location where your criteria will be exported. Please confirm that this is the correct Initiative and Period. If it is incorrect, simply use the selection lists in the Navigation Box at the top of the page and choose the correct Criteria Source. Once you have selected, click the Get Criteria button. Your criteria will be displayed in the Criteria table.

To finish the Criteria Import process, review the criteria in the criteria table. Each criterion has a Check Box in the right hand column; check this box for each criterion you wish to import. When you are finished reviewing the criteria and have checked the ones you wish to import, click the Import button located

at the bottom of the criteria table. Your Criteria will be imported and you are re-turned to the default Period Scoring Criteria Home page. To ensure that your criteria have been imported, select the Period, Initiative, and Agency (All Agencies) and click the Go button. Your imported Criteria will be listed. From this page, you can modify any criteria (Step 5), add checklists (Step 4), and/or add new criteria (Step 3). You can also delete criteria by clicking on the Trash Can icon next to the Criteria.

ⓘ INFO: if you are importing criteria and you receive the message "Criteria already in Database", this message means that one or more of the criteria you are trying to import is already present. If you receive this message, please make sure that you are not trying to import criteria into a period that already has the same criteria.

Also, if you are trying to delete a criterion and you receive a message "There are Score Cards In Process with the Criterion, Are you sure you want to delete", this message is a warning message that you are about to delete criteria which are currently being used (scored) within an existing score card. If you proceed to delete criteria when you get this message, please be aware that existing score cards in process will no longer have the criteria available and also score cards which have already been scored with the criteria will have their score for the criteria you are about to delete removed from the database.

7.11. Step 10: Return a Score Card to Agency User

This step of the PMA Coordinator Score Card training involves Returning the Agency Self-Score to the Agency User for revision. This step provides some flexibility for the PMA Coordinator:

3. The PMA Coordinator can return all score card items at once
4. The PMA Coordinator can selectively click on each criterion and metric and request that the Agency User revise individual criterion

For item #2 above, it should be noted that even though one or more items have been returned for Agency User revision, the score card cannot be ap-proved until all items have been scored and submitted back from the Agency User to the Approving Official to the Initiative Owner.

To complete this step and return the Score Card to the Agency User for revision, first finish any revisions to the metrics/criteria and evidence and click either the OK button or the Revise button (as described above). When you click the OK button, you will be redirected to the Agency Self Score page. Ensure that all records have been unlocked and then click the "Return to Agency for Revision" button located below the Criteria Table. You will receive an online notice that the Score Card has been returned to the Agency User for revision. Click the OK button to acknowledge. The Agency User will receive an email indicating that the Score Card has been returned for revision. This step is now completed.

7.12. Step 11: Approve a Score Card

This step of the PMA Coordinator Score Card training involves approving the Agency Self-Score. This step is very straightforward and involves only one primary action from the PMA Coordinator. Principally, from the PMA Coordinator Home Page, click on the scoring link for the selected initiative with the status indicating "Finalizing" (Alternatively, as the PMA Coordinator, you can click on any score link and approve the Score Card). You will be redirected to the Agency Self-Score home page. Ensure that all items have been scored. Review each Agency Self-Score. You must provide a Final Score for each item. When completed with your review and Final Score, click the "Approve" button located below the Criteria Table. You will receive an online message indicating that the Score Card has been submitted to the PMA Coordinator. Click the OK button to acknowledge. The PMA Coordinator will receive an email notification that a Score Card has been Approved. This step is now completed.

7.13.   Conclusion and Wrap-up

This ends the PMA Coordinator Training for the Score Card Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Chapter 7

PMA Coordinator Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: PMA Coordinator User login
		STEP 2: PMA Coordinator home page navigation
		STEP 3: Perform an Agency Self-Score
		STEP 4: Enter criteria and metric evidence information
		STEP 5: Upload an evidence file (.PDF format) for a given criteria metric
		STEP 6: Create a new criterion
		STEP 7: Add a Deliverable Checklist Item
		STEP 8: Modify an existing criterion
		STEP 9: Import criteria from one quarter to another quarter
		STEP 10: Return a Score Card to Agency User
		STEP 11: Approve Score Cards

-------------=========== **END OF CHAPTER 7** ===========--------

8. Software Developer Training

Software Developer Training is limited to the Score Card software developers (eSpherical.com and G&B Solutions). Furthermore, the software developer training is identical the PMA Coordinator training. Accordingly, Software Developer Training should reference all chapters (1-11) of this manual.

-------============ END OF CHAPTER 8 ============--------

9. Online Calendar Training

The Score Card Module includes an online calendar for keeping track of deliverable items in the Score Card checklists and for managing other Score Card events. Each of these two primary functions will be covered in this training chapter.

9.1. Training Objectives

The primary goal for the Calendar training includes completing each of the following tasks:

1) Login to the Score Card homepage (PMA Coordinator Account)
2) Review the Calendar area navigation on the home page
3) View Checklist Items
4) Manage Calendar Events

For each task above, we will confirm that all users are able to successfully accomplish the task.

> Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the Executive Officer Score Card home page.

9.2. Step 1: Login

The first step in this training process is to login as a PMA Coordinator. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the PMA Coordinator home page.

> Please Note: we are using the PMA Coordinator login for this training as a matter of convenience; the PMA coordinator can view all events and checklist items. This ensures that there will be events for users to view.

9.3. Step 2: Calendar Home Page Navigation

A Calendar sample view is shown in Figure #8 below. Please follow the image on the projector screen as the instructor explains the Calendar navigation elements.

Figure 8: Calendar Sample View

For this Training exercise, we will focus on the Calendar, Events, and Due Checklist areas of the home page screen (see Figure #8 and follow along with the Instructor).

9.4. Step 3: View Checklist Items

For this step of the Calendar training, please view the "My Due Score Card Checklist Items" area located in the upper right of the home page. If you have checklist items that are due, this area will include a table with information about your due items. Generally, for most account types, this table will only include items for your agency. The table includes the following information about the due item(s) for your quick reference:

1. Target due date (default is for all items due this month)
2. Actual completion date, if any
3. Deliverable item title
4. Initiative
5. Agency
6. Status (Green for on-time, yellow for due within 30 days, red for past due and blue for completed late)

In the above Checklist table, to view and edit a checklist item, click on the link for the Deliverable Item title. This will redirect you to the criteria for the checklist item where you can edit the item. This is the same screen you have worked with in Chapter 3, Section 3.7, Step 6: Checklist Milestone Follow-up. The online Calendar provides you a quick link into your checklist deliverable items.
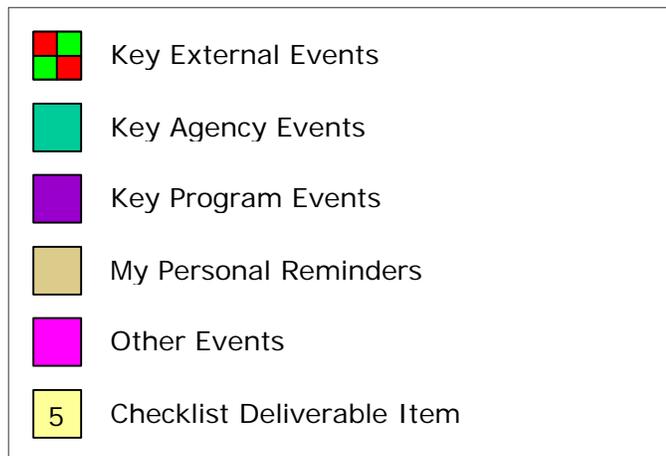
9.5. Step 4: Manage Calendar Events

This step of the calendar training involves adding new items to the Online Events Calendar. The Online Events Calendar allows you to schedule events, notify other colleagues of events, designate events as private (for your use only) or public (for your agency), and print a listing of your events. This training will focus on each of these functions.

9.5.1. Calendar Legend

The Calendar home page includes a legend (key) that explains the various calendar icons. These icons will appear in the Calendar on days when an event is present. The calendar icons are designed to give you a quick reference to items due. Icons include the following:

Figure 9: Calendar Legend

	Key External Events
	Key Agency Events
	Key Program Events
	My Personal Reminders
	Other Events
5	Checklist Deliverable Item

External events would be events outside of the USDA, such as OMB or Congressional events. Key Agency events are events within your own agency. Key program events refer to more specific events for individual programs within your agency or perhaps across agencies. Personal reminders are your own individual reminders which you can use as you wish. Other Events is an open category for any other event type that does not fit in the above events. Checklist deliverable items will be highlighted with a light yellow background color on the calendar for the day the item is due.

9.5.2. Adding Events

To add an event in the event calendar, click on the link entitled "Manage My Calendar" located beneath the calendar. You will be redirected to the Calendar management page. Please see Figure #10 below and follow along with the Instructor for an explanation of the calendar items.

Figure 10: Event Management Sample

The Events calendar management allows you to enter basic event information (see Figure #10) as well as select colleagues to be notified by email when the event is due. Event notifications are made each day around 3am Eastern Standard Time. Additionally, the Events calendar allows you to upload a map (.gif, .jpg or .PDF) for direction to your event and the calendar includes a location for a support file for the event. This could include a document on your public drive or a web link to information relevant to the

event. Once you have completed entering the information into the calendar, click the Submit button located at the bottom of the page and your event will be added to the online Calendar.

9.5.3. Viewing Events

To view online calendar events, from the Score Card home page, click on the Project Title link located in the Events table in the upper right of the page. You will be redirected to the View Event page that will show your event on the daily hour-by-hour schedule. Your event will span across each half-hour interval for the length of your event. To view details of your event, click on the Icon next to your event title and the event will open with more details. To close the event detail, click on the icon again. You can also navigate one day at a time forward or backward using the links at the top or bottom of the event detail page. You can also email the event contact directly from the event detail view; simply click on the contact name and a new email window will open. You can complete the window and send email without having to open your regular email program. This allows quick access to event coordinators.

9.5.4. Editing Events

To edit online calendar events, from the Score Card home page, click on the Project Title link located in the Events table in the upper right of the page. You will be redirected to the View Event page that will show your event on the daily hour-by-hour schedule. If you are the event owner, a small E icon (E) will appear next to the Event title. Click on the E icon (E) to go to the Event Management page. Edit any information you need and click the Edit Button at the bottom of the page. Your event edits are now saved. Additionally, you can also delete an event in the same manner you edit. To delete and event, click on the small X (X) icon from the Event Detail page. In order to delete, you must be the event owner. Also, you will be given a warning before your deletion is complete; deletions are final, there is no way to recover deleted events. If you want to delete, click the Confirm button and your event is deleted.

9.5.5. Printing Events

To print your events calendar, from the Score Card home page, click on the small printer icon below the Events table. This will redirect your browser to a print page.

You may need to set your printer alignment to landscape to view all your events information.

9.6. Conclusion and Wrap-up

This ends the Calendar Training for the Score Card Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Calendar Training Table		
Completion		Skill
Yes	No	
		STEP 1: Score Card login
		STEP 2: Calendar home page navigation
		STEP 3: View checklist items
		STEP 4: Manage calendar events

---------========== END OF CHAPTER 9 ==========--------

10. Online Reports Training

The Score Card Module includes an online reporting module for generating standard reports, custom reports, and trend analyses. Each of these report types will be covered in this training chapter.

10.1. Training Objectives

The primary goal for the Reports training includes completing each of the following tasks:

1) Login to the Score Card Homepage (PMA Coordinator Account)
2) Review the Reports Page Navigation
3) Generate Standard Reports
4) Construct and Generate a Custom Report
5) Generate a Trend Analysis Report

For each task above, we will confirm that all users are able to successfully accomplish the task.

> 📄 Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the Score Card home page.

10.2. Step 1: Login

The first step in this training process is to login as a PMA Coordinator. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, click on the Score Card Reports link in the Navigation box and please confirm that your login was successful and you are directed to the Score Card Reports home page.

> 📄 Please Note: we are using the PMA Coordinator login for this training as a matter of convenience; the PMA coordinator can view all report types for all agencies.

10.3. Step 2: Reports Home Page Navigation

A Report sample view is shown in Figure #11 below. Please follow the image on the projector screen as the instructor explains the Report navigation elements.

Figure 11: Online Report Sample

For this Training exercise, we will focus on the three Reporting areas in the Reports Home page: Standard Reports, Custom Reports, and Trend Analysis areas of the Reports home page screen (see Figure #11 and follow along with the Instructor).

10.4. Step 3: Generate Standard Reports

This step of the Reports training involves generating several Standard Reports. To begin, make sure you are on the Score Card Reports home page. If you are

not on the Score Card Reports home page, please click the Score Card Reports link in your Navigation box.

We will generate 2 standard reports. To generate the first report, check the radio button entitled "Scorecard Summary Report" and then click the "Get Report" button. A current summary report is generated on-screen. The data in this report is current (real-time) as of the date and time you just generated the report.

To generate the second report, check the radio button entitled "Deliverable Checklist Due Items Report" and then click the "Get Report" button. A current Deliverable Checklist report for Due and Past Due items is generated on-screen. The data in this report is current (real-time) as of the date and time you just generated the report. The report is sorted by the Target Due Date. Color icons in the Status column include ┊ Red for past due, ┊ Green for On-Time, ┊ Yellow for In Progress, and ┊ Blue for Completed Late.

10.5. Step 4: Construct and Generate a Custom Report

This step of the Reports training involves generating a Custom Report. To begin, make sure you are on the Score Card Reports home page. If you are not on the Score Card Reports home page, please click the Score Card Reports link in your Navigation box.

To generate a Custom Report, you can select any combination of data fields present. To begin, follow these tasks in order in the Scorecard Custom Reports table area:

Task 1: Select one or more Initiative(s) from the select box (to select more than one initiative, hold down your Control key (Ctrl) while you click on an Initiative)

Task 2: Select one or more Agency (Agencies) from the select box (to select more than one Agency, hold down your Control key (Ctrl) while you click on an Agency)

Task 3: Select a Year from the select list in the Period area

Task 4: Select a Quarter from the select list in the Period area

Task 5: Choose any combination of Data Columns you want to appear in your report.

Task 6: Select the Grouping of your report (grouping means the data will be grouped either by Agency or Initiative)

Once you have made your selections above, click on the Get Report button and your report will be generated online. The data in this report is current (real-time) as of the date and time you just generated the report. If you need to make any changes to your custom report, use your back button and modify any of the parameters you previously selected.

10.6.   Step 5: Generate a Trend Analysis Report

This step of the Reports training involves generating a Trend Analysis Report. To begin, make sure you are on the Score Card Reports home page. If you are not on the Score Card Reports home page, please click the Score Card Reports link in your Navigation box.

The Trend Analysis report allows you to view the trend of scores over a given period. To generate a Trend Analysis report, from the Trends Analysis Report table on the Score Card Reports page, follow these tasks in order:

Task 1: Select an Initiative from the select box

Task 2: Select All agencies, a single agency or combination of agencies box (to select a combination of Agencies, hold down your Control key (Ctrl) while you click on an Agency)

Task 3: Select the Trend Period you wish to view

Once you have made your selections above, click on the Get Report button and your Trend Analysis report will be generated online. The data in this report is current (real-time) as of the date and time you just generated the report. If you need to make any changes to your Trend Analysis report, use your back button and modify any of the parameters you previously selected.

10.7.   Conclusion and Wrap-up

This ends the Report Training for the Score Card Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Reports Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: Score Card login
		STEP 2: Reports Home Page Navigation
		STEP 3: Generate Standard Reports
		STEP 4: Construct and Generate a Custom Report
		STEP 5: Generate a Trend Analysis Report

---------========== **END OF CHAPTER 10** ==========---------

11. Training Conclusion

This chapter concludes the Score Card Training. During this training, we covered the following major topics:

Topic 1: How to access the online Score Card

Topic 2: Basic Score Card navigation

Topic 3: User accounts, roles and responsibilities for the Score Card

Topic 4: How to manage the online calendar

Topic 5: How to generate reports

If you have any additional questions regarding the topics we covered during your training, this is the open discussion time for your questions.

It is recommended that you keep this training manual for your records in case you wish to refer to the manual as you use the Score Card.

From the team at eSpherical.com and G&B Solutions, we greatly appreciate your time and efforts in learning the Score Card.

------======= END OF TRAINING MANUAL ============-------