Tools for better allocation process

- Process Monitor
- Bulk Status Move

Process Monitor TOP


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>Please 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