CITIIS Program Management Platform (CMP)

Phase I User Manual

March 2021
CITIIS

CITIIS Program Management Platform (CMP)

Phase I User Manual
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Introduction
1. Introduction

1.1. Objectives of the CMP

CITIIS Program Management Platform (CMP) is an online, completely digital, collaborative, data-driven and repository-oriented platform serving the core purpose of managing the implementation of the program’s objectives in selected Indian Smart Cities under the City Investments to Innovate, Integrate and Sustain (CITIIS) program. CMP is intended to serve as a holistic and a one-stop digital platform for all CITIIS program stakeholders. The broad focus of the CITIIS Management Platform, is:

- Enabling controlled access of:
  - Project and program indicators
  - Program tasks
- Documentation for the key stakeholders, where each project under the program is easily managed and understood from the perspective of CITIIS themes and program roadmap.

This user guide will assist the CMP users in understanding the platform modules, features and workflows.

A typical user from a Smart City SPV will use CMP features like:

1. Accessing documents via document hub
2. Sending and receiving program messages to PMU users and/or mentors/experts on messaging module
3. Updating project progress details and project information

The platform shall enable access to the features mapped against each role.

1.2. Access

CMP shall be accessible for all users at https://cmp.niua.org

1.3. How do you log on to CMP?

1.3.1. You will need to use the access URL in order to log on to CMP. Upon entering the URL, you will land at the default landing page shown in Figure 2, which is the sign in or login page of the platform.

1.3.2. You will need to enter the mandatory details on this page as shown in Figure 2:

1.3.2.1 Registered email

1.3.2.2 Password set up by you during the registration

1.3.2.3 Captcha to confirm an authorized access:

1. 1. It is a checkbox titled “I’m not a robot”, which needs to be checked to be able to log in

2. 2. The captcha tool may pop-up an image identification window (Figure 5) for the user to validate
1.3.2.4 User registration procedure and setting up of password is explained in more detail in section 1.4 of this document.

Figure 1 CMP Login Screen

**Note 1:** If the user enters the wrong email format, then the message appears "Please enter a valid email address", as shown below.

If the user does not add a password, then the message appears "Password is required", as shown below.

Figure 2 Error in Login email format and blank password field

**Note 2:** If the user enters the email address without registering via the email link sent, then the message appears "User not registered", as shown below.
1.3.3. The username and password shall be validated against the registered entries on the platform after you click the login button.

1.3.4. In case you are not registered, or the credentials entered are invalid, the screen shall display necessary error message “Please enter valid login credentials” upon clicking the login button. (Figure 3 and 4)

**Note 3:** If the user session (after login) is idle for more than **15 minutes**, then you will be logged out automatically. You will need to login again to access CMP.
1.4. How do you register as a CMP user?

1.4.1 The user is sent an invite by the CMP Administrator/Program Co-ordinator, via an invitation email, as shown in Figure 5, to register.

1.4.2 The user clicks on the link marked in pink (Figure 5).

1.4.3 In case you have not received an invitation email from the platform to register, then you can write to cmp@niua.org requesting to resend the email invitation.

Figure 5 CMP User Invitation Email

Subject: Invitation for CITPS Management Platform

Dear User,

We are pleased to invite you to join CITPS Management Platform as Program Co-ordinator.

To accept the invitation, please click on the following link and proceed for registration.

Please ignore this email if you think this is not intended for you.

Note: Link will expire in 15 minutes.

Best Regards,

CMP Administrator

1.4.4 After clicking on the link, you will land at the profile registration page (Figure 6).

1.4.5 It is mandatory to fill the following entries on the registration page:

  1.4.5.1. First Name
  1.4.5.2. Last Name
  1.4.5.3. Phone Number

  3. A “Verify” button is located adjacent to the Phone Number field, which will send a four-digit OTP (One Time Password) on the entered mobile number.

  4. If you have received the OTP on your mobile, proceed as follows: (Refer Figure 7)

     e. Add the OTP from the mobile to the Mobile OTP field
     f. Add the OTP from the email to the Email OTP field
     g. Click on submit
     h. If you have not received the OTP, click on resend

**Note 4:** If the user clicks on the link more than **15 hours** after receiving the email, then the user will receive a message saying “This link has expired. Kindly contact your CMP administrator on cmp@niua.org”. The user will then have to write an email to cmp@niua.org requesting for the invite to be resent via email.
9. 4. Password - Password must contain (e.g. 0penD@ta):
   a. Minimum of 6 characters
   b. Maximum of 20 characters
   c. At least 1 special character(s) (*, /, @, #, etc.)
   d. At least 1 uppercase character(s)
   e. At least 1 digit(s)

**Note 5:** If the user enters a password which does not fulfil the above criteria, then a message "Password must contain a minimum of 6 characters and a maximum of 15 characters and at least 1 special character(s) (*, /, @, #, etc.) and at least 1 uppercase character(s) and at least 1 digit(s)" will appear, until the password in correct format is filled in.
1.4.6. Other optional details that can be filled are:

1.4.6.1 Middle Name

1.4.6.2 Upload Photo (Profile Picture)

1.4.6.3 About Me (Short description)

1.4.7. Once the mobile number is verified, you are registered and can log on to the platform

Note 6: If the user does not verify the number, then the registration will be on hold, till the user verifies their mobile number.

1.4.8. After successful registration, a confirmation email shall be sent to you

Note 7: If the confirmation email is not received by the user, then the user needs to check in Spam. If still not received, then the user needs to send a mail to cmp@niua.org requesting that the confirmation email be sent.

1.5. Post-login landing screen

Depending on the role assigned to you by the CMP Administrator, you will be able to access various modules and different landing screens accordingly. SPV users shall directly access the project dashboard, which is a part of the program management module.

The landing screen displays CITIIS logo on the top left corner and user profile options and settings on the top right corner (Figure 8). Following is the list of all the options available to users, depending on their access privileges:

1.5.1. Edit Profile

1.5.2. User Groups

1.5.3. Private Members

1.5.4. Notifications Management

1.5.5. Logout

Figure 8 Post-Login Landing Screen
User Settings
2. User Settings

2.1 Introduction

2.1.1. The notifications and settings are accessible on the top right panel of the post login-landing screen.

2.1.2. Depending on access permissions enabled for you, you can access and/or update the following settings:

2.1.2.1. view and access notifications
2.1.2.2. edit your user profile
2.1.2.3. create private member lists
2.1.2.4. change notification settings
2.1.2.5. create user groups
2.1.2.6. merge tags
2.1.2.7. configure email templates and
2.1.2.8. change platform configurations

2.2 Notifications

2.2.1. Notifications on CMP can be accessed using the bell-shaped icon on top right of the screen, shown in Figure 9.

2.2.2. These web-based notifications are meant to send necessary web alerts to you to access changes on CMP, allocation of projects, tasks or documents, receipt of messages, changes in projects, etc.

2.2.3. You can see the number of unread notifications in red font, overlaid on the notification icon. The icon appears like this: 📣

2.2.4. When the notification icon is clicked, you can see a preview of notifications available for you (Figure 10).
2.2.5. Click on “View all notifications” to get an expanded full screen view of all notifications received by you on CMP

2.2.5.1 Every notification is accompanied by a timestamp (date and time)

2.2.5.2 Notification screen allows you to scroll and view all notifications (read and unread) on a single screen (see Figure 10)

2.2.5.3 You can click on any notification to navigate to the specific module and its item about which the notification has been shown

2.2.5.4 For e.g. If the notification reads “You have received a message from the Program Coordinator”, then upon clicking it, you will navigate to Messaging Module and the same message which has been referred to by the notification

Figure 10 Notifications Screen

2.3. How do you edit your CMP profile and change password?

2.3.1 Click on your username, shown on top right corner of the landing screen

2.3.2 The first option that you will see is the “Edit Profile” option (refer the first option in Figure 11)

2.3.3 Upon clicking the option, you will see two different panels on the same screen (refer section shown in pink colour in Figure 12):

2.3.3.1 Details Panel (to update the user profile) with following options to update:

1. Profile picture of the user: You will see the current picture uploaded on CMP. You can replace it with another image by clicking on Upload button and choosing any image from your computer

2. Email ID of the user:
   a. You can update your email ID by clicking on edit icon (pencil-shaped icon) alongside the Email ID
   b. You will need to input new email ID and current password to update your email ID
3. First Name
4. Middle Name
5. Last Name
6. Role:
   a. Role is not editable by the user, as it is assigned by CMP Administrator
7. Country code and mobile number
8. “About me” or description

Figure 11 User Setting Menu

Figure 12 Edit Profile Screen
2.3.3.2 **Change Password** Panel (to update your current password):

1. You will need to input the following three details to update your CMP password:
   a. Current Password
   b. New Password
   c. Confirm New Password

2. Necessary password validations as explained in section 2.2 shall be required to be followed on this page as well.

**Note 8:** If the user enters the wrong current password, then the error shows in Figure 13 below.

![](Figure_13_Error_when_current_password_isWrong.png)

**Figure 13 Error when current password is wrong**

![](Figure_14_Change_Password_Screen.png)

**Figure 14 Change Password Screen**
2.4 How do you change email and SMS notification settings?

2.4.1 CMP enables notifications through Email and SMS (text messages on registered mobile phone)

2.4.2 CMP Administrator can change the settings for each role using the “Notifications” option in the user settings menu. Please contact the PMU for more details
Messaging Module
3. MESSAGING MODULE

3.1 Introduction

3.1.1 Messages are sent in threads, where the receiver and the sender of messages with the same subject are clubbed together

3.1.2 Messages from and to the user can be viewed by clicking on “My Messages”

3.2 How do you send messages?

3.2.1 To create a new message, click on “New Message”, shown on top right corner in Figure 16
3.2.2 Messages can be sent to either a group or an individual

3.2.2.1 Groups are either public user groups or private member lists

Figure 18 Sending Messages to User Groups

3.2.2.2 User groups can be seen by clicking on the profile icon on the top right-hand corner and clicking on User Groups (marked in pink), as in Figure 19

Figure 19 Menu - User Icon
3.2.3 If the message is sent to an individual, then the individual’s role will also be shown e.g. John (Communication Specialist)

3.2.4 Documents if needed, can be attached by clicking on Attach (Figure 21)

3.2.5 This will open up options for

3.2.5.1 Add New Document (for uploading a new document)

3.2.5.2 Existing Document (to attach an existing document from Document Hub)

3.2.6 For easy reference, tags can be added by clicking on “Add Tags”, where:

3.2.6.1 Existing tags can be used

3.2.6.2 New tags are created, which are saved in the CMP and are visible to all users in the same message

Note 9: If the user leaves the name blank while sending a message, then the error will be as shown below.
3.3 How do you read and respond to messages?

3.3.1 Users read messages by clicking on the column on the left marked in pink and viewing the message in the column on the right.

3.3.2 To respond to messages, you can click on any of the options available in the row marked in blue, as shown in Figure 23, which are as follows:

3.3.2.1 Reply – Here, the user gets the option to remove the users listed and add other users or groups, with “Re:” in the header.

3.3.2.2 Reply to all – Here, the user may choose to respond to all in the message or remove users as per the need, with “Re:” in the header.

3.3.2.3 Forward – Forwards the message with “Fwd:” in the header.

3.3.2.4 Send Email – Sends the message as an email to the user’s email address which is registered in the CMP.

3.3.2.5 Delete – Deletes the message only for the user.

3.3.2.6 Add Tags – Adds tags which will be visible to all users who are addressed in the same message.
3.4 How do users search messages?

3.4.1 Users search messages by clicking on the Search bar, marked in yellow in Figure 24 by

3.4.1.1 Tag
3.4.1.2 Username
3.4.1.3 Text matching
4. DOCUMENT HUB

4.1 Introduction

4.1.1 The document hub is the main repository where documents are stored. The landing screen shall show the documents in four categories (depending on your CMP access permissions):

4.1.2 My Documents: Documents which are uploaded by you on CMP

4.1.3 Shared with Me: Documents uploaded by other CMP user(s), but shared with you in the capacity of a collaborator or a viewer

4.1.4 Public Documents: Documents uploaded and published on CMP for common use

4.1.5 All CMP Documents: This is a restricted view of all documents uploaded on CMP for the administrator

![Figure 25 Document Hub Dashboard](image)

4.2 How do you upload a new document?

4.2.1 Documents are created/uploaded on CMP by clicking on the “New” option as shown in Figure 25, marked in green

4.2.2 On clicking “New” button, you will be required to choose one out of two options:

4.2.2.1 Folder

4.2.2.2 Document

4.2.3 You will need to select “Document” to upload a new document

4.2.4 Upon selecting “Document”, a form appears, which requires you to fill the following details for creating a new document:

4.2.4.1 Document Name: This name will appear as the name of the document on CMP. You may choose a name which is different from the file name of the document to be uploaded.
4.2.4.2 Upload Files: Documents in file formats such as .doc/.docx/.pdf/.xls/.xlsx/.jpeg/other image formats can be uploaded using this option.

4.2.4.3 Document Description: An optional description of document that you are uploading

4.2.4.4 Add Tag: This is an important feature, wherein you can search for available tags on CMP. Alternately you can suggest a new tag, which may not be present in CMP’s database. Tags will help you search the uploaded documents easily. Tags suggested by you shall be recorded in the CMP database, which may be added to the common pool by CMP Administrator or PMU’s Communication Specialist.

Figure 26 Uploading a Document

4.2.4.5 After uploading the document, the document will be visible in “My Documents” section of Document Hub

4.3 How do you create a folder?

Documents on CMP can be managed by creating folders. The folders are created only to be viewed on your user session. Unlike documents, folders cannot be shared with other users. Follow these steps to create a folder:

4.3.1 Navigate to “My Documents” screen of Document Hub

4.3.2 Click on “New” button

4.3.3 You will get two options: Folder and Document

4.3.4 Choose “Folder” option and you will see a screen where you need to input the folder name

4.3.5 When you submit the form on this screen, the folder with the same name is created on “My Documents” screen

4.3.6 Three options are available for each folder created by you (Figure 27):

4.3.6.1 Rename: This option will help you rename the folder already created

4.3.6.2 Move To: This option will help you move the folder inside another folder

4.3.6.3 Delete: This option will help you delete an existing folder
Note 8: If you delete a folder, then the folder gets deleted, but all the documents stored in it are restored on “My Documents” screen.

4.3.7  How do you move documents to a folder?

4.3.7.1 Go to “My Documents” on Document Hub

4.3.7.2 Select the file/document you wish to move to a folder

4.3.7.3 Against each document, two options are available:

1. Move To: Clicking this option will move the document to a folder

2. Download: Clicking this option will download the document

4.3.7.4 When “Move To” is selected, a screen opens up, which prompts the user to select a folder to which the file will be moved and a “Move Here” button to complete the process (Figure 28)

4.4  How do you share and update an existing document?

4.4.1  Viewing an uploaded document

4.4.1.1 You can access the document management screen for any document that you have uploaded on CMP by clicking on that document on the Document Hub
4.4.1.2 After you click a document, you will navigate to document control screen, which enables numerous options for you to work with that document.

4.4.1.3 Following elements are visible on the screen (Figure 29):

1. Top panel:
   a. Add Tag: You can add more tags or manage existing tags using this option
   b. Share Document: Share the document with other users
   c. Edit Document: An option to update the document
   d. Version Picker: To choose which version of the document is required to be viewed

2. Document Name

3. File Name

4. Last Updated Date

5. Download Option

6. Preview: It will open a web preview of the uploaded document

7. Description

8. Tags

9. Owner Name: Name of the user who uploaded the document

10. Comments Section: All collaborators of a document can add comments in this section

![Figure 29 Document View Screen](image)

4.4.2 Sharing a document

Sharing option enables providing access of the document uploaded by you to different CMP users, who may access the document as a collaborator or as a viewer.

4.4.2.1 Click on “Share” button in the document management screen
4.4.2.2 You will see two options (refer Figure 30):

1. **Add Members**: The tool will suggest names and roles of users based on the characters you type in this field. It will also suggest user groups and private member lists, depending on your role permissions.

2. **Access Selector**: Two options are available:
   a. **Can View**: Add the members as viewers of the document, who cannot make any changes.
   b. **Can Edit**: Add the members as collaborators.

4.4.3 Editing/Updating a document

4.4.3.1 Updating a document is enabled for the document owner as well as the collaborator.

4.4.3.2 Using update option on document management screen, you can update the document’s name, upload another file and update description and tags.

4.4.3.3 When you upload another file, it gets uploaded under the same document name, but as a different version. The version picker, explained in Section 4.3.1, will then allow the document viewers to pick which version they want to refer to.
Task Module
5. Tasks Module

5.1 Introduction

5.1.1 The task management module is responsible for managing all program- and project-related tasks created; wherein a user will create a task and the task will be deemed as complete after necessary approvals and endorsements are in place and the task assignee marks the task as complete.

Figure 32 Task Dashboard (suggestive list of tasks)

5.1.2 You can create and manage tasks through the Task dashboard as shown in Figure 32.

5.1.3 As shown in the top panel, the tasks are grouped under the following categories:

5.1.3.1 All Tasks: All the tasks that you are a part of.
5.1.3.2 Created by me: All tasks created by you.
5.1.3.3 Assigned to me: All tasks assigned to you.
5.1.3.4 [Restricted Access] All CMP Tasks: Available only for CMP Administrator and/or authorized users.

5.2 Task dashboard

5.2.1 Task screen shows the following columns:

5.2.1.1 Task ID
5.2.1.2 Task Name
5.2.1.3 Created by
5.2.1.4 Currently Assigned To
5.2.1.5 Status
5.2.1.6 Start Date
5.2.1.7 Due Date

5.2.2 Search functionality on the same screen allows you to search any task based on task name or tags.

5.2.3 A filter option available on the task dashboard will assist you in filtering tasks on the basis of:

5.2.3.1 Status of the Task (Refer Section 6.4)
   1. To Do
   2. Reopened
   3. In Progress
   4. Completed

5.2.3.2 Created by
5.2.3.3 Currently assigned to
5.2.3.4 Owner

5.3 How are tasks created?

5.3.1 To create a task, the user clicks on New Task, on the Task Dashboard, as shown in Figure 32

5.3.2 For task creation, you will need to input the following details (Figure 33):

5.3.2.1 Task Name: Mandatory field
5.3.2.2 Description
5.3.2.3 Start Date
5.3.2.4 Due Date
5.3.2.5 Owner: Mandatory field
5.3.2.6 Approver(s)
5.3.2.7 Endorser(s)
5.3.2.8 Add Tag(s)
5.3.3 After creation of the task, you can then:

5.3.3.1 Add documents to the task, as shown in Figure 34. The document can be added afresh by uploading or from existing documents in the Document Hub.

5.3.3.2 Add viewers to the task, as shown in Figure 35. Task viewers are added as observers to the task.
5.3.3.2 You can also edit approvers and endorsers from this task using the same option menu.
(Figure 35)

5.3.3.2 As a task creator, you have an option to cancel the task as well

5.4 What are the states of each task?

5.4.1 The states of the task (after creation) are as:

5.4.1.1 To Do: When a task is assigned to a user, the status shows as “To Do”

5.4.1.2 In Progress: When the task is accepted by the user, via the “Claim” button, the status is changed to “In Progress”

5.4.1.3 Completed: If the user has completed the task, then the user clicks on the Completed button and the status will change to “Completed”

5.4.1.4 Pending Approval: If the user has completed the task and the task has Approvers assigned, then the task status will change to “Pending Approval”

5.4.1.5 Pending Endorsement: If the user has completed the task and the task has Endorsers assigned, then the task status will change to “Pending Endorsement”

5.4.1.6 Rejected: If the Approver or Endorser rejects the task, by clicking on the Reject button, then the task status changes to “Rejected”

5.4.1.7 Approved: If the Approver or Endorser accepts the task, the status changes to “Approved”. After this, if the user clicks on the “Completed” button, the status changes to “Completed”

5.4.1.8 Endorsed: If the Endorser accepts the task, the status changes to “Endorsed”. After this, if the user clicks on the “Completed” button, the status changes to “Completed”

5.5 Linking/Adding other tasks to an existing task

5.5.1 Adding Sub-tasks

5.5.1.1 Sub-tasks are tasks which require completion, for the overall task to be completed. For example, for a construction project, if creating a Detailed Project Report (DPR) is a task, then primary data collection could be its sub-task

5.5.1.2 Sub-tasks are added by clicking on the Subtask icon as shown in Figure 36 and filling the form as shown in Figure 40
5.5.2 Linking tasks

5.5.1.1 Tasks are linked which have a common purpose or are being executed in parallel

5.5.1.2 Tasks can be linked by clicking on “Link Task” icon as shown in Figure 36

5.5.1.3 A window asking you to input the task ID of an existing task that needs to be linked is shown (Refer Figure 37)

Figure 37 Link Task Window

5.5.1.4 As you start typing the task ID of the task that needs to be linked, the screen suggests you to select one of the suggested tasks

5.5.1.5 The linked task will appear at the bottom of the task screen, of the task to which it is linked

Figure 38 Adding a Subtask
5.6 What do you do when a task is assigned to you?

5.6.1 You will receive a notification on CMP (top panel) when a new task has been assigned to you in the capacity of “Owner”

5.6.2 When you click on that notification or go to Tasks Dashboard, you will see the task which has been assigned to you

5.6.3 The task screen will show the details of the task (Figure 39) and other options to take action as enlisted below:

![Figure 39 Task View - as seen by Owner](image)

5.6.1.1 Portion of the screen highlighted in yellow in Figure 39 above shows the details of the task. Following details can be accessed by you here:

1. Task ID (e.g.: TASK-115 shown in the screenshot)
2. Task Due Date (shown as 23-Jan-2020 in this example)
3. Task Name
4. Status
5. Currently Assigned To
6. Created By
7. Start Date
8. Owner
9. Approver(s)
10. Endorser(s)
11. Documents(s), if attached by the task creator
12. Linked Task(s); if linked by the task creator
13. Tag(s) added by the task creator

5.6.1.2 There is an option to “Request to Reassign” (as highlighted in purple in Figure 39). You can choose this option if the task is not meant to be acted upon by you
5.6.1.3 If you as task owner click on “Request to Reassign”, then the task will cease to be assigned to you and the task creator will be notified to reassign the task.

5.6.1.4 In order to act on the task, you will need to click on “Claim” button. This button (green coloured, as shown in Figure 39 above) will activate the task for you and you will need to act, as required in the task. Details of action required to be taken after claiming the task are provided in Section 6.6.4.

5.6.1.5 You can add other CMP users as viewers of the task, who will be able to view the task, its documents and updates. An option to “Add Viewers” is available using the button with three dots (...).

5.6.1.6 When you click on “Add Viewers”, a pop-up screen appears, where you can add other CMP users as viewers to the task (Figure 40).

![Figure 40 Add Task Viewers](image)

5.6.1.7 The last section on the screen (on extreme right) is the “Comments” section (refer the area highlighted in pink in Figure 41). You can add comments and communicate with the other users on the task.

![Figure 41 Comment Option - Task View](image)

5.6.4 After you have claimed the task, the task window is updated, and the screen shown in Figure 42 is visible to the task owner.
5.6.4.1 Apart from the task details as listed in Section 6.6.3.1, other options are activated to assist you to complete the task

5.6.4.2 “Add Tag” option allows you to add more tags to the task

5.6.4.3 “Add Document” option allows you to add an existing document from document hub or upload a new document. This option will be used most frequently while completing the task

5.6.4.4 “Link Task” option allows you to link another task

1. A button which shows the option according to the next set of actions
2. Submit for Approval: This option is available if approvers are present in the task

5.6.4.5 Mark as Complete: The option is available if there is no approver/endorser involved in the workflow

5.6.4.6 “Add Viewers” option to add viewers to the task

5.6.5 Depending on the task steps, you will either need to submit the task for approval or mark it as complete. If you have submitted a task for approval, the status will change to “Pending Approval”

5.7 How do you approve/reject a task?

5.7.1 After a task is submitted for approval and if you are assigned to the task as an approver, then you will receive a notification on CMP and/or by email/SMS to view the task and its update by the owner

5.7.2 If you are the approver, the task screen shall show that the task is “Currently Assigned to” you. The screen will look as shown in Figure 43 below
5.7.3 You will see two options: Approve and Reject

5.7.4 In both the cases (Approval and Rejection), when you click on the button, a screen pops up requiring to add a comment compulsorily (Figure 44)

5.7.5 When you add the comment, it appears in the “Comments” section of the screen

5.7.6 After approval, the task would show either of these three statuses:

1. Approved: In case no further endorsement or approval is required for the task

2. Pending Approval: In case another approver needs to approve the task

3. Pending Endorsement: In case the next step is to endorse the task

5.7.7 In case of Pending Approval and Pending Endorsement status, the task will then show the approver or the endorser’s name in “Currently Assigned To” section

5.7.8 In case you reject the task, the task status is shown as “Rejected” and the task gets assigned to the owner who had originally submitted the task for approval
5.8 How do you respond to rejection of your task?

5.8.1 In case the approver rejects the task, the task gets automatically assigned to you as the owner.

5.8.2 As shown in Figure 45 below, you can either claim the task again or request the task creator to re-assign the task.

![Figure 45 Task Screen after Rejection - Owner’s View](image)

5.8.3 After you claim the task, you need to re-submit the task for approval. The flow is similar to the steps outlined in Section 6.6.

5.9 How do you endorse/reject a task?

5.9.1 After a task is submitted for endorsement and if you are assigned to the task as an endorser, then you will receive a notification on CMP and/or by email/SMS to view the task and its update by the owner/approver.

5.9.2 If you are the endorser, the task screen shall show that the task is “Currently Assigned to” you. The screen will look as shown in Figure 46 below:

![Figure 46 Task for Endorsement](image)

5.9.3 You will see two options: Endorse and Reject.

5.9.4 In case you click on the button to Endorse, a screen pops up requiring to input an OTP sent to your registered mobile number (Figure 47).

5.9.5 After entering the OTP, you will be required to add a comment, it appears in the “Comments” section of the screen.

5.9.6 After endorsement, the task would show the status as “Endorsed”.

5.9.7 In case of Pending Approval and Pending Endorsement status, the task will then show the approver or the endorser’s name in “Currently Assigned To” section.
5.10 How do you respond to approval/endorsement of your task?

5.10.1 In case the last step in the task owned by you was “Endorsement”, and the endorser has endorsed the task, you will receive a notification updating the status of the task.

5.10.2 You will see the status as “Endorsed” and a button to “Mark As Complete”. You will need to mark the task as complete to complete the task. (Figure 48)

5.10.3 In case the last step in the task owned by you was “Approval”, and the approver has approved the task, you will receive a notification updating the status of the task.

5.10.4 You will see the status as “Approved” and a button to “Mark As Complete”. You will need to mark the task as complete to complete the task.

5.10.5 In both the cases mentioned above, the final status of the task shall be shown as “Completed” (Refer Figure 47 below)
Program Management Module
6. Program Management Module

6.1 Introduction

6.1.1 Program Management Module is a collaborative module, which enables all CITIIS Program stakeholders to engage at the program and at individual project levels.

6.1.2 The module gives an overall insight of the projects covered under CITIIS program.

6.1.3 It also enables to deep-dive at every project by incorporating the following key aspects of project management:

   6.1.3.1 Core Team Members
   6.1.3.2 Phases
   6.1.3.3 Project Tasks
   6.1.3.4 Tracking Project Activities and Milestones
   6.1.3.5 Financials and CITIIS Grant: Released and Utilized
   6.1.3.6 Risks and Opportunities
   6.1.3.7 SPV and Project Compliance

6.1.4 The subsequent sections explain in detail on each of these aspects: creation, editing, management and visualization.

6.2 Program Management Dashboard

6.2.1 Based on the roles assigned to you, you are provided an access to the “Program Dashboard”, which is a module available to be accessed from the top panel on the landing screen. Some sections in this chapter are relevant only for the PMU and the Technical Assistance (Domestic Expert and Global Mentor); however, they have been included here for a more holistic understanding of the platform.

Figure 50 Program Dashboard (Sample View: Program Coordinator)
6.2.2 The dashboard has the following key elements:

6.2.2.1 List of projects available to be accessed by you (grey coloured portion shown in Figure 50) with following attributes:

6.2.2.2 Name of the Project
1. Phase (abbreviated or denoted and colour coded)
2. Project’s Reference Code
3. Overall Progress (in Percentage) of the Project

6.2.2.3 “Add Project” tool
6.2.2.4 “Add/Edit Phases” tool
6.2.2.5 “Add/Edit Steps” tool
6.2.2.6 “Add/Edit Pillars” tool

6.3 How are Projects Created and Managed?

6.3.1 Project Creation

6.3.1.1 Creation of a new project is a one-time activity in the program implementation, wherein projects can be onboarded on to CMP by an authorized user (typically Program Coordinator)

6.3.1.2 Add Project functionality allows a provision on the platform to add new projects, if added to CITIIS Program, in future. The workflow to add project is as follows:

6.3.1.3 Upon clicking “Add Project” button on the Program Dashboard, a project creation window will appear (Figure 51)

Figure 51 Create Project Screen

← Create Project

Project Name *

Reference Id *

Select State *

Select City *

Create  Cancel
6.3.1.4 You will need to fill the following entries mandatorily:

1. Project Name
2. Reference ID
3. Select State (from a dropdown menu)
4. Select City (from a dropdown menu)

6.3.1.4 Once the project is created, it will appear in the list of projects on Program Dashboard screen (refer Figure 50)

6.3.2 What do you see after clicking a project?

Depending on the access privileges of your role, you will be able to see a few or all of the following items as shown in Figure 52 and enlisted below:

Figure 52 Project View

6.3.2.1 Project Name on top of the screen
6.3.2.2 Project Reference ID on top right of the screen with an edit tool to edit the project
6.3.2.1 Project Menu Items (highlighted in yellow in Figure 52 and detailed in subsequent sections):
   1. Dashboard: collapsible overview of all aspects of the project
   2. Work Area: Section to update project tasks, risks, financial details, compliances and opportunities
   3. Core Team: To view and/or edit project core team members
   4. Open Comments: An area to add open comments by all users involved in the project
   5. Activity Log: A complete trail of updates/ changes and access logs for that project

6.3.3 How do you edit a project?

6.3.3.1 Upon clicking the project from the project list, an edit tool is available beside the Project Reference ID on top right corner of the project screen

6.3.3.2 Upon clicking the tool, Edit Project window appears (refer Figure 53)
6.3.4 How are project core team members added?

6.3.4.1 Adding project core team members is the next step involved after creating a project.

6.3.4.2 Figure 54 illustrates the Core Team screen, where existing team members can be viewed.

Figure 54 Project Core Team View

6.3.4.3 Following is the workflow to add/remove project core team members (Figure 55):

1. Click on “Add/Edit Members” button on the Core Team screen.
2. You will see a window with existing team members (with their roles) enlisted and an option against each name to remove them.
3. You can use “Add” option to add a new member.
4. You can type first few letters of the username or the role and the related names will be auto-suggested.
How to use Work Area for Updating Projects?

6.4.1 Work Area is the most important section of the project management workflow. PMU team and core team members, depending on their access privileges, can update the projects using the work area. Figure 56 illustrates how you can access Work Area.

The subsequent sub-sections provide the details of each of the features available in Work Area.

6.4.2 How to create and update project tasks/ work plan?

6.4.2.1 Program tasks are different from tasks in the Tasks Module, in a specific manner that additional attributes like steps and pillars are present for each task. For instance, in maturation phase, the tasks are categorized into pillars and steps as follows (Refer Figure 57):
6.4.2.2 Following sub-sections explain how project tasks, steps and pillars can be added in a step-by-step manner. Figure 58 illustrates the work plan screen where all the transactions concerning project tasks are carried out.

Figure 58 Work Plan Screen - Tools
### 6.4.2.3 Step 1: Add Pillars

Users with necessary privileges (PMU) can add or edit a project task pillar using the tool highlighted on Program dashboard screen in Figure 58. Following steps are required to be followed:

**Figure 59 Add/Edit Pillars Screen**

![Add Pillars Screen](image1)

1. Click on "Add" button. A form to add pillar will appear (Figure 60).

**Figure 60 Add Pillar**

![Add Pillar Form](image2)

2. As you input the pillar name and press Add button, the pillar will appear on the screen shown in Figure 59.

3. If you need to make any edits on the pillar name, click the edit tool (pencil shaped icon) in front of the pillar name.

### 6.4.2.4 Step 2: Add Steps

Users with necessary privileges (PMU) can add or edit a project task pillar using the tool available at Program Dashboard. Following steps are required to be followed:

**Figure 61 Add/Edit Steps Screen**

![Add Steps Screen](image3)
1. Click on “Add” button. A form to add steps will appear (Figure 62)

![Figure 62 Add Step](image)

Add Step

<table>
<thead>
<tr>
<th>Step Name *</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

*Step Name is mandatory

![Add Button](image)

2. As you input the step name and press Add button, the step will appear on the screen shown in Figure 61

3. If you need to make any edits on the steps' name, click the edit tool (pencil shaped icon) in front of the step name

6.4.2.5 Step 3: Add Project Tasks

The next step is to create tasks, input pillars and steps and assign them to core team members

1. Click on “New Task” button on the Work Plan screen as shown in Figure 63

2. “Task Creation” screen is similar to the task creation screen as explained in Section 6.3. Pillars and Steps are required to be inserted as an additional input as shown in Figure 63

![Figure 63 Project Task Creation](image)

3. As soon as the task is created, the task owner can view the task on “Task Module”. The owner may either Claim the task or request to re-assign to another user. The flow hereon is essentially same as that explained in Section 6 of this document

4. All Maturation Phase tasks currently visible to the SPV users have been created using this functionality
6.4.2.6 Step 4: Updating Project Progress

Once you have assigned the tasks to the owner (e.g., SPV Project Incharge), the owner shall be able to see the tasks categorized in steps and mapped against pillars on the Work Plan screen.

Figure 64 illustrates the project tasks and their view.

![Figure 64 Project Tasks](image)

1. You can view the following details for every task:
   a. Task ID
   b. Task Name
   c. Pillar
   d. Start Date
   e. Due Date
   f. Progress (in Percentage)
   g. An ellipsis option menu to “Edit Dates and Progress”: based on your user privileges

2. If you click on a task, depending on your role permissions, you will be able to get a complete view of the task as shown in Figure 65.

![Figure 65 Project Task - Detailed View](image)
3. In order to update Start Date, Due Date and Progress, you will need to click “Edit Dates and Progress” option. You can update these options on the window that opens after clicking on the option mentioned (Figure 66)

Figure 66 Editing Task Dates and Progress

6.5 How to update project financials?

The second option in Work Area is available to view and update the financial details of the projects. If you are authorized to view and edit these details, you will be able to access this module from the Work Area (Figure 67).

Figure 67 Financial Information – Projects
Following are the three major components of this sub-module:

### 6.5.1 Financing Plan and CITIIS Grant Allocation

6.5.1.1 In this section, you can view and update the following two figures:

1. Project Cost (INR): Total cost of the project
2. CITIIS Grant (INR): CITIIS Grant component of the project cost

6.5.1.2 You can use the edit icon (pencil shaped icon) to update these figures

6.5.1.3 Please remember that the edit tool will not allow you to enter CITIIS Grant figure, which is greater than the project cost (Figure 68)

![Figure 68 Updating CITIIS Grant](image)

6.5.2 Instalments and Funds Released

6.5.2.1 In this section, you can view and update grant instalments and released amount. Figure 69 illustrates the individual instalments and their details.

![Figure 69 Fund Instalments and Release](image)

6.5.2.2 Following details are available at the screen to view:

1. Total funds released (INR)
2. Instalments and their split
3. Phase to which each instalment is tied to
4. Released amount (INR) against each instalment
5. Planned amount (INR), which is equivalent to the proportionate CITIIS grants amount corresponding to that milestone
### 6.5.2.3 How do you update the instalments?

“Add/Edit Instalment” button is available in this section for updating the details. Once clicked, you will view a screen which enlists the instalments present and options to edit existing entries or add new ones.

![Add/Edit Instalments](image)

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
<th>Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10</td>
<td>Maturation</td>
</tr>
<tr>
<td>2</td>
<td>40</td>
<td>Implementation</td>
</tr>
<tr>
<td>3</td>
<td>40</td>
<td>Implementation</td>
</tr>
<tr>
<td>4</td>
<td>10</td>
<td>Implementation</td>
</tr>
</tbody>
</table>

Following are the steps involved:

1. Click on “Add Instalment”
2. You will be asked to provide two inputs:
   - Instalment Percentage
   - Phase of the Project corresponding to this Fund Instalment
3. There is a validation on instalment percentage, which will prevent you from adding entries if they exceed a total of 100%.
4. You can also edit an existing instalment by simply changing the percentage and/or phase
5. There is an option to delete an instalment too, in case you wish to delete an entry altogether

### 6.5.2.4 How do you update the released funds?

Users with necessary privileges are able to access “Add Details” functionality against each instalment item listed as shown in Figure 71

This functionality is accessed by clicking the instalment entry, which expands its view and gives an option to add fund release details using “Add Details” tool. Expanded view of the instalment entries is shown in Figure 71.
Following steps are followed to add the details:

1. Click any installment to expand its view
2. Click “Add Details” button
3. You will need to input the following details (see Figure 72 for details):
   d. Released Amount in INR
   e. Supporting Document (attaching a supporting document as an evidence towards the release of funds is mandatory)

   1. A validation on this screen will prevent you from adding released amount more than the CITIIS Grant amount
2. The tool allows you to add fund released in scenarios where the released funds do not equate with the instalment amount. The differential amount is rolled over to the subsequent instalments and are finally adjusted in the last instalment.

3. You can also edit any fund release details by using the edit button against each instalment. Same screen as shown in Figure 71 appears, but with filled values that need updates.

### 6.5.3 Funds Utilized

Users with necessary privileges can view and/or update the funds utilized against each instalment and fund released. Figure 73 demonstrates how the fund utilization section is viewed.

#### Figure 73 Funds Utilized

<table>
<thead>
<tr>
<th>Installments</th>
<th>Phase</th>
<th>Utilised Amount (INR)</th>
<th>Total Released (INR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st instalment (10%)</td>
<td>Implementation</td>
<td>7,00,00,000.00</td>
<td>8,00,00,000.00</td>
</tr>
<tr>
<td>2nd instalment (20%)</td>
<td>Maturity</td>
<td>17,00,00,000.00</td>
<td>17,00,00,000.00</td>
</tr>
<tr>
<td>3rd instalment (30%)</td>
<td>Implementation</td>
<td>27,00,00,000.00</td>
<td>27,00,00,000.00</td>
</tr>
</tbody>
</table>

#### 6.5.3.1 How do you update the utilized funds?

Users with necessary privileges can access “Add Details” functionality against each instalment item listed as shown in Figure 74. This functionality is accessed by clicking the instalment entry, which expands its view and gives an option to add fund release details using “Add Details” tool.

#### Figure 74 Updating Funds Utilized

Following steps are followed to add the details:

1. Click any instalment to expand its view
2. Click “Add Details” button
3. You will need to input the following details (see Figure 75 for details):
   a. Released Amount in INR
   b. Supporting Document (attaching a supporting document as an evidence towards the release of funds is mandatory)
4. A validation on this screen will prevent you from adding utilized amount more than the CITIIS Grant amount.

5. The tool allows you to add fund utilized in scenarios where the utilized funds do not equate with the release/instalment amount. The differential amount is rolled over to the subsequent instalments and are finally adjusted in the last instalment.

6. You can also edit any fund utilization details by using the edit button against each instalment. Same screen as shown in Figure 74 appears, but with filled values that need updates.

6.6 How to update project Phase Duration and Agreement Date?

Work Area has the following two screens to update the project phases and tri-partite agreement dates.

Figure 76 Project Phases and Tri-partite Agreement Dates

6.6.1 Phases

6.6.1.1 Select “Phases” tab in Work Area (Figure 76).

6.6.1.2 “Add/Edit Phases” button is used to add a program phase to the project and enter its duration. It is also used to edit any existing phase and/or its duration.

6.6.1.3 Phase dropdown button will show only those program phases which were created.
Figure 77 illustrates how you can use “Add/Edit Phases” tool for adding or editing phases:

6.6.1.4 Tri-partite Agreement Date:

1. Tri-partite agreement date is accessible in Work Area as shown in Figure 78
2. You can view and/or update the date, depending on the role permissions, on the same screen (Refer Figure 78)

6.7 How to update project Risks and Opportunities?

Project risks and opportunities can also be updated from the Work Area by the users who have necessary access permissions. Figure 79 illustrates the screen where these details can be viewed and/or updated.
The screen has two sections:

### 6.7.1 Risk Assessment and Monitoring

All project risks are logged in this section. They are assessed based on two parameters: Probability and Impact; which determine the criticality of the risks. You can hover over the information button available above the top right section of the risks table (Figure 79).

**Figure 80 Assessment Information**

You can click on “Add Risk” to add a new row to enter risk details and use “Save Changes” button to save the updated data. Following cells need to be filled for each risk:

1. Status (Dropdown: Open or Closed)
2. Date Raised (Current Date, which is not editable)
3. Risk Family (Text based input)
4. Risk No. (Auto-sequenced number)
5. Description (Text based input)
6. Phase / Period Impacted (Dropdown to Choose Project Phase)
7. Probability (Dropdown: Values 1 to 4)
8. Impact (Dropdown: Values 1 to 4)
9. Risk Criticality (Auto-calculated number using the preceding values)
10. Mitigation Actions (Text based input)
11. Comments (Text based input)
12. Risk Provision (INR) (Numeric input)
13. Risk Owner (Dropdown to choose core team member)
14. Criticality at previous update (Auto-filled entry in case the risk was updated at a later stage)
15. Trend (Change in criticality from last update – auto-filled)
16. Action Button (History and Delete Buttons)

**Figure 81 Trend and Action Buttons - Risks**

<table>
<thead>
<tr>
<th>Risk Provision (INR)</th>
<th>Risk Owner</th>
<th>Criticality at previous update</th>
<th>Trend</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20000</td>
<td>SPV Project Incharge</td>
<td>▼ 8</td>
<td>-2</td>
<td></td>
</tr>
</tbody>
</table>

* All mandatory fields are required

**Figure 82 History Log of a Risk**

a. If you click History button, you will navigate to another screen, where a complete history of the risk shall be made available (Figure 81)

b. Clicking “Delete” button will delete the risk
6.7.2 Opportunity Assessment and Monitoring

All project opportunities are logged in this section. You can click on “Add Opportunity” to add a new row to enter opportunity details and use “Save Changes” button to save the updated data. Following cells need to be filled for each opportunity:

1. Status (Dropdown: Open or Closed)
2. Date Raised (Current Date, which is not editable)
3. Opportunity Family (Text based input)
4. Opportunity No. (Auto-sequenced number)
5. Description (Text based input)
6. Phase / Period Impacted (Dropdown to Choose Project Phase)
7. Probability (Dropdown: Values 1 to 4)
8. Impact (Dropdown: Values 1 to 4)
9. Opportunity Criticality (Auto-calculated number using the preceding values)
10. Mitigation Actions (Text based input)
11. Comments (Text based input)
12. Opportunity Provision (INR) (Numeric input)
13. Opportunity Owner (Dropdown to choose core team member)
14. Criticality at previous update (Auto-filled entry in case the risk was updated at a later stage)
15. Trend (Change in criticality from last update – auto-filled)
16. Action Button (History and Delete Buttons)
   a. If you click History button, you will navigate to another screen, where a complete history of the opportunity shall be made available.
   b. Clicking “Delete” button will delete the opportunity.

6.8 How to update SPV and project Compliance?

6.8.1 SPV and Project Compliance are key components of CITIIS Program.

6.8.2 They are reported, tracked, updated and viewed at a project level using “Compliances” tab within Work Area.

6.8.3 The screen has three sections:
   6.8.3.1 SPV and Project Compliance Details
   6.8.3.2 SPV Compliance
   6.8.3.3 Project Compliance
Figure 83 shows the compliances screen

**Figure 83 SPV and Project Compliance Screen**

<table>
<thead>
<tr>
<th>SPV &amp; PROJECT COMPLIANCE DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPV COMPLIANCE</td>
</tr>
<tr>
<td>PROJECT COMPLIANCE</td>
</tr>
</tbody>
</table>

6.8.4  **How do you add SPV and Project Compliance Tasks?**

6.8.4.1 Workflow to create SPV and Project Compliance Tasks is similar to creation of tasks functionality as explained in Section 6.

6.8.4.2 Click on “Add Compliance Task” button shown on the compliance screen.

A new task creation screen will appear, where you will fill the attributes of the compliance task as follows:

1. Task Name
2. Description
3. Start Date
4. Due Date
5. Owner
6. Approver(s)
7. Endorser(s)
8. Attach Document(s)
9. Add Tag(s)

6.8.4.3 As soon as the task is assigned to a task owner (typically a Project Core Team member), the owner shall view it in the Tasks module listing page.

6.8.4.4 The owner can either claim the task or request the creator to re-assign it to another user.

6.8.4.5 When the task is marked as complete by the owner, the compliance screen will show an updated status of the task (Figure 84).
6.8.4.6 If you need to view the documents or details of the compliance tasks, you can click on the green coloured down arrow and expand the task. You will be able to see if documents are available for each task.

6.8.5 How do you update details of compliance?

6.8.6 CMP provisions the facility to highlight major compliance slippages using the first section of compliances screen.

6.8.7 “SPV and Project Compliance Details” section helps you view a list of slippages (Fig. 85) and allows you to update them, in case you have editing permissions.

You can use the editing tool (pencil shaped icon) to edit the details on this screen.

6.9 How to add open comments and view activity logs?

6.9.1 Open Comments

This section is available for every project and users with editing permissions can add any open comments.

1. You can go to Open Comments section and choose “Edit” option to add a new comment (Figure 86). If an open comment exists already, you can replace it with a new open comment using the same tool.
2. You can also click on “View Log” to view the history of open comments. A screen showing open comments with a timestamped log of previous comments. (Figure 87)

Figure 87 View Log - Open Comments

6.9.2 Activity Logs

6.9.2.1 Authorized users of CMP shall be able to use “Activity Log” functionality of the platform to track all activities that have been performed for the selected project.

6.9.2.2 This log provides you the activity description, timestamp and the user details of the users who carried out that activity. A snapshot of how the activity log interface looks like, is shown in Figure 88

Figure 88 Activity Log - Projects
6.10 How to use project dashboard?

Project(s) are updated and transactional/operational events like project task monitoring, financial updates, activity logs, etc. are recorded in different sections. The dashboard, however, is a “view only” interface, which gives an overall snapshot of the project. This snapshot is derived from various sub-modules and sections in the program management module. Various components of the dashboard and how to use them are explained in the subsequent sub-sections.

6.10.1 Dashboard Structure

The dashboard has seven (7) components, which appear on the screen as collapsible sections.

6.10.2 Financial Information

This section provides the following insights (Figure 89):

6.10.2.1 A horizontal card on:

a. Project Cost (INR)

b. CITIIS Grant (INR)

c. Funds Released (INR)

d. Funds Utilization (INR)

6.10.2.2 Pie Charts on:

e. Funds Released and CITIIS Grant

f. Funds Released and Utilized
6.10.3 Activity Tracker

This is a Gantt Chart view of all the project tasks with their completion status.

6.10.4 Phases

A timeline view of all phases and their duration for the project is available in this section (Figure 91)

6.10.5 Overall Progress

You can access phase-wise time progress and compare it with the project’s progress in this section of the dashboard (Figure 92)
6.10.6 SPV and Project Compliance

This section highlights the following:

1. Compliance progress in percentage
2. List of slippages in compliance

6.10.7 Risks

All risks with criticality > 12 are shown on the dashboard

6.10.8 Opportunities

All opportunities with criticality > 12 are shown on the dashboard
About CITIIS
City Investments To Innovate, Integrate, and Sustain (CITIIS) is the main component of the ‘Supporting Smart Cities Mission for a more Inclusive and Sustainable Urban Development in India Initiative’ launched by the Ministry of Housing and Urban Affairs (MoHUA), Government of India in 2018. The program is supported by the Agence Française de Développement (AFD) and the European Union (EU), and is being coordinated and managed by the Program Management Unit (PMU) at the National Institute of Urban Affairs (NIUA). External aid to the tune of EUR 100 million has been provided to twelve Smart City SPVs in the form of loan, and EUR 6 million has been made available for technical support to the program.