

## Project and Programme Management (PPM) Release | Discussion Document

Version: 00j

### **Document Objective**

This document initiates the design phase of the proposed project and programme management (PPM) focused major release. The objective of this document is to facilitate feedback from all tier one users (i.e. to gather final thoughts and design amendment) ahead of the final design “lock down” and build phase.

### **Summary Vision**

This release represents a natural culmination of **Method Grid** real-world usage across our growing community (1000+ accounts now exist).

Fundamentally, **Method Grid** seeks to be famous for, and uniquely-differentiated by, its combination of knowledge management AND project management components in a fully integrated platform.

The foundations of the solution could be described as a solution on which to easily build/maintain structured, repeatable methodology. It has become a popular, leading solution in its own right for this (knowledge management) focused application.




Tracking real-world user behaviour, new features were added to allow for basic deployment of such "master" grids into real-world projects and client commissions (e.g. checklist-completion color rendering, simple grid and folder status reporting).

With this release, however, a substantive project management suite of features will be added (e.g. assignment of tasks/elements/stages/grids to accountable members and “due date” completion, productivity enablement via reminder notification and a suite of dashboard reporting tools). In summary, on completion of this release, we will truly be able to say, when asked what **Method Grid** is:

“Quite simply, **Method Grid** uniquely enables knowledge management and project management in one integrated solution.”

## **Primary User Avatars**

For the purposes of this design discussion document, there are three primary user avatars:

User Avatar	Abbreviation	Remarks
Executive 	E	Primarily requiring portfolio-level assurance of summary (portfolio-level) progress and the ability to apply “drill down” problem assessment/resolution.
Team Leader 	TLead	Primarily requiring the ability to assign (person) accountability and (date) schedule allocation; further, to track and manage delivery to this assignment.
Team Member 	TMem	Primarily requiring clarity as to the tasks assigned to them - with productivity enablement and support tools (e.g. notifications when tasks close to becoming due etc.)

## **Document Structure**

This major new design is presented through three different devices:

- (1) Via the narrative of an example case study - seeking to simulate the chronological flow of features sought from the perfect application of **Method Grid** in this regard. The simulated case study focuses on the generic instance of a professional service company deploying a project/engagement based methodology ("master" grid) into an actual live commission of this methodology with a live end-client - **Case Study**
- (2) Via a hierarchical set of technical “use story” based features - **Use Stories**
- (3) Via a set of design screenshots - **Design Screenshots (see separate file)**



These presentations overlap and duplicate - most readers should be able to form a working understanding of the proposed new release by focusing on (1) only.

## Case Study Simulation

This simulated case study focuses on the generic instance of a professional service company (*Proton Advisors*) deploying a project/engagement based methodology ("master" grid) into an actual commission of this methodology with a live end-client (*Abacus plc*).

The simulation will involve four key user avatars:

Avatar	Name	Company	Role
	Harry	Proton Advisors	Executive
	Sonja	Proton Advisors	Team Leader
	Shan	Proton Advisors	Team Member
	Fiona	Abacus plc (Client)	Lead Client (but effectively an [external] Team Member with respect to Method Grid functionality)

The simulation steps through the following chronology:

## Project Kick-Off

#	Activity
1	Project won! Harry briefs Sonja to mobilise the delivery team for Project Abacus.
2	Sonja configures the project methodology as based on their "master" methodology configured to this specific client commission.
3	Sonja invites in Shan (and other colleague members) of the delivery team.
4	Sonja assigns deliverables/elements to her colleague team members.

Referencing the project bid documentation, Sonja assigns dates to the deliverables/elements within the grid.

Some of these deliverables will need explicit completion-evidencing and/or her specific “sign off” approval. Sonja updates the grid to reflect.

5	Sonja creates a simple bespoke grid dashboard page which she proposes to update on a weekly basis (i.e. to serve as a simple summary “Checkpoint” report).
6	Sonja invites Fiona (as the Lead Client) into the new “Project Abacus” grid
7	Sonja sets up a simple (visual) progress device for Fiona and the integrated project team. When an element has all of its tasks complete, she configures a conditional-logic rule for it to turn green. She updates the grid label legend to reflect this.

## **Project In Progress**

Somewhere mid-way into the project ...

#	Activity
8	Monday morning. Shan seeks to understand what tasks he has to complete in the coming week. He also wishes to set some “remind me” dates on some future tasks.
9	Tuesday morning. Shan is making good progress with deliverables and updates the grid with his evidenced progress.
10	Wednesday morning. At the project team meeting, Sonja facilitates a “Checkpoint” meeting with her Proton delivery colleagues. “Where are we to plan overall?” is her headline question to the project team.
11	Thursday morning. Harry prepares for his weekly practice area meeting. His team leader colleagues are currently delivering c. 60 live commissions. “How is our delivery portfolio performing to plan overall?” and “Which projects/colleagues most need my support - and where?” are his key thoughts.
12	Friday afternoon. Shan receives a “reminder” notification with respect to future tasks he is accountable for. Concerned that he doesn’t have all the

information he requires for this task, he wishes to “flag” this to his project lead, Sonja.

And, another week in the project ...

#	Activity
13	Wednesday morning. At this week’s “Checkpoint” meeting, Sonja’s attention is drawn to the task that Shan flagged - along with other related overdue tasks. The project is slipping into difficult territory and she updates the status to “Red” commensurately. She “flags” the project - wishing to speak to Harry fairly urgently on the matter (she is going to ask for an additional support resource). Finally, she updates her grid’s bespoke dashboard - serving as a simple “By exception - Highlight” report - to describe the key risks and issues.
14	Thursday morning. At this week’s practice area meeting, Harry notices the flag against “Project Abacus” and drills down to explore the likely problematic areas. Fully armed with this overview, he gives Sonja a call as soon as the meeting concludes. “How can I help resolve?” is his opening line.
15	Friday morning. Harry is also the senior lead for knowledge management generally in the practice. In conversation with his dedicated knowledge manager colleague, Sarah, he wants to just get a sense of how much change activity there has been generally in recent weeks - specifically with respect to what recent updates have been made to their “master” service methodologies.
16	Friday afternoon. Before Sonja closes down for the week, she is just keen to understand how much has happened this week on Project Abacus. What tasks have been completed? How many of her team have accessed the grid? Have her clients viewed the grid this week?

And, eventually, the project comes to a successful close ...

#	Activity
17	At the project close meeting, Sonja discusses with her team the key learns: what “best practice” deliverables, and proposed updates to the “master” grid can they share with Sarah - to feed back into this grid’s

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continuous improvement. Sonja messages Sonja in **Method Grid** to set up this conversation.

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- 18 Some months later, perhaps at an end-of-year “clean up”, Project Abacus is moved from “Completed” to “Archived” such that it does not clog up executive dashboard reporting.
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The following devices are used throughout the case study:

Note. This red text captures a series of running questions we still have: design/logic aspects that need further thought.

Note. This blue text captures a point of development/code logic that accompanies this component of the UX.

Let's get going ...

### **1 - Project won! Harry briefs Sonja to mobilise the delivery team for Project Abacus.**

Harry describes to Sonja how the detailed description of their transformation methodology (based on many consultant-years of delivery experience) - evidenced in the bid document and at the live-pitch - was key to them winning this work. The Lead Client wishes for her, and other client colleagues, to also use the **Method Grid** platform to further the collaborative working during this six-month transformation project.

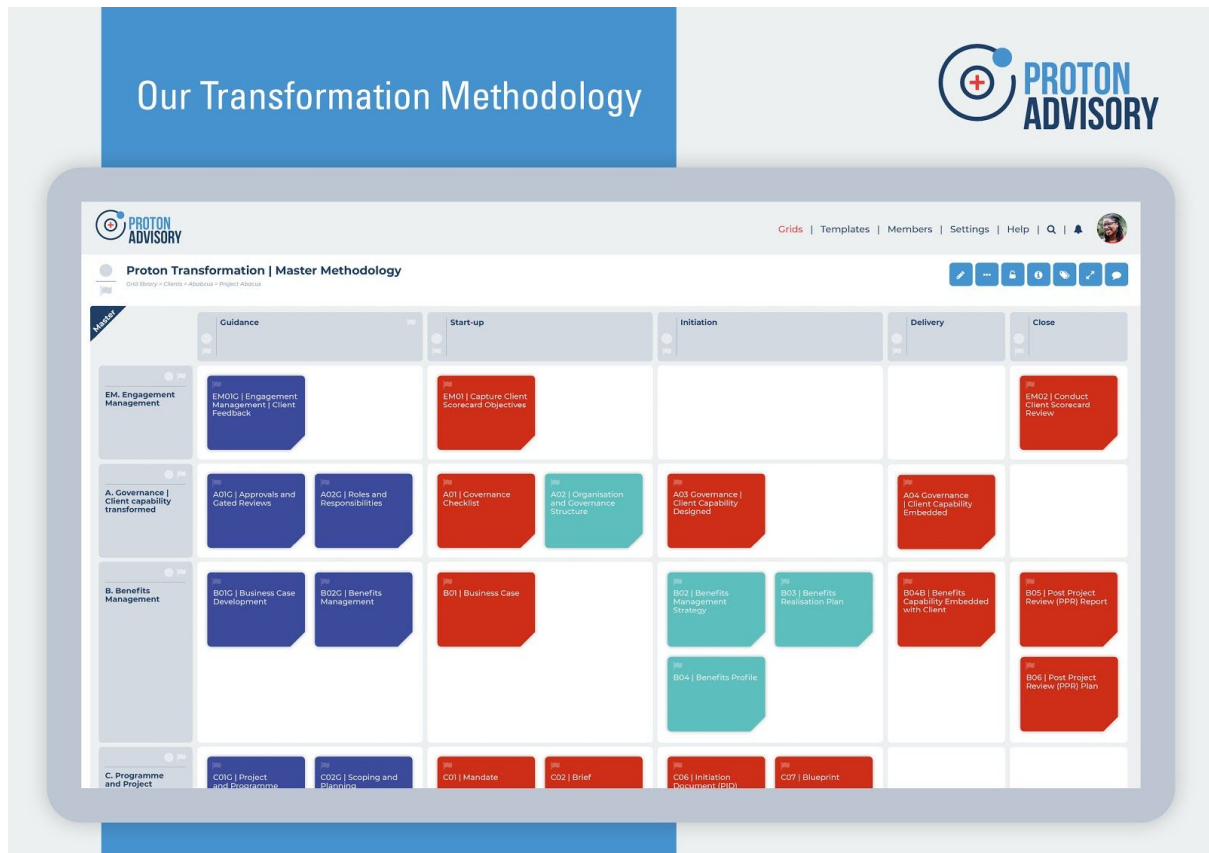
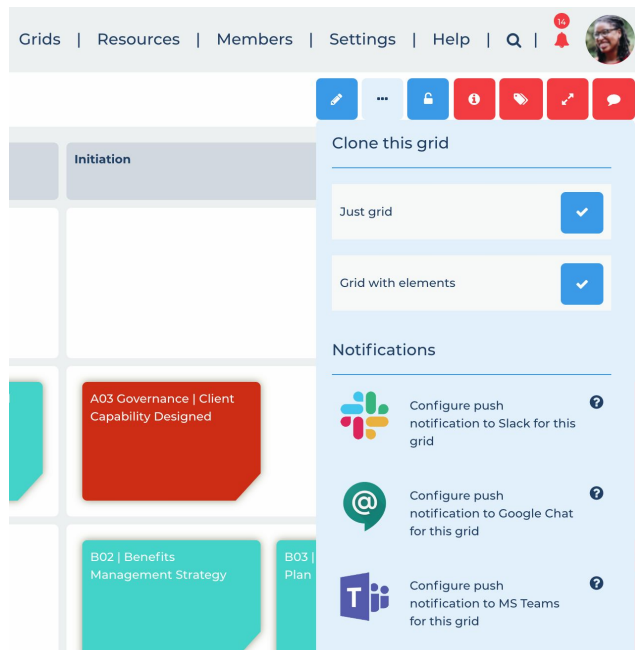


Figure > Showing off their detailed methodology helps Proton win the work. Hurrah!

## 2 - Sonja configures the project methodology as based on their "master" methodology configured to this specific client commission.

Sonja clones the (master) "Proton Transformation" grid into a separate instance for "Project Abacus". While she is at this, she also links the new grid to a project room in her company's Slack<sup>1</sup> account - so the team can receive **Method Grid** notifications into their preferred instant messaging app also.

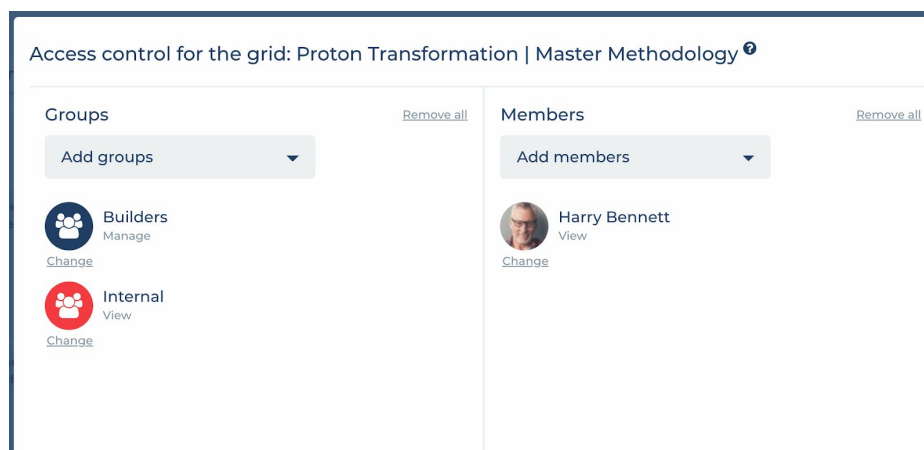
<sup>1</sup> Integration with Google Chat and Microsoft Teams available also.



**Figure > Cloning the "master" grid into new specific project "instance"**

This functionality exists now.

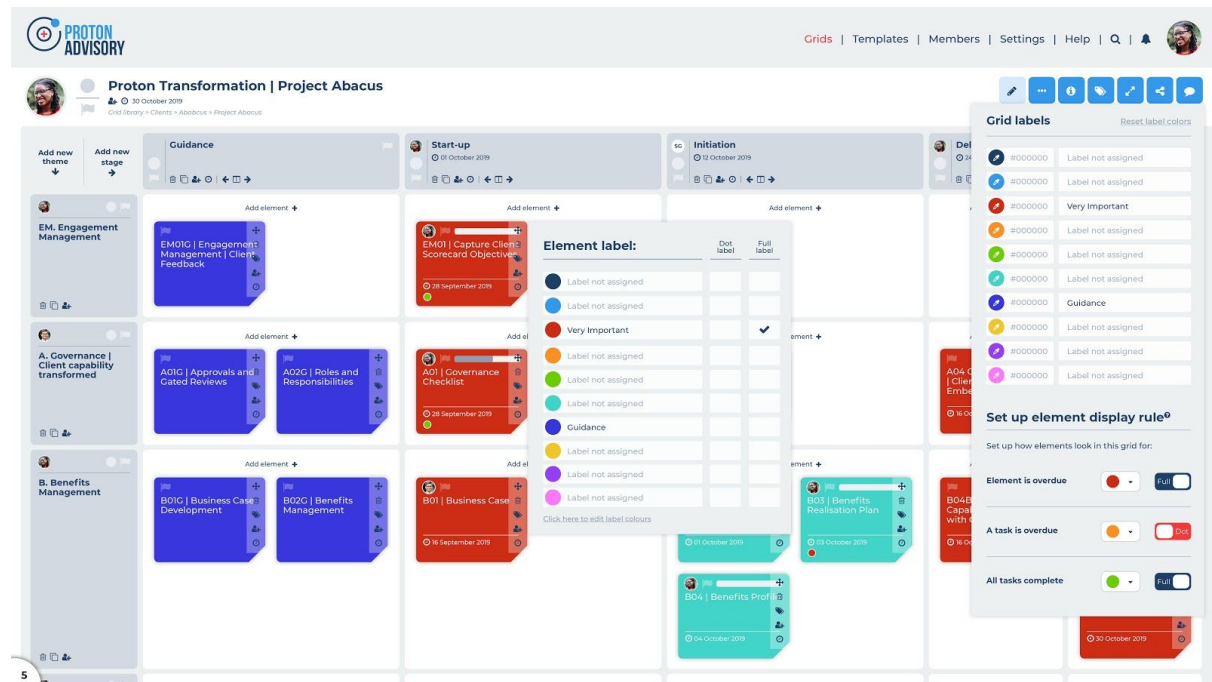
Initially Sonja, seeks for only her and Harry to see this new grid.



**Figure > Access configured (Harry added)**

This functionality exists now (via access configuration panel).

Once cloned, Sonja configures the new grid - she deletes elements not required for this specific engagement, modifies the labels and label-legend (e.g. to denote elements that the client has described as "Very important") and adds a few elements unique to this project.



**Figure > Sonja configures/updates the cloned project grid - specific to the Project Abacus brief**

This is all done via an intuitive, easy-to-use interface (in edit mode).

This functionality exists now.

Note. This release builds on the existing behaviour of users effectively having "master" grids that are cloned into "instances" of live project delivery. On completion of a live project "instance" best-practice can be built back into an ever-improving "master" ahead of the next such snapshot. This integration of knowledge management (KM) and project management (PM) delivery sits at the heart of this new release. As such, it also makes sense to accentuate the "master" status through greater UX signalling.

On assigning a grid as a "master" in the grid info panel, it can be signalled as such using the following top corner device (in grid library view):

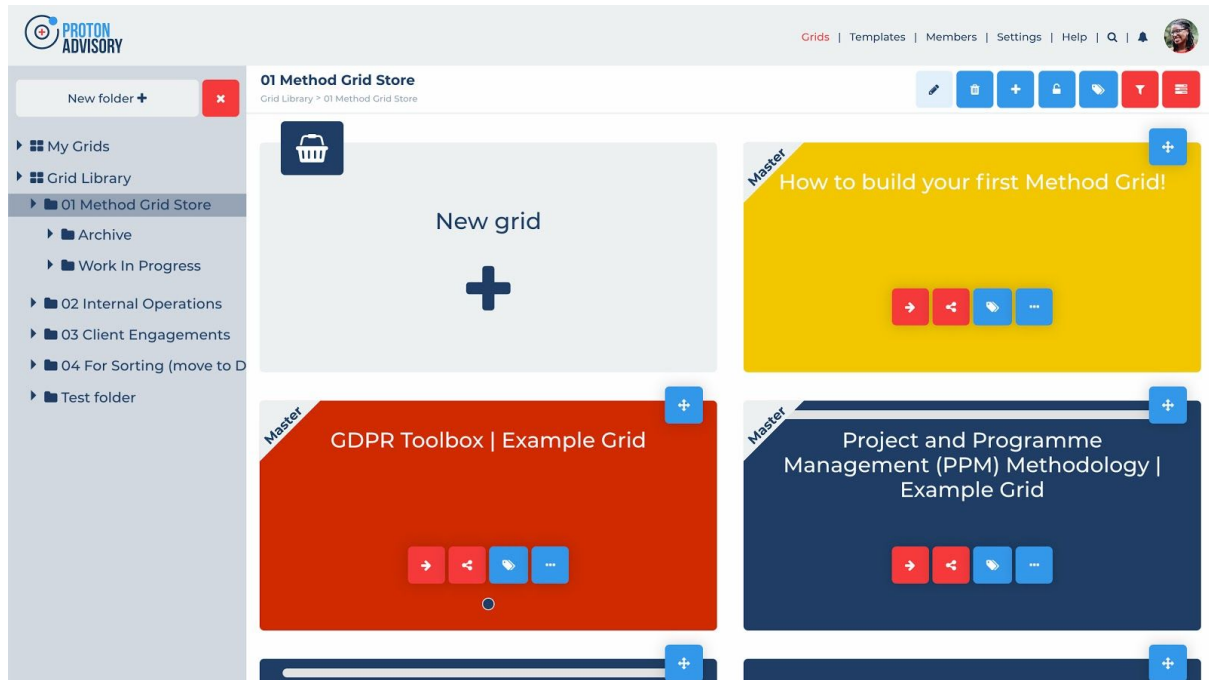


Figure > Grid thumbnails showing "master" status (top left hand corner)

And, in the actual grid view as follows:

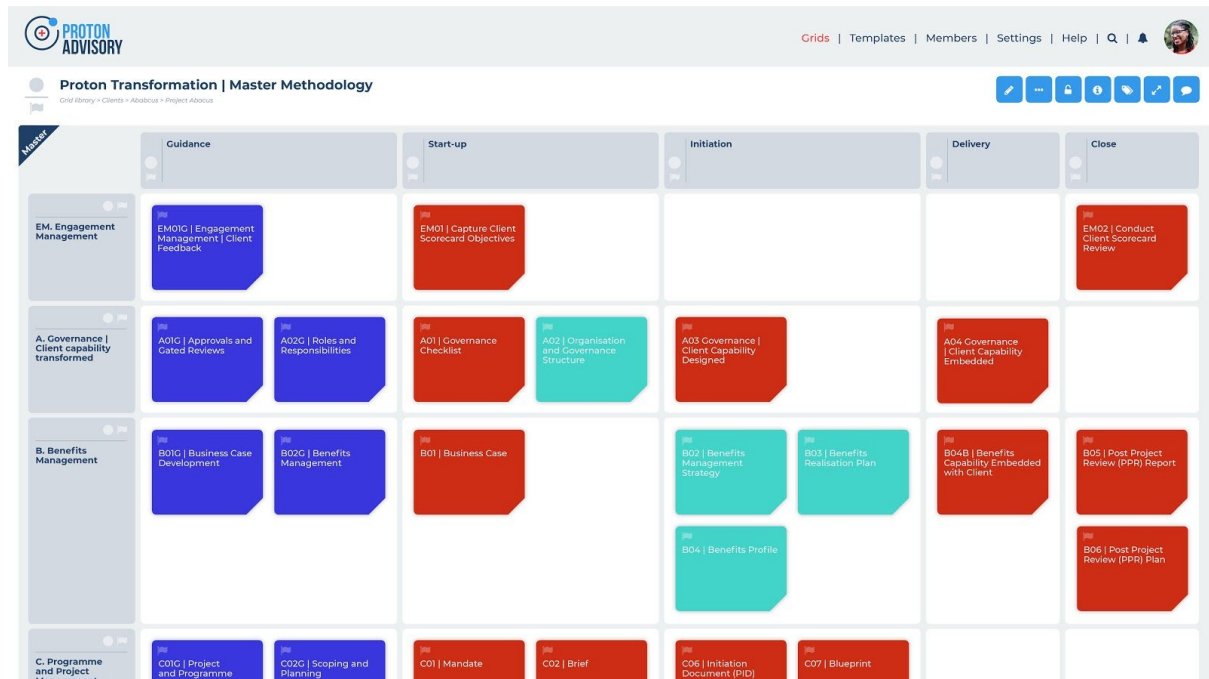
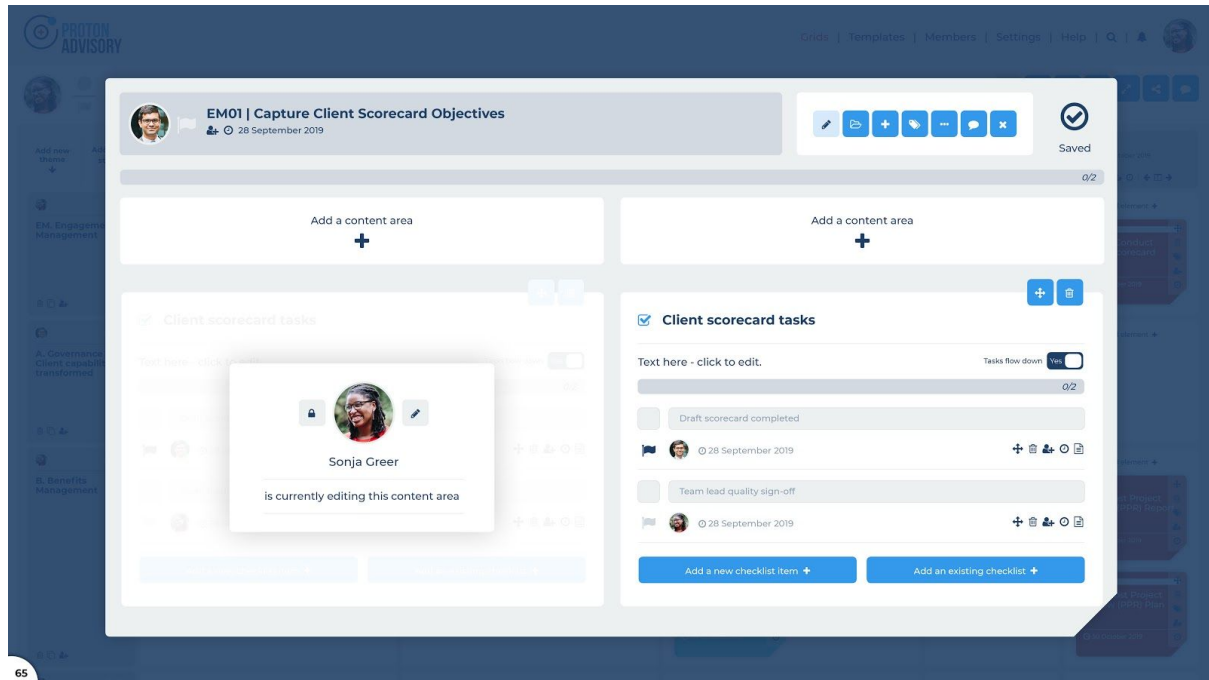


Figure > Grid view showing this is a "master" grid (top left hand corner)

Discussion. Are there any logic implications e.g. ability to toggle off "master" grids in report filters, user checks if tasks are actually ticked off in a master?

It should also be noted that this release will enable the collaborative editing of elements (previously there have been incidents of lost content due to elements being updated by multiple editors concurrently). We propose to deal with this by a simple lock-device at the element level (with a time-out on inactivity).

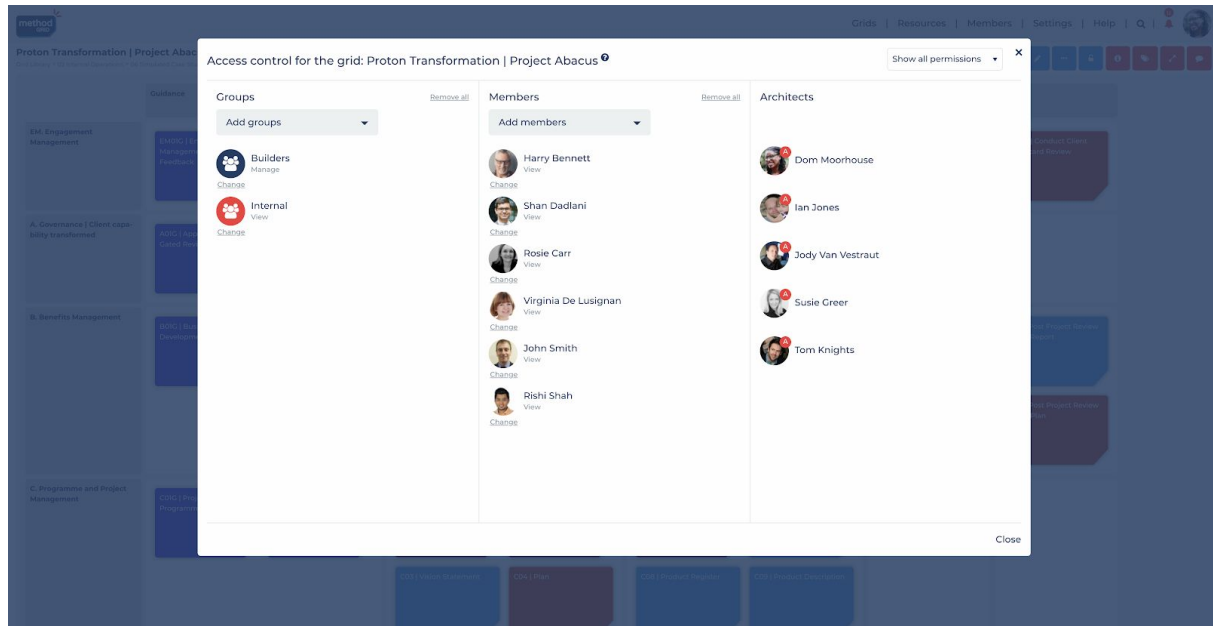


**Figure > Content area locked as Sonja edits/updates it - as viewed by another user with edit rights in edit view.**

Note. This lock disappears when either Sonja comes out of editing the element - or - after a period of inactivity (five minutes). See wordpress for reference.

### 3 - Sonja invites in Shan (and other colleague members) of the delivery team

Next up, Sonja invites in Shan and four other members of the Proton delivery team.



**Figure > Sonja adds colleague team members (via access configuration panel)**

This is all done via an intuitive, easy-to-use interface (in edit mode).

This functionality exists now.

**4 - Sonja assigns deliverables/elements to her colleague team members. Referencing the project bid documentation, Sonja assigns dates to the deliverables/elements within the grid. Some of these deliverables will need explicit completion-evidencing and/or her specific “sign off” approval. Sonja updates the grid to reflect.**

This could build out in a number of ways.

For example, Sonja could start by assigning ownership of the overall grid (project) to herself. Next, she could assign a single point of accountability to all the elements (key deliverables in this instance) as well as planned "Due dates" for each element. In the summary grid view, member avatar images and the dates can be easily seen on the constituent element “thumbnails”.

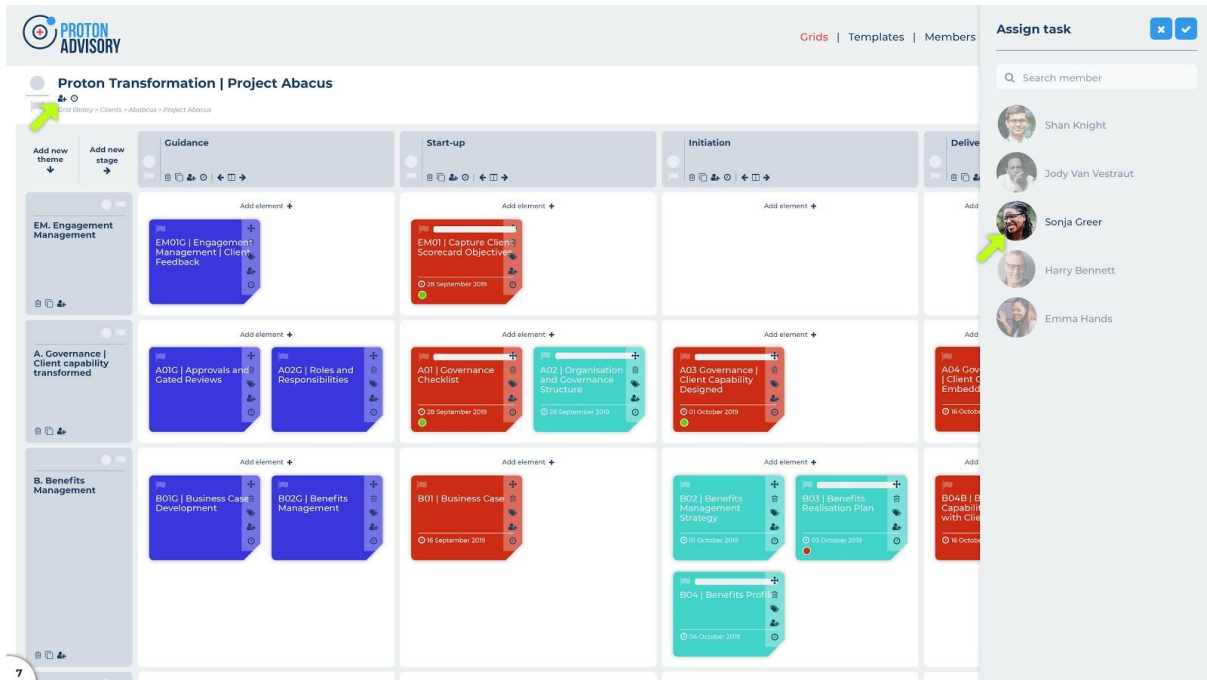


Figure > Sonja assigns overall project/grid ownership to herself

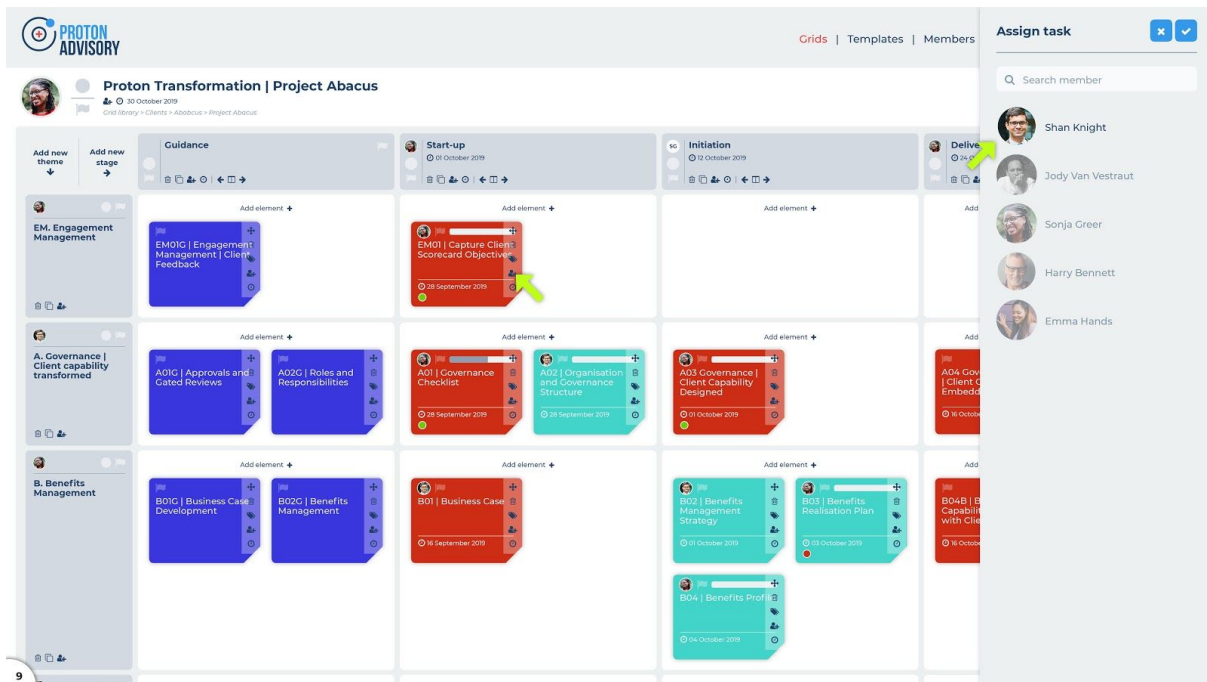
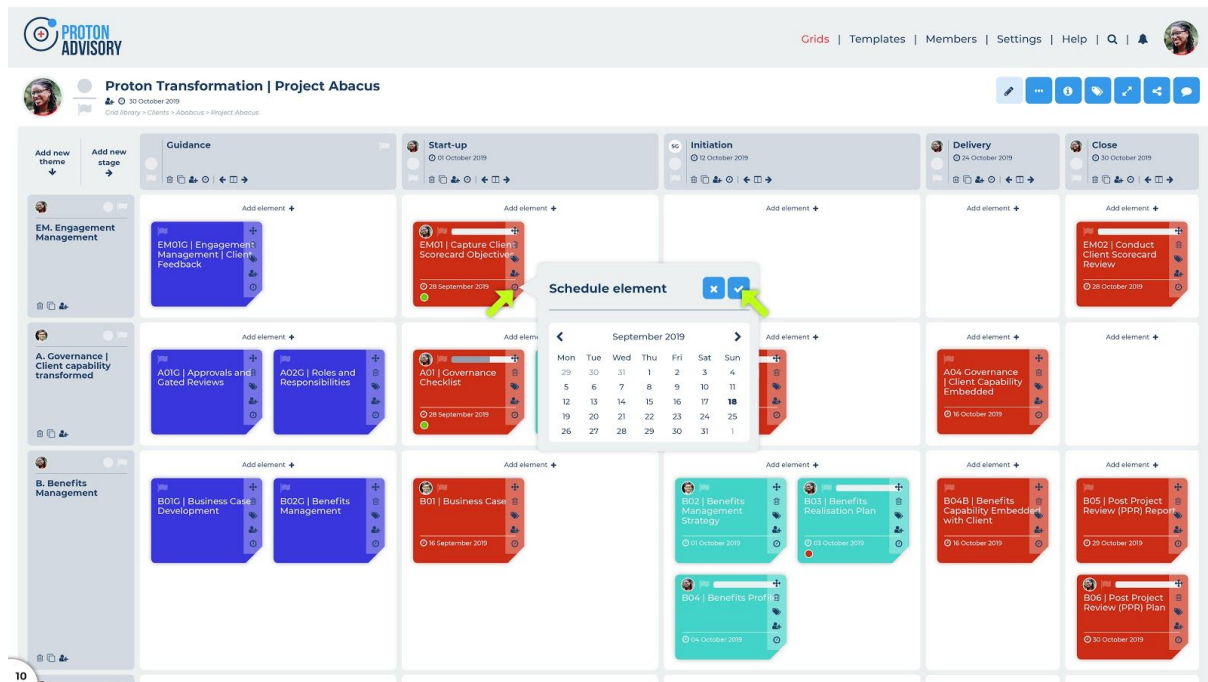


Figure > Sonja assigns a colleague (accountable owner) to an element (using the element thumbnail “quick action”)

Note. We now have a search facility on the expert off-canvas device in this new design.

Note. As it currently stands, elements only arrive at “Completed” status as a function of constituent tasks all completed i.e. there is no plan for an “Element

complete” override. As such, if an element “Due date” is set and there are no constituent tasks within the element, we propose to add a default checklist task saying “Element complete” (with user message to this effect). If the element is subsequently edited to remove all checklist tasks then this element “Due date” will need to be removed (with user message to this effect”).



**Figure > Sonja assigns a “due date” to a first stage deliverable (using the element thumbnail “quick action”)**

If she so wishes, Sonja can build this from the checklist task level upwards.

Note. We will use the logic that only members with grid “edit” or “manage” rights can add tasks, change tasks and related element/stage/theme owners and “Due dates” (where applicable).

For example, within a specific element (deliverable), Sonja assigns Shan the task of “Draft Scorecard completed” and assigns a “Due date” to this task.

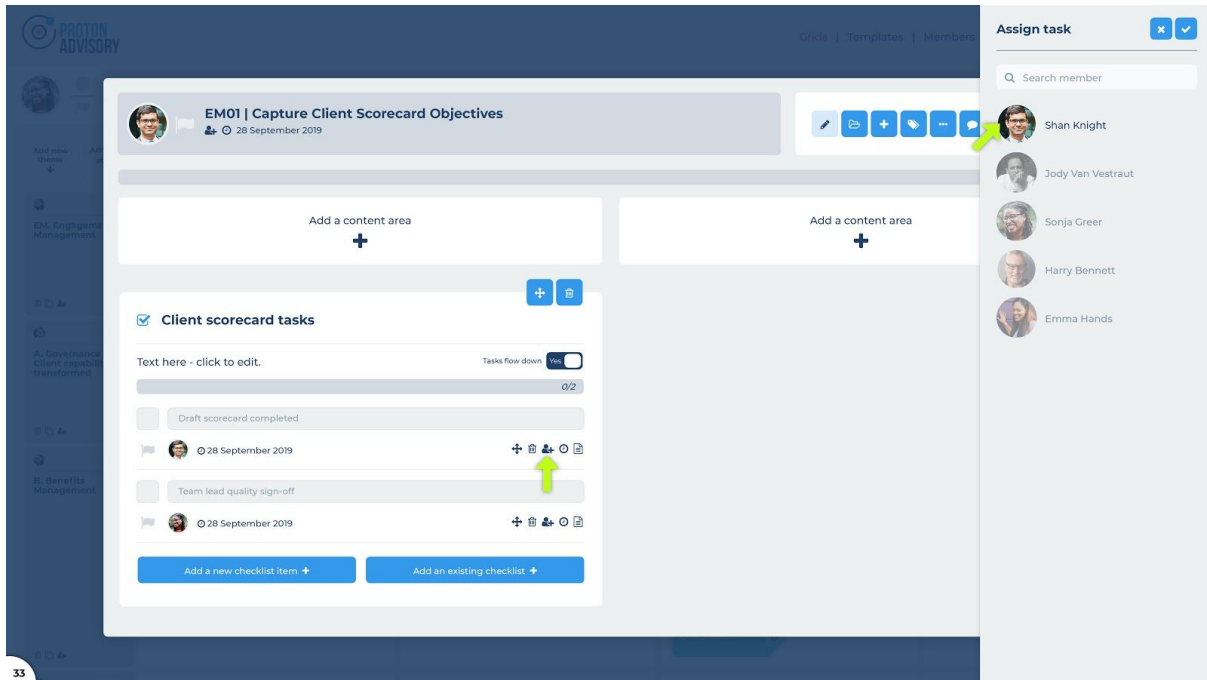


Figure > Sonja assigns the task to Shan (within an open element's checklist task area)

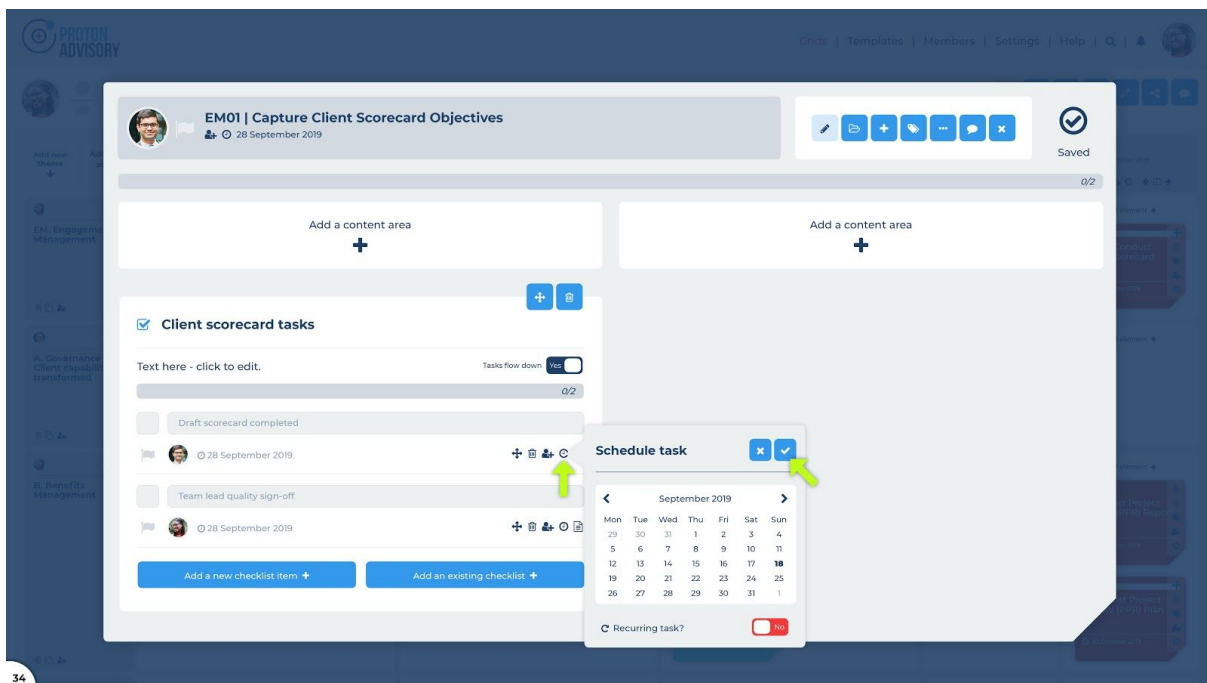


Figure > Sonja schedules the task's "Due date" (within an open element's checklist task area)

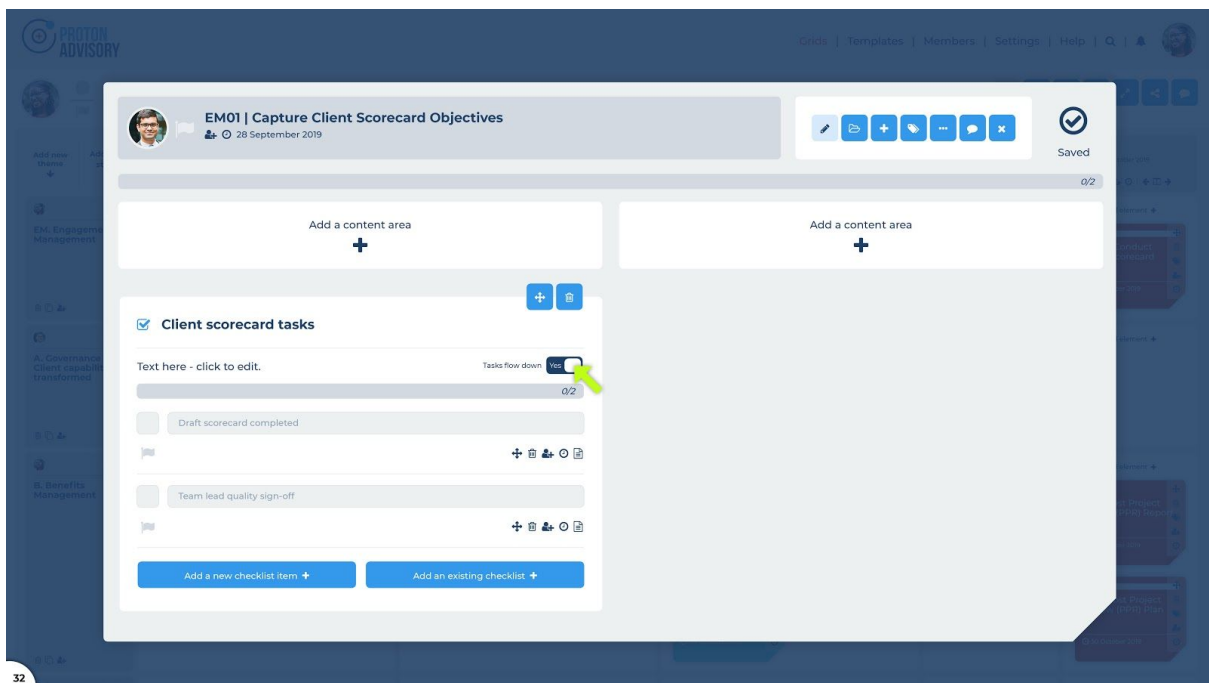
Further, let us also add the real-world reality of:

- (a) These tasks need to flow in their stated order i.e. task 2 can only be assigned "completed" status when task 1 is complete;

- (b) One of these tasks need to be “evidenced” with a file artefact; for example an actual deliverable/file needs to be created to satisfy the completion status.
- (c) One task is that of quality assurance and only a specific manager can effectively sign it off.
- (d) Recurring tasks e.g. a weekly progress report.

Let’s take each of these in turn.

With (a), Sonja can turn on a “task flow down” logic for a specific checklist task content area.

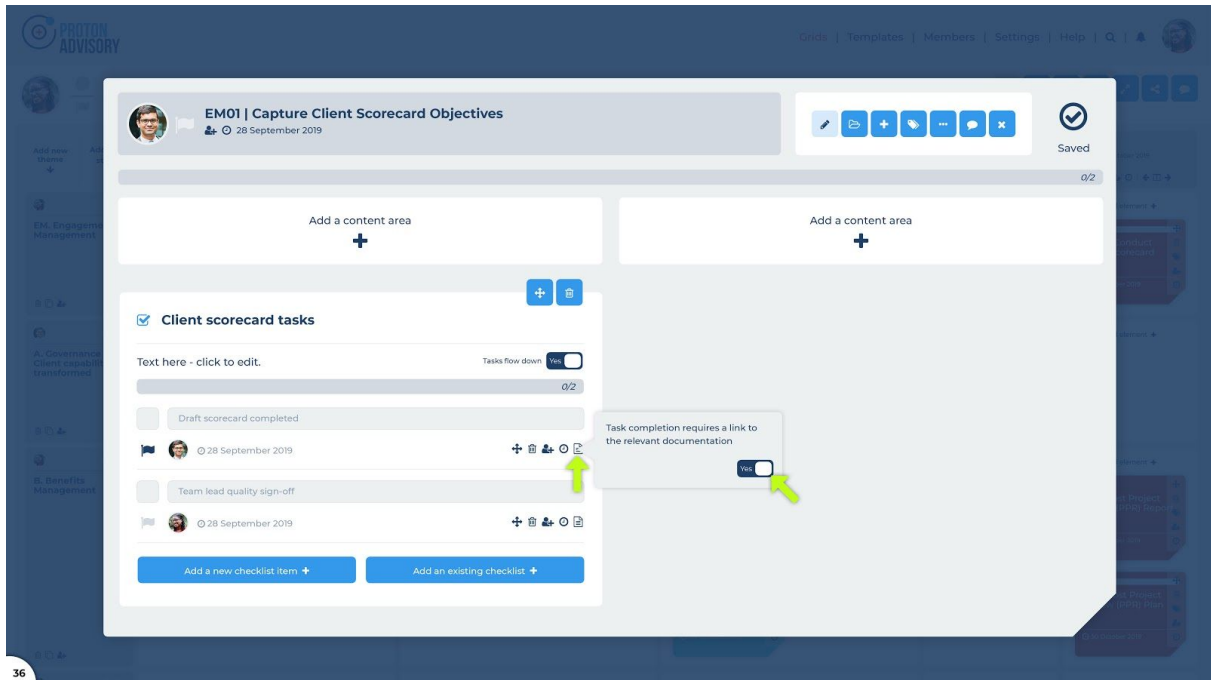


**Figure > Sonja turns on the “Task flow down” logic (in edit mode) for this element’s checklist task area**

Toggling this on, will force the checklist tasks to be completed in their presented order.

*Note. We do not propose to include date/logic checks when there is forced flow down i.e. we allow for full user configuration even if illogical. User feedback supports this view.*

With (b), Sonja has a task in this particular element that require specific evidence of work; for example, a link to the draft client deliverable stored on their legacy document management system (say, Sharepoint in this example).

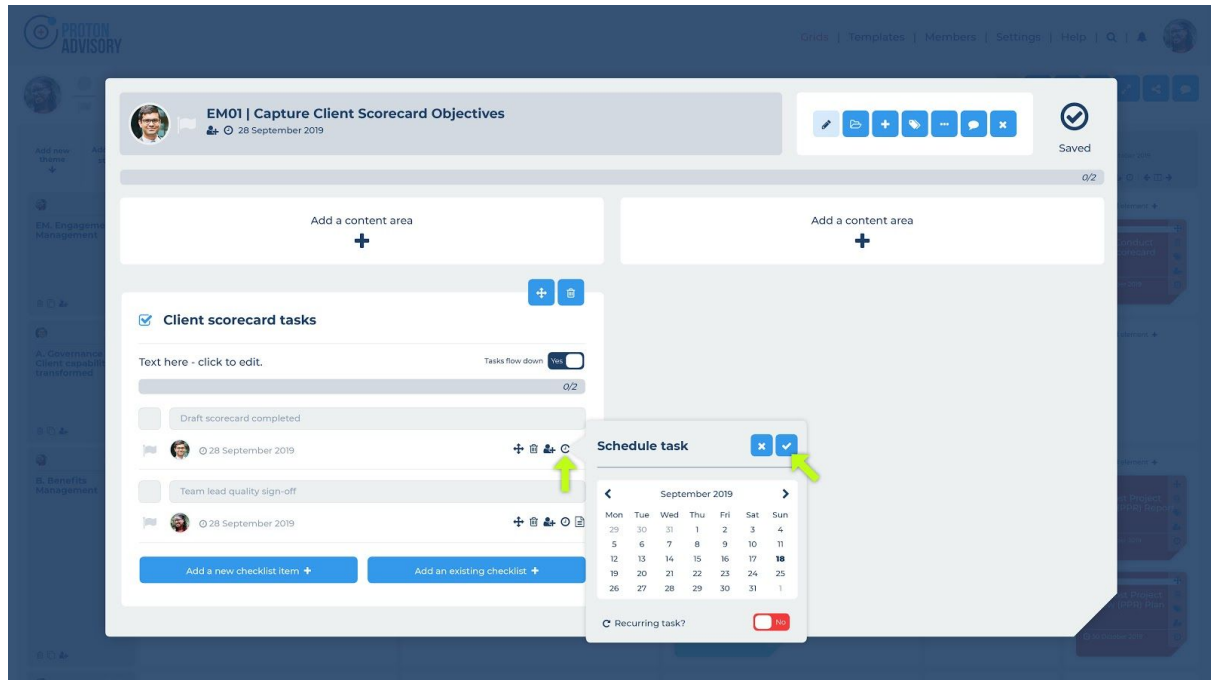


**Figure > Sonja links the checklist task “Draft Scorecard completed” to an evidence point (link to file)**

Note. Some clients potentially require even greater specificity here e.g. specification of file type required and even a file properties field interrogation - to ensure right template followed. We envisage this falling in the bespoke-client-development category.

Scenario (c) is easily handled in so much as this just involves specifying the quality assurance task, say, “Quality Management sign-off” and then this task is assigned to a specific quality manager. As such, in the same way that Sonja assigned a task to Shan, she can assign a quality management type task to another specific individual.

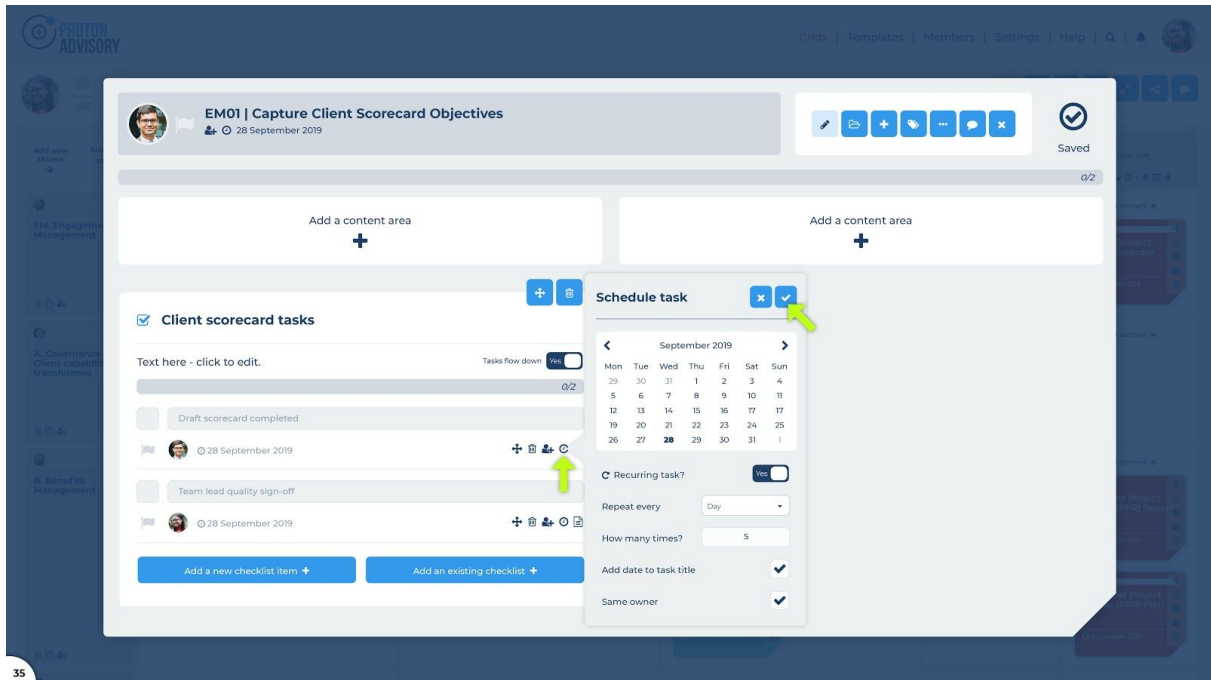
With scenario (d), recurring tasks can be handled by toggling on the “Recurring task?” toggle:



**Figure > Sonja can toggle on the “Recurring task?” toggle (element view)**

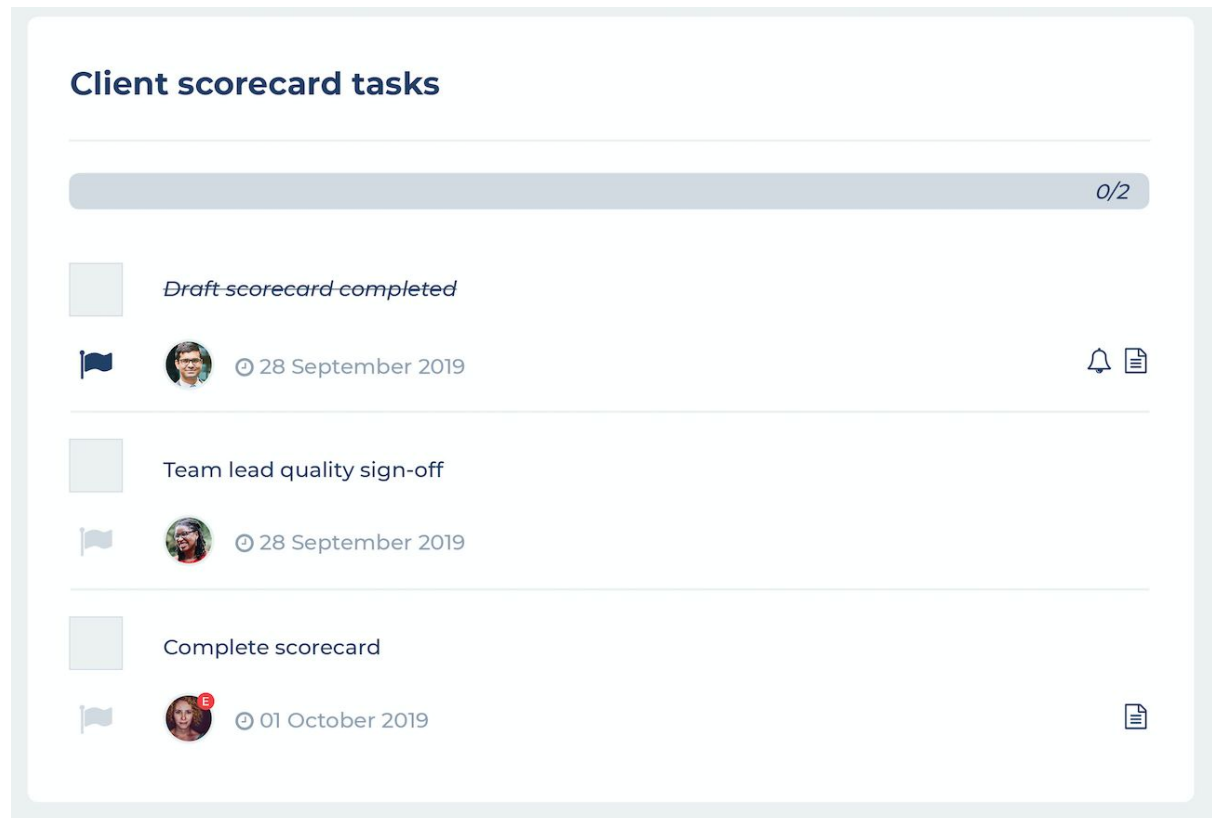
Note. Toggling on “Recurring task?” will - assuming there is a scheduled date set (mandatory) - then reveal the ability to repeat this task every day, week, month, or year (mandatory field), to specify how many times it recurs to this frequency (mandatory field), to specify whether the date is appended to each new task occurrence title and whether to allocate the same owner to all tasks. Once set then all these additional tasks should also appear in the checklist task area - immediately below the task that is recurring.

Note. There was discussion as to whether you can create a “recurring” task list from a task that was previously the result of this recurring-task output. We don’t see any reason why not i.e. any task can be used as the “input” reference for further recurrence.



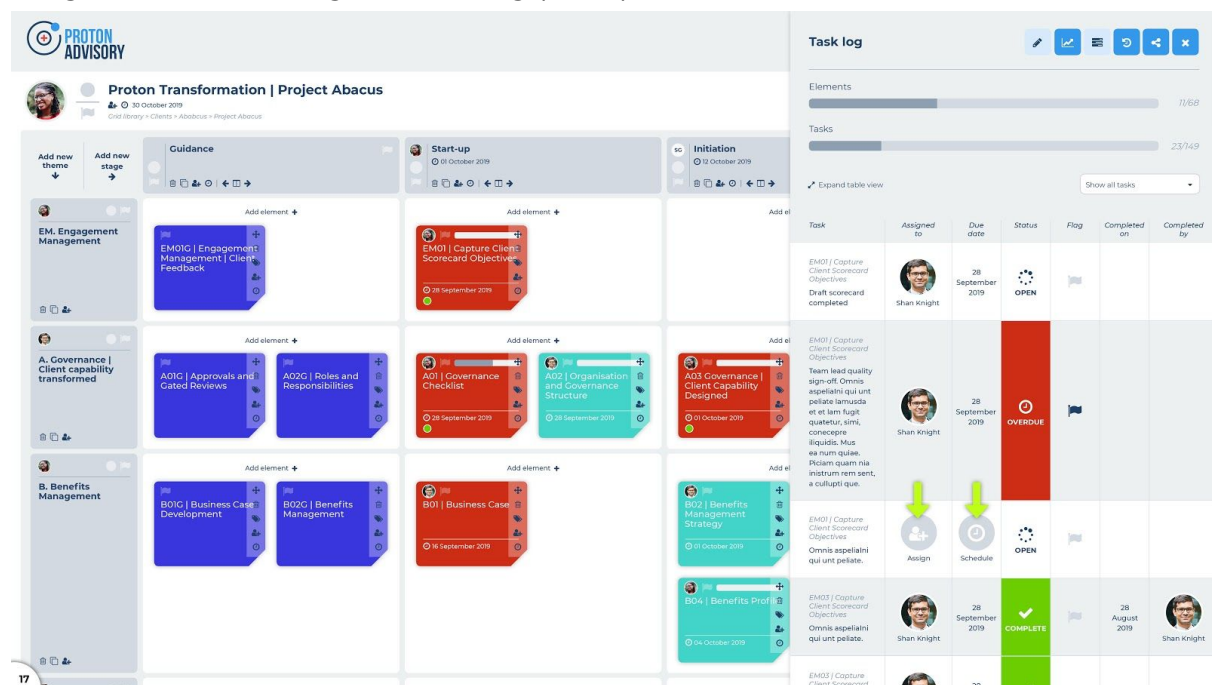
**Figure > Sonja adds recurring task**

It should be noted that external members will be consistently denoted throughout this release with the red “E”; see an example of an external member having a task allocation:



**Figure > External members appear with red “E” - to accentuate their potential allocation to tasks/elements/stages/themes/grids**

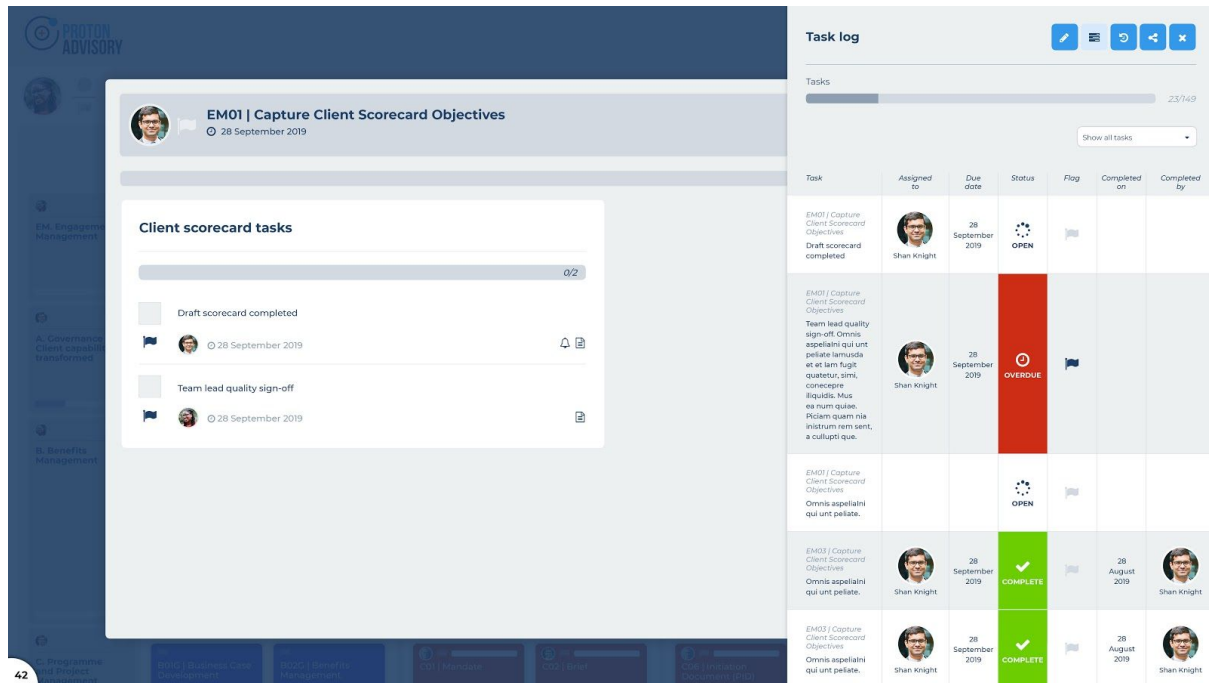
A complimentary view which will allow Sonja to speed up the process of task assignment is via the grid’s task log (table).



**Figure > Sonja can assign owners and Due dates to tasks via a “Task Log” view (at the Grid level)**

Note. If a member has edit rights then propose we default to this configurable view i.e. defaults to edit mode on (no need for edit toggle on this window).

Note. We need a device to handle edit locking - Sonja cannot edit task allocation if another editor is concurrently editing the parent element. This needs more thought.



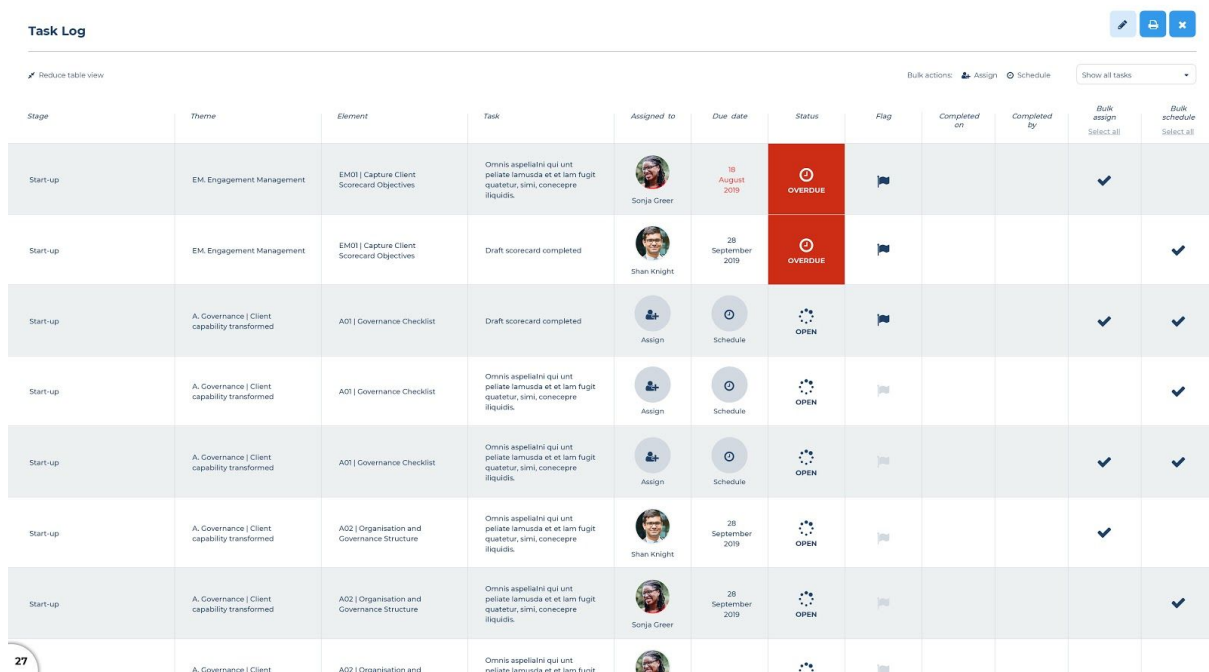
**Task log**

Tasks: 23/49

Show all tasks

Task	Assigned to	Due date	Status	Flag	Completed on	Completed by
EM01   Capture Client Scorecard Objectives Draft scorecard completed	Shan Knight	28 September 2019	OPEN			
EM01   Capture Client Scorecard Objectives Team lead quality sign-off. Omnis aspellaini qui unt pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis. Mus ea num quae. Pictam quam nia instrum rem sent, a cullupit que.	Shan Knight	28 September 2019	OVERDUE			
EM01   Capture Client Scorecard Objectives Omnis aspellaini qui unt pellate.			OPEN			
EM03   Capture Client Scorecard Objectives Omnis aspellaini qui unt pellate.	Shan Knight	28 September 2019	COMPLETE		28 August 2019	Shan Knight
EM03   Capture Client Scorecard Objectives Omnis aspellaini qui unt pellate.	Shan Knight	28 September 2019	COMPLETE		28 August 2019	Shan Knight

Figure > Sonja can assign owners and Due dates to tasks via a "Task Log" view (at the Element level)



**Task Log**

Reduce table view

Bulk actions: Assign Schedule

Show all tasks

Stage	Theme	Element	Task	Assigned to	Due date	Status	Flag	Completed on	Completed by	Bulk assign Select all	Bulk schedule Select all
Start-up	EM Engagement Management	EM01   Capture Client Scorecard Objectives	Omnis aspellaini qui unt pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	Sonja Creer	18 August 2019	OVERDUE				✓	
Start-up	EM Engagement Management	EM01   Capture Client Scorecard Objectives	Draft scorecard completed	Shan Knight	28 September 2019	OVERDUE					✓
Start-up	A. Governance   Client capability transformed	A01   Governance Checklist	Draft scorecard completed	Assign	Schedule	OPEN				✓	✓
Start-up	A. Governance   Client capability transformed	A01   Governance Checklist	Omnis aspellaini qui unt pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	Assign	Schedule	OPEN					✓
Start-up	A. Governance   Client capability transformed	A01   Governance Checklist	Omnis aspellaini qui unt pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	Assign	Schedule	OPEN				✓	✓
Start-up	A. Governance   Client capability transformed	A02   Organisation and Governance Structure	Omnis aspellaini qui unt pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	Shan Knight	28 September 2019	OPEN				✓	
Start-up	A. Governance   Client capability transformed	A02   Organisation and Governance Structure	Omnis aspellaini qui unt pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	Sonja Creer	28 September 2019	OPEN					✓
	A. Governance   Client	A02   Organisation and	Omnis aspellaini qui unt pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.								

Figure > Sonja can bulk assign owners and Due dates to tasks via a "Task Log" (in expanded table view)



Note. We need to add a “Task complete” column to this expanded table to allow for bulk task sign-off.

On completion of this project “start up” activity, all members of the project have clarity as to task and element (accountable) ownership and the respective "Due dates" - at least for the early stage(s) of Project Abacus.

Note. There is a significant amount of “due date” flow logic that needs to be incorporated in this aspect of the new release. Whilst there is an argument for “no enforced logic” - allowing full client configuration but accepting the likelihood of illogical/user error, the current thinking is as follows.

There is a connecting date logic flowing upwards from checklist tasks to > elements to > stages to > grids. A member (with edit rights) can manually configure:

- A grid’s “Due date” (as long as it falls on a date after the last stage “due date”)
- A stage’s “Due date” (as long as it falls on a date after the last constituent element’s “Due date”)
- An element’s “Due date” (as long as it falls on a date after the last constituent task’s “Due date”)

If a “Due date” has been manually configured in compliance with this logic but then a constituent task’s “Due date” is updated to subvert this condition, then every manual setting just auto-adjusts i.e. updates to the new task “Due date” (in order to re-comply with this nested-date logic.

Note. This date logic checking will not cater for stage-order logic i.e. users can have illogical stage order presentation.

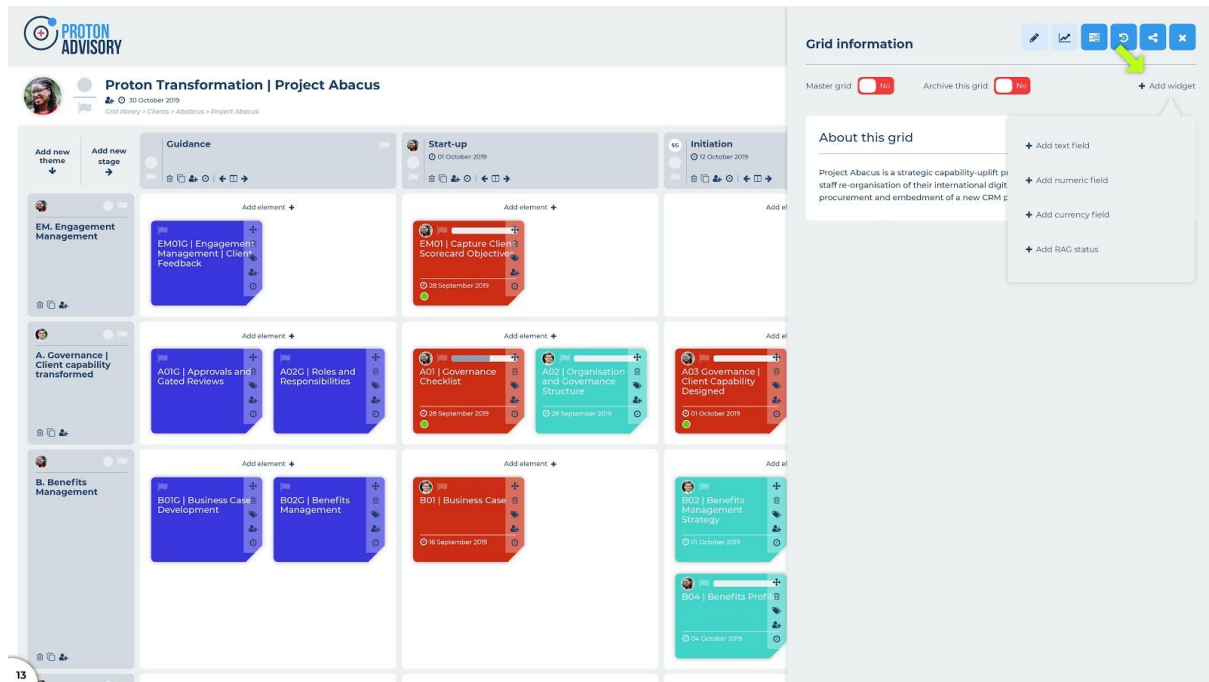
Note. There is also a significant amount of notification-based features that can emanate from this new feature set; for example, we propose:

- A notification sent to task owner when a task is assigned to them and when the task name or “Due date” is subsequently updated.
- A notification sent to task owner (and “parent” element owner if different) when a task goes “overdue”.
- A notification sent to an element owner and any “parent” stage/theme/grid owners when an element goes overdue. It should be noted that an element only goes overdue as a function of a constituent task being overdue (and current date now beyond element “due date”).
- A notification sent to the “parent” element owner (if not them) when a task is completed.



- A notification sent to “parent” stage/theme/grid owners when an element is completed.

**5- Sonja creates a simple bespoke grid dashboard page which she proposes to update on a weekly basis (i.e. to serve as a simple summary “Checkpoint” report).**

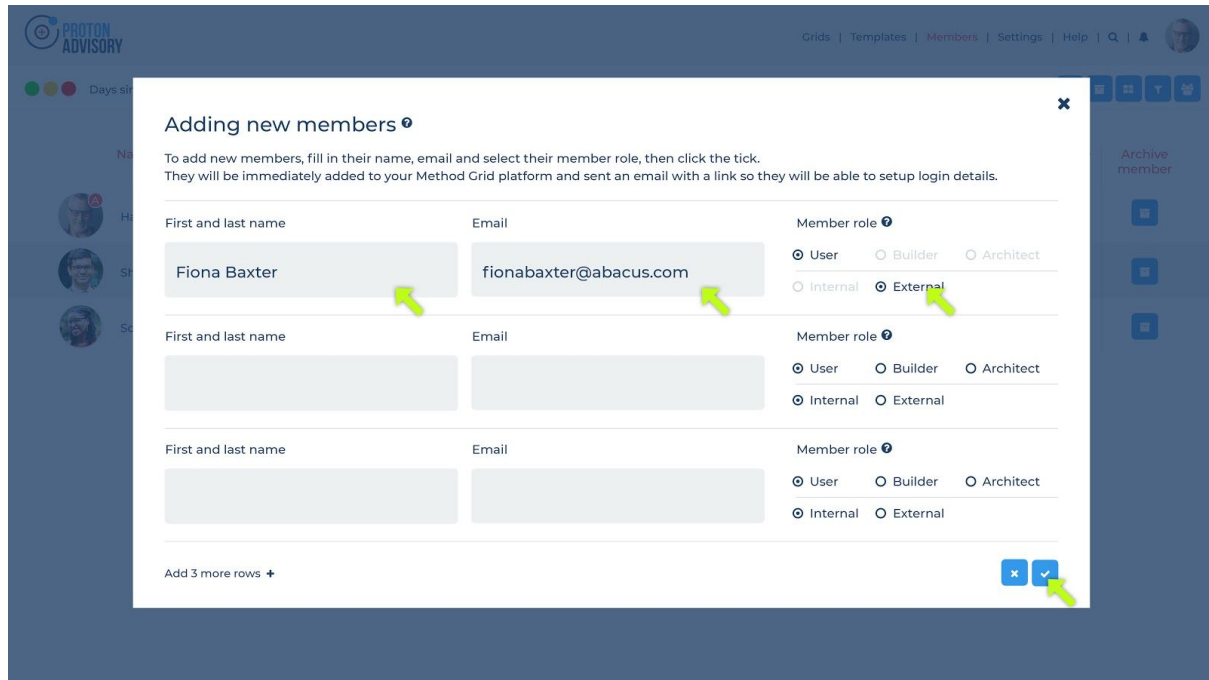


**Figure > Sonja can add simple data fields to this grid's dashboard page (edit mode)**

Tom - more screens needed here.

## **6 - Sonja invites Fiona (as the Lead Client) into the new “Project Abacus” grid**

Sonja is now happy to share the new project grid with the lead client, Fiona. She firstly invites Fiona into Proton Advisory's Method Grid account - specifying that she is an “External” member. This membership class automatically restricts them to resources in **Method Grid** that they are explicitly added to.



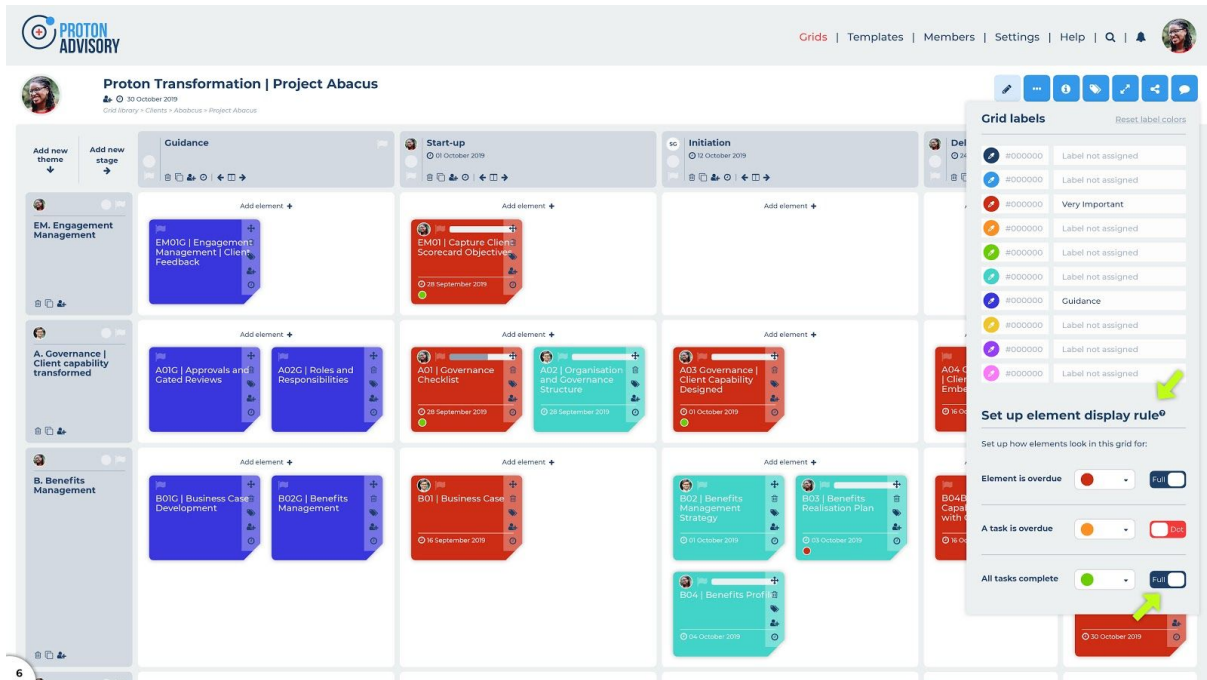
**Figure > Sonja invites Fiona (Lead Client) to Proton's Method Grid account, as an External member (via members>add new members page)**

Once Fiona accepts her invite to the platform, Fiona can add her as an individual member to the "Project Abacus" grid; in this instance, she just needs Fiona to have "view" rights (the default). This will allow Fiona at any stage to access the real-time status of the integrated team engagement.

This is the same functionality as per adding her own internal colleagues (per step 3) - functionality that exists now.

**Note.** Do we need to need to produce a user notification on being added to a grid's access?

**7 - Sonja sets up a simple (visual) progress device for Fiona and the integrated project team. When an element has all of its tasks complete, she configures a conditional-logic rule for it to turn green. She updates the grid label legend to reflect this.**



**Figure > Sonja sets up a checklist display rule (all task-completed elements to turn green)**

This functionality exists now.

What we propose to add in this new release is additional display-configuration rules. Sonja can for example, additionally, specify that she wants element thumbnails to turn, say, amber if any constituent task goes overdue and, say, red if the element goes overdue (i.e. open tasks and “due date” expired).

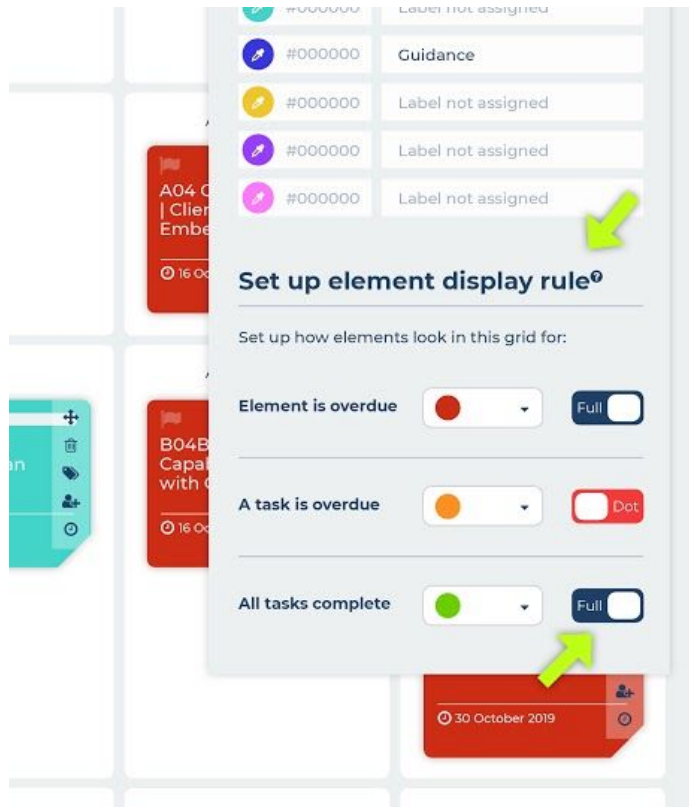


Figure > Sonja can add additional display rules

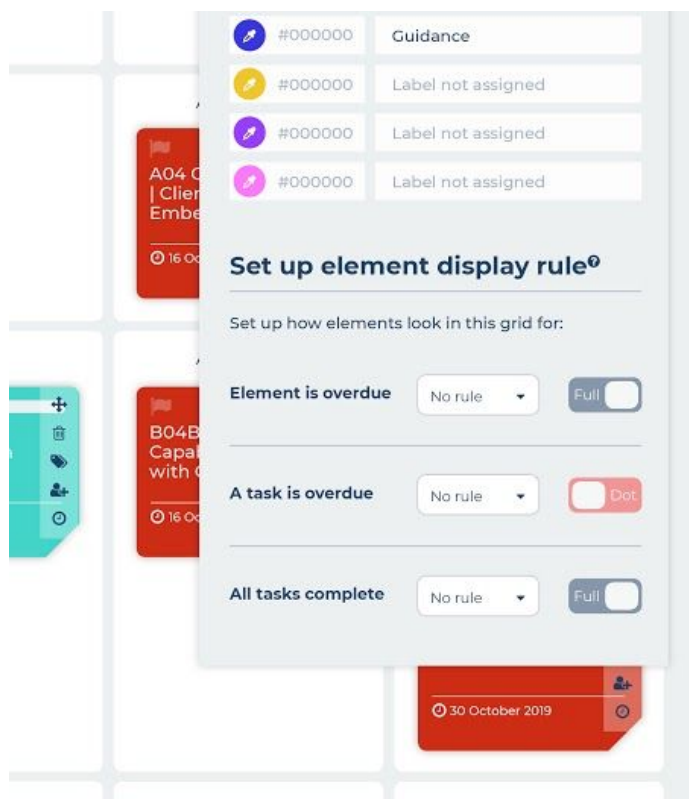


Figure > The display rules can easily be set to “No rule” which turns any rule off



Note. These new rules will require careful logic handling. There is a logic precedence hierarchy to these rules.

Highest precedence: Rule A. All tasks complete

Medium precedence: Rule B. An element is overdue

Lowest precedence: Rule C. A task is overdue

If, for example, two rules apply (logically this can only be the case with B and C) then the colouring rule with the highest precedence wins out (B in this case).

Another situation to consider is the chronological build of these rules; for example (assuming all three rules have been activated):

Day 1. User manually configures element's colour labels (full and dot)

Day 2. A task goes overdue - Rule C invoked (overwrites manual configuration)

Day 3. An element goes overdue - Rule B invoked. This should reverse out Rule C and then apply Rule B.

Day 4. All tasks complete - Rule A invoked. This should reverse out Rule B and then apply Rule A.

If all rules subsequently non-invoked then the display should return to any previous manual setting. The logic principle is that rule-based colouring should completely replace previous rule-invocation cf. building upon previous rule-invocation.

With this additional logic complexity, consideration should be given to constraining this feature to "full" element thumbnail colouring only (cf. allowing for full and dot variants in the same rule set).

Let's now jump to a point mid-project delivery and explore a typical set of live engagement activities ...

**8 - Monday morning. Shan seeks to understand what tasks he has to complete in the coming week. He also wishes to set some "remind me" dates on some future tasks.**

Shan logs into **Method Grid** and goes to his personalised task dashboard.

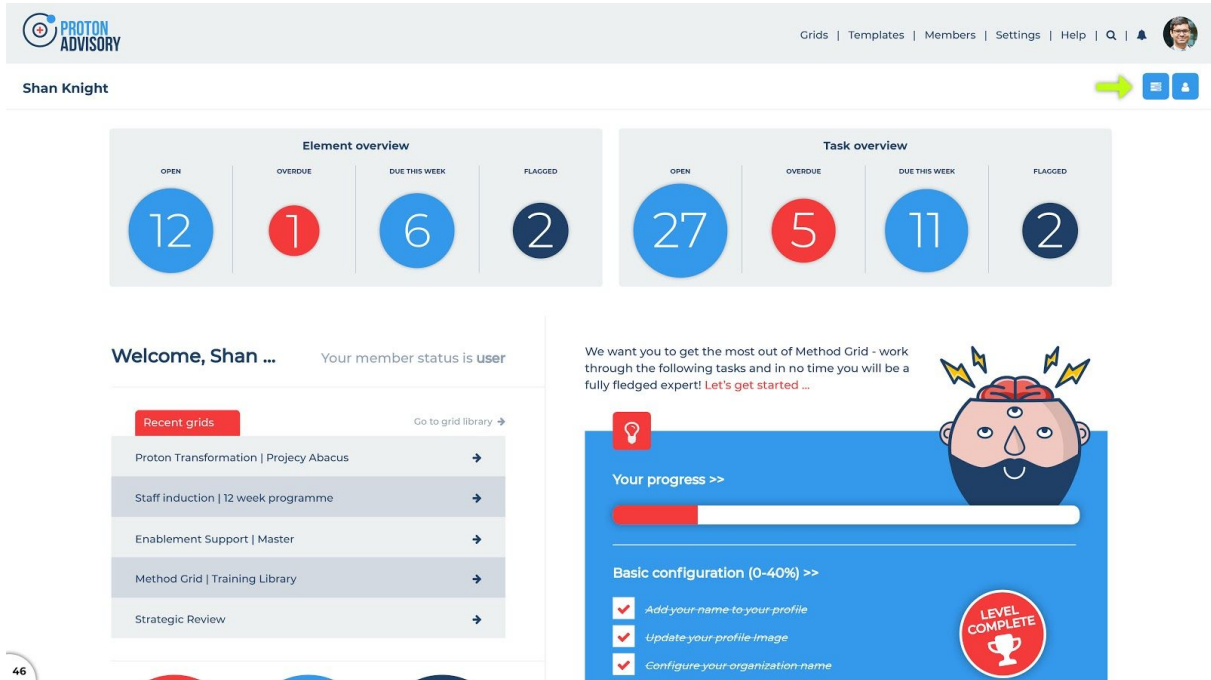


Figure > Shan clicks on the “My tasks” page from his personalised home page

Note. The personalised home page can be modified to show “Top 5” tasks (longest overdue and/or next upcoming). Tom to add.

Note. Propose to add “My Dashboard” to profile drop-down.

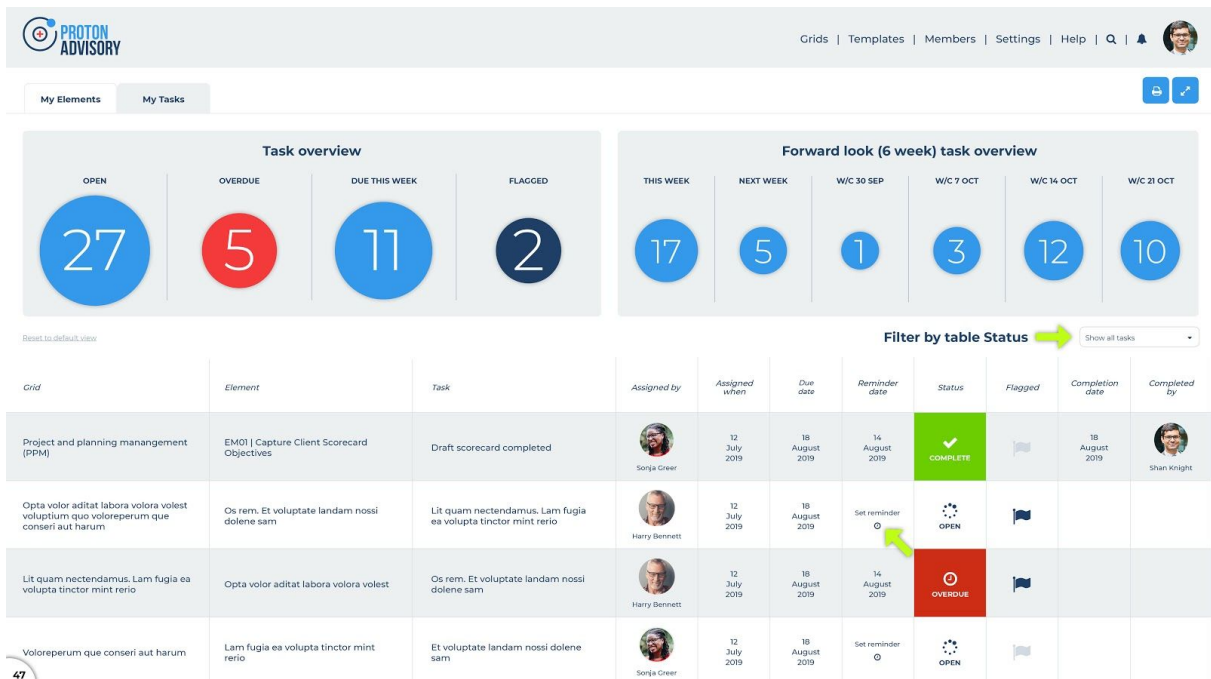


Figure > Shan's personal task log (see top arrow re: filtering on status column)



This dashboard provides a top-page visual summary status of his task load and a forward look with respect to forthcoming task "Due dates".

The task roundels can be clicked to auto-filter the task table to this parameter. For example, if Shan specifically wants to know the tasks he has that are due this week, he clicks the "Due this week" roundel - and the task log (table) will re-configure to this view.

Shan can interrogate this task log further by data sort (clicking the column heading sorts alpha/chronologically up and down) and a simple data filter on the Status field (via an off-canvas device).

Note. The task status is based on three logic conditions: open, complete and overdue (assigned "Due date" has passed).

Note. The default view is to "Show open tasks" (hiding "completed" tasks) with "overdue" tasks at the top of the table. A "Reset to default view" link allows users to always return to this view (after applying sorts/filters).

Full task filter dropdown includes:

- Show all tasks
- Show open tasks (default)
- Show overdue tasks
- Show completed tasks

Note. We will present these tables in default first view with flagged items at the top.

**Discussion needed. Do we also include a link to this task log in member profile pages (allowing colleagues to see other member's tasks)? Team agree - just Architects to have this view.**

Shan notices a forthcoming task that he really needs to start well in advance of the scheduled "due date" and sets a "reminder" date on this for the end of the week.

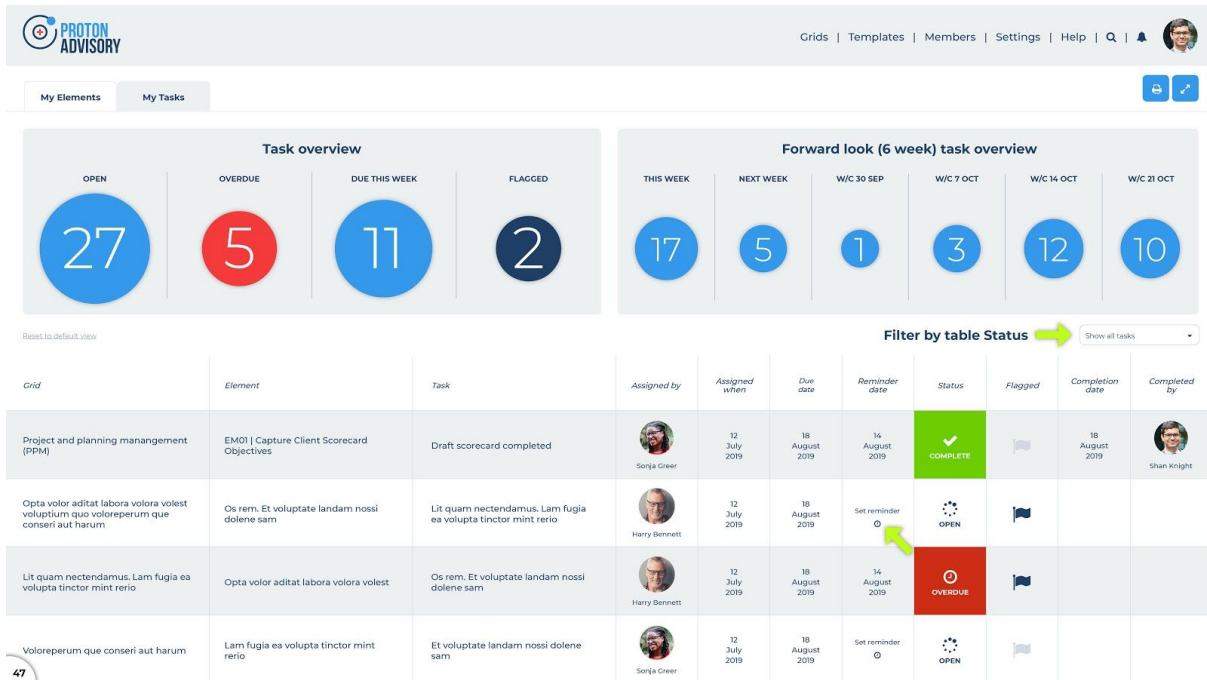


Figure > Shan's personal task log allows him to set "Reminder" dates (see bottom arrow)

Additionally, Shan can view any elements he has ownership of by clicking on his "My Elements" tab.

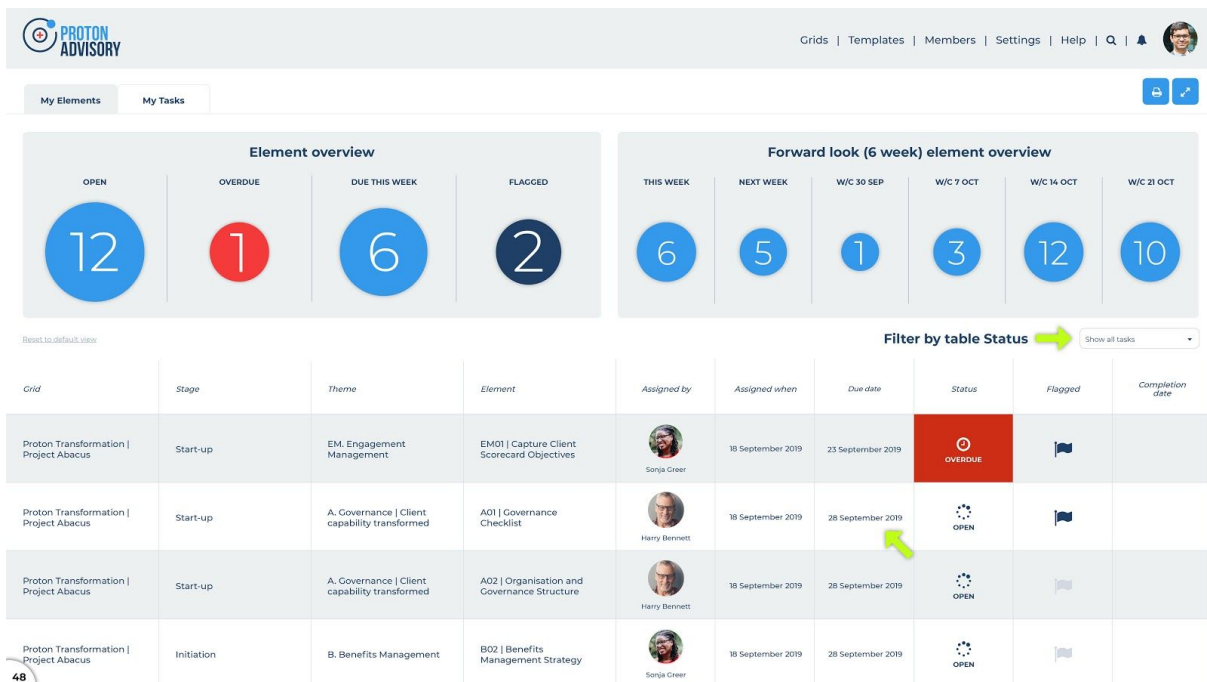
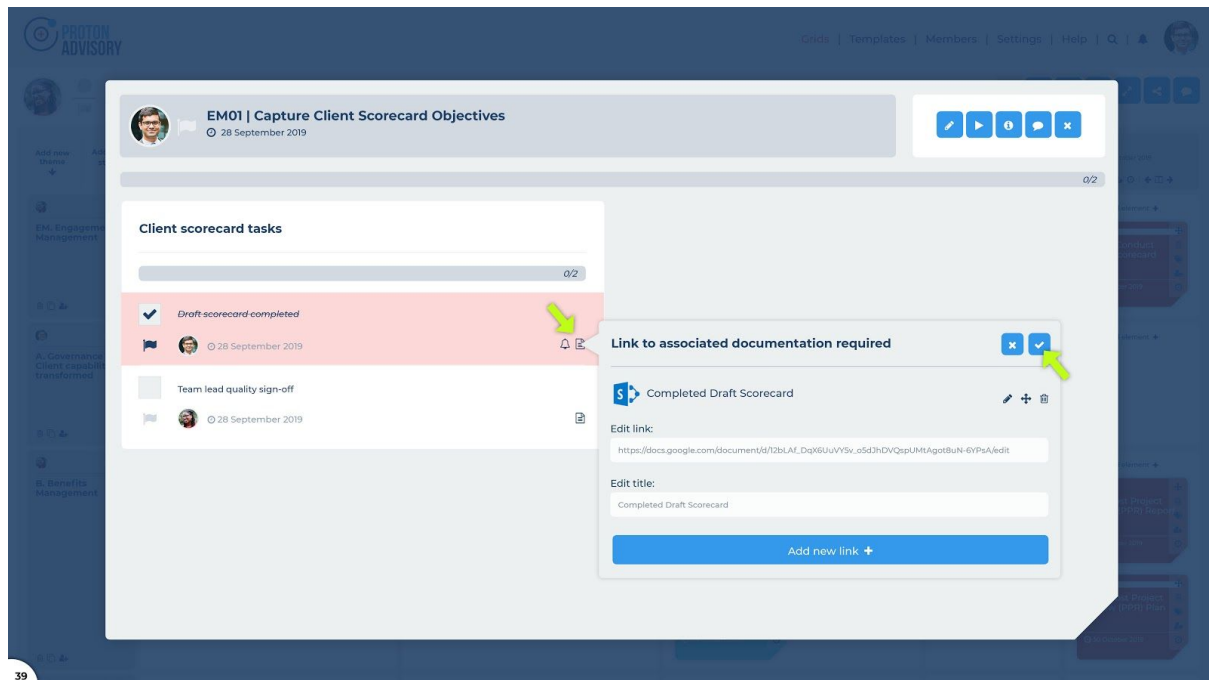


Figure > Shan's personal element log

Note. UX for roundels proposal - we could have 10 roundel sizes and apply one of these per numeric range in question.

## 9 - Tuesday morning. Shan is making good progress with deliverables and updates the grid with his evidenced progress.

Shan has completed a key draft deliverable; it is one that requires a specific “evidence” link for. He adds this link to the requisite task, allowing him to check it off as complete. Shan is able to add additional links as necessary.



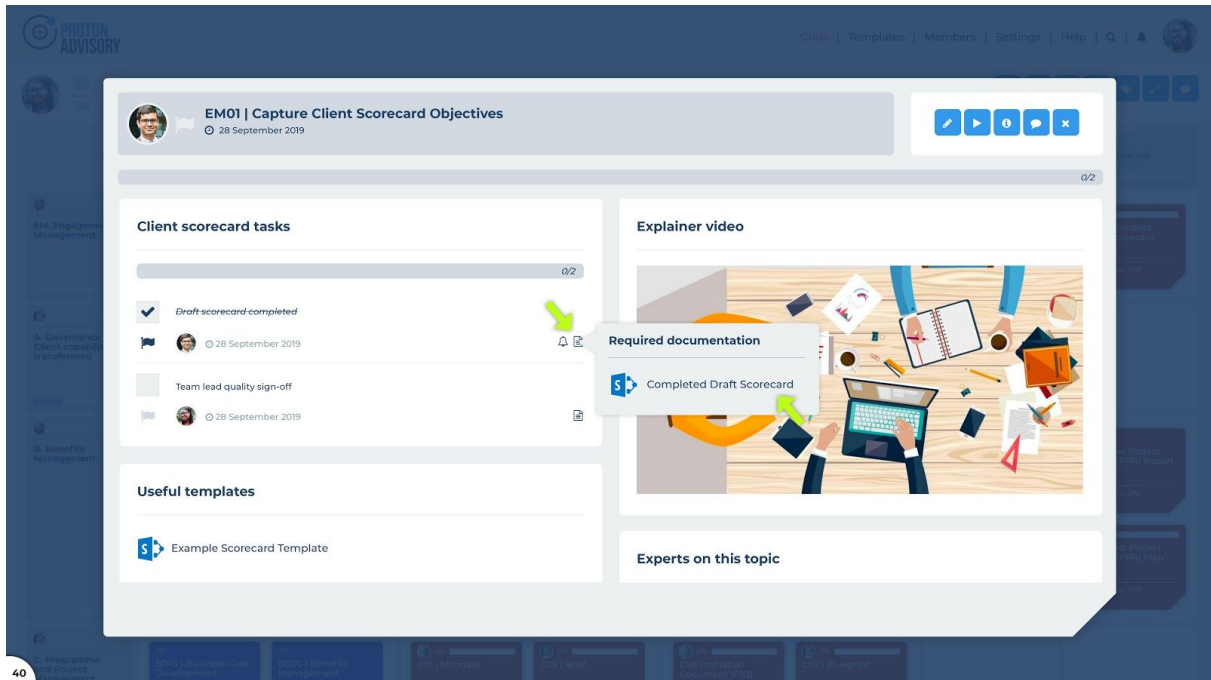
**Figure > Shan evidences completion of a task by adding a link - thus allowing him to tick-complete**

Note. This is only possible in the element view of Shan’s checklist tasks. Adding this to the “My Tasks” dashboard starts to make this view too cumbersome.

Note. The checklist task can only be ticked-complete once a link has been saved. If this link is subsequently deleted it will untick.

Note. If a ticked task is subsequently unticked - and - there is task flow down logic in place, then all subsequent ticked tasks will need to be unticked also.

If anyone else were now to view this element, they will see (and be able to access/download) this link.

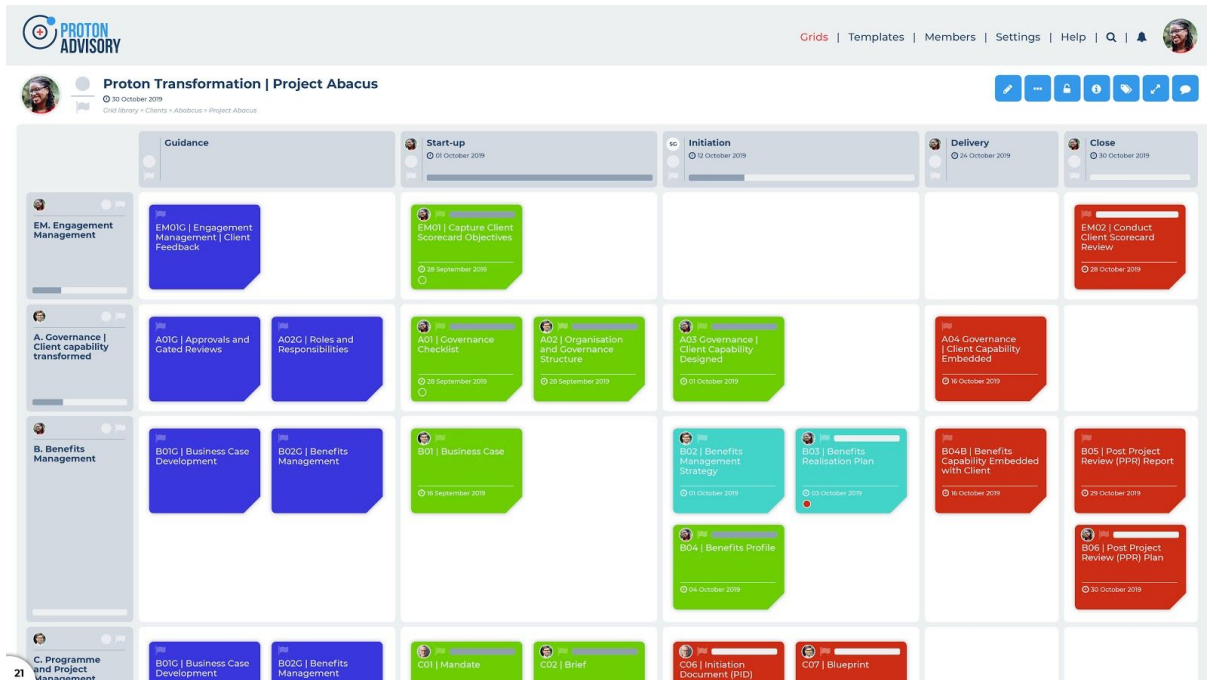


**Figure > Viewing a completed checklist task. The “Evidence” icon to the right of the task indicates that it is a task that needed evidencing. Clicking on this icon reveals the link. Clicking on this link downloads/accesses.**

**10 - Wednesday morning. At the project team meeting, Sonja facilitates a “Checkpoint” meeting with her Proton delivery colleagues. “Where are we to plan overall?” is her headline question to the project team.**

This question can be addressed at a number of different levels.

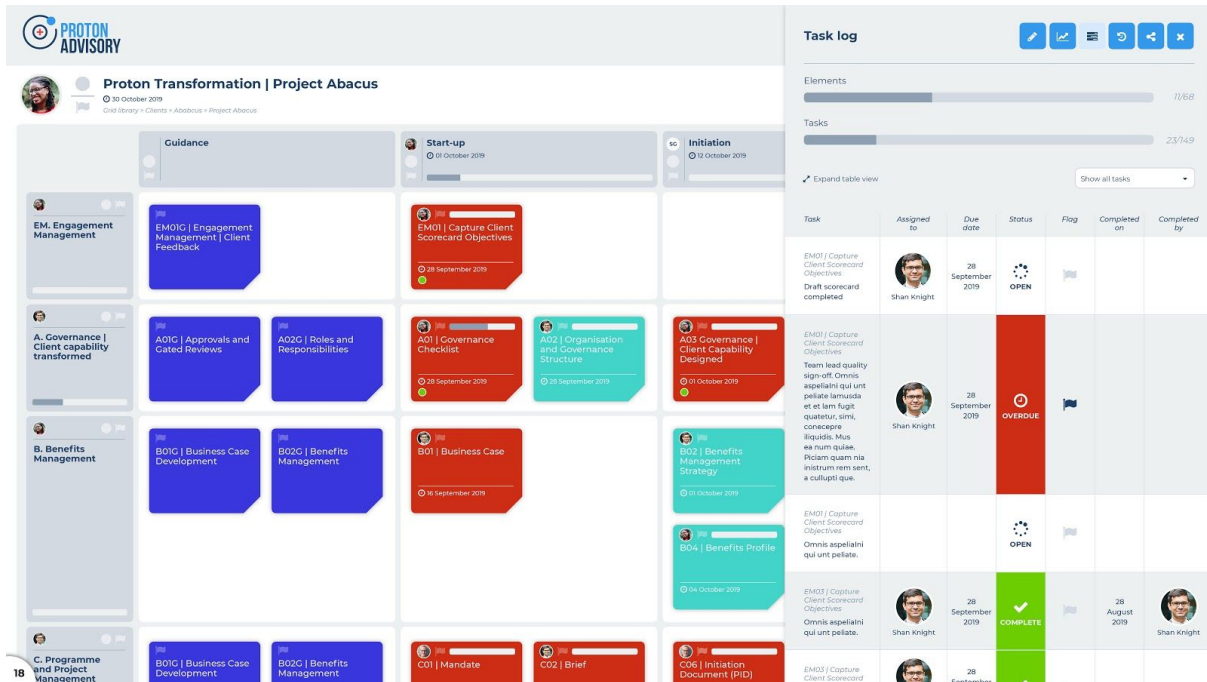
At the simplest level, the project team can view the actual grid. With the colour-condition rule in place (see step 7), this view provides an intuitive at-a-glance graphical summary:



**Figure > At-a-glance overview of the “Project Abacus” grid shows (green-coloured) completed elements. Grid view showing stage and theme %complete bars**

Note. We have added the concept of stage %progress and theme %progress bars per the figure above. These bars only visible in view mode (edit mode off) and based on the auto-generated logic of  $\%progress = \text{tasks complete} / \text{total tasks}$ . Some users would also like to see the actual derivation of this % complete (tasks complete / total tasks) - we suggest this is best done in the form of mouse roll-over reveal.

At the next level, Sonja will want to view the grid’s “Task Log” (within the grid’s “Info Panel”).



**Figure > The “Project Abacus” Task Log details all tasks with a summary progress graphic above**

The grid “Task Log” is shown in situ with actual grid via an off-canvas device.

The progress bars detail both %progress by elements (that contain tasks) and by actual checklist tasks across the entire grid.

This table can be examined further by data sort (clicking the column heading sorts alpha/chronologically up and down) and a simple data filter on the “Status” field.

Note. By default, this view will not show completed tasks and will order with flagged tasks at the top. Task status fields include: Open (open icon), Overdue (red icon) and Complete (green tick).

























Note. This table will also have a “[What's new \(last 7d\)?](#)” action which will reset the table to include only tasks that have been updated/completed or gone overdue in last seven days. We propose to add this to the dropdown selector.

Note. This design currently works on a simplified (off-canvas) side view. The advantage of this is the ability to see tasks in situ with the overall grid. Sonja can expand on this (see “Expand table view” link to additionally view tasks by stages and themes).

**Task Log**

✖ Reduce table view

Bulk actions: Assign Schedule Show all tasks

Stage	Theme	Element	Task	Assigned to	Due date	Status	Flag	Completed on	Completed By	Bulk assign Select all	Bulk schedule Select all
Start-up	EM: Engagement Management	EM01   Capture Client Scorecard Objectives	Omnia expellat qui ut pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	 Sonja Greer	18 August 2019	OVERDUE				<input checked="" type="checkbox"/>	
Start-up	EM: Engagement Management	EM01   Capture Client Scorecard Objectives	Draft scorecard completed	 Shan Knight	28 September 2019	OVERDUE					<input checked="" type="checkbox"/>
Start-up	A: Governance   Client capability transformed	A01   Governance Checklist	Draft scorecard completed	 Assign	 Schedule					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Start-up	A: Governance   Client capability transformed	A01   Governance Checklist	Omnia expellat qui ut pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	 Assign	 Schedule						<input checked="" type="checkbox"/>
Start-up	A: Governance   Client capability transformed	A01   Governance Checklist	Omnia expellat qui ut pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	 Assign	 Schedule					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Start-up	A: Governance   Client capability transformed	A02   Organisation and Governance Structure	Omnia expellat qui ut pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	 Shan Knight	28 September 2019	OPEN				<input checked="" type="checkbox"/>	
Start-up	A: Governance   Client capability transformed	A02   Organisation and Governance Structure	Omnia expellat qui ut pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	 Sonja Greer	28 September 2019	OPEN					<input checked="" type="checkbox"/>
27	A: Governance   Client	A02   Organisation and	Omnia expellat qui ut pellate lamusda et et iam fugit quaterur, simi, concepre iliquidis.	 Assign	 Schedule						

Note. We need to add a pdf/print icon/action to this expanded table view (same for all tabular report type pages). Possibly also export (to Excel, csv)?

Note. We need to add task complete column - for bulk task sign-off.

**11 - Thursday morning. Harry prepares for his weekly practice area meeting. His team leader colleagues are currently delivering c. 60 live commissions. “How is our delivery portfolio performing to plan overall?” and “Which projects/colleagues most need my support - and where?” are his key thoughts.**

With cup of coffee in hand, Harry embarks on his weekly conference call with the senior practice leadership team.

As an account “Architect” (or admin), he can access the “Account Dashboard” via his **Method Grid** home page.

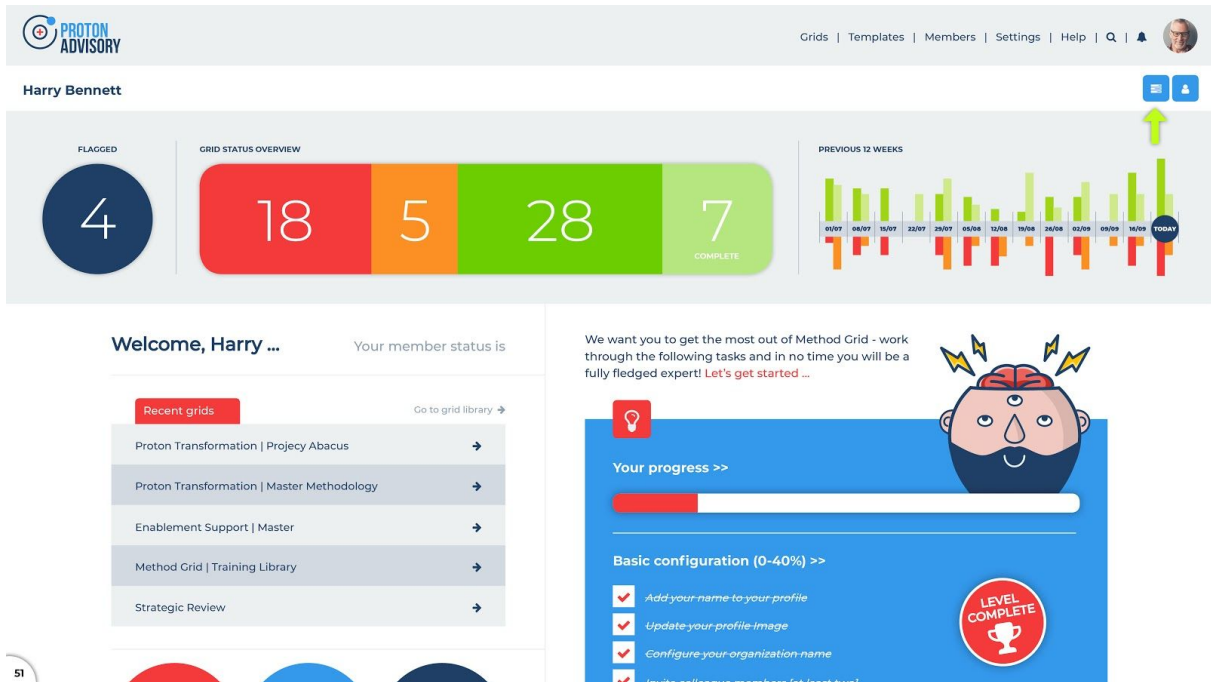


Figure > Harry accesses his "Account Dashboard" via his personalised homepage (see arrow)

Note. Propose to add "My Dashboard" to profile drop-down.

Discussion. Does it need to be more prominent than this?

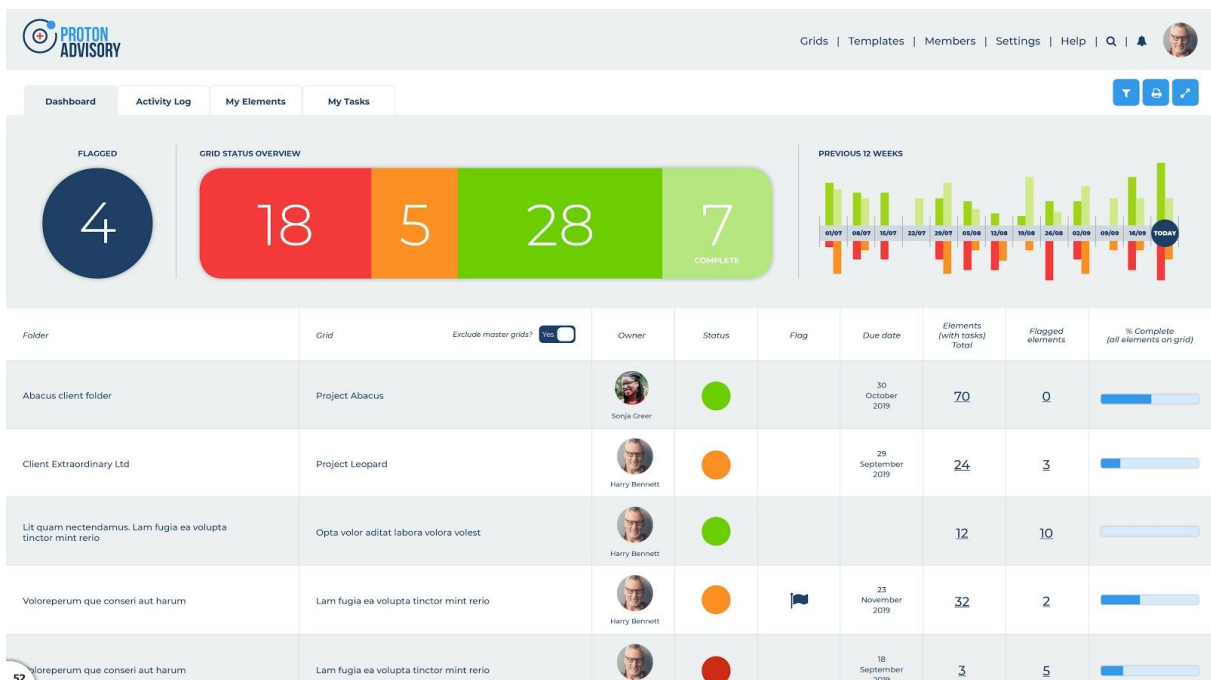


Figure > Harry's Account Dashboard

The summary pane on this view, left to right, shows the number of flagged grids/projects, a status summary count (red/amber/green/complete) and a historical look-back at the account/portfolio status over the preceding 12-weeks.



Note. The look-back logic will be based on a weekly snapshot (Sunday 0000hrs) that captures the grid status summary count for that week ending.

The flagged roundel and the grid status summary graphic can be clicked to auto-filter the table to this subset of grids.

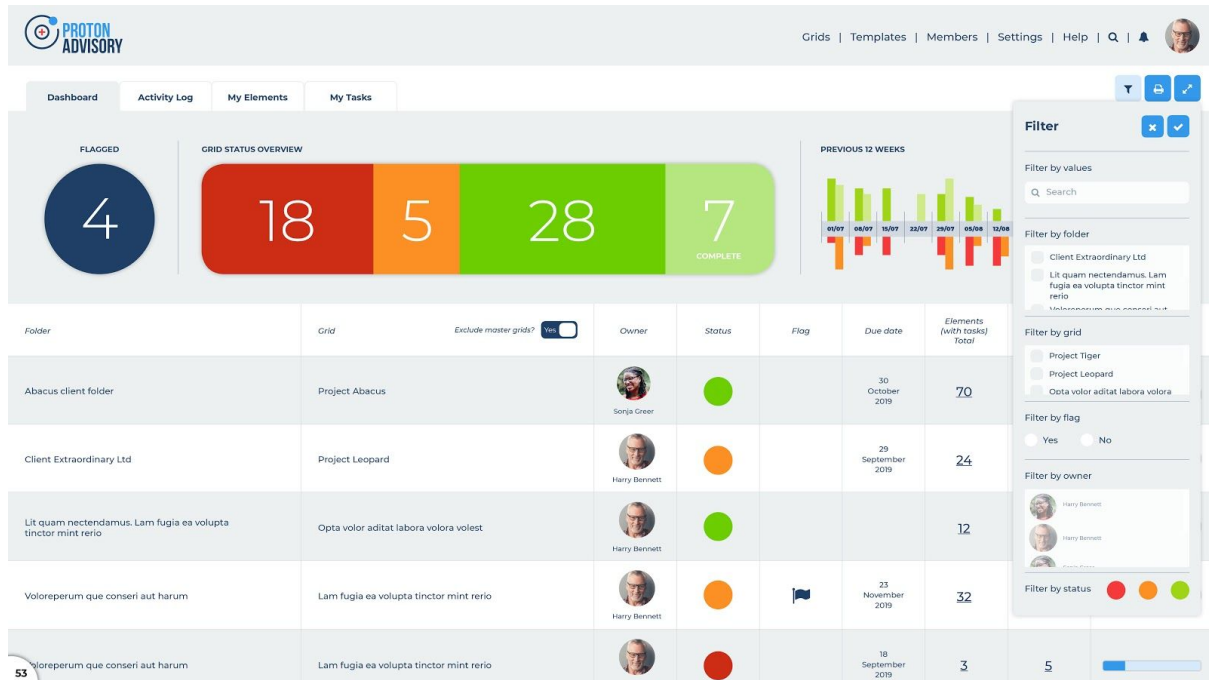
Note. We will need a link to reset the table to default view.

Note. We discussed how a grid is actually awarded "Complete" status. It was decided this best done as a manual update - via the grid page status icon (requiring grid "edit" rights) as there are many instances when users would not want it logic-enforced (as a function of all elements-with-tasks being completed).

In the main table, live (un-archived) grids are shown per row. For each row/grid, the table shows grid owner, grid status, grid flag (on/off), grid "Due date", grid element count (elements containing tasks) and %complete bar (based on elements-containing-tasks).

By default, this table view does not show grids that have been attributed as "master" grids (which are typically central, continuously-updated, best-practice grids). There is the ability, however, to toggle on the inclusion of "master" grids also.

This powerful, summary view is sortable (up/down) by clicking on the data column headers and filterable via the filter action button:

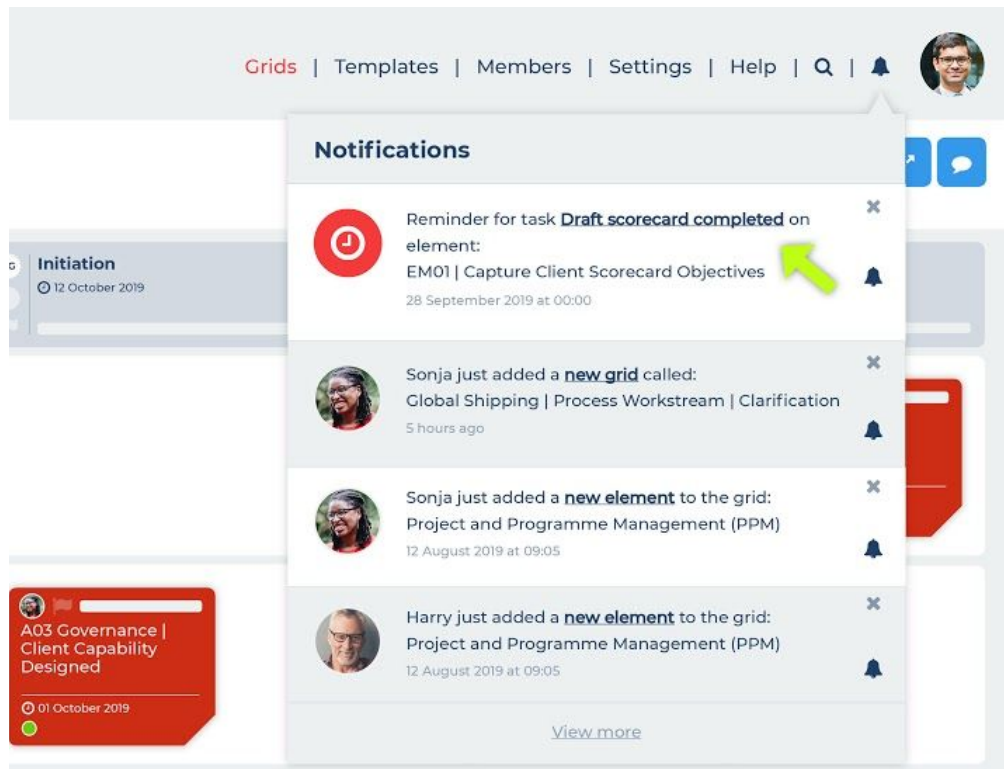


**Figure > Harry's Account Dashboard (filter device open)**

From this summary view, Harry can see, for example, that there are four grids/projects specifically flagging attention.

**12 - Friday afternoon. Shan receives a “reminder” notification with respect to future tasks he is accountable for. Concerned that he doesn’t have all the information he requires for this task, he wishes to “flag” this to his project lead, Sonja.**

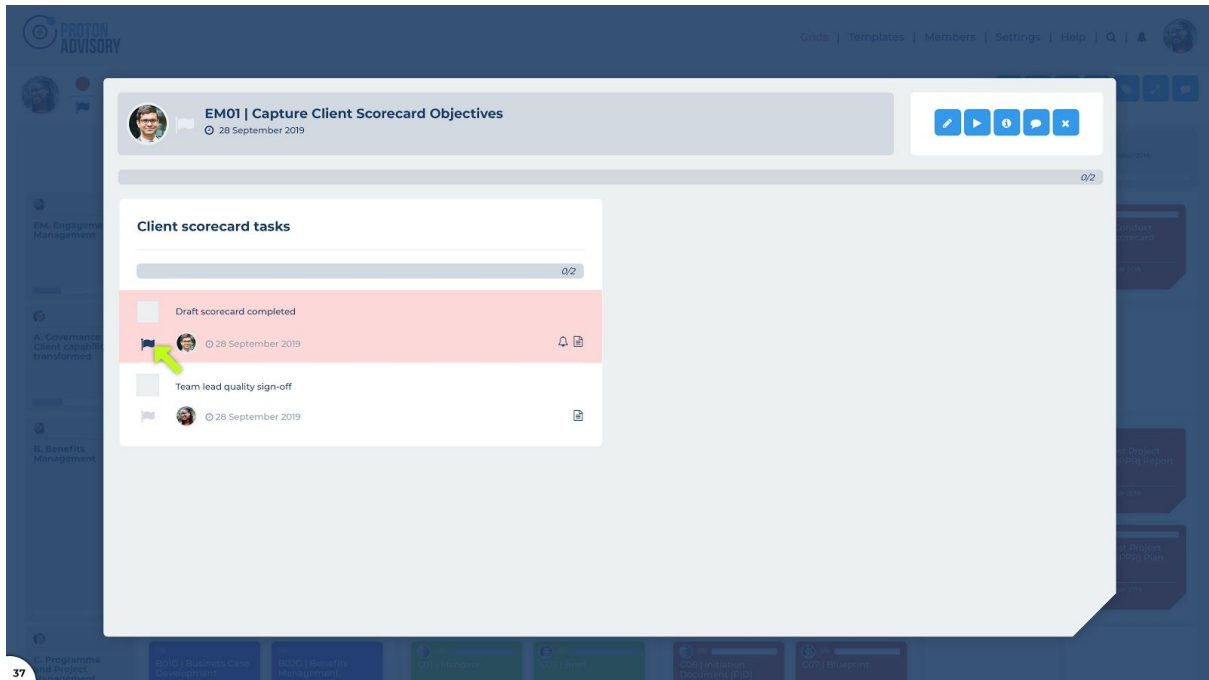
When Shan logs into Method Grid on Friday morning, he can see that he has unread notifications (via the top menu notifications icon):



**Figure > Shan receives a notification as a result of a “Reminder” he set earlier**

Shan will also receive an email notification to the same effect - at the start of his day.

Triggered by seeing this, he flags the task in question as he is now concerned that this is not deliverable by the “Due date”. At the very least, this will bring it to Sonja’s attention at this week’s project checkpoint meeting.



**Figure > Shan flags the task in question (by clicking on the flag icon adjacent to the task)**

Note. In the element, checklist tasks assigned to the viewer are colour-accentuated (red) to draw them to the attention of the task-owner.

Note. Assigned task/element owners and anyone with “edit” rights in a grid can flag a task/element.

Note. We can apply notifications to the action of flagging i.e. all element/stage/theme/grid owners (if different to task owner) receive notification.

**13 - Wednesday morning. At this week’s “Checkpoint” meeting, Sonja’s attention is drawn to the task that Shan flagged - along with other related overdue tasks. The project is slipping into difficult territory and she updates the status to “Red” commensurately. She “flags” the project - wishing to speak to Harry fairly urgently on the matter (she is going to ask for an additional support resource). Finally, she updates her grid’s bespoke dashboard - serving as a simple “By exception - Highlight” report - to describe the key risks and issues.**

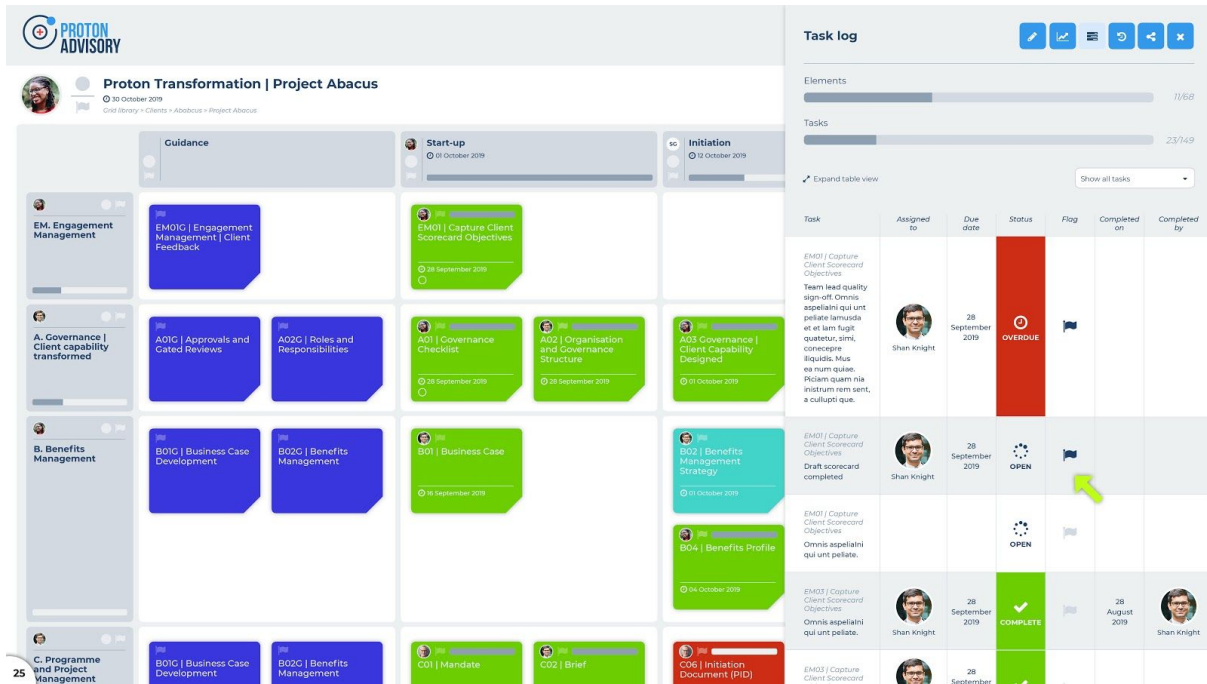


Figure > Flagged task (within grid-level task log)

After discussion with project colleagues, Sonja decides to move “Project Abacus” to “Red” status and, additionally, to “Flag” the grid. She does this by updating the status fields in the Grid title bar:

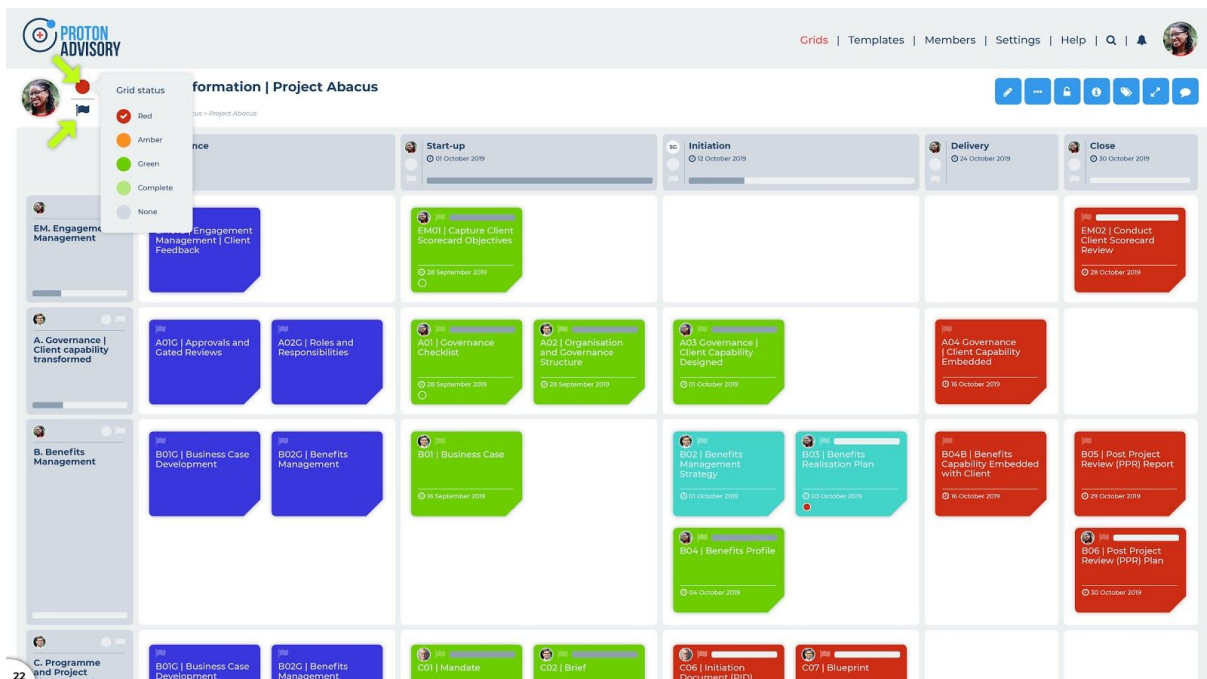


Figure > Sonja updates the grid's status and turns the “Flag” on

Opening the grid's "Dashboard" page, via the grid information action button, she provides a brief explanatory summary.

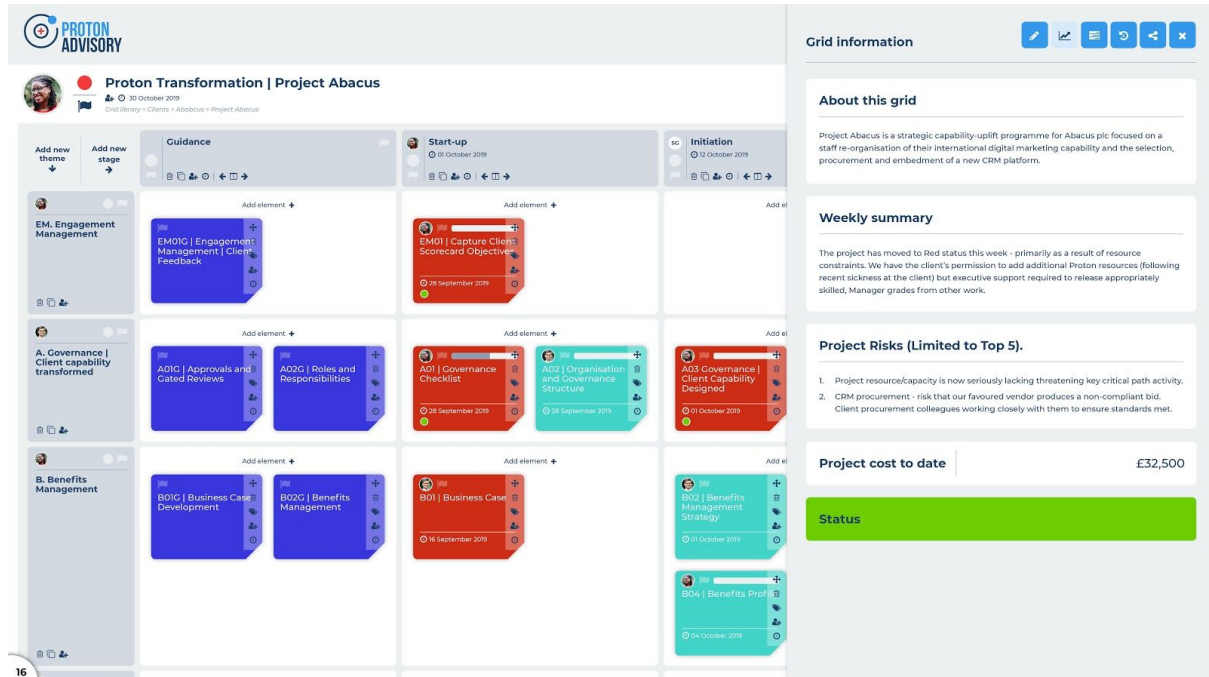


Figure > Sonja updates the grid's dashboard page - updating the bespoke structure she originally created

Note. We have also added RAG status to stages and themes also - using similar device to overall grid status/flag setting. This device is only relevant to main grid view - not repeated in any table dashboards.

Discussion. We can reflect the grid status in the grid thumbnail (grid library) view. Potential to add grid owner, flag, "Due date" also. Ability to edit these fields at this level also.

**14 - Thursday morning. At this week's practice area meeting, Harry notices the flag against "Project Abacus" and drills down to explore the likely problematic areas. Fully armed with this overview, he gives Sonja a call as soon as the meeting concludes. "How can I help resolve?" is his opening line. Harry's drill down starts with his entry page Account Dashboard page:**

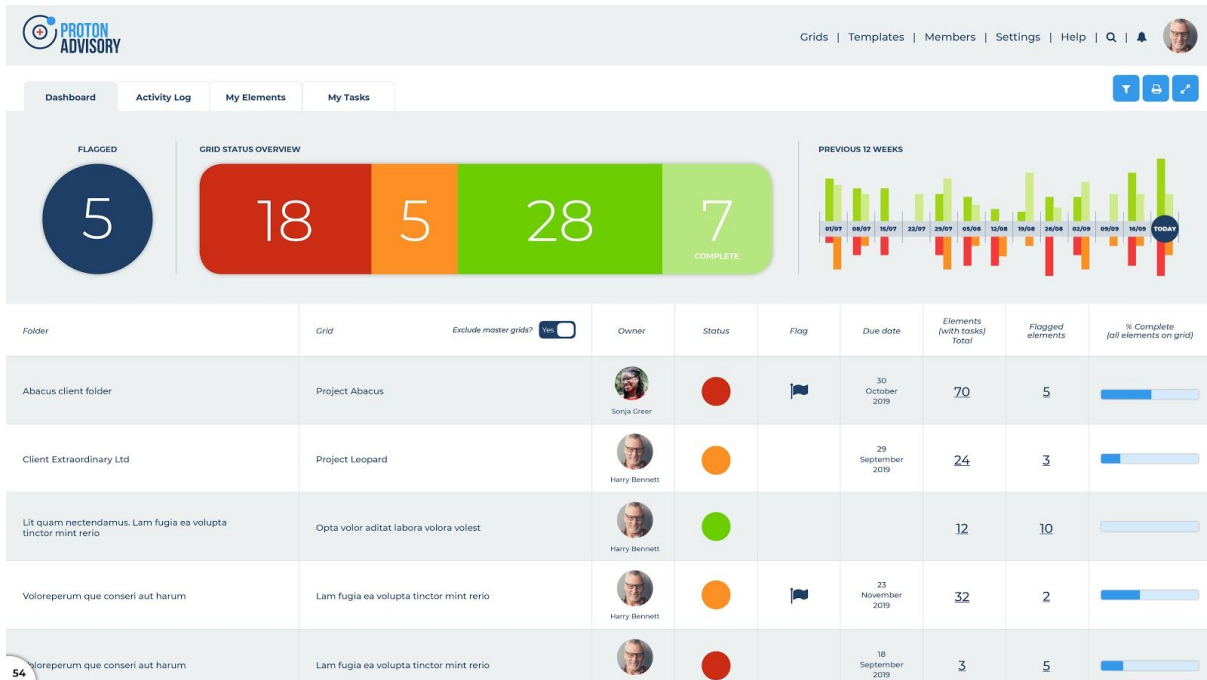


Figure > Harry's Account Dashboard page

From this page, he notices at-a-glance the “Flag” against “Project Abacus” and its red status. He clicks on the elements link (see arrow) to “drill down” into this.

Note. Harry could also click on the grid name to open up the grid directly.

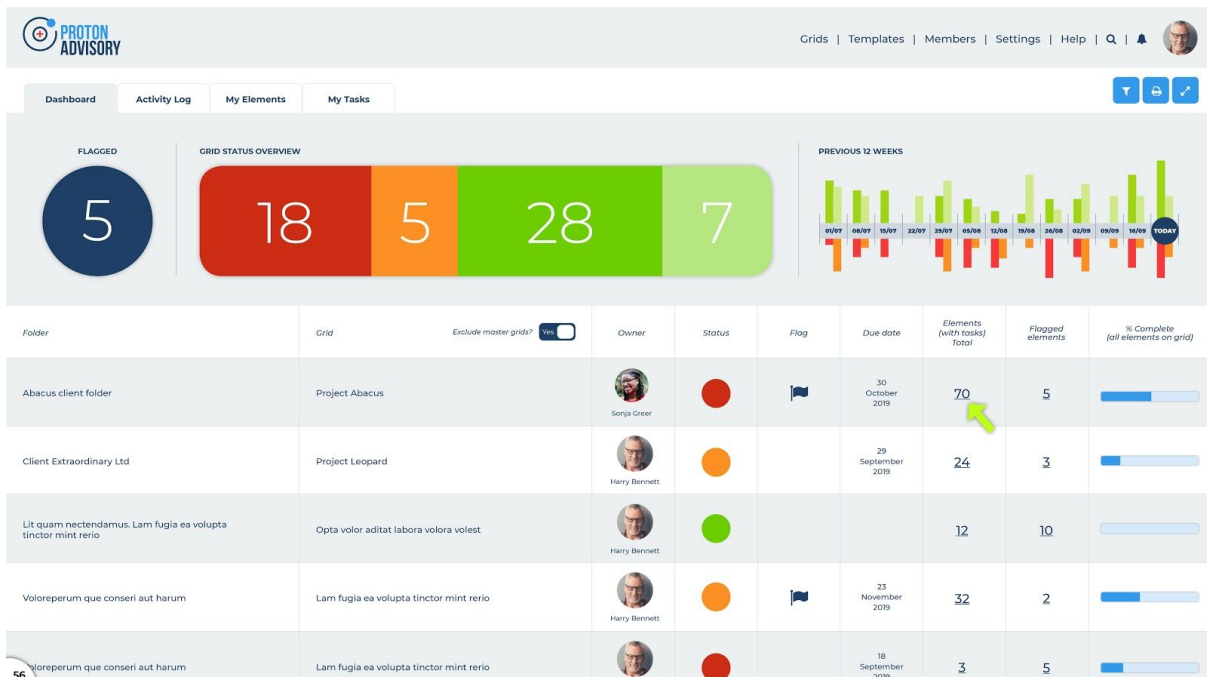


Figure > Harry's Account Dashboard page (green arrow indicating grid “drill down” link)

This opens up the following view - where Harry can see all elements, their accountable owners and whether flagged.

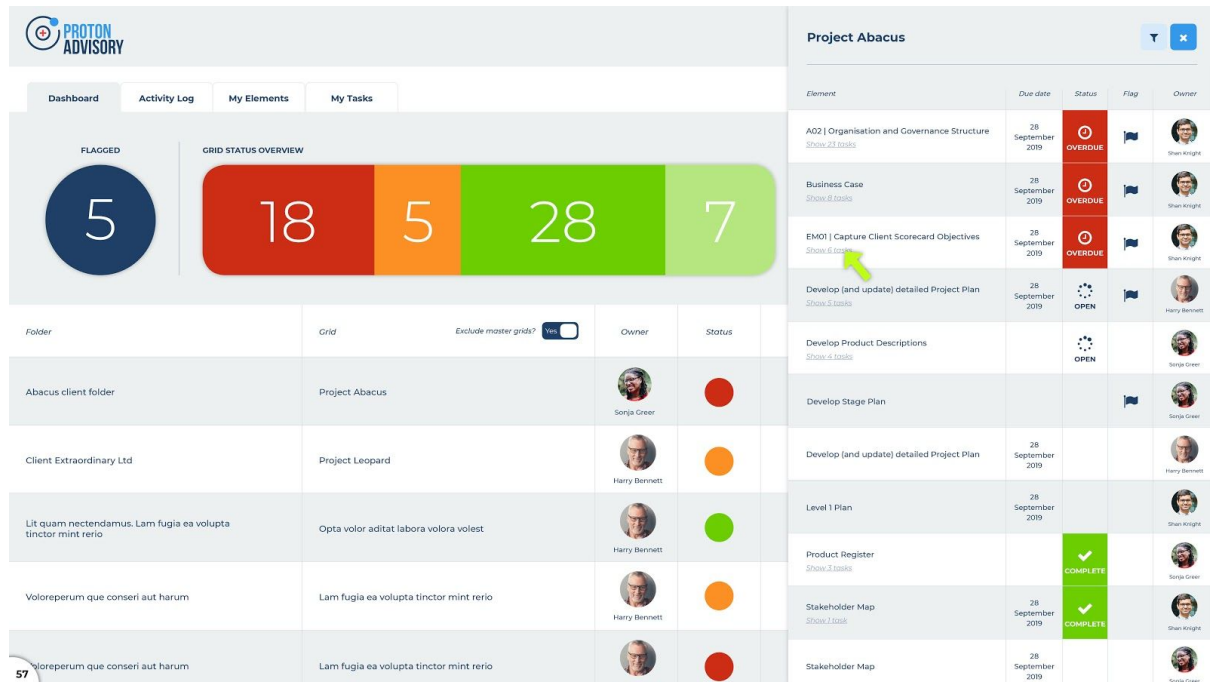
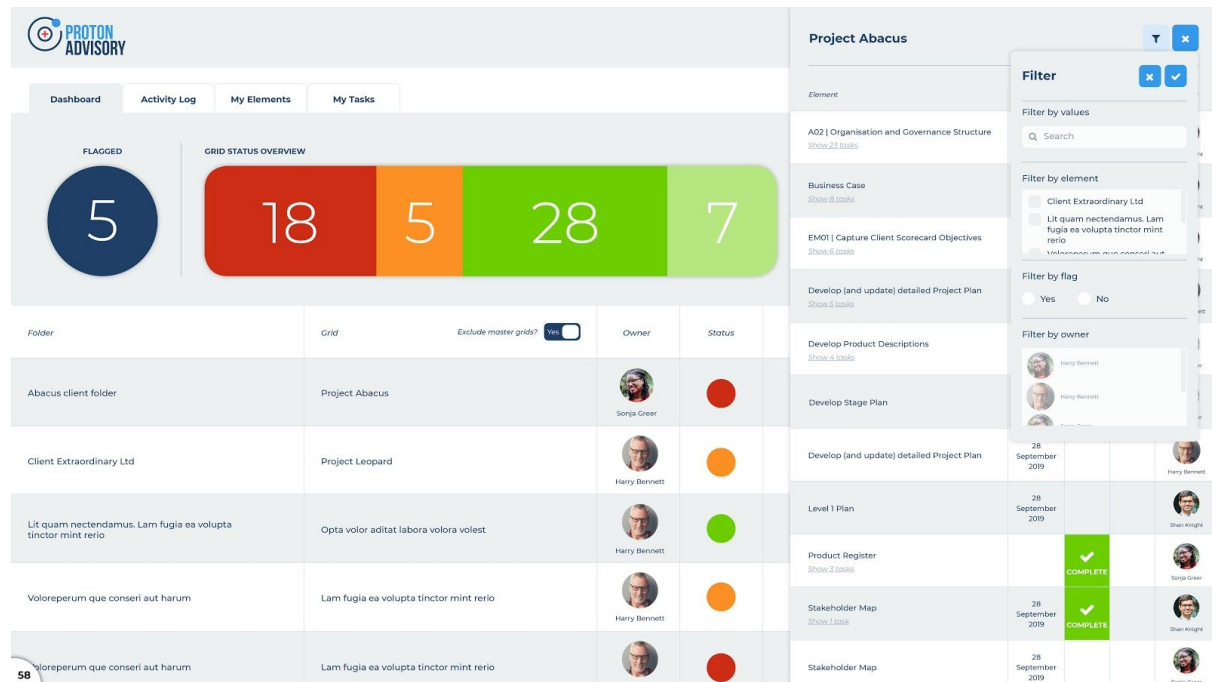


Figure > Element drill-down view from Account Dashboard table

Discussion - this design assumes we show all elements in the grid (cf. just elements that contain tasks). Is this right? if an element has no constituent tasks then we just leave the status cell blank.

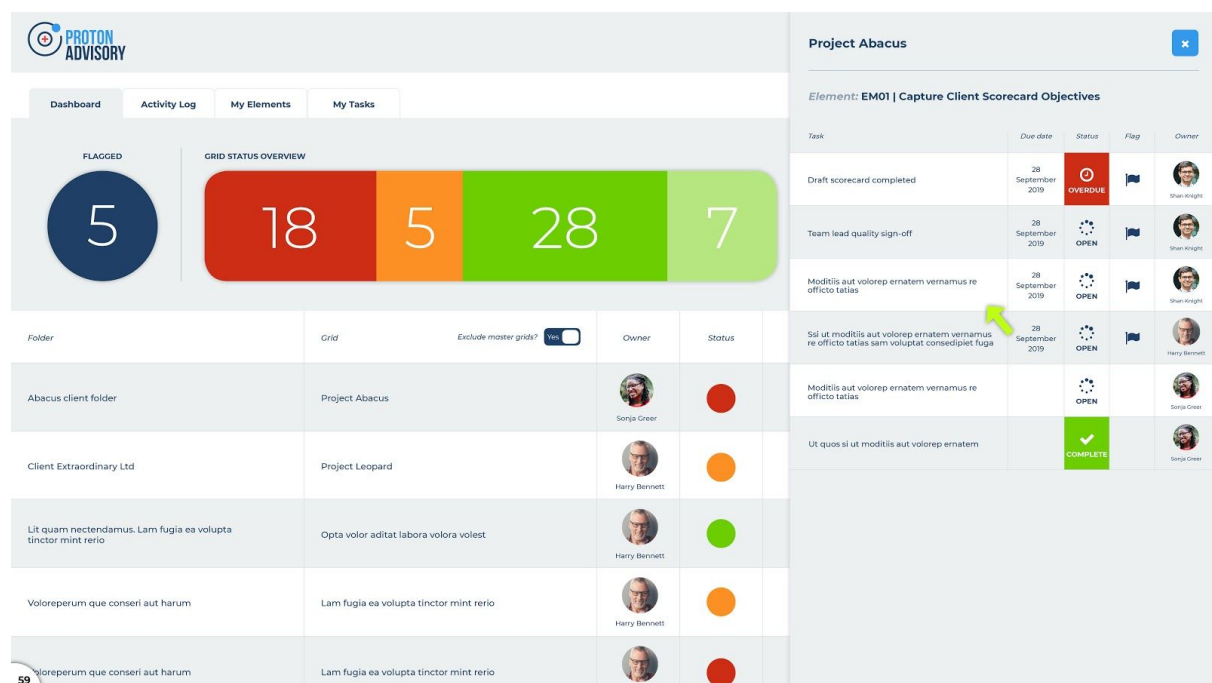
Discussion. Do we recreate the "Element Log" view in the actual grid also?



**Figure > Element drill-down view from Account Dashboard table (filter device open)**

Note. Filtering by values at the top of the filter drop down will reduce the data in all sections of the filter commensurately e.g. typing “Bu” will show “Business case” in elements and “Bud Jones” in experts.

From this table, Harry can similarly “drill down” into an individual element to see the constituent tasks - including task flags, task "Due dates" and task owners.





**Figure > Element drill-down view from Account Dashboard table (an element expanded to show constituent tasks)**

Finally, Harry clicks on the grid name to go through to the grid - to take a look at the latest grid dashboard report (created by Sonja in step 13). Armed with this overview, he is ready to speak to Sonja to discuss resolution.


**15 - Friday morning. Harry is also the senior lead for knowledge management generally in the practice. In conversation with his dedicated knowledge manager colleague, Sarah, he wants to just get a sense of how much change activity there has been generally in recent weeks - specifically with respect to what recent updates have been made to their "master" service methodologies.**

Harry accesses the account-wide "Activity Log" via his home page.

Folder	Grid	Element	Activity	Who	When
Internal Operations	Project and planning management (PPM)	A02   Organisation and Governance Structure	Viewed this element	Harry Bennett	12 July 2019 at 13:34
Internal Operations	Project and planning management (PPM)	A02   Organisation and Governance Structure	Changed element title to <b>A02   Organisation and Governance Structure</b>	Harry Bennett	12 July 2019 at 11:52
Internal Operations	Project and planning management (PPM)	Organisation and Governance Structure	Added image content area and called it	Harry Bennett	12 July 2019 at 11:46
Internal Operations	Project and planning management (PPM)	Organisation and Governance Structure	Added a new element <b>Organisation and Governance Structure</b>	Sonja Greer	12 July 2019 at 11:40
Internal Operations	Project and planning management (PPM)		Viewed this grid	Harry Bennett	12 July 2019 at 11:40
Internal Operations	Strategic review	Opta volor adit at labora volora volost	Edited a text are	Shan Knight	12 July 2019 at 11:38
Strategic review	Strategic review	Opta volor adit at labora volora volost	Viewed this element	Shan Knight	12 July 2019 at 11:37
Internal Operations	Strategic review	Opta volor adit at labora volora volost	Edited a text are		12 July 2019 at 11:36

**Figure > Activity Log (accessible via Harry's home page)**

This view is sortable (up/down) via clicking on the column/data headers. There is also a filter device to ....

<div>  <div> <a href="#">Grids</a>   <a href="#">Templates</a>   <a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Help</a>   <a href="#">Q</a>   <a href="#">A</a> </div> </div>			
<div> <div>Dashboard</div> <div>Activity Log</div> <div>My Elements</div> <div>My Tasks</div> </div>			
Folder	Grid	Element	Activity
Internal Operations	Project and planning manangement (PPM)	A02   Organisation and Governance Structure	Viewed this element
Internal Operations	Project and planning manangement (PPM)	A02   Organisation and Governance Structure	Changed element title to <b>A02   Organisation and Governance Structure</b>
Internal Operations	Project and planning manangement (PPM)	Organisation and Governance Structure	Added image content area and called it
Internal Operations	Project and planning manangement (PPM)	Organisation and Governance Structure	Added a new element <b>Organisation and Governance Structure</b>
Internal Operations	Project and planning manangement (PPM)		Viewed this grid
Internal Operations	Strategic review	Opta volor aditat labora volora volest	Edited a text are
Strategic review	Strategic review	Opta volor aditat labora volora volest	Viewed this element
50 Internal Operations	Strategic review	Opta volor aditat labora volora volest	Edited a text are

Filter

Filter by activity

☐ Edit
 ☐ View

Filter by values

Search

Filter by folder

☐ Client Extraordinary Ltd.
 ☐ Ut quam nectendamus. Lam fugia ea volupta tincitor mint rerio
 ☐ Voluptatum in egestat sed

Filter by grid

☐ Project Tiger
 ☐ Project Leopard
 ☐ Opta volor aditat labora volora

Filter by flag

☐ Yes
 ☐ No

Filter by owner

☐ Harry Bennett
 ☐ Harry Bennett
 ☐ Sharon Knight

12 July 2019

at 11:58

Figure > Activity Log (filter device open)

Note. We will need to define the (phase 1) set of application event activities that are captured in this view. First thoughts per table below.

Grid-level	Element-level
<b>Creation:</b> Grid, Stage, Theme, Element	<b>Creation:</b> Content Area, Template
<b>Moved:</b> Stage, Theme, Element	<b>Moved:</b> Content Area
<b>Title Edited:</b> Grid, Stage, Theme	<b>Title Edited:</b> Element, Content Area
<b>Deleted:</b> Stage, Theme, Element	<b>Deleted:</b> Content Area
<b>Edited:</b> Label legend, Element content, Access Control, Info	<b>Edited:</b> Content Area, Labels
<b>Cloned:</b> Grid	
Access Control updated	
Push notification added	
Grid exported	
Accessed/viewed.	Accessed/viewed.

Note. The following overall nomenclature/hierarchy is proposed in relation to the various “Logs” in this new release:

1. Activity Log - filterable by:
  - a. Edit activity (i.e. “building” - content development/amendment)
  - b. View activity (i.e. simple view access of grid or element)
2. Task Log (i.e. project delivery as based on checklist task activity)

These logs have been designed in at three-levels:

1. Element-level
2. Grid-level
3. Account-level

Discussion. Do we include task activity within the activity log? Not for now.

**16 - Friday afternoon. Before Sonja closes down for the week, she is just keen to understand how much has happened this week on Project Abacus. What tasks have been completed? How many of her team have accessed the grid? Have her clients viewed the grid this week?**

Sonja access the “Activity Log” via the grid’s main action button menu.

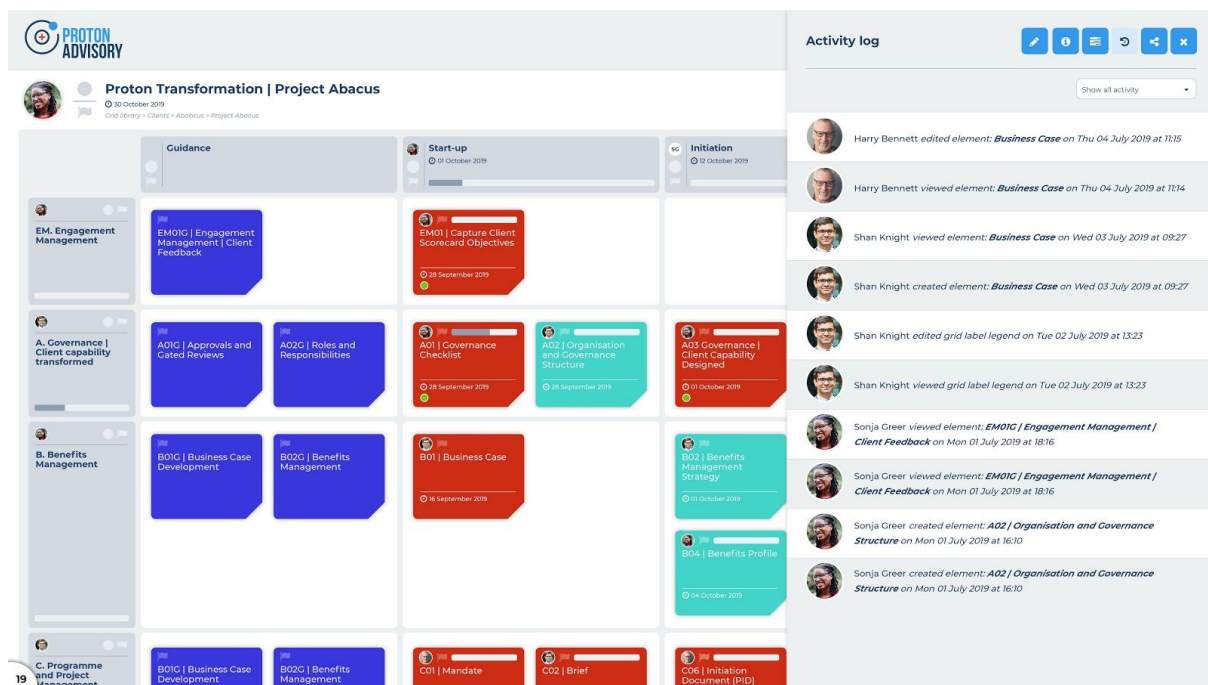


Figure > Activity Log (at the Grid level)

This view can be filtered by: “Show all activity” (default) and “Show edit only”, “Show view only”.

Note. This view selector supports the distinction between edit (builder) and view activity - defaulting to “Show all activity”. Build activities (other than initial



element creation) effectively leads to both a view activity and a build activity couplet being created. Include “What’s new in last 7d” filter action.

**17 - At the project close meeting, Sonja discusses with her team the key learns: what “best practice” deliverables, and proposed updates to the "master" grid can they share with Sarah - to feed back into this grid’s continuous improvement. Sonja messages Sonja in *Method Grid* to set up this conversation.**

In-app messaging functionality is available now. A key benefit of **Method Grid’s** integration of knowledge management and project management is that it reinforces this continuous learning-and-improvement dynamic. Project delivery/assurance and knowledge build-out and distribution is happening in the same place!

**18 - Some months later, perhaps at an end-of-year “clean up”, Project Abacus is moved from “Complete” to “Archived” such that it does not clog up executive dashboard reporting.**

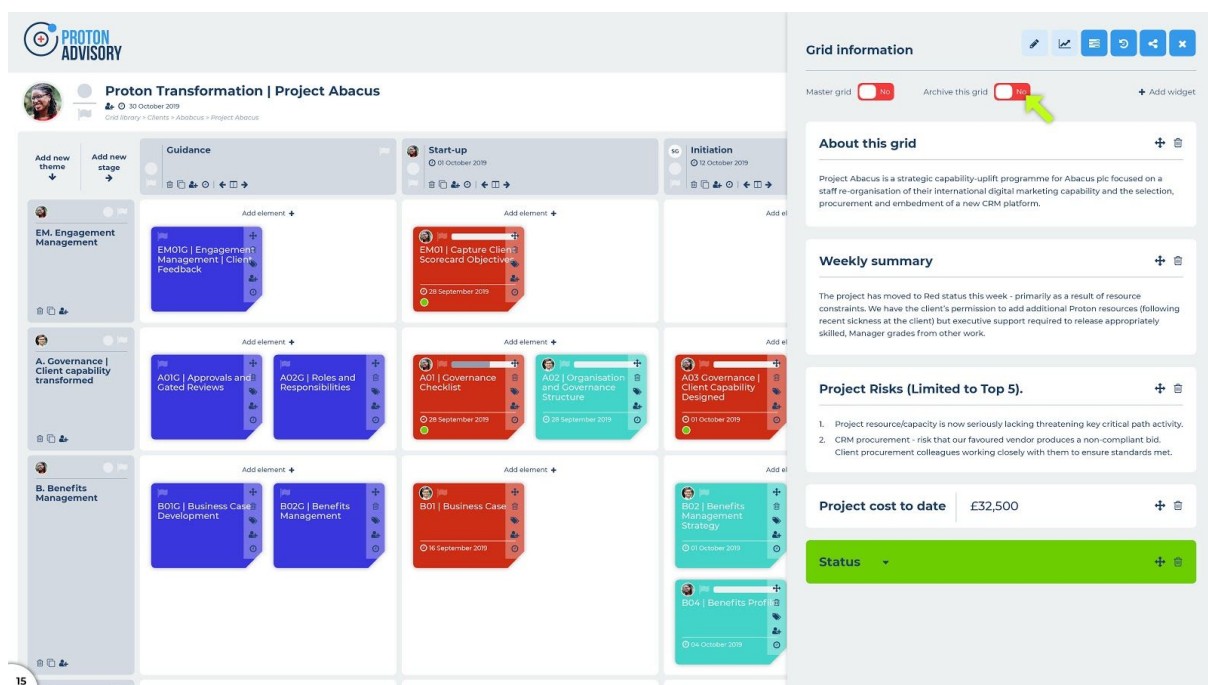


Figure > Grid Dashboard page (arrow shows “Archive grid” function)

## Annex A | Use Stories

### Executive

Story	"As an Executive, I want to ...."
E1	<p>... view an account-wide dashboard of all (checklist) <u>task-based</u> active ( non-master) grids showing: grid status, grid flagged?, grid-owners, %progress grid completion.</p> <p>This view contains summary graphical MI e.g. grids flagged, RAG status overview, historical look back.</p> <p>This view is sortable/filterable by key data columns e.g. Folder, Grid, Grid Owners, Grid status, Grid "Due dates" etc.</p> <p><a href="#">[see Story Step 11]</a></p>
E2	<p>... "drill down" into an account-wide dashboard to explore a specific grid ... firstly to explore a table of elements ... specifically to see which ones are flagged</p> <p><a href="#">[see Story Step 14]</a></p>
E3	<p>... "drill down" into an element (from E2 view) to see constituent checklist tasks and related information (i.e. task flag?, task "Due date", task owner)</p> <p><a href="#">[see Story Step 14]</a></p>
E4	<p>... see an account-wide "Activity Log" showing me all activity related to changes in grid/element content (i.e. access and content change as opposed to checklist task-based activity which is captured in the "Task Log").</p> <p>This view is sortable/filterable on relevant column data headings e.g. Folder, Grid, Element, Type of Activity, Member, Date.</p> <p><a href="#">[see Story Step 15]</a></p>

### Team Leader

Story	"As a Team Leader, I want to ...."
TLead1.1	<p>... assign checklist tasks to my colleague team members (in element view). Only this member (and members with "edit" permission in a grid) can then tick complete.</p> <p><a href="#">[see Story Step 04]</a></p>

TLead1.2	... assign checklist tasks to my colleague team members (in element “Task log” view). Only this member (and members with “edit” permission in a grid) can then tick complete. <a href="#">[see Story Step 04]</a>
TLead1.3	... assign checklist tasks to my colleague team members (in grid “Task log” view). Only this member (and members with “edit” permission in a grid) can then tick complete. <a href="#">[see Story Step 04]</a>
TLead2.1	... assign elements to my colleague team members (in grid view) <a href="#">[see Story Step 04]</a>
TLead2.2	... assign elements to my colleague team members (within the element itself) <a href="#">[see Story Step 04]</a>
TLead3	... assign stages to my colleague team members <a href="#">[see Story Step 04]</a>
TLead4	... assign themes to my colleague team members <a href="#">[see Story Step 04]</a>
TLead5	... assign a grid to a member <a href="#">[see Story Step 04]</a>
TLead6.1	.... assign a “Due date” to a checklist task (in element view). <a href="#">[see Story Step 04]</a>
TLead6.2	.... assign a “Due date” to a checklist task (in element “Task log” view). <a href="#">[see Story Step 04]</a>
TLead6.3	.... assign a “Due date” to a checklist task (in grid “Task log” view). <a href="#">[see Story Step 04]</a>
TLead7.1	... assign a “Due date” to an element (in grid view) <a href="#">[see Story Step 04]</a>
TLead7.2	... assign a “Due date” to an element (in element view) <a href="#">[see Story Step 04]</a>
TLead8	... assign a “Due date” date to a stage <a href="#">[see Story Step 04]</a>
TLead9	... assign a “Due date” to a grid <a href="#">[see Story Step 04]</a>
TLead10	.... search for colleagues when using the “Assign owner” tool (to save scroll through long list)

	<a href="#">[see Story Step 04]</a>
TLead11	... specify that checklist tasks can only be completed in the order they are presented i.e. task flow-down <a href="#">[see Story Step 04]</a>
TLead12	... specify that a specific task can only be completed when there is an “evidential link” (i.e. link to one or more related files) <a href="#">[see Story Step 04]</a>
TLead13	... create a bespoke dashboard/info pane specific to an individual grid/project (containing text, RAG, currency and numeric fields) <a href="#">[see Story Step 05]</a>
TLead14	... view a grid’s “Task Log” to see a summary of task status across the grid/project (RAG colour coded). Able to sort and filter this table by key data columns e.g. Flagged?, Completion Dates, Task Owner etc.  This view to include a “What’s new/changed in last 7 days?” quick-action filter.  <a href="#">[see Story Step 10]</a>
TLead15.1	... send to pdf/print a grid’s “Task Log”(expanded view) <a href="#">[see Story Step 10]</a>
TLead15.2	... send to export a grid’s “Task Log” (expanded view) to CSV file <a href="#">[see Story Step 10]</a>
TLead16	... see (auto-generated - based on element-completion) progress bars against stage and theme headers <a href="#">[see Story Step 10]</a>
TLead17	... update a grid/project status (RAG) ... including the ability to turn off again <a href="#">[see Story Step 13]</a>
TLead18	... flag a grid/project <a href="#">[see Story Step 13]</a>
TLead19	... view a grid-specific “Activity Log” to see a chronological list of access/content updates made to the grid/project <a href="#">[see Story Step 16]</a>
TLead20	... move a grid/project to “Archived” status such that it does not clog up executive reporting <a href="#">[see Story Step 18]</a>
TLead21	... track delivery progress at the grid (project) level using

configurable display rules (that change element thumbnail display).

For example, change element colour based on ...

- Element is overdue
- A task is overdue
- All tasks complete

The ability to turn these rules on and off.

[\[see Story Step 07\]](#)

TLead22

... add a recurring set of tasks.

[\[see Story Step 04\]](#)

TLead23

... bulk assign tasks to members and dates in an expanded table view

[\[see Story Step 04\]](#)

## Team Member

**Story**

**“As a Team Member, I want to ...”**

TMem1.1

... see my “Top 5” tasks on my personalised homepage (for quick reference)

[\[see Story Step 08\]](#)

TMem1.2

... see a graphical overview of tasks on my personalised homepage (for quick reference)

[\[see Story Step 08\]](#)

TMem2

... see a detailed, personalised “My Tasks” containing all tasks assigned to me. Sortable and filterable by key data columns (e.g. flagged grids, “Due dates”, related grid/project etc)

[\[see Story Step 08\]](#)

TMem3

... see a detailed, personalised “My Elements” containing all elements assigned to me. Sortable and filterable by key data columns (e.g. flagged grids, “Due dates”, related grid/project etc)

[\[see Story Step 08\]](#)

TMem4.1

... set a reminder date against a task (to automate a reminder notification on that date) ... and receive a notification on this day (in-app and email) - in “My Tasks” view

[\[see Story Step 08/12\]](#)

TMem4.2

... set a reminder date against a task (to automate a reminder notification on that date) ... and receive a notification on this day

	(in-app and email) - in an element view <a href="#">[see Story Step 09]</a>
TMem5	... assign a link(s) to a task requiring evidence (and access it subsequently) <a href="#">[see Story Step 09]</a>
TMem6.1	... flag a task as requiring attention - in element view (task content area) <a href="#">[see Story Step 04]</a>
TMem6.2	... flag a task as requiring attention - in element task log view <a href="#">[see Story Step 12]</a>
TMem6.3	... flag a task as requiring attention - in grid task log view (and expanded grid task log view) <a href="#">[see Story Step 13/10]</a>
TMem7	... in an element view, have tasks assigned to me colour-accentuated <a href="#">[see Story Step 12]</a>
TMem8	... see any external (client colleague) members clearly accentuated as “external” (e.g. red avatar icon) when allocated to a task/element/stage/grid. <a href="#">[see Story Step 04]</a>
TMem9	... evidence a task completion (updating link and link name). Ability to add more than one and edit/move/delete such links. <a href="#">[see Story Step 09]</a>

## Generic

Story	“As a generic member, I want to ....”
G1	... with edit rights, I want to be able to assign “master” status to a grid <a href="#">[see Story Step 05]</a>
G2	... see that a grid is a “master” grid in grid library/folder view <a href="#">[see Story Step 02]</a>
G3	... see that a grid is a “master” grid in the actual grid view <a href="#">[see Story Step 02]</a>
G4	... with edit rights, in edit mode, be locked out of an element content area that is being edited by another editor. <a href="#">[see Story Step 02]</a>
G5	... tasks assigned to external members are visually flagged

	<a href="#">[see Story Step 04]</a>
G6	... see that a task has been evidenced and be able to download the respective link (file) <a href="#">[see Story Step 09]</a>
G7	... see grid progress as a function of stage and theme progress bars <a href="#">[see Story Step 10]</a>
G8	... view a grid-level task log and see task progress bars and constituent task table <a href="#">[see Story Step 10]</a>
G9	... see the initials of a member in their profile roundel when no picture has been uploaded
G10.1	... be able to print an expanded table view (grid task log) <a href="#">[see Story Step 10]</a>
G10.2	... be able to export an expanded table view (grid task log) into a CSV file <a href="#">[see Story Step 10]</a>
G11	... view a grid's dashboard page <a href="#">[see Story Step 13]</a>

## **Annex B | Feature List**

- **Interface change - 15/11/19**
  - new dropdown design (move to gray and shadowed)
  - remove blue/red buttons - just blue (on button active with dropdown it's dropdown gray)
  - Global change all buttons to light blue
  - Off-canvas design change
    - to the gray
    - Action buttons top right, title left
    - Add experts
    - Comments - move
  - Off-canvas sizes - define sizes and apply appropriate size to existing ones
  - All headings to be bold font
- **Checklist progress per stage/theme - 22/11/19**
  - Based on existing checklists
  - Hide in edit mode
- **Locking elements for editing - 22/11/19**
  - When element in edit mode it's locked for editing for all other users
- **Activity log stage 1 - 13/12/19**
  - Initial foundation
  - User x viewed:
    - Grid
    - Element
    - View cloud doc
    - Download file
    - TBC in sprint
  - Initially a new page showing all activity account wide - architects only
- **All profile avatars to be initials if no image uploaded - 13/12/19**
  - JV, DM, TK, IJ
- **Architects can edit any user's profile - 13/12/19**
  - Image upload
  - Change name
  - Change email
  - etc
- **Assign users to elements and checklist tasks - 3/1/19**
  - New element header design
  - New checklist tasks design
  - New element thumbnail design

- Search feature in add users (experts off canvas)
- External member avatars - globally to have red E callout
- Colour indicator on my tasks in element view
- Only assigned user or edit access can complete an assigned task
- **Notifications revamp**
  - Sort existing
  - ACL access added notifications?
  - Add assigning users to elements and checklists notification
  - One scheduled email or as it happens?
- **Task log stage 1**
  - In element
  - In grid
  - All columns supporting existing functionality
  - Expanded view
  - Print function
  - Export table function
- **Task log stage 2**
  - User's dashboard of tasks
    - Homepage links
    - Profile dropdown link
  - User's top 5 tasks on homepage
  - Showing user's assigned tasks
- **Assign users to stages, themes and grids**
  - New grid header design
  - New stage/theme head design
  - New notifications
- **Architect's dashboard stage 1**
  - Shows grid, user's assigned etc
- **Activity log stage 2**
  - All assigning based activity
  - Activity logs at element and grid level
- **Checklist tasks due dates**
  - Time and date in account settings and user settings - new design?
  - Assigning due dates to checklist tasks
  - Add date picker plugin
  - New notifications
  - Display dates at this point on
    - Element head
    - Element thumb
    - Stage
    - Grid
- **Task log stage 3**
  - Update all task logs to show due date

- Filters? What's new and last 7 days
- Overdue status
- **Architect's dashboard stage 2**
  - Show due dates on grids
- **New grid element display rules**
  - Element overdue
  - Task overdue
  - All tasks complete
- **Task log stage 4**
  - Assigning users to tasks - bulk assign in expanded view
  - Schedule due dates to tasks
- **Checklist tasks evidence linking**
  - Link to docs to complete task
  - Cannot complete without linked doc
  - Link to doc
  - New notifications?
- **Grid, stage and element due dates**
  - Can set these manually
  - New notifications
- **Flags - grids, stages, elements and tasks**
  - Interface to flag
  - Dashboard updates to show flags
  - New notifications
- **Grid status**
  - Manual status on grids
  - Dashboard updates relating to it
  - New notifications
- **Checklist tasks reminders**
  - In my tasks
  - In element
  - New notifications
- **Master grids, archive grids & new grid library design**
  - Master grid toggle - removes the grid from stats
    - In grid
    - In grid library
  - Archiving grids
  - New grid library design
    - Master grid
    - Status
    - Due date
    - Owner
    - Flag
    - Existing features
- **Architect's dashboard stage 3**

- Filters
  - Drill down off-canvas
  - Flags
  - Status
  - Etc
- **Activity log stage 3**
  - All change based activity
- **Checklist task flow**
  - In elements
- **Checklist task recurring**
  - In elements
- **Grid info widgets**
  - In grid info off-canvas
- **Task log stage 5**
  - Charts
  - Show elements assigned
  - All remaining
- **Architect's dashboard stage 4**
  - Charts
  - All remaining