Tools for better allocation process

- Process Monitor
- Bulk Status Move


Purpose: The Process Monitor Report helps to identify the average number of days between various stages of the project lifecycle.

Usage:
- To generate a Process Monitor Report, click on the Process Monitor sub menu under Reports menu.
- A user can monitor the progression of projects through the various project workflow statuses within a particular allocation.
For example:
Projects within a particular project status are timed on how long a project takes to complete that particular status.

For Allocation: Standard Allocation – 2016
Project Instance: Submission of Proposal, Project Status: Project Draft

- The average number of days that 73 projects took to clear through this project status was less than 1 day.

Whereas, in the Project Instance: Strategic Review, Project Status: Under SR

- The average number of days that 66 projects took to clear through this project status was 3 days.

Bulk Status Move

Navigation: System Setup > Workflow Management > Bulk Status Move
**Purpose:** To move multiple projects from one status to another perform bulk move of the projects from one status to next status.

**Usage:**
- Select Instance Type, Instance Status, Cluster and Organization on **(Screen 1)** and click **[Get Projects]** button. It will list down all the projects falling in the filter criteria.
- Select required projects from the grid which are required to be moved to next status.
- In the **"Workflow Action Status"** list, select the status to which status the selected projects need to be moved. **"Alert triggered"** should be checked if alerts are to be associated with this activity.
- Click on **[Perform Bulk Action]** button.
- A dialog will open **(Screen 2)** on which selected projects are displayed. Click on **[Proceed to Update Status]** button to move the selected projects to the required status.

**Screen 1:**

**Bulk Status Move**

<table>
<thead>
<tr>
<th>Current Status</th>
<th>Next Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instance Type</td>
<td>Select Instance Type</td>
</tr>
<tr>
<td>Cluster</td>
<td>Select options</td>
</tr>
<tr>
<td>Instance Status</td>
<td>Select Instance Status</td>
</tr>
<tr>
<td>Organization</td>
<td>Select options</td>
</tr>
</tbody>
</table>

**Alert triggered?** [Perform Bulk Action]

**Screen 2:**
Field Descriptions:

**Screen 1:**

- **Instance Type:** list of all the instances
- **Instance Status:** All the statuses for selected instance
- **Cluster:** list of all the clusters for the pool fund
- **Organization:** List of all the organizations in the pool fund
- **Workflow Action Status:** List of Next statuses to which project can move
- **Alert triggered:** Alert associated with action