



process improving performance

Version 2009.4.2 Release Notes

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Date of publication: 11/02/2009

The upgrade for 2009.4.2 includes updates to:

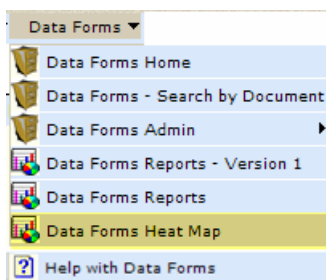
- Data Forms Module
- Admin Module

Data Forms Module Updates

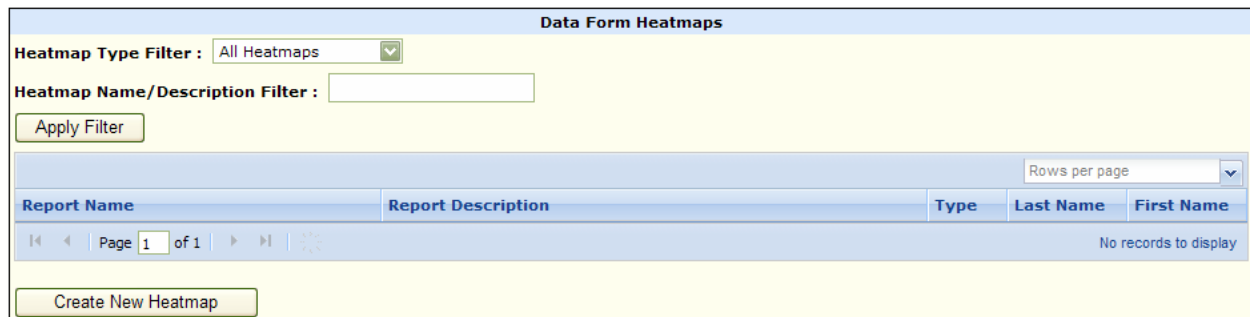
Data Forms Heatmap Reporting Tool Upgrade

Data Forms module users will now have access to build, customize and save heatmaps for forms that are being collected in the Data Forms area of the application.

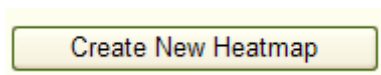
To access the upgrades that have been implemented to the Data Forms Heatmaps go to Data Forms – Data Forms Heatmaps



The Data Forms Heatmaps page will display.



To create a brand new heatmap, click the Create New Heatmap button. Users must have security access to a form in order to be able to create a heatmap.



Once the Create New Heatmap button has been clicked, the heatmap generation screen will display.

Users attempting to create a heatmap must first select the Form for which they would like to see queried in a heatmap from the Fields tab.

Once a form has been selected from the fields tab, the fields contained in the form that can be processed in a heatmap will display.

Fields Filters Legend Description Preview Save Heatmap

Form and Fields to Display

Select a Form: Vendor Assessment (VCAP)

Group Results by: --- Add Group By Field ---

Remove Empty Group By Columns

Fields to Display:

Fields

Vendor Assessment (VCAP) [check All](#) [uncheck All](#)

Part 2: [check Part 2](#) [uncheck Part 2](#)

- Does the Board of Directors/Trustees/Audit annually review and approve the BCP?
- Does the review include the scope of the BCP Program?
- Does senior leadership annually approve the Corporate Support Plan of the BCP Program?
- Does senior leadership annually approve the business impact analysis results of the BCP?
- Does leadership mandate an annual risk assessment?
- Are the BCP program objectives based on current and anticipated regulatory requirements?
- Is there a BCP program coordinator?
- Is there a formal BCP organization consisting of designated personnel and recovery teams?
- Is there a central repository for BCP related documentation?
- Have all BCP plan components been identified and integrated to ensure a successful implementation?
- Are there clearly defined thresholds to guide the escalation sequence and trigger recovery activities?
- Are formal, documented procedures in place to guide the escalation and implementation of the organization's recovery strategies?
- Is there a formally documented training and awareness schedule for all concerned employees?
- Is BCP addressed when conducting training for related disciplines (disaster recovery, risk management, security, etc.)?
- Do company publications include information and updates on the BCP program?

Part 3: [check Part 3](#) [uncheck Part 3](#)

Users will need to select the Group Results by field. The Group Results by selection will represent the categories of results that will be displayed on the heatmap. The Group by field is comprised of a fixed data set (example drop down menu text that has vendor included in Part one of the data form).

Group Results by: --- Add Group By Field ---

Remove Empty Group By Columns

Once the Group Results by selection has been completed, users will have the ability to specify which fields should be incorporated on the custom heatmap that is being built. The fields are displayed according to part. Radio button numeric and drop down numeric fields can be added to a heatmap.

Fields

Vendor Assessment (VCAP) [check All](#) [uncheck All](#)

Part 2: [check Part 2](#) [uncheck Part 2](#)

- Does the Board of Directors/Trustees/Audit annually review and approve the BCP?
- Does the review include the scope of the BCP Program?
- Does senior leadership annually approve the Corporate Support Plan of the BCP Program?
- Does senior leadership annually approve the business impact analysis results of the BCP?
- Does leadership mandate an annual risk assessment?
- Are the BCP program objectives based on current and anticipated regulatory requirements?
- Is there a BCP program coordinator?
- Is there a formal BCP organization consisting of designated personnel and recovery teams?
- Is there a central repository for BCP related documentation?
- Have all BCP plan components been identified and integrated to ensure a successful implementation?
- Are there clearly defined thresholds to guide the escalation sequence and trigger recovery activities?
- Are formal, documented procedures in place to guide the escalation and implementation of the organization's recovery strategies?
- Is there a formally documented training and awareness schedule for all concerned employees?
- Is BCP addressed when conducting training for related disciplines (disaster recovery, risk management, security, etc.)?
- Do company publications include information and updates on the BCP program?

Part 3: [check Part 3](#) [uncheck Part 3](#)

- Is there a formal procedure to identify time critical business and operational processes (process mapping) within the company?
- Does the process mapping exercise involve all appropriate stakeholders (internal and external)?

Users will then need to place checks next to the fields that should be included on the heatmap.

Vendor Assessment (VCAP) [check All](#) [uncheck All](#)

Part 2: [check Part 2](#) [uncheck Part 2](#)

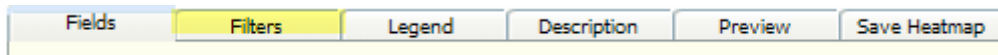
- Does the Board of Directors/Trustees/Audit annually review and approve the BCP?
- Does the review include the scope of the BCP Program?
- Does senior leadership annually approve the Corporate Support Plan of the BCP Program?
- Does senior leadership annually approve the business impact analysis results of the BCP?
- Does leadership mandate an annual risk assessment?
- Are the BCP program objectives based on current and anticipated regulatory requirements?
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- Is there a formally documented training and awareness schedule for all concerned employees?
- Is BCP addressed when conducting training for related disciplines (disaster recovery, risk management, security, etc.)?
- Do company publications include information and updates on the BCP program?

Note: There are Check All and Uncheck all options that can be utilized to select all the fields from a form or all the fields from the part of a form.

Vendor Assessment (VCAP) [check All](#) [uncheck All](#)

Part 2: [check Part 2](#) [uncheck Part 2](#)

Once a user has selected all the fields that should be included as part of the heatmap data, he/she will need to click the Filters tab.



Once the filters tab has been selected, the screen will refresh displaying the Folder location of the form that should be queried for the custom heatmap. Users can select the Folder(s) that should be included as part of the heatmap data.

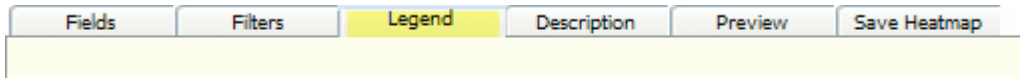


Once the Folder(s) have been selected, users will select the first field from the Filter Fields drop down that should be used on the custom heatmap.



Note: Completion Date – Does Not Equal – ‘Null’ (Blank) will return all completed records. Open records will not be included when this filter has been set.

Once the first filter field has been selected the screen will refresh, giving the user the ability to select another field as a filter. Once all of the filters that should be used on the heatmap have been set, the user can click the Legend tab.



The screen will refresh displaying the custom legend criteria that can be set up by users creating the custom heatmap.

First enter the label for the first legend rule

Label:

Second select the color that should be generated for the first heatmap rule

Color:

- Select a Color -
- Green
- Yellow
- Red
- Gray
- White
- Aqua
- Fuchsia
- Lime
- Maroon
- Navy
- Olive
- Purple
- Silver
- Teal

Third enter the Min Value and Max Value

Min Value: Max Value:

To add another heatmap rule, click the Update Legend button.

The steps above should be repeated for any additional legend rules that need to be added to the heatmap.

Once the legend has been constructed for the heatmap users can click the Description tab.



Once the Description tab has been clicked the user will have access to title the heatmap report, list a description for the heatmap and select whether the date the report is queried should display at the top of the heatmap.

Fields Filters Legend **Description** Preview Save Heatmap

Heatmap_Report Description

Heatmap Report Title:

Heatmap Report Description:

Add Date to Heatmap Report:

Once the Description table has been completed users can click the Preview tab to display the results of the heatmap that is being built.

Fields Filters Legend Description **Preview** Save Heatmap

Legend:
■ Poor: 0% - 70%
■ OK: 70% - 80%
■ Good: 80% - 10000%

Total Score				
	Audit	International Accounting	Computer Operations	Headlines Replenishment
Business Continuity Assessment(BCAP)	60	70	64	82
⊕ Part: 2 - Organization and Structure	78	75	60	60
⊕ Part: 3 - Business Impact Analysis	45	67	67	100

Users can drill into heat map results by expanding the parts that have been included on the heatmap assessment.

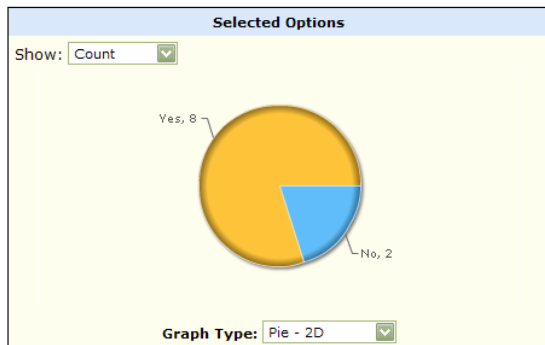
Legend:	
	Poor: 0% - 70%
	OK: 70% - 80%
	Good: 80% - 100%

Total Score		
	Footwear	Hobbies
Vendor Assessment (VCAP) - small	11	53
<input type="checkbox"/> Part: 2 - Organization and Structure	25	53
Does the Board of Directors/Trustees/Audit annually review and approve the BCP?	0	50
Does the review include the scope of the BCP Program?	0	50
Are the BCP program objectives based on current and anticipated regulatory requirements?	0	0
Is there a BCP program coordinator?	0	50
Are there clearly defined thresholds to guide the escalation sequence and trigger recovery activities?	0	100
Is there a formally documented training and awareness schedule for all concerned employees?	100	50
Is BCP addressed when conducting training for related disciplines (disaster recovery, risk management, security, etc.)?	0	100
Do company publications include information and updates on the BCP program?	100	50
<input type="checkbox"/> Part: 3 - Business Impact Analysis	0	53

A user can drill into the score on a heatmap to research responses to a question.

Field Information	
Form Name	Field Name
Business Continuity Assessment(BCAP)	Does the Board of Directors/Trustees/Audit annually review and approve the BCP?
	1. Yes 1.0
	2. No 0.0
	3. N/A

Values			
Department	User	Option Selected	Value
Audit	Project Admin	Yes	1.0
Audit	Project Admin	Yes	1.0
Computer Operations	Project Admin	Yes	1.0
International Accounting	Project Admin	No	0.0
Computer Operations	Project Admin	Yes	1.0
Audit	Project Admin	Yes	1.0
Sam's Club Cafe	Project Admin	Yes	1.0
Headlines Replenishment	Project Admin	Yes	1.0
International Accounting	Project Admin	Yes	1.0
International Accounting	Project Admin	No	0.0



If changes need to be made to the current heatmap, then the necessary tab where changes should be applied can be selected.

Once the user is content with the custom heatmap, he/she can click the Save Heatmap tab. The Save Heatmap tab will give users access to save the heatmap as Private (only the user that created the heatmap can see it) or Public (grant access to multiple teams contained in the project).

Heatmap Report Security

Heatmap Report Title:

Heatmap Report Security: Private Public

Teams

- CRM Admin Team
- Data Forms Admin Team
- Document Admin Team
- Emergency Response Team
- Improvement System Admin Team
- Internal Audit Admin Team
- Internal Audit Team
- Plan Development Team
- Project Management Team
- Survey Admin Team
- Training Admin Team

Save Heatmap Report Save Heatmap Report As New Reset

Once the heatmap has been saved, it can be accessed by clicking on the name of the heatmap in the applet on the Data Forms Heatmaps home page.

Data Form Heatmaps

Heatmap Type Filter:

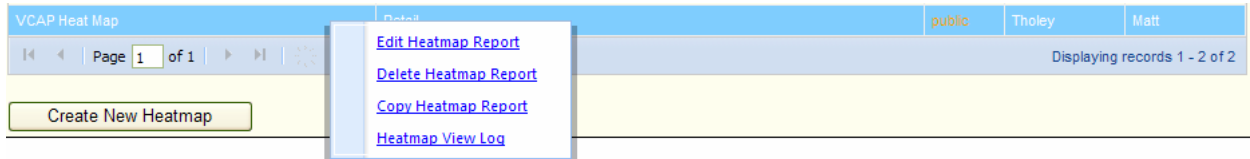
Heatmap Name/Description Filter:

Report Name	Report Description	Type	Last Name	First Name
BCAP Heatmap	Retail	public	Tholey	Matt
VCAP Heat Map	Retail	public	Tholey	Matt

Page 1 of 1 Displaying records 1 - 2 of 2

Heatmaps can be copied and edited by users that have access to create heatmaps.

Users that create heatmaps can edit, copy and delete heatmaps they have created by right clicking on the heatmap's name.



A heatmap view log is also available so that users can track/research user heatmap access activity.

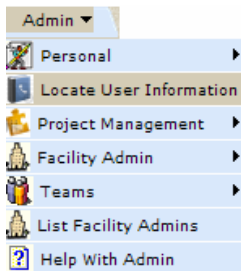
Heatmap View Log for "VCAP Heat Map"		
Date	Action Taken	Action Taken By
30-Oct-2009 11:13 AM	Viewed	Matt Tholey (Prism, King of Prussia PA)

Admin Module Updates

Locate User Information Menu Upgrade

Prism has added a menu option under Admin – Locate User Information that gives users the ability to locate users within the company’s project. This menu will let users search their project for user information such as a user’s facility, email address, phone information, and team assignment information.

To access this new menu, go to Admin – Locate User Information



Once the Locate User Information screen displays, users will have access to search for a system user(s) tied to his/her project.

display facility listing is descending or ascending order.

Prism is not expecting to experience any down time during the upgrade. The upgrade is scheduled to take place on 11/05/2009 during the early morning hours.