MITS PART Training Manual

USDA

Version 1.0   June 2006

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FIGURES

Chapter 1

1

1. Introduction

This training manual has been prepared as a guide to assist in-person hands-on USDA staff training for the PART (Performance Assessment Rating Tool) module. The PART module is a component of the MITS (Management Initiatives Tracking System) web application. The MITS PART is an online web application that allows the USDA to prepare, review, and submit PART evidence and explanations, performance measures, follow-up actions, and budget information to the OMB (Office of Management and Budget). Key components of the PART module include the following:

A) Online integrated OMB PART evidence and explanation management templates
B) OMB questions set up and assignment
C) Online follow-up action milestone management and tracking
D) Multi-level internal approval processes for key tracking and performance items
E) Enhanced performance metrics management
F) Automatic email reminders for items/milestones due
G) Enhanced and expanded online standard and custom reporting

1.1. Training Manual Tips

This training manual includes a series of standard Tips and Visual Cues that are designed to notify and/or alert users about important items or items that require user actions. These tips are included throughout this help manual and are explained as follows:

Icon	Description
	TIP Icon: this icon alerts you to an important note or tip. Generally, there is tip text associated with this icon.
	INFO Icon: this icon alerts you to a text box with more information. This tip usually includes more specific in-depth information.

Chapter 1

1

Stop	STOP Icon: this icon alerts you stop what you are doing. This tip usually includes information you need to read before you proceed.
✓	CHECK Icon: this icon alerts you check your data entry. This tip usually includes information you need to check before you proceed.

1.2. Training Manual Organization

This training manual is organized into 9 Chapters. Each Chapter covers one general topic or a group of similar topics. The first chapter (this chapter) includes this introduction and general training instructions. Chapter 2 is a special section for Security Officer Training. Chapter 2 is included for reference purposes only and can be skipped if there are no Security Officers to be trained. Chapters 3-8 include training based on the primary key PART functions. Chapter 9 includes a training summary/conclusion. As such, this manual can be used to train all types of users for any or all PART functions. Each chapter can be used for “stand-alone” training for the given chapter topic or as a training refresher.

1.3. Hands-On Training Process

For the purposes of the present USDA training session, each chapter will be covered by the instructor with the exception of Chapter 2 (Security Officer Training). The training will include the following general process:

A) Introduction of the Instructor

B) Trainee sign in and introduction

C) Instructor description of the general purpose of the training

D) Instructor description of the overall training process

   a. Instructor introduces topic and displays PART on the classroom screen
   b. Trainees are guided through the topic on their own computer workstations
   c. Instructor work with trainees to ensure each trainee can perform the topic
   d. Instructor summarizes topic and elicits feedback from the trainees

E) Instructor summary topics covered

F) Open discussion and feedback

During the training process, the instructor will encourage the interaction of the classroom trainees with each other. The training is a learning process and open discussion during practice exercises and lessons is encouraged.

1.4. Accessing the PART Module

In order to access the PART module online application for training, the instructor will provide students with the URL for PART.

Trainees: You should write down the URL to the PART Online Training web page here. Make sure you include the https:// at the start of the URL. This is to ensure that Security is turned on. Also, your instructor should provide you with a Training User ID and Training Password for you to access this training session

Training URL: ____

Once you have written down the URL to access PART, trainees will be given a User ID and Password for access. Trainees will be directed to the USDA e-authentication portal and required to enter the User ID and Password just provided. If authenticated, the trainee web browser is redirected to the MITS home page or Security Officer Home page, depending on the User ID.

1.5. PART Home Page Navigation Overview

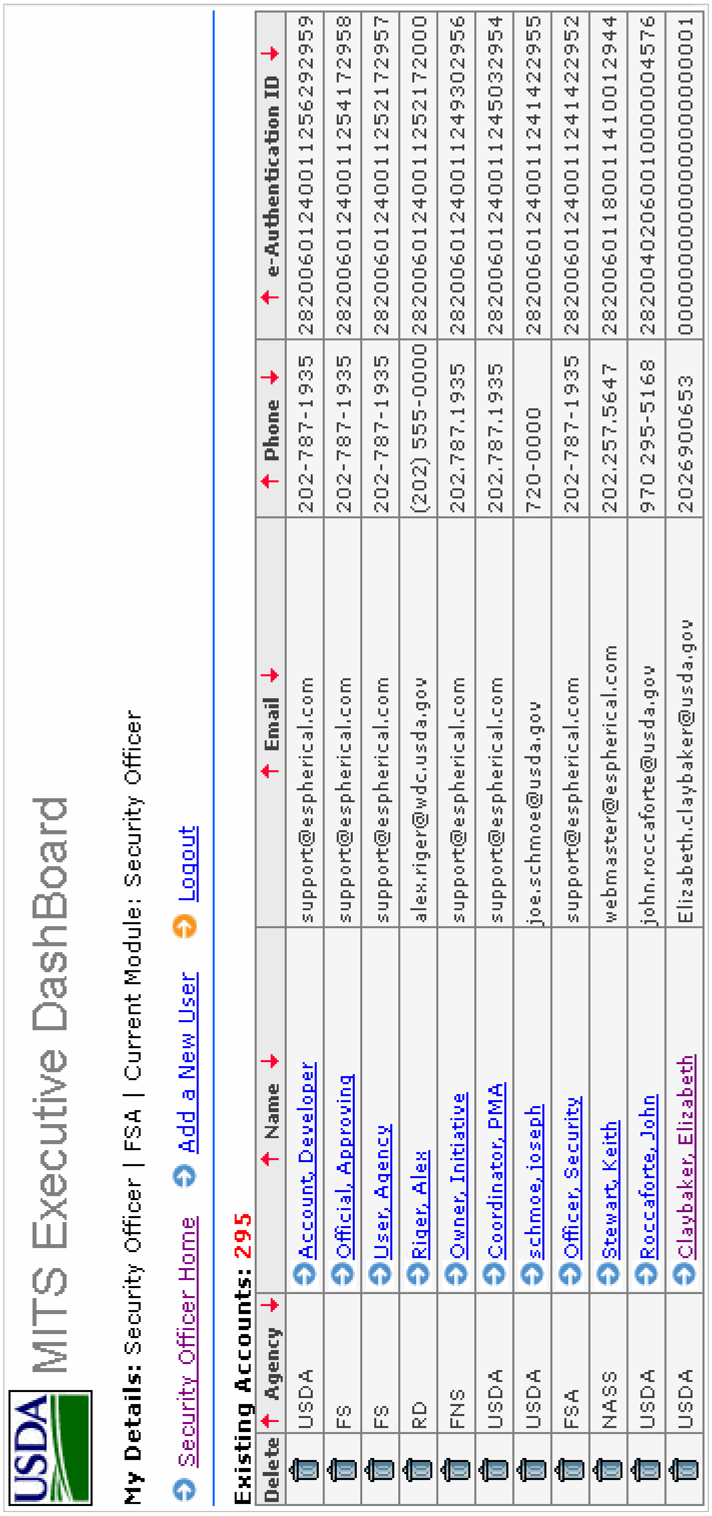
Once trainees have been authenticated and are logged in to the PART home page, there are two different views available:

1) Security Officer View
2) PART View (this view will be slightly different based on your user role.)

Please Note: the security officer role is that of an account manager responsible for creating all user account levels within MITS. For PART training, we will skip the Security Officer View. The Security Officer training is presented here for reference purposes.

In order to acquaint trainees with the PART Navigation, an overview of these two views and the navigation items are presented as follows:

Figure 1: Security Officer Home Page

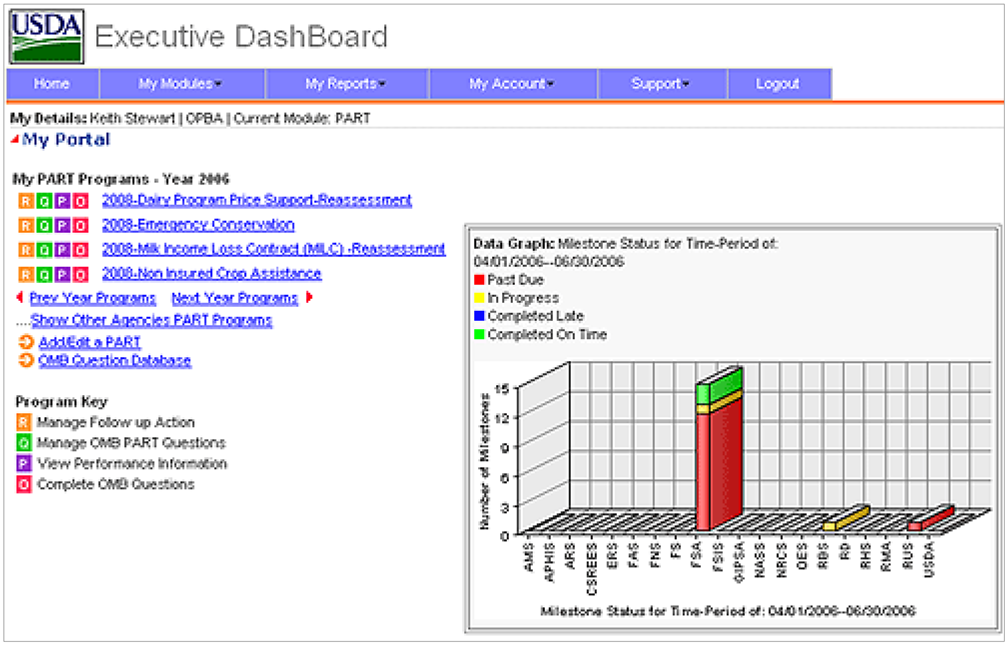


Delete	Agency	Name	Email	Phone	e-Authentication ID
	USDA	Account, Developer	support@espherical.com	202-787-1935	28200601240011256292959
	FS	Official, Approving	support@espherical.com	202-787-1935	28200601240011254172958
	FS	User, Agency	support@espherical.com	202-787-1935	28200601240011252172957
	RD	Riger, Alex	alex.riger@wdc.usda.gov	(202) 555-0000	28200601240011252172000
	FNS	Owner, Initiative	support@espherical.com	202.787.1935	28200601240011249302956
	USDA	Coordinator, PMA	support@espherical.com	202.787.1935	28200601240011245032954
	USDA	schmoe, joseph	joe.schmoe@usda.gov	720-0000	28200601240011241422955
	FSA	Officer, Security	support@espherical.com	202-787-1935	28200601240011241422952
	NASS	Stewart, Keith	webmaster@espherical.com	202.257.5647	28200601180011410012944
	USDA	Roccaforte, John	john.roccaforte@usda.gov	970 295-5168	28200402060010000004576
	USDA	Claybaker, Elizabeth	Elizabeth.claybaker@usda.gov	2026900653	00000000000000000000001

The Security Officer Home Page sample is shown in Figure #1. This image is in Landscape View and will require you to turn your Training Manual to view it properly. Please turn your Manual now as the instructor explains the navigation elements.

For this training exercise, we will practice scrolling on several of the user table columns to learn how to quickly locate users. We will also learn about using some of the icons on the page as visual cues to quickly perform various tasks.

Figure 2: PART Homepage View



The PART Home Page sample is shown in Figure #2 above. Please follow the image on the projector screen as the instructor explains the PART home page navigation elements.

For this Training exercise, we will learn about the page navigation icons and how they can assist us in performing tasks and locating information quickly.

1.6. PART User Roles Overview

For this section of the training, a quick overview of the 7 User Roles within the PART module is presented for reference:

1. **Security Officers:** Security Officers are essentially account managers and can create all user account levels within MITS.

2. **OBPA Officer:** The OBPA Officer is the top-level PART manager with the following overall functions:

    a. Approve/reject follow-up action milestones
    b. Approve/reject performance measures
    c. Approve/reject agency evidence and explanation responses
    d. Create New PART programs
    e. Edit/Manage existing PART programs
    f. Manage PART questions database and assign questions to individual PARTS

g. Manage OMB Follow-up Actions

3. **Executive Officers:** Executive Officers include senior management officials, and sub-cabinet officials. Executive Officers can generate and view standard and custom reports from the system

4. **Mission Area Coordinators:** Mission area coordinators have control of PART programs for Agencies within their Mission Area. Mission area coordinators have the following functions:

    a. Approve/reject follow up action milestones
    b. Approve/reject performance measures
    c. Approve/reject agency evidence and explanation responses

5. **Administrators:** Administrators have similar functions as the Mission Area coordinators except that Administrators are responsible only for their own agency. In addition, Administrators serve as the first level in the approval process for milestones, evidence/explanations, and performance measures.

6. **Agency Users:** Agency Users can enter PART data such as OMB Question evidence/explanation data, milestones, and performance data.

7. **Developer Account Users:** Developer Account Users can have read/write access to all PART information. These accounts will be limited to USDA NITC support staff, G&B, and eSpherical.com software developers.

Please Note: In the PART detail screen and on some graphs in the PART module, you may see the terms “Recommendations” and “Follow-up Actions” used interchangeably. Starting in the 2006 PART review year, the OMB decided to rename “Recommendations” to “Follow-up Actions”. Generally, this PART module will replace the term Recommendation with Follow-up Action.

---------========== END OF CHAPTER 1 =========----------

Chapter 2

2

2. Security Officer Training

Security Officers are responsible for creating, managing, and deleting user accounts for the MITS software application. In order to create a user in MITS, Security officers should receive a completed AD-1143 Form with all the required user details and authorities within MITS. Security Officers do not have access to the individual MITS modules (PART, Scorecard, Audit, Budget, etc.); they can only manage user accounts within the Security Officer Module.

2.1. Training Objectives

The primary objectives for the security officer training include the following user management functions:

A. Login and get to know the Security Officer home page
B. Create a new user
C. Edit an existing user details
D. Delete an existing user

For each objective above, we will confirm that the security officer was able to successfully accomplish the task.

> Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the Security Officer home page.

2.2. Step 1: Login

The first step in this training process is to login as the Security Officer. Using the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are on the Security Officer home page.

> Check to ensure that you have logged into the Security Officer Home page. You should see a list of user accounts (similar to Figure #1). If you are unable to login, please notify the instructor now.

2.3. Step 2: Create a New User

The second step for Security Officer training is to create a new user account. To create a new user account, from the Security Officer Home page, click on the Add a New User link at the top of the page. This will take you to the New User page.

STOP: when creating a new user, you cannot use an existing e-authentication ID; each user must have a Different and Unique e-authentication ID. Your Instructor will provide you with a temporary e-authentication ID to use for this training.

To create a new user, you will need to enter all the information on the form. Each item will be discussed by your instructor.

INFO: when you create a new user, you have the choice of selecting multiple Initiatives for the user. Multiple Initiatives can be selected for all user types except Initiative Owners. For Initiative Owners, you need to select only one Initiative. Also, the email frequency radio button refers to the frequency which users will be notified of upcoming milestones and/or events in MITS.

Once you have entered all the information for the new user, click the submit button and your new user has been created. Your browser is directed back to the Security Officer home page and your new user will be highlighted in light yellow color. Please scroll to find the user you just created. If you receive any error or warning message or if you cannot locate the user you just created, please alert your Instructor.

Note: remember the user account you just created, you may want to write it down for your reference. You will use this account in the next two training steps.

New User Account (Name): ____________________________________

2.4. Step 3: Edit Existing User

The third step for Security Officer training is to edit information in a user account. To edit user information, from the Security Officer Home page, find the user you wish to edit and click on the user’s name. This will take you to the manage user page.

STOP: for this step, please use the new account you created in the previous step.

You can edit any of the information in this user's account. When you are finished editing, please click on the Edit button at the bottom of the page to save your edits. Your browser will be redirected to the Security Officer home page and the account you just edited will be highlighted in light yellow color. Please verify that the edits you made for the account were successful.

2.5. Step 4: Delete Existing User

The fourth and final step for the Security Officer training is to delete a user account. To delete a user account, from the Security Officer home page, find the user to be deleted.

STOP: for this step, please use the new account you created in the previous step.

Once you have located the user for deletion, click on the trash can icon next to the user name. This will redirect your web browser to the Confirm Deletion page. The purpose of the confirm deletion page is to provide the Security Officer with an additional confirmation step before a user is deleted.

INFO: when a user is deleted from the MITS system, there is NO undo for this deletion. All deletions are final.

2.6. Conclusion and Wrap-Up

This ends the Security Officer Training. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Security Officer Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: Security Officer home page navigation
		STEP 2: Create new user
		STEP 3: Edit existing user
		STEP 4: Delete existing user

Trainee, please complete the table above for your records.

The Instructor will provide a few minutes for open discussion, questions and answers from the trainees.

---------========== END OF CHAPTER 2 ==========----------

Chapter 3

3

3. Managing PART Summary Information

The PART module includes features which allow authorized users to manage key summary information about their individual PART program. This summary information includes OMB required data as well as data which will help an agency manage its PART and track PART follow-up actions. The PART summary page can be thought of as the "PART Portfolio" for a given PART since it has an accumulation of key program, agency and OMB information.

INFO: One of the key new features of the PART module Summary page includes the ability to track agency-level Follow-up Action milestone approval and OMB Follow-up Action approval status. This training will focus on these new functions as well as the new Key Finding and Budget Account filter features.

3.1. Training Objectives

The primary goal for the PART Summary training includes completing each of the following tasks:

1) Login to the MITS application
2) View a PART program summary page
3) Create a new follow-up milestone
4) Review and approve an existing follow-up milestone
5) Enter and edit Key Finding information
6) Select and assign budget account information

For each task above, we will confirm that the Trainee was able to successfully accomplish the task.

Please Note: the Training Instructor will provide you with a temporary User ID and Password to access the MITS home page.

3.2. Step 1: MITS Login

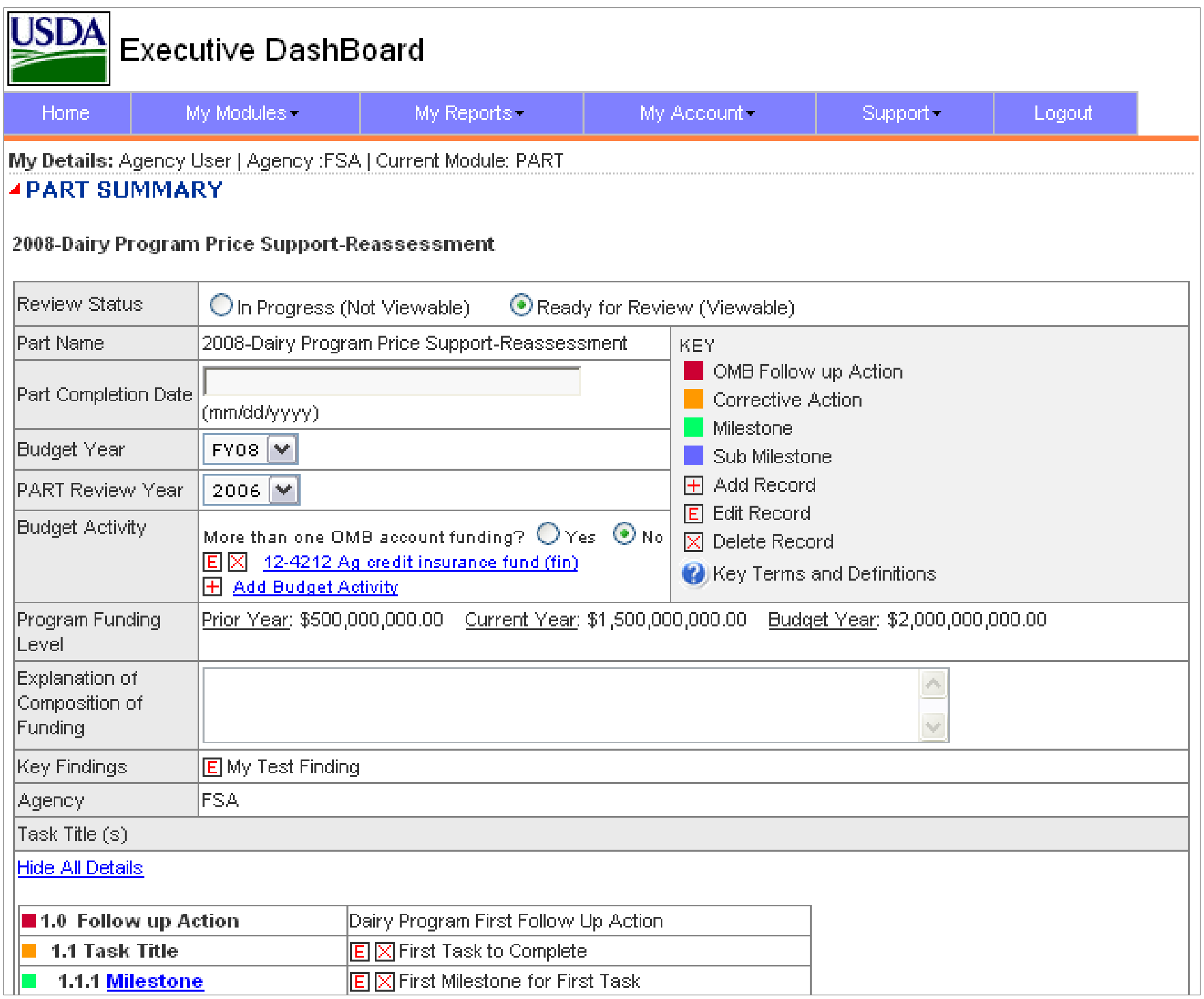
The first step in this training process is to login to MITS. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the PART home page.

STOP: For this part of the training, please login as a PART Administrator. The instructor will provide you with an ID and password.

3.3. Step 2: PART summary page

The PART summary page includes overall program information for each individual PART. For this portion on the training, we will review some of the key areas on the PART summary page and learn about new milestone and follow-up action approval processes and tracking.

Figure 3: PART Summary Page



In addition, your instructor will review the new Key Findings function as well as the new Budget Activity selection feature. Please follow with the instructor for an on-screen review of the summary page.

3.4. Step 3: Create a new follow-up milestone

This version of the MITS PART module includes a new milestone approval and tracking process in the summary screen. To test the new follow-up action milestone approval process, for this exercise we will create a new milestone and then view its default status. This will allow us to examine how the approval and tracking process works.

> Please Note: for this step in the training exercise, the Instructor will assist you with creating a new milestone. Please follow along with the instructor to add a new milestone.

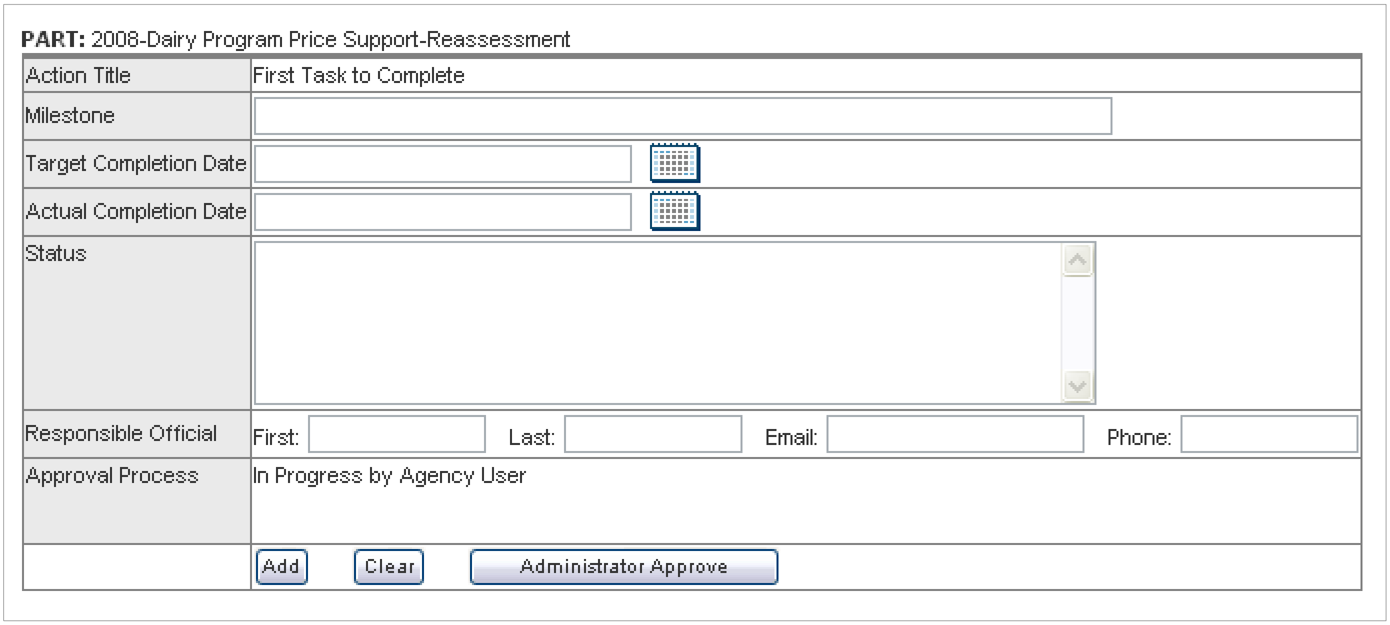
To add a new milestone, we first click the selected PART program. After the summary screen is displayed, we then select a follow up action where we wish to add the new milestone; click the New Milestone icon to add a new milestone (See Figure #4). For the purpose of this exercise, the instructor will type in a sample milestone for demonstration purposes.

1.0 Follow up Action	Dairy Program First Follow Up Action
1.1 Task Title	First Task to Complete
1.1.1 Milestone	First Milestone for First Task
Target Date	05/22/2006
Actual Date	
Status	Under Way
Approval Process	Approved by OBPA
Responsible Official	Keith Stewart ceo@espherical.com 2022575647
Add New Milestone	New Milestone
Add New Sub Milestone	New Sub Milestone
1.1.2 Milestone	Second Milestone for First Task
Target Date	06/30/2006
Actual Date	
Status	
Approval Process	In Progress by Agency User
Responsible Official	Dedria White dedria.white2@usda.gov 202 7208346
Add New Milestone	New Milestone
Add New Sub Milestone	New Sub Milestone
2.0 Follow up Action	Dairy Program Second Follow Up Action

Manage: Add Task Title

Figure 4: Sample Milestone Management

When you click the New Milestone icon, a new Add Milestone template will open to allow you to enter your milestone information (See Figure #5).



PART: 2008-Dairy Program Price Support-Reassessment

Action Title	First Task to Complete
Milestone	
Target Completion Date	
Actual Completion Date	
Status	
Responsible Official	First: Last: Email: Phone:
Approval Process	In Progress by Agency User
	Add Clear Administrator Approve

Figure 5: Sample Add Milestone Template

CHECK: please enter all the information in the Add Milestone template (actual completion date is optional). When you have entered all the data, please click on add to return to the PART summary page. The status for the new milestone should now indicate In Process by Agency User.

The milestone you just created should now be displayed next to the Approval Process heading with the status of “In Progress by Agency User”. Once you have confirmed this, please move to the next step.

3.5. Step 4: Review and approve a follow-up milestone

One of the new functions available in the PART summary module includes the milestone approval process. By default, when a milestone is created, it is automatically assigned a status of “In Progress by Agency User”. After the successful creation of a new milestone, a PART administrator and/or an OBPA officer can approve the milestone or send the milestone back to the agency user for revision. This process automates the business rules for the USDA regarding the creation and management of milestones for PART programs.

For this training, we will approve the new milestone we just created in step 3 above.

CHECK: please ensure that you are still logged on as a PART Administrator. If you are not sure, please logoff and log back on with the PART administrator credentials.

To approve the new milestone, click on the Edit Milestone icon for the new milestone you created in Step 3 (Please refer to Figure #4). The Add/Edit milestone screen will be presented. This is the same screen as in Figure #5 except that the screen will include the data you entered for your milestone. At the bottom of Figure #5 the Administrator Approve button is visible; click this button to approve the milestone. Your web browser should be redirected to the PART summary page and your milestone Approval Process indicator should indicate "Approved by Administrator". The milestone approval process is complete.

Note: We will repeat the above process for OBPA Officers during Chapter 8 training. The milestone approval process is essentially the same for OBPA Officers with the exception that OBPA Officers can return the Milestone to the Agency user.

3.6. Step 5: Enter and edit Key Finding information

The new Key Finding feature allows users to create and edit PART key finding information. This field is designed to synchronize with the OMB key findings. For this training, we will simply edit and/or create a key finding. To create/edit a key finding, click on the icon next to the Key Finding title in the PART summary page; type in your key finding text and click the Edit button when completed. Your Key Finding information is now updated. This concludes the Key Finding portion of the training.

3.7. Step 6: Select budget account information

The PART summary screen includes a new enhancement for the Budget Activity feature. The new enhancement will filter the USDA treasury accounts based on the user's agency. To use this new feature, click on the Add Budget Activity link in the PART summary page. The Add Budget Activity page will be displayed; confirm that only treasury accounts associated with your agency are listed in the drop drown select list.

INFO: For OBPA Officers, the treasury list is a complete list of all USDA treasury accounts to allow OBPA Officers complete PART control.

3.8. Conclusion and Wrap-up

This ends the User Training for the PART Summary page and new/enhanced PART summary features. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

PART Summary Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: MITS User login
		STEP 2: PART summary page display
		STEP 3: Create a new follow-up milestone
		STEP 4: Review and approve a follow-up milestone
		STEP 5: Enter and edit Key Finding information
		STEP 6: Select budget account information

Trainee, please complete the table above for your records.

The Instructor will provide a few minutes for open discussion, questions and answers from the trainees.

----------========== END OF CHAPTER 3 ==========---------

4. Managing PART Explanation and Evidence Information

The MITS PART module includes several new features in the OMB PART explanation and evidence submission templates. As a refresher, these templates allow authorized users to respond to each OMB question for each of the 4 PART sections. A sample screen for section 1 is displayed in Figure #6 below.

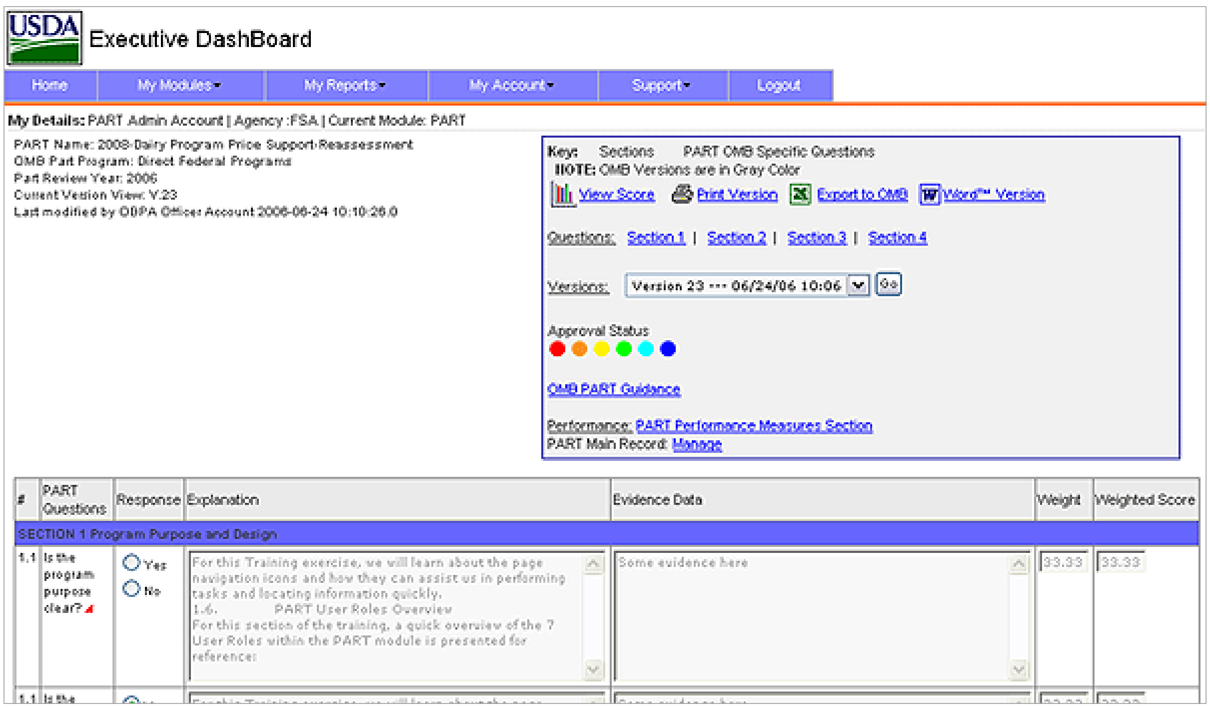


Figure 6: Sample Explanation / Evidence Screen

There are two new features included in the Explanation and Evidence sections for PART:

1. New 4,000 character count function for each explanation and each evidence field.
2. New approval process

Each of these new features will be covered in this training course.

Chapter 4

4

4.1. Training Objectives

The primary goal for the PART Explanation and Evidence training includes completing each of the following tasks:

1) Login to MITS using each of the following User Accounts
   a. Agency Administrator
   b. Mission Area Coordinators
   c. OBPA Officer
2) Test the 4000 Character Limit field
3) Save the PART Explanation/Evidence record
4) Manage the Explanation/Evidence record through each approval process:
   a. Not Yet Submitted
   b. Version has been submitted to OBPA for revision
   c. Version has been approved from OBPA and send back to Agency for revision
   d. Version has been submitted to Mission Area Coordinator
   e. Version has been approved and sent to OBPA for final revision
   f. Final Version has been sent to OMB

Please Note: The training instructor will provide you with a Test PART and user account information to accomplish each of the items in Tasks 1-4 above.

4.2. Step 1: Account Login

The first step in this training process is to login as a PART Administrator. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to MITS PART home page. We will work on a test PART supplied to you by your training instructor. To begin, click on the Red O next to the PART name indicated by your instructor. Once you have entered the PART Explanation and Evidence record, continue to the next step.

4.3. Step 2: Test 4,000 character limit

For this training step, we will attempt to enter 4000 characters of text to see if the character limit functions properly. To test this feature, we have created a 4,000 character block of unformatted text below. To test this feature, use your cursor and select (highlight) the text below the COPY BELOW line and above the COPY ABOVE line; make sure you do not copy ANY characters in the COPY lines. Once you have selected (highlighted) the text block, click your CTRL and C key at the same time to Copy the text; alternatively, you can view the following online file and select all the text: https://mitstest.ocfo.usda.gov/4000.txt.

------------- COPY BELOW THIS LINE -------------

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Chapter 4

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When you paste this information into the explanation or evidence box, check at the bottom of the box (you will need to use the scroll on the right side of the box) to ensure that you can see the last 4 end characters in the box; 4000. Try to type an additional character after the 4000 number. You should NOT be able to enter any additional characters. This completes the 4,000 character limit test for the explanation and evidence template.

4.4. Step 3: Save Explanation/Evidence Record

This step of the PART training involves saving the Explanation/Evidence record which you just worked on in step 2 above. Since this is a new record and you are logged on as a PART administrator, you will see the following button options at the top of your record:

I am finished working on this record

Save as New Version

Save Version to OBPA

For this step, we will select the bottom button: Save Version to OBPA. Click this button and you will receive the message “Version xx has been created. A copy has been submitted to OBPA for revision”. The red Approval icon will change to the Orange Approval icon. We will now continue the approval process in the next step (4).

4.5. Step 4: Manage the Explanation/Evidence Approval Process

Managing the Approval Process for the PART Explanation/Evidence templates is essentially the same for each user level: the user must review the submitted information and either approve or send the information back to the agency user. Each time the Explanation/Evidence is approved or sent back to the agency user, a new version of the record is created. This allows for the accurate tracking of the data. For reference, a diagram of the flow process from the PART requirements document and design document is included in Figure #7.

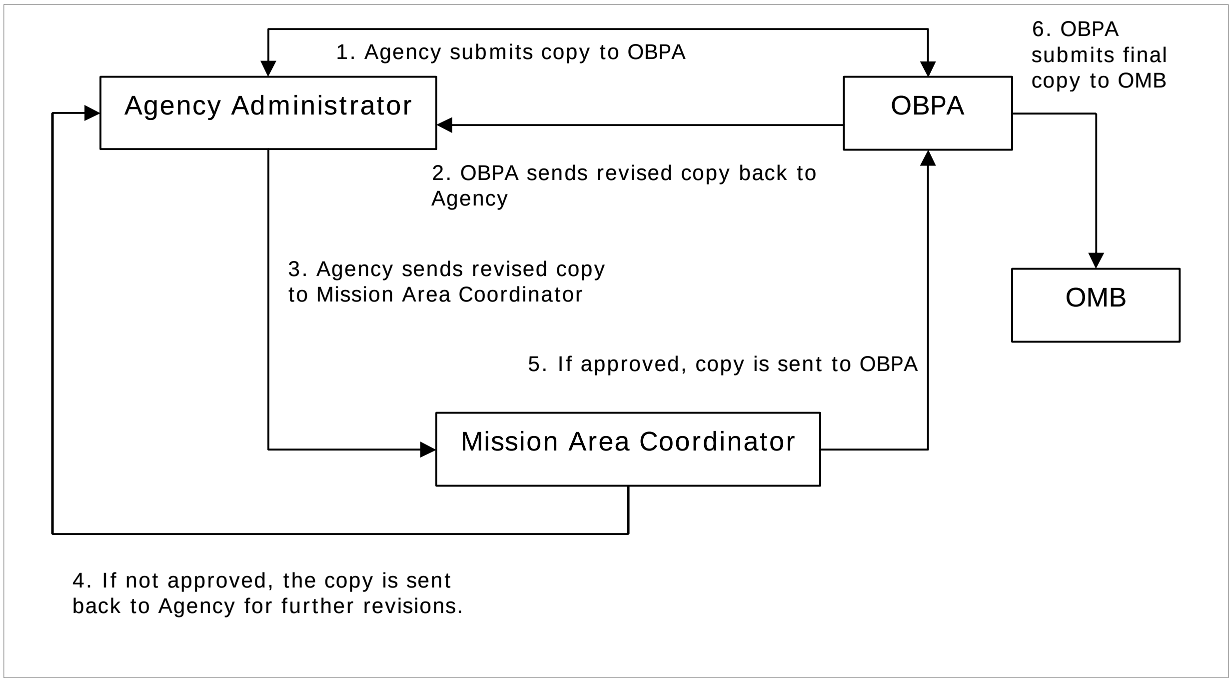


Figure 7: Approval Process for Explanation and Evidence Template

For the approval process, users will now logout of the MITS application and then log back in as an OBPA officer. Once successfully logged in, navigate back to the PART just entered. Click on the “I want to work on this Record” and review the Explanation/Evidence information. When satisfied, click the Return Version to Agency and a new Version is created and notification sent to the Agency user. The yellow icon will be displayed on the Approval Status indicating that the PART has been returned to the Agency. Now, logout and log back on as a PART Administrator. Navigate back to this PART.

The next phase in the approval process requires the agency user to review the returned PART and either send to the Mission Area Coordinator or return back to the OBPA officer to start the process again (see buttons below).

Save as New Version

Save Version to OBPA   Save Version to Mission Area

For this training exercise, we will submit the PART to the Mission Area coordinator for review. A new version will be created and sent to the Mission Area coordinator; the green icon is now displayed indicating that the PART has been submitted to the Mission Area coordinator. Now, logout and log back in as a Mission Area coordinator, and navigate to the PART just entered.

The next phase in the approval process requires the Mission Area coordinator to review the submitted PART and either send to the OBPA Officer or return back to the Agency user to start the process again (see buttons below).

Save as New Version

Return Version to Agency Save Version to OBPA

For this training exercise, we will submit the PART information to the OBPA Officer for final approval. Click the Save Version to OBPA button and a new version is created and notification sent to the OBPA officer; the light blue icon is displayed indicating the PART has been submitted to the OBPA officer. Now, logout and log back in as the OBPA Officer, navigate to the PART just entered.

The final phase in the PART Explanation/Evidence approval process requires the OBPA Officer to review the submitted PART and either return the PART back to the Agency user to start the process again or to Approve the PART for OMB submission (see buttons below).

Save as New Version

Submit Version to OMB

For this training exercise, the OBPA Officer will approve the PART for OMB submission. Click on the Submit Version to OMB and the process is completed. The dark blue icon is now displayed in the Approval Status area. The training is complete for the Explanation/Evidence Approval Management Process.

4.6. Conclusion and Wrap-up

This ends the Explanation/Evidence Approval Management Process Training for the PART Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

PART Explanation / Evidence Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: Account login
		STEP 2: Test 4,000 character limit
		STEP 3: Save Explanation/Evidence Record
		STEP 4: Manage the Explanation/Evidence Approval Process

---------========== END OF CHAPTER 4 =========---------

5. Managing PART Performance Information

The MITS PART module includes several new features in the OMB PART Performance Measures templates. As a refresher, these templates allow authorized users to create and manage performance measures specific to each PART program. A sample performance measures screen is displayed in Figure #8 below.

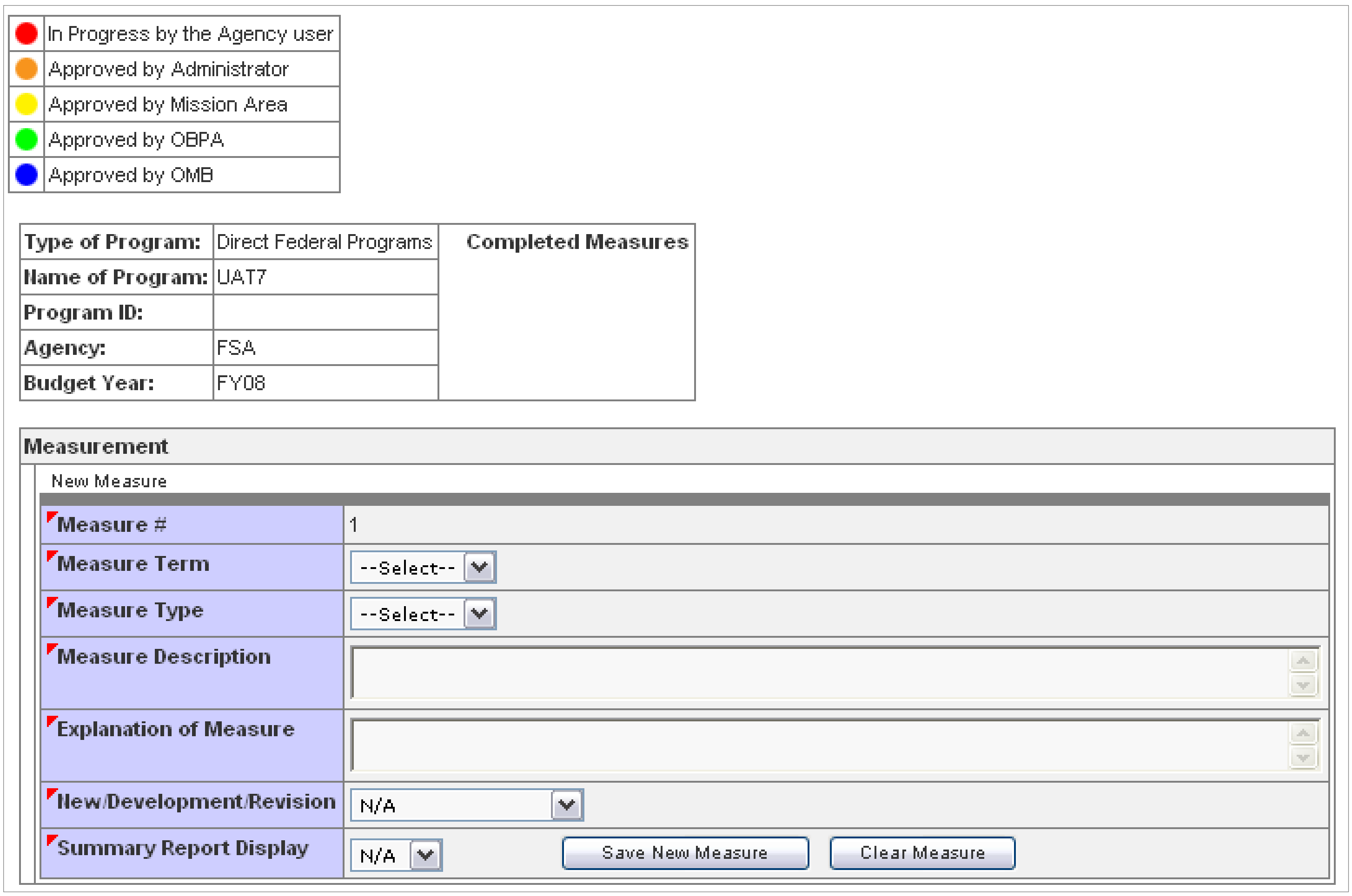


Figure 8: Sample Performance Measures Screen

New features for the performance management templates include:

1. Measure detail ordering/reordering
2. Measure approval process

Chapter 5

5

5.1. Training Objectives

The primary goal for the Performance Measures training includes completing each of the following tasks:

1) Login to MITS using each of the following User Accounts
   a. Agency Administrator
   b. Mission Area Coordinator
   c. OBPA Officer
2) Create new performance measures
3) Manage the performance measure record through each approval process:
   a. In Progress by the Agency user
   b. Approved by Administrator
   c. Approved by Mission Area
   d. Approved by OBPA
   e. Approved by OMB

Please Note: The training instructor will provide you with a Test PART and user account information to accomplish each of the items in Tasks 1-3 above.

5.2. Step 1: Login

The first step in this training process is to login as an Agency User. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the PART home page. Click on the purple P icon P next to the PART you wish to manage; you will be navigated to the performance management page (refer to Figure #8 above).

5.3. Step 2: Create a New Performance Measure

This portion of the PART performance measures training involves creating a new performance measure for the test PART created in Chapter 4. From the performance measures screen, enter the information for your measure using the drop down selection boxes and the text areas. Complete all the information on the new measure screen and click the Save New Measure button at the bottom of the data entry screen. Your new measure is created and saved as Measure #1 (unless you have entered other measures, in which case your measure will be numbered sequentially). When your measure is saved, it is by default assigned a status of "In Progress by Agency User" and the red Approval Status icon is displayed next to the measure number and measure title.

Once you have completed creating the first measure, repeat the process and create a second measure. When you have created your second measure, click on the Edit icon for the first measure, click on the "I want to work on this record" button and begin to enter a few measure details. For your measure details, select the measure detail year and enter numeric values for Target and Actual; you may leave some actual values empty for future years.

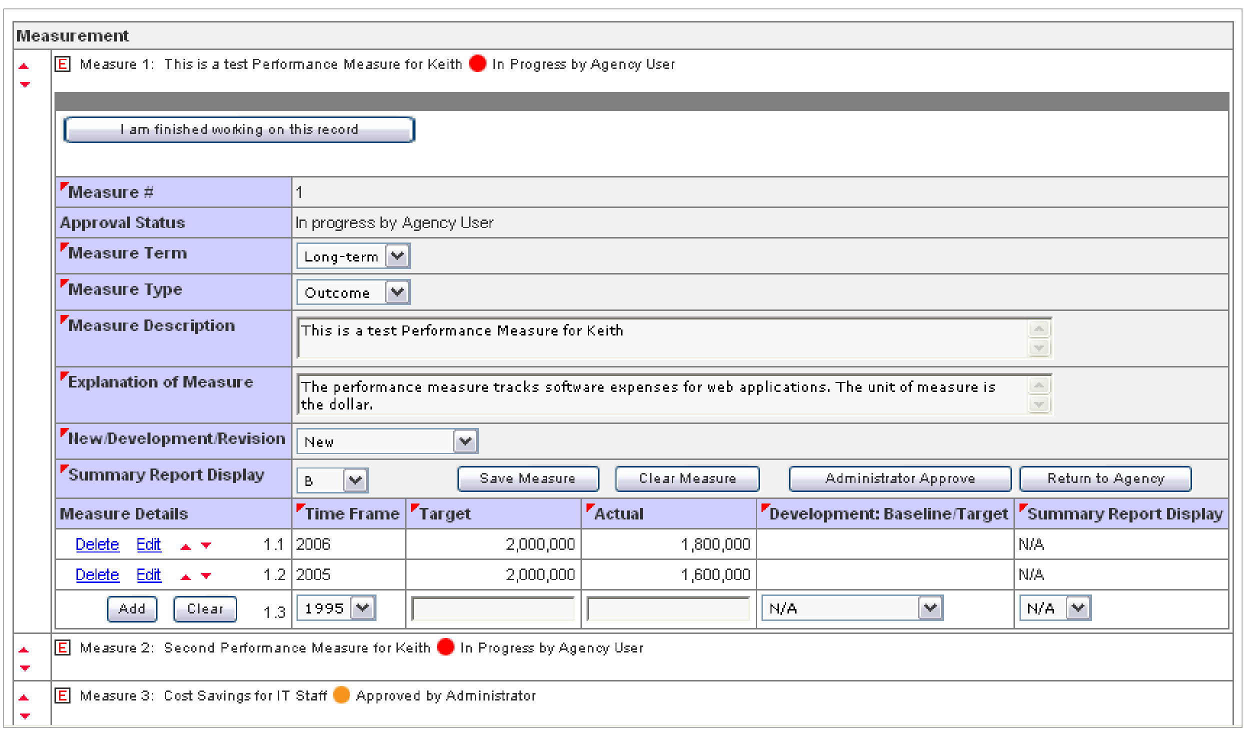


Figure 9: Sample Performance Measures Detail Screen

Once you have created two measures, one of the new features for this version of the PART module allows you to move and re-order measures and measure details. As a preview, please follow along with the instructor on the screen as the instructor demonstrates the measure detail re-order function. To practice this feature, locate the small up/down red triangles next to a measure detail for the measure you are working on. Make sure you have at least two details. Click the up or down icon to move the measure detail.

This function is also available to re-order an entire measure. To use this function, ensure that you have finished working on all measures by clicking the "I am finished working on this record" button. You can then click the small up/down red triangles next to a measure number and re-order the entire measure. Please practice this feature. When you have moved a measure up and/or down, you are finished with this step and ready to move to the next step (step 3) of this training.

5.4. Step 3: Manage the Performance Measures Approval Process

Managing the Approval Process for the PART performance measures templates is essentially the same for each user level: the user must review the submitted information and either approve or send the information back to the agency user. Each time the performance measure is approved or sent back to the agency user, the status icon changes to reflect the current status.

Unlike the PART Explanation/Evidence Approval process, the performance measures approval process does NOT include versioning.

From the performance measures created in the previous step (Step 2), you should be logged on now as a PART administrator; if you are not, please log on as a PART administrator. Locate the first measure and click on the E icon to edit the measure. Click on the "I want to work on this record" button to open the measure for editing. Towards the bottom of the measure description and above the measure detail area, you will see a series of Approval buttons (please refer to the lower right in Figure #9 above).

Administrator Approval

Review the measure and if you are satisfied with the measure, click the Administrator Approve button. If you are not satisfied with the measure, you may click the Return to Agency button to send the measure back to the Agency User for revision. For the purpose of this training exercise, we will click the Administrator Approve button. When you click the Administrator Approve button, the Approval status changes to the orange icon and the measure is no longer available for administrator edit. Now, logout of MITS and log back in as a Mission Area coordinator.

Mission Area Approval

Once you have logged on as a Mission Area coordinator, please click on the purple **P** icon next to the PART you just worked on. When you open the performance measures page, click on the E icon to edit the measure from the previous step, then click on the "I want to work on this record link" to open the measure. Towards the bottom of the measure detail you will see a series of buttons for Mission Area approval and return to Agency user. For this training exercise, we will approve the measure; click the Mission Area Approve button and the approval status is changed to yellow. The performance measure is now unavailable for Mission Area coordinator edit; it is in the OBPA approval status. Now, logout of MITS and log back in as an OBPA user.

OBPA Officer Approval

Once you have logged on as an OBPA Officer, please click on the purple **P** icon next to the PART you just worked on. When you open the performance measures page, click on the E icon to edit the measure from the previous step, then click on the "I want to work on this record link" to open the measure. Towards the bottom of the measure detail you will see a series of buttons for OBPA Approve, OMB Approve, and Return to Mission Area.

For this training exercise, we will approve the measure for OBPA; click the OBPA Approve button and the approval status is changed to green. The performance measure may still be approved by the OBPA Officer for OMB approval. Now, logout of MITS and log back in as an OBPA user. For practice, you may also click on the performance measure again and approve the measure for OMB which will change it approval icon to dark blue. This concludes the performance measure approval process training.

5.5. Conclusion and Wrap-up

This ends the Performance Measure Training for the PART Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

Performance Measure Approval Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: Multiple account login
		STEP 2: Create new performance measures
		STEP 3: Manage performance measure approval process

---------========== END OF CHAPTER 5 ==========---------

6. Reporting Functions

The PART Module includes an online reporting module for generating standard reports, custom reports, status graphs, and OMB reports. Each of these report types will be covered in this training chapter.

6.1. Training Objectives

The primary goal for the PART Reports training includes completing each of the following tasks:

1) Login to the MITS PART Homepage
2) Review the Reports Drop Down List Navigation
3) Generate Standard Monthly Reports
4) Generate Standard Annual Reports
5) Construct and Generate a Custom Report
6) Review Status Graphs
7) Generate an OMB Report

For each task above, we will confirm that all users are able to successfully accomplish the task.

6.2. Step 1: Login

The first step in this training process is to login as a PART Administrator and ensure that you are on the MITS PART home page. You can use any of the other account types for reporting; the Mission Area coordinator account will allow you to view information for all Mission Area agencies. The OBPA Officer account will allow you to view data for all agencies. For this training, we will use the PART Administrator account.

6.3. Step 2: Reports Drop Down List Navigation

Once you login, place your cursor over the menu item labeled My Reports to access the various types of reports. We will use this menu link throughout this

Reports Training session. A sample of the Menu Drop Down is displayed in Figure #10 below. Please follow the image on the projector screen as the instructor explains the Report navigation elements.

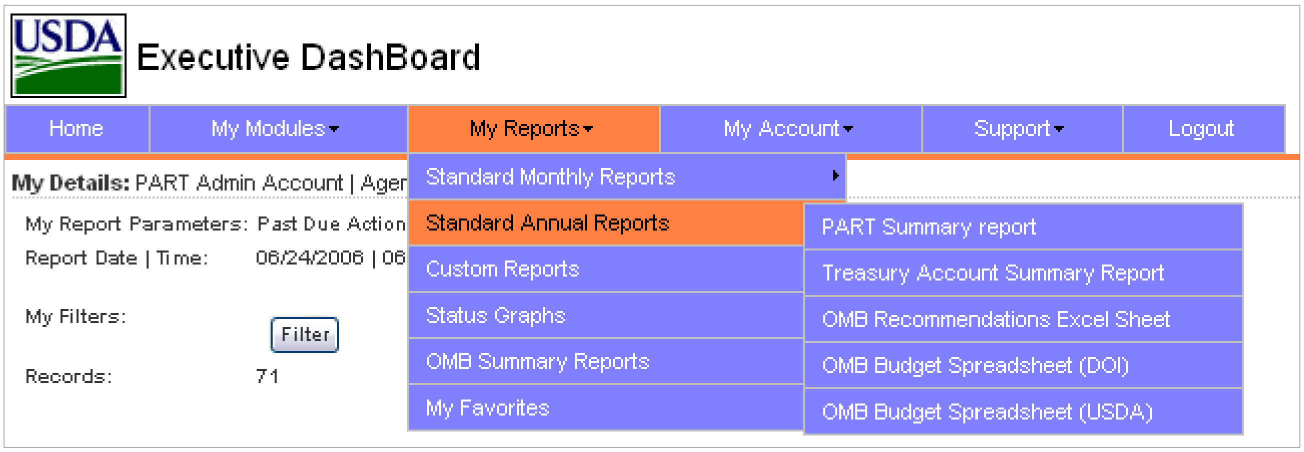


Figure 10: Reports Menu Navigation

For this Training exercise, we will introduce the course participants to the five Reporting areas available on the My Reports menu:

1. Standard Monthly Reports
2. Standard Annual Reports
3. Custom Reports
4. Status Graphs
5. OMB Summary Reports

With in each of these report types, there are multiple sub reports available. We will cover most of these reports in this training session.

6.4. Step 3: Generate Standard Monthly Reports

This step of the Reports training involves generating several Standard Monthly Reports. To begin, put your cursor over the My Reports menu item and select the Standard Monthly Reports sub menu. From this sub menu, you can generate the following standard monthly reports:

1. Mission Area Reports
2. Due Milestones Reports
3. Completed Milestones Reports
4. In Process Milestones Reports
5. Past Due Milestones Reports

For this portion of the training, please follow along with the instructor as you are guided through the available reports. For each standard monthly report, several report key fields are printed at the top of the report as displayed in Figure #11 below:

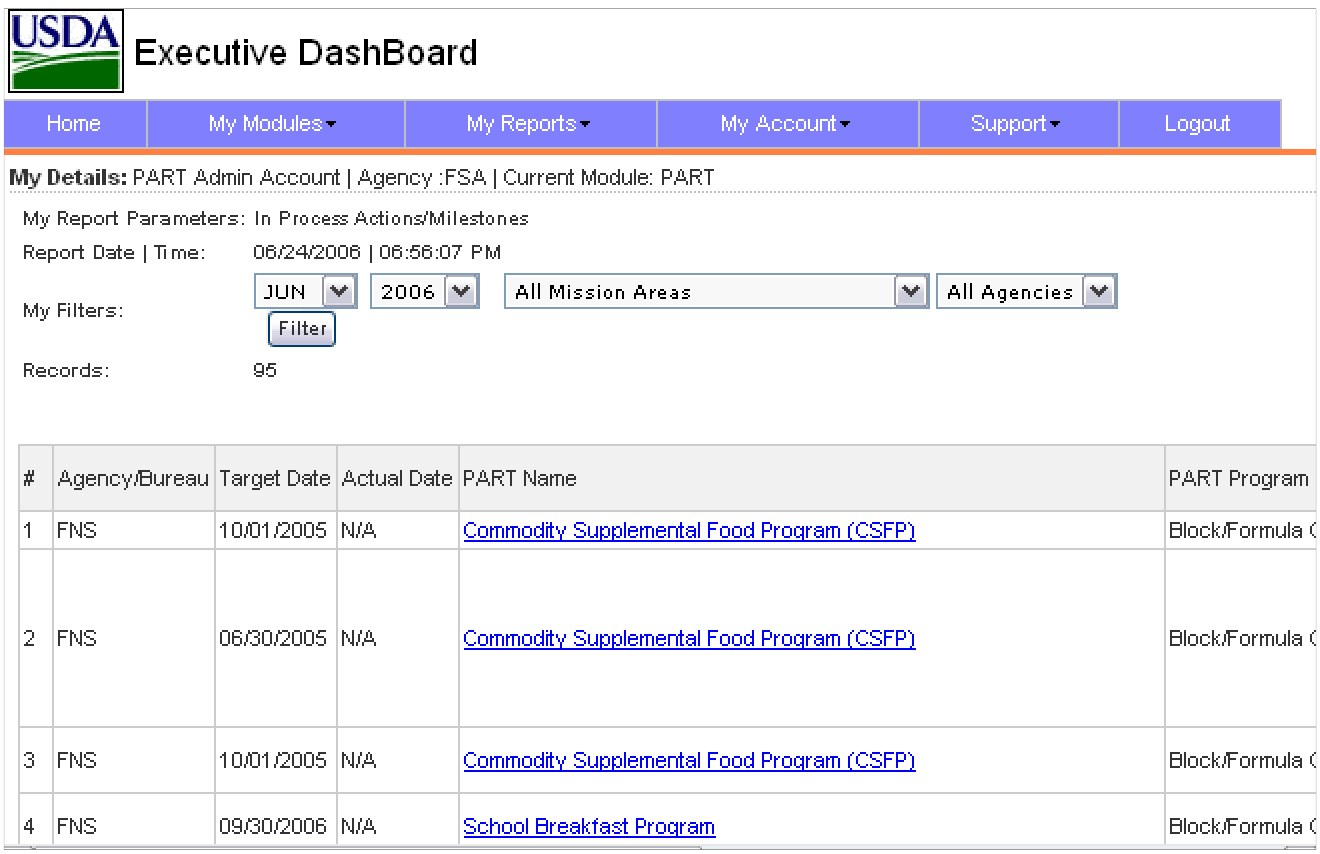


Figure 11: Sample Custom Report Screen

Key indicator items at the top of each report include the report parameters, date and time, filters and a count of returned records. There are also several drop-down selection list boxes to let you view other report periods (months) and mission areas and agencies based on your permission levels.

The report sample in Figure #11 above is similar for each of the Standard Monthly report types. Please practice generating several of these reports as your instructor demonstrates on the class room screen.

6.5. Step 4: Generate Standard Annual Reports

This step of the Reports training involves generating several Standard Annual Reports. To begin, put your cursor over the My Reports menu item and select the Standard Annual Reports sub menu. From this sub menu, you can generate the following standard annual reports:

1. PART Summary Report
2. Treasury Account Summary Report
3. OMB Recommendations (Follow Up Actions) Excel Sheet
4. OMB Budget Spreadsheet (DOI)
5. OMB Budget Spreadsheet (USDA)

For this portion of the training, please follow along with the instructor as you are guided through the available reports. Reports 2 through 5 above are Microsoft Excel™ reports. The MITS PART module will automatically generate these reports in Excel Format and will open the Excel program on your computer to view the report.

6.6. Step 5: Construct and Generate a Custom Report

This step of the Reports training involves generating a Custom Report. To generate a Custom Report, put your cursor over the My Reports menu tab and click the Custom Reports selection; you will be directed to the Custom Reports Generation page (see Figure #12 below).

Chapter 6

6

For the custom report, you can select any combination of data fields present to build a filter for your repot. The custom report is partitioned into two main areas: the PART Report and the Performance Measures Report.

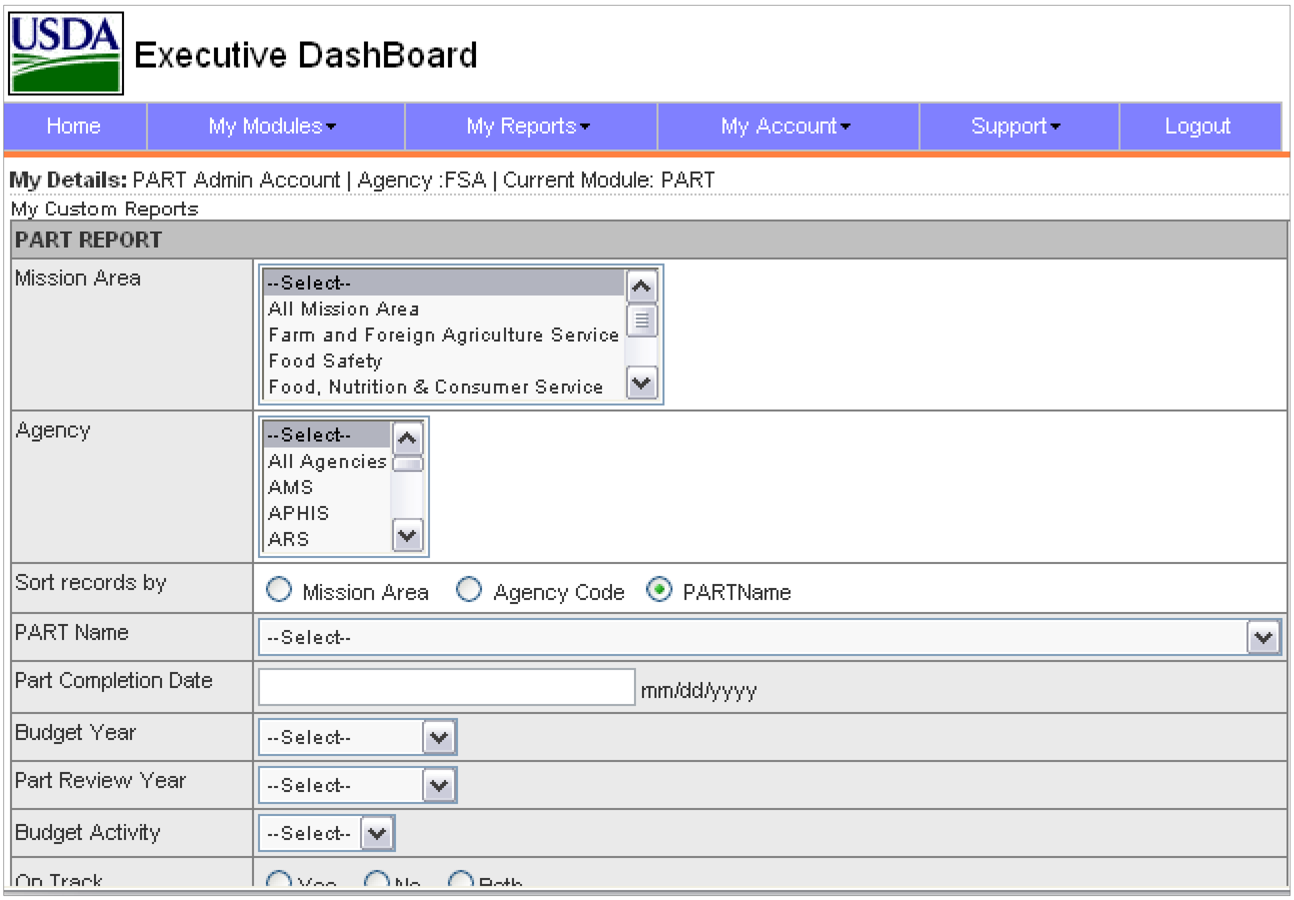


Figure 12: Custom Reports Generation Screen

Follow along with you instructor as you practice generating several custom reports.

INFO: After you have generated a custom report, if you are happy with the report, you can save the report to your Favorites. This will save all your report parameters and then next time when you wish to view the report, you can quickly select the report from your favorites in the My Reports Drop Down menu. This will save you time for reports you wish to view periodically. When you save a report to My Favorites, you will be prompted to name the report. It is suggested that you name the report something intuitive so you will easily remember when you view the report later.

6.7. Step 6: Review Status Graphs

The Status Graphs are a new report type available in the release of MITS PART. To access the status graphs, put your cursor over the My Reports Menu and select the Status Graphs link.

The Status graph will be generated. Please be patient as the graph is generated: this graph is measuring several items and may take up to a minute to generate. The Status Graph will provide you with 5 general graphs and associated data tables as displayed below:

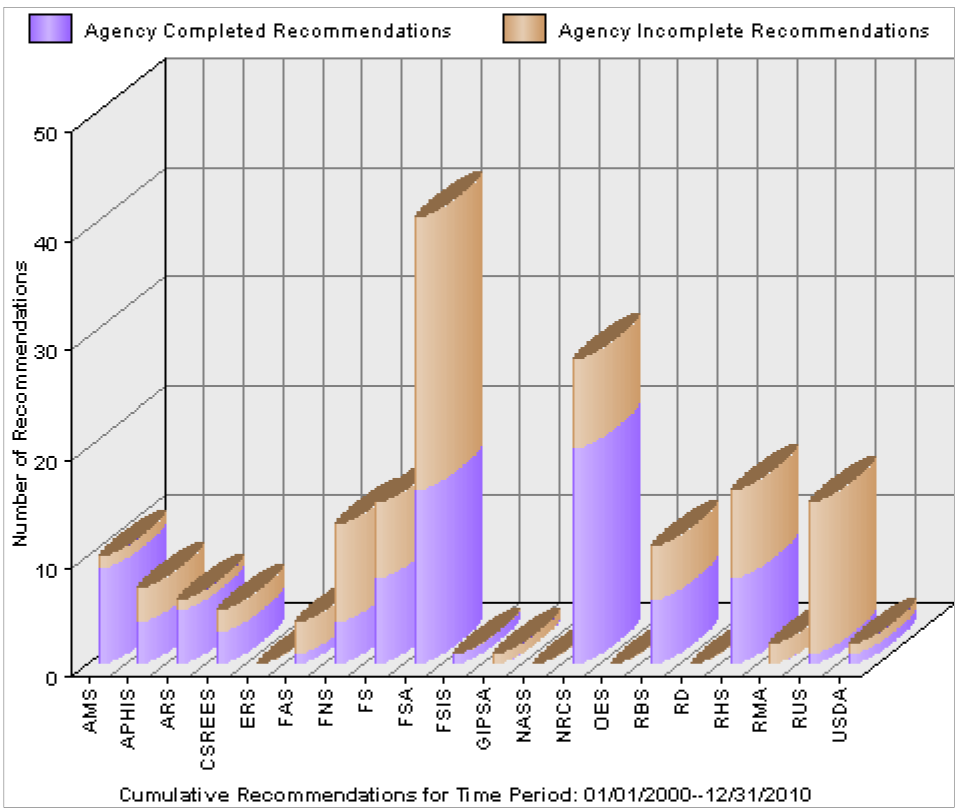


Figure 13: Recommendations Report

The recommendations report shows the incomplete and complete recommendations for each agency. Recommendations will be renamed to Follow Up actions in accordance with the OMB naming convention.

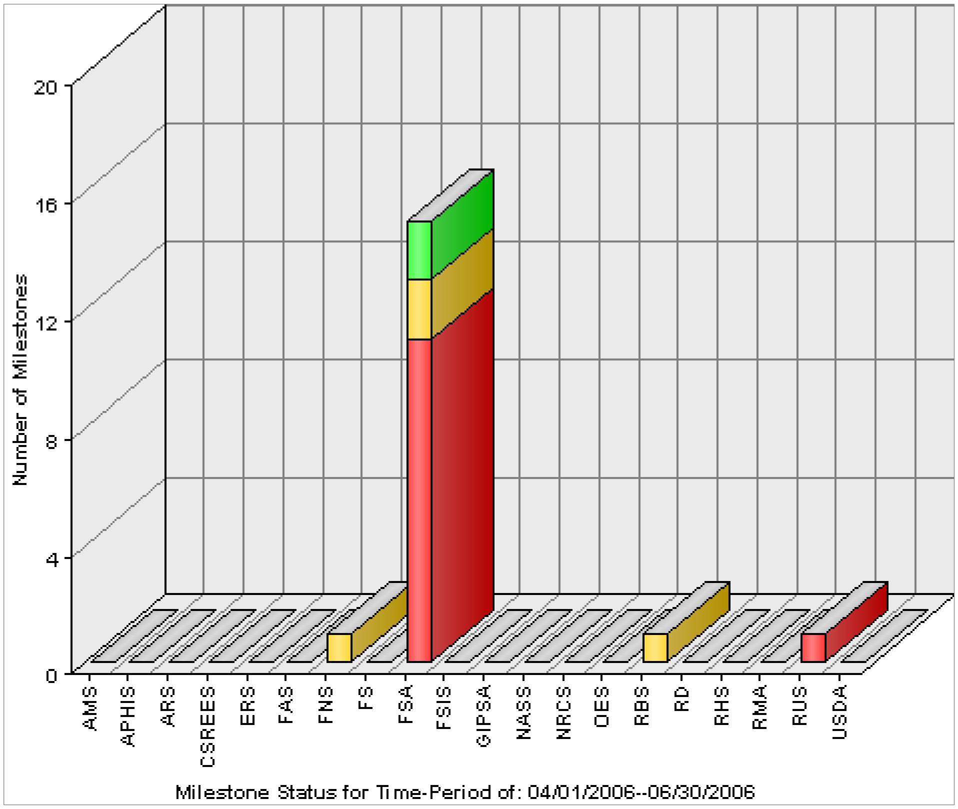
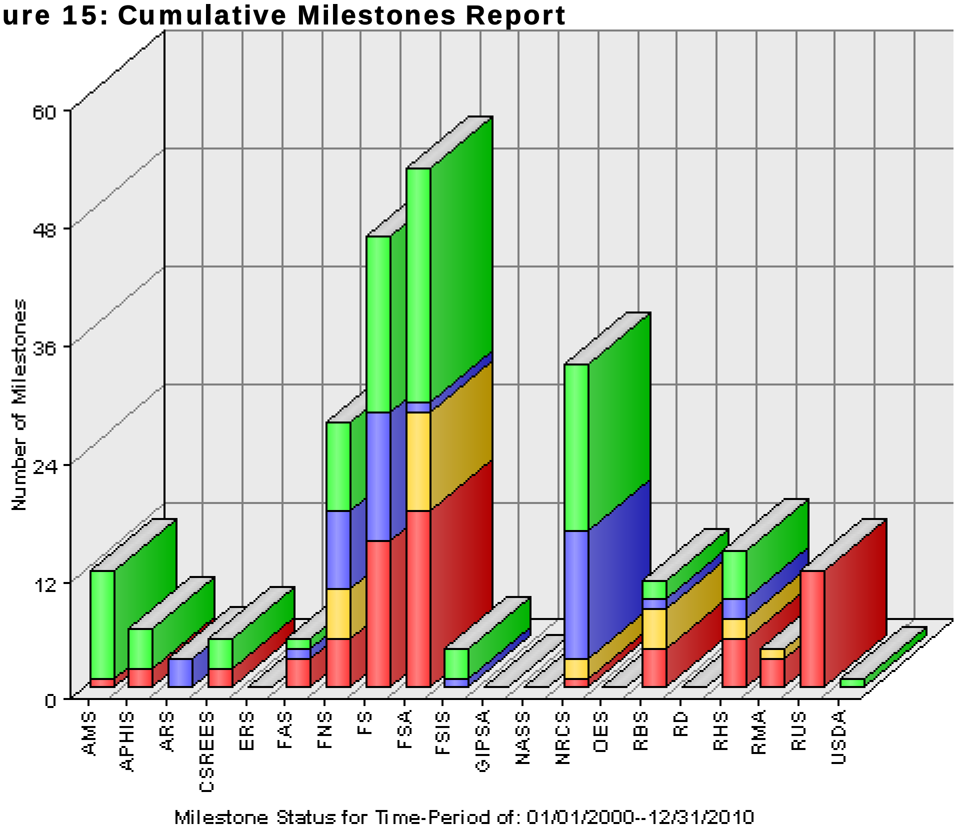


Figure 14: Sample Quarterly Milestones Report

Figure 15: Cumulative Milestones Report



The quarterly milestones report (figure #14) shows milestone status for the current quarter for each agency whereas the cumulative milestones status report (figure #15) shows milestones for each agency for all years.

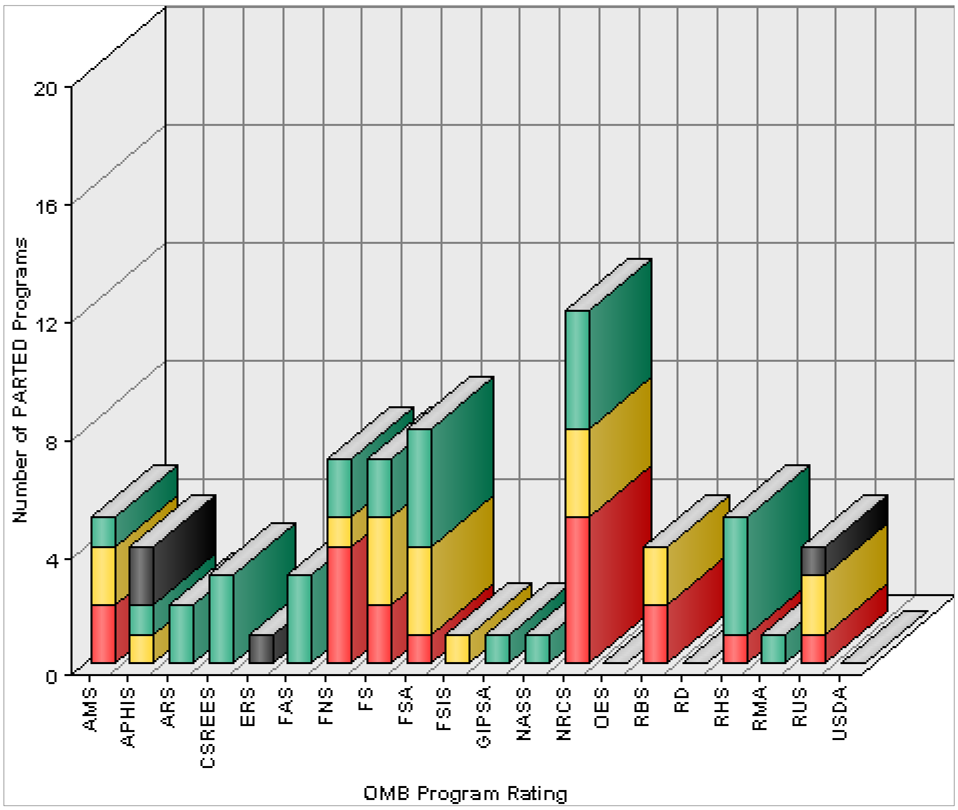


Figure 16: OMB Rating Report by Agency

The OMB Rating Report by Agency lists the cumulative OMB ratings for each agency (see the graph key for the ratings: Red for Results not demonstrated, Yellow for Adequate, Green for Moderately Effective, and Black for Effective)

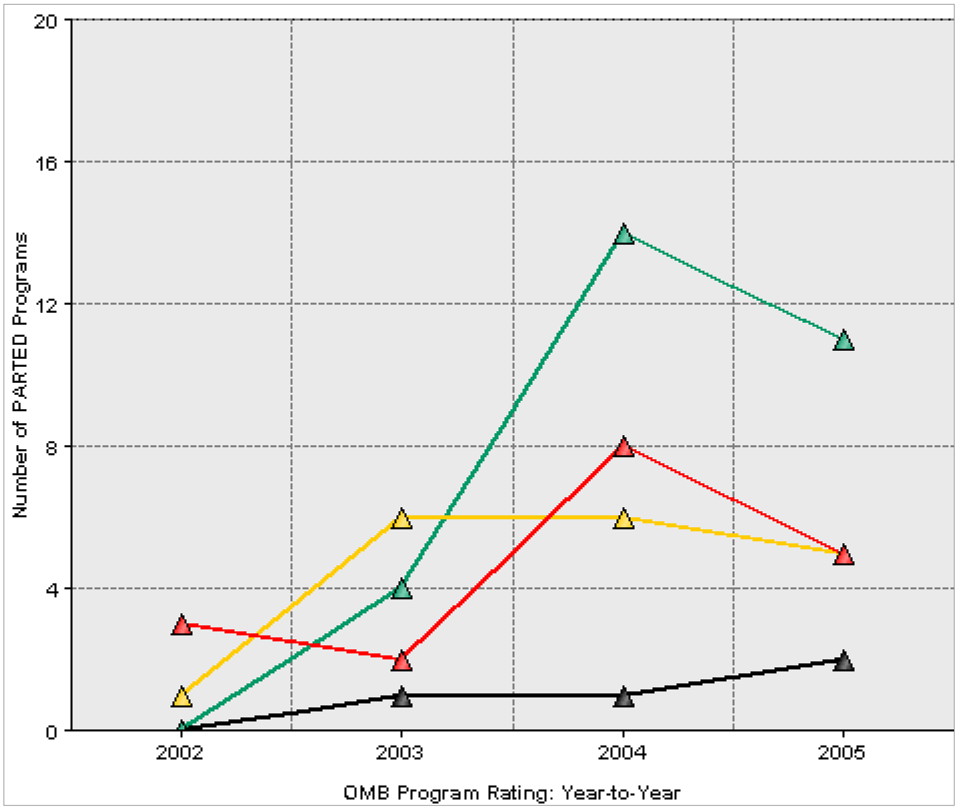


Figure 17: OMB Ratings by Year

The OMB Ratings by year graph shows the entire USDA ratings trending from year to year. For a key to the ratings, see the explanation in Figure #16 above or view the key on the MITS PART Status Graphs page.

6.8. Step 7: Generate an OMB Summary Report

To generate an OMB Summary Report, put your cursor over the My Reports menu and select the OMB Reports link. This will direct you to the OMB Summary reports page where you can select a preformatted OMB report in one of two formats:

1. Summary report for All PART programs for Each Agency
2. Summary report for individual PART programs

The OMB Summary report page also allows you to filter the reports by Mission Area and also to show only the most recent PARTed programs. The OMB summary reports which are generated are formatted in the style required by the OMB and are displayed in a “Print Version” without the MITS headers. These reports can be printed and submitted to the OMB.

Please follow along with the instructor for a demonstration of the OMB Summary reports features.

6.9. Conclusion and Wrap-up

This ends the Report Training for the PART Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

PART Reports Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: MITS PART login
		STEP 2: Reports Drop Down Menu Navigation
		STEP 3: Generate Standard Monthly Reports
		STEP 4: Generate Standard Annual Reports
		STEP 5: Construct and Generate a Custom Report
		STEP 6: Review Status Graphs
		STEP 7: Generate an OMB Report

---------========== END OF CHAPTER 6 ==========---------

7. Online Calendar Training

The PART Module includes an online calendar for keeping track of Follow-up Milestones and for managing other PART-related events. Each of these two primary functions will be covered in this training chapter.

7.1. Training Objectives

The primary goal for the Calendar training includes completing each of the following tasks:

1) Login to the PART homepage
2) Review the Calendar area navigation on the home page
3) View Milestone items
4) Manage Calendar Events

For each task above, we will confirm that all users are able to successfully accomplish the task.

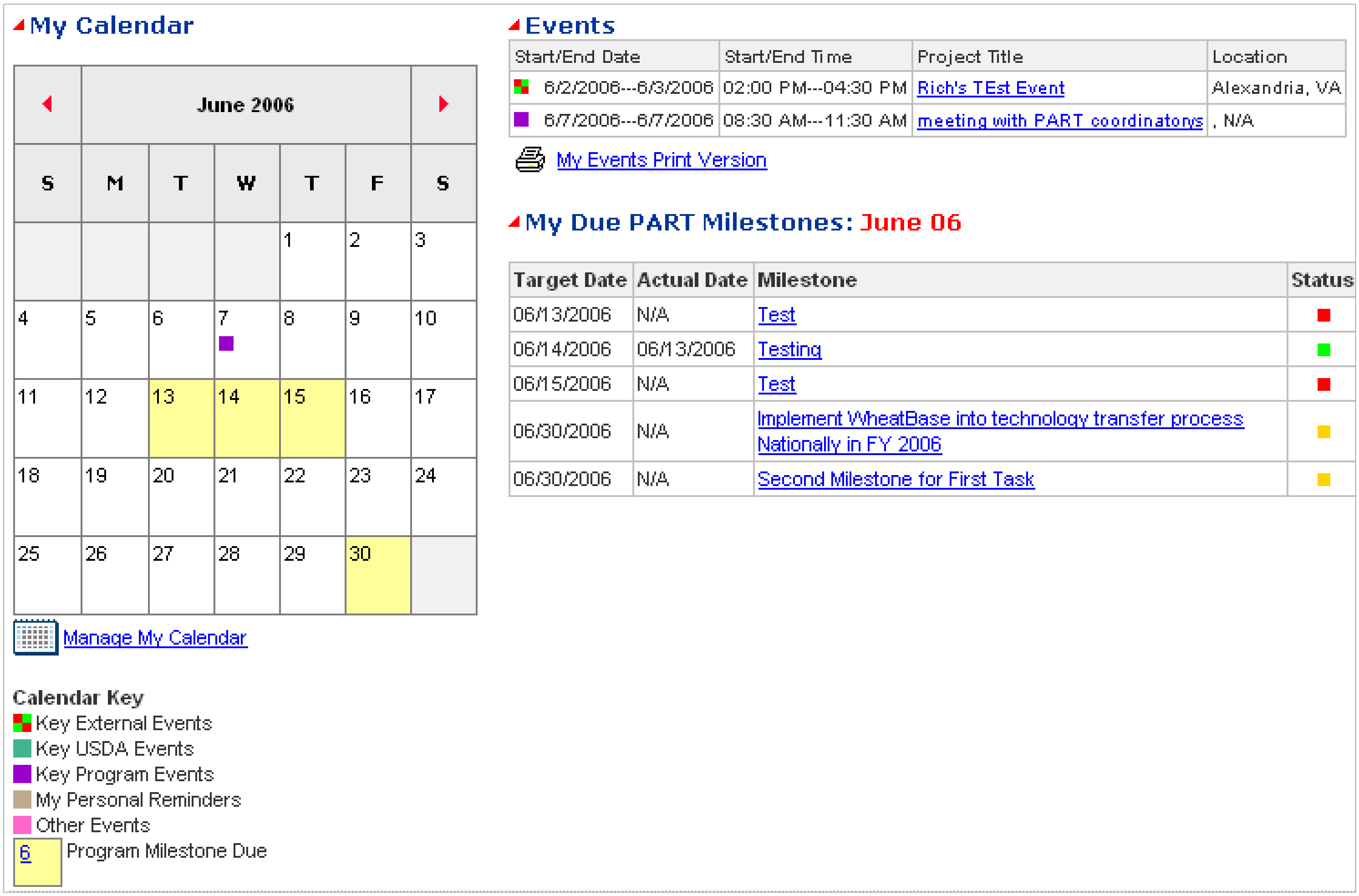
7.2. Step 1: Login

The first step in this training process is to login as a PART administrator. With the User ID and the Password provided to you by the instructor, please go to the Training URL and login. Once you login, please confirm that your login was successful and you are directed to the PART home page.

7.3. Step 2: Calendar Area Navigation

A Calendar sample view is shown in Figure #18 below. Please follow the image on the projector screen as the instructor explains the Calendar navigation elements.

Figure 18: Calendar Sample View



For this Training exercise, we will focus on the milestones and events (see Figure #18 and follow along with the Instructor).

7.4. Step 3: View Milestone Items

For this step of the Calendar training, please view the “My Due PART Milestones” area located in the lower right of the PART home page. If you have milestone items that are due, this area will include a table with information about your due items. Generally, for most account types, this table will only include items for your agency. The table includes the following information about the due item(s) for your quick reference:

1. Target due date (default is for all items due this month)
2. Actual completion date, if any
3. Milestone
4. Status (milestone date status)

In the above milestone table, to view and edit a milestone, click on the link for the milestone. This will redirect you to the PART Summary page containing the milestone. You can find your milestone in the summary table quickly by locating the Red Triangle link pointing at your milestone. You can now manage your milestone as described in the PART summary training section (Chapter 3).

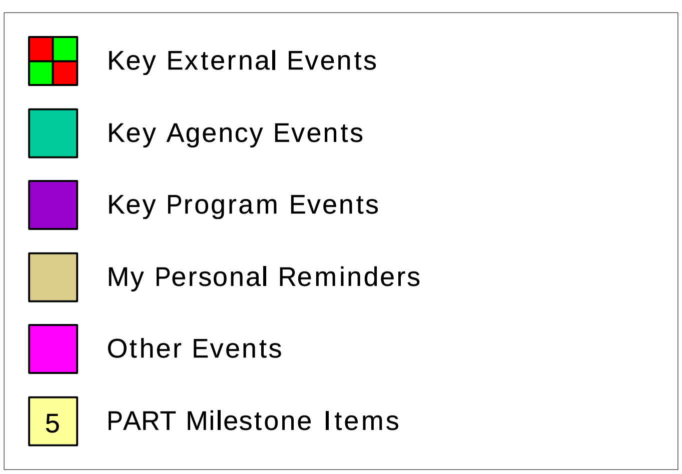
7.5. Step 4: Manage Calendar Events

This step of the calendar training involves adding new items to the Online Events Calendar. The Online Events Calendar allows you to schedule events, notify other colleagues of events, designate events as private (for your use only) or public (for your agency), and print a listing of your events. This training will focus on each of these functions.

7.5.1. Calendar Legend

The Calendar home page includes a legend (key) that explains the various calendar icons. These icons will appear in the Calendar on days when an event is present. The calendar icons are designed to give you a quick reference to items due. Icons include the following:

Figure 19: Calendar Legend



External events would be events outside of the USDA, such as OMB or Congressional events. Key Agency events are events within your own agency. Key program events refer to more specific events for individual programs within your agency or perhaps across agencies. Personal reminders are your own individual reminders which you can use as you wish. Other Events is an open category for any other event type that does not fit in the above events. PART milestones will be highlighted with a light yellow background color on the calendar for the day the item is due.

7.5.2. Adding Events

To add an event in the event calendar, click on the link entitled "Manage My Calendar" located beneath the calendar. You will be redirected to the Calendar management page. Please see Figure #20 below and follow along with the Instructor for an explanation of the calendar items.

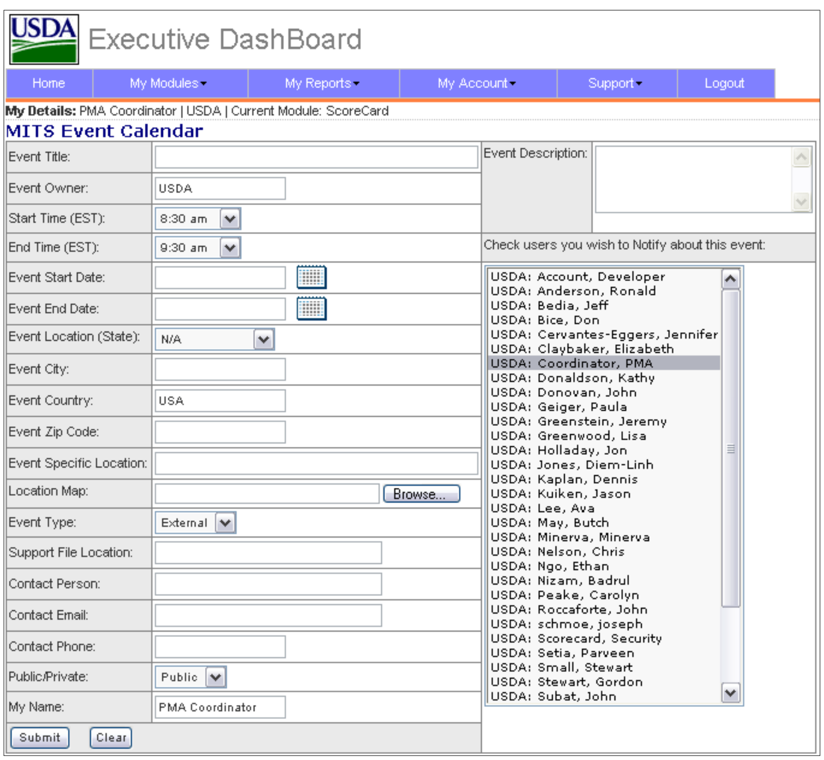


Figure 20: Event Management Sample

The Events calendar management allows you to enter basic event information (see Figure #20) as well as select colleagues to be notified by email when the event is due. Event notifications are made each day around 3am Eastern Standard Time. Once you have completed entering the information into the calendar, click the Submit button located at the bottom of the page and your event will be added to the online Calendar.

7.5.3. Viewing Events

To view online calendar events, from the PART home page, click on the Project Title link located in the Events table in the lower right of the page. You will be redirected to the View Event page that will show your event on the daily hour-by-hour schedule. Your event will span across each half-hour interval for the length of your event. To view details of your event, click on the Icon next to your event title and the event will open with more details. To close the event detail, click on the icon again. You can also navigate one day at a time forward or backward using the links at the top or bottom of the event detail page. You can also email the event contact directly from the event detail view; simply click on the contact name and a new email window will open. You can complete the window and send email without having to open your regular email program. This allows quick access to event coordinators.

7.5.4. Editing Events

To edit online calendar events, from the PART home page, click on the Project Title link located in the Events table in the upper right of the page. You will be redirected to the View Event page that will show your event on the daily hour-by-hour schedule. If you are the event owner, a small E icon (E) will appear next to the Event title. Click on the E icon (E) to go to the Event Management page. Edit any information you need and click the Edit Button at the bottom of the page. Your event edits are now saved. Additionally, you can also delete an event in the same manner you edit. To delete an event, click on the small X (☒) icon from the Event Detail page. In order to delete, you must be the event owner. Also, you will be given a warning before your deletion is complete; deletions are final, there is no way to recover deleted events. If you want to delete, click the Confirm button and your event is deleted.

7.5.5. Printing Events

To print your events calendar, from the PART home page, click on the small printer icon below the Events table. This will redirect your browser to a print page. You may need to set your printer alignment to landscape to view all your events information.

7.6. Conclusion and Wrap-up

This ends the Calendar Training for the PART Module. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

PART Calendar Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: MITS PART login
		STEP 2: Calendar navigation
		STEP 3: View milestones
		STEP 4: Manage calendar events

---------========== END OF CHAPTER 7 ==========---------

8. PART Management Functions

The PART Module includes several new management functions and enhancements available to users based on user account permissions. Each of these new functions and enhancements are described in the Training Objectives section below.

8.1. Training Objectives

The primary goal for the PART Management Functions training includes completing each of the following tasks listed below. Several of the PART management functions are restricted to OBPA Officers only; these are noted on the tasks below:

1) Login to the MITS PART Homepage
2) Access the PART questions management screen (OBPA Officers only)
3) Add/Edit PART programs (OBPA Officers only)
4) Manage Follow Up Actions
5) Assigning Questions to a PART

For each task above, we will confirm that all users are able to successfully accomplish the task.

8.2. Step 1: Login

The first tasks for this training process require a login as an OBPA Officer in order to access the Questions Management and PART Add/Edit functions. Once we have completed these tasks, we will then logout and log back in as a PART Administrator to complete the remaining two steps. At this point, please logon as an OBPA Officer and ensure that you are on the PART homepage.

8.3. Step 2: PART Questions Management

One of the key new features of the PART module is the ability for OBPA officers to manage PART questions. Essentially, these questions are from the OMB and are loaded into the PART database so that each PART program can access the appropriate questions. Features of the Questions Management function include the following:

1) Import questions from year to year
2) Add new questions
3) Edit existing questions
4) Remove questions

Each of these functions is described in the following subsections:

Question Import

To access the Questions Import functions, you must be logged on as an OBPA Officer. Once logged on, click on the OBPA Questions Database link located below the list of PART programs on the PART home page. This link will direct you to the OMB Questions Management page (see Figure #21).

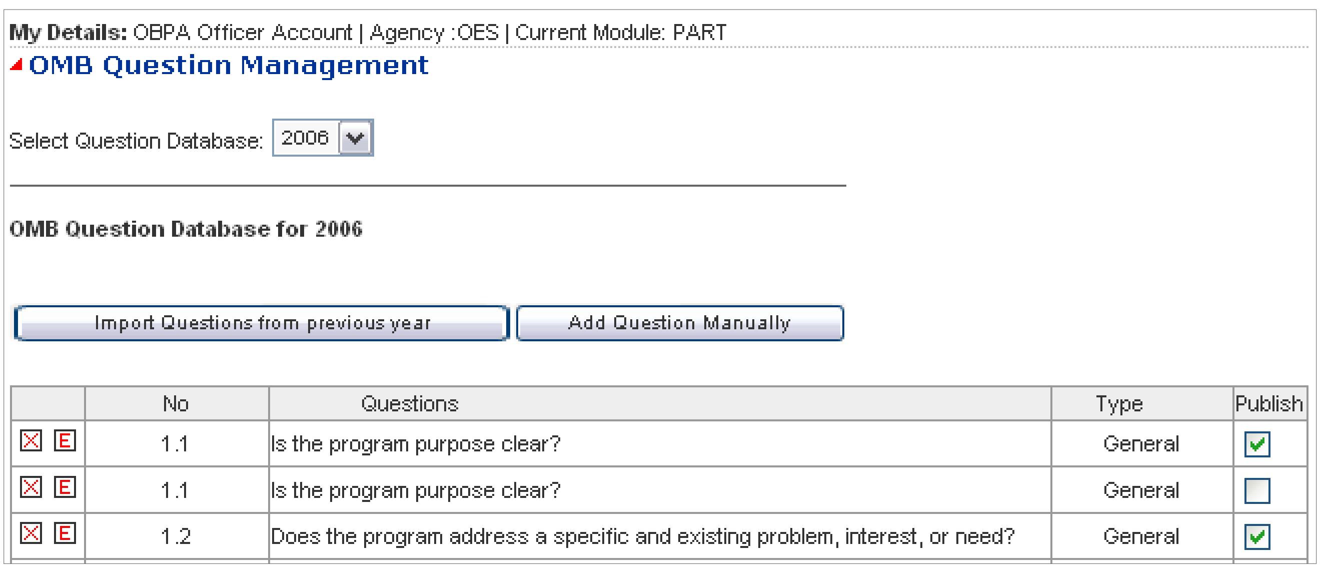


Figure 21: Questions Import Screen

The questions management screen allows an OBPA officer to view the current questions loaded, import questions from a previous year, add, edit and delete questions. From this screen, a table listing each question displays the

Edit and Delete icons ( ), the question number, the question, the OMB program type, and a publish key for reference. The publish key determines if the Question is available for assignment to PART programs; a checked Publish box indicates the question IS available; an unchecked box indicates a question is NOT available.

> STOP: For this section of the training, please DO NOT attempt a Question Import. This import is a One Time function and will be demonstrated by the instructor so that all training participants can view the example.

For this portion of the training, please follow along as your instructor performs a Question Import. Key features of the import include the ability to pick and chose which questions to import. Generally, based on the OMB requirements, all questions are imported from the previous year to the current year.

Add New Questions

In addition to the Questions Import Screen, OBPA officers also can add new questions manually to the Question database. This feature can be used in the event that the OMB makes last minute additions and/or changes to the PART questions; the USDA can easily and quickly accommodate these OMB changes using the Add New Questions feature. To use the feature, click the Add Questions Manually button above to navigate to the Questions Screen (see Figure #22).

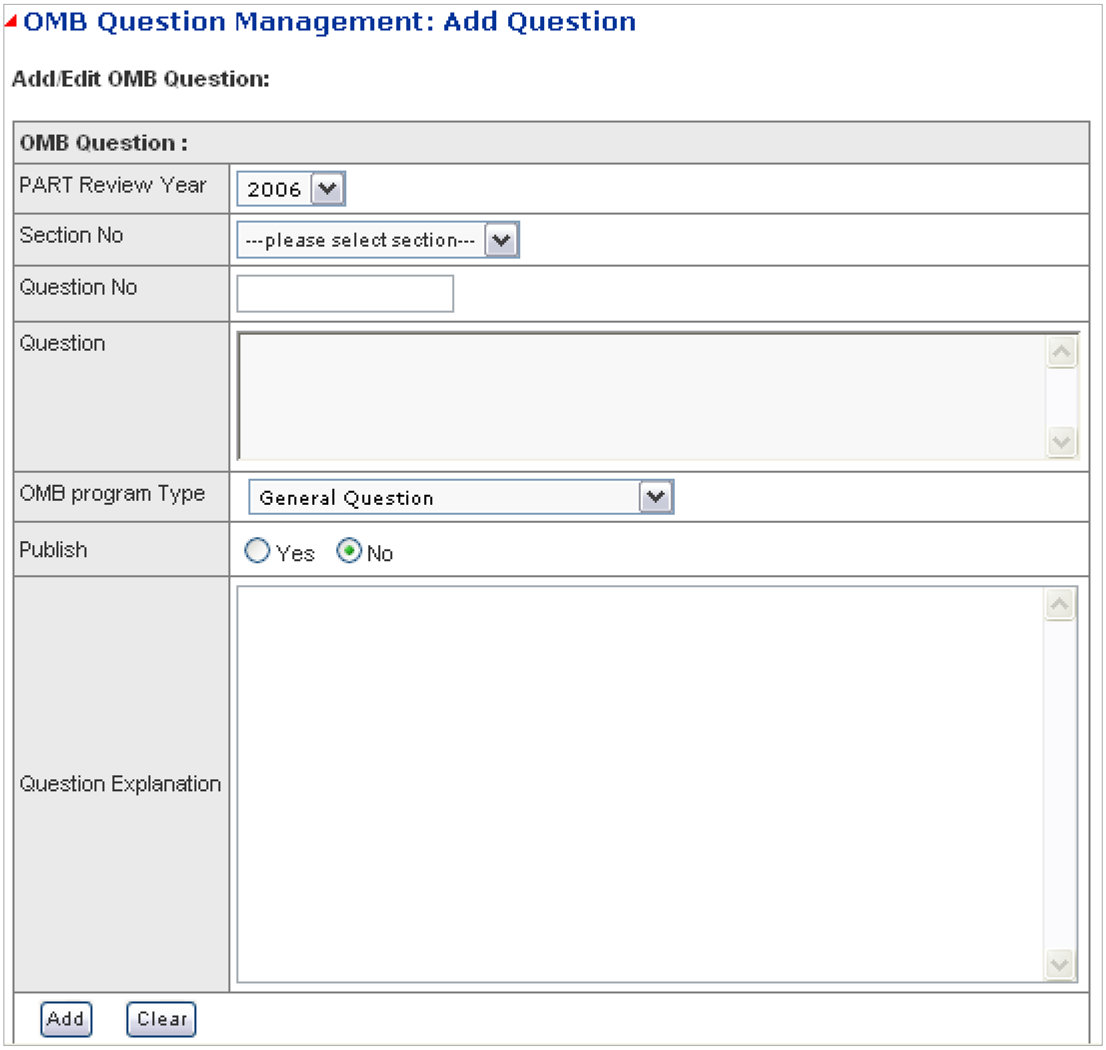


Figure 22: Add Questions Screen

The Add Questions screen includes the required questions information for PART year, section number, question number, question text, OMB program type, publish key, and the question detailed explanation. Once complete, click the Add button and the question is added to the database.

Edit Questions

The Edit Questions function operates in a similar process with the Add Questions function; the only difference is that the question information is prefilled for the Edit Question screen. The user may edit any portions of this data.

Remove Questions

The remove questions function is available from the main Questions Management page (Figure #21) by clicking on the delete icon (☒). Using this function will ONLY remove a question from the current year. Also, if a question is currently assigned to a PART program and you try to delete the question, you will receive a warning message pop up (Figure #23) stating that the question cannot be removed because it is being used in an active PART program. This is a safeguard to prevent deletion of questions while they are in use.

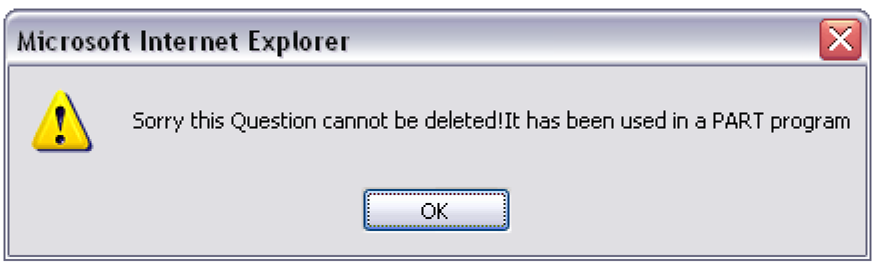


Figure 23: Question Deletion Warning Message

8.4. Step 3: Add/Edit PART Programs

The Add/Edit function allows OBPA officers to create new PART programs and to edit PART titles and other basic information. This function is generally used once per year when the OMB issues new PART programs; this will allow the OBPA to add the new programs for USDA access. The Add/Edit PART screen is displayed in Figure #24 below.

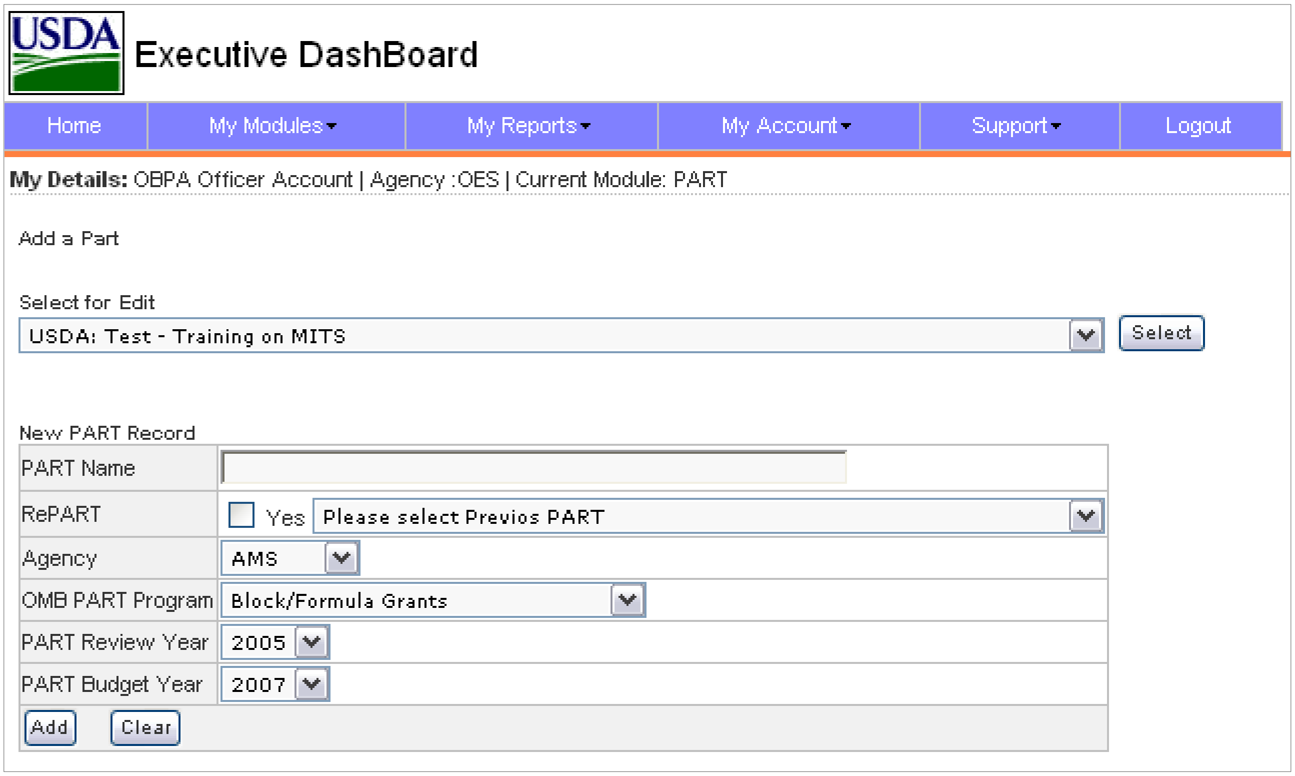


Figure 24: PART Add/Edit Screen

8.5. Step 4: Manage Follow-Up Actions

The Manage Follow-up Actions function allows authorized PART users to access the Follow-up actions for their PART program. To access these actions, click on the Orange **R** icon next to the PART program selected. This will direct you to the Follow-up management page.

The Follow-Up management page allows authorized users to add and edit follow up actions and to enter key tracking information for follow-up actions including the following items:

1) Status by OBPA
2) Comments by OBPA
3) Status by OMB
4) Comments by OMB

Essentially, the follow-up actions screen allows the USDA to enter follow up actions specified by the OMB and to also track the status of each follow-up action. Status can be tracked based on internal OBPA status as well as status from the OMB (see Figure #25).

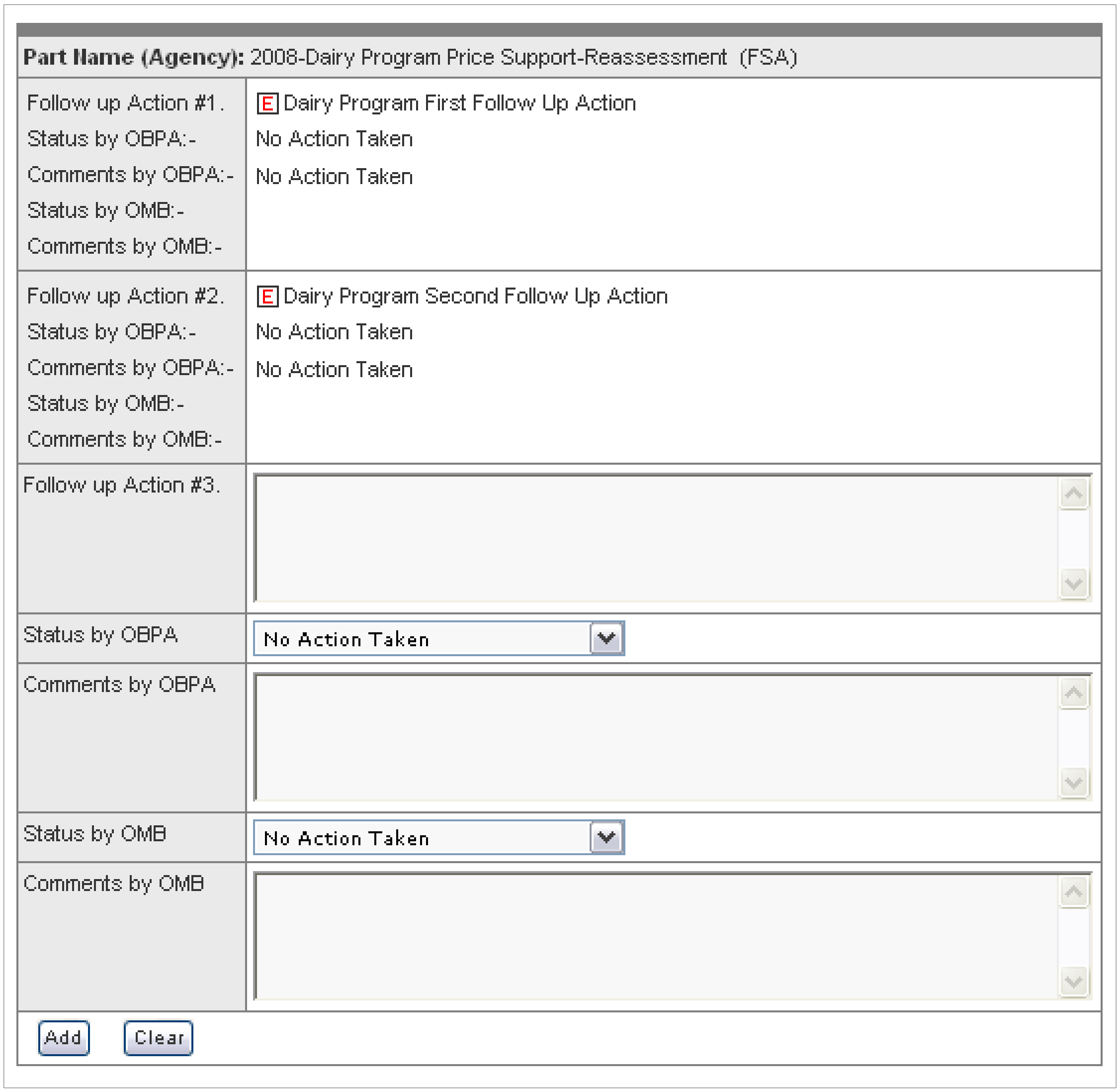


Figure 25: Follow-up Action Management Screen

To use the follow-up action features, enter the required information and click the Add button to add a new follow-up action. To edit an existing follow-up action click the E icon and edit the follow-up action information and click the Edit button.

8.6. Step 5: Assign Questions to a PART

The PART module allows authorized users to assign questions to individual PART programs. This feature allows for complete flexibility in the PART questions matrix for each PART and is useful when the OMB requires special question mixes for individual PART programs. In addition, this feature allows PART users to reorder questions within a given section as needed.

To use the questions assignment template, click on the green **Q** icon next to the selected PART program on the PART home page. This will direct you to the OMB Questions Management page for assigning questions to the PART you just selected.

> INFO: When questions are assigned to an existing PART program which is currently being worked on, it is necessary to create a New Version of the PART from the PART Explanation and Evidence screen (Chapter 4) before any new or edited questions will be visible. This feature is on purpose and for the following reason: for an existing PART, it is NOT possible to change the Explanation and Evidence questions for an existing version. This would cause inconsistency if this occurred. In order to prevent this inconsistency, again, a New Version must be created from the Explanation and Evidence screen before any new Questions or modified questions are available. Accordingly, as an internal management pointer; it is recommended that PART administrators make an effort to set up ALL the questions and have ALL the PART questions completed and assigned to a given PART before the Agency user starts working on the PART if at all possible. This will minimize the need to create new PART versions.

An example of the question assignment screen is displayed in Figure #26 below.

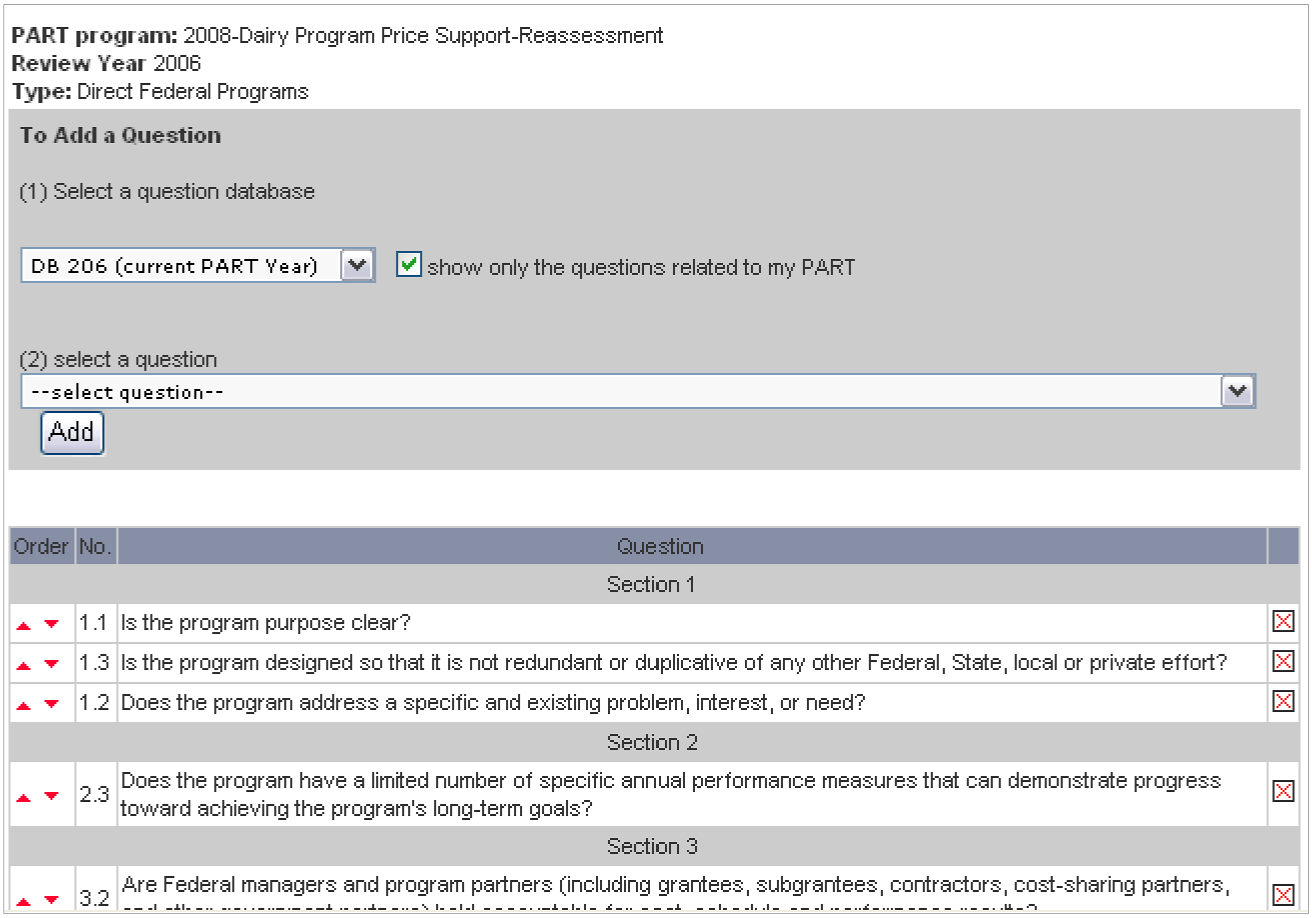


Figure 26: Question Assignment Screen

From this screen, users can add and remove questions from the current question database and users can click the up/down (▲▼) triangles to re-order questions. In addition, as a visual assistance to users, the drop down select list in the question database ({2} in Figure #26 above) is color coded for three items:

1) Green: indicates that a question is available for this PART according to PART year and PART program
2) White: indicates that the question is already assigned to this PART
3) Yellow: indicates that the question is available for assignment to this PART but that the question is either NOT for the current PART year or NOT for the current PART program type.

Once the user has completed assigning questions for the selected PART and the questions have been re-ordered to meet the user's requirements, the assignment is completed. The user should then inform the PART manager to create a new PART version (Chapter 4) if the PART is currently in progress.

8.7. Conclusion and Wrap-up

This ends the PART Management Functions Training. At this point, each trainee should confirm that they were able to successfully accomplish each of the following skills:

PART Management Training Table		
Completion		**Skill**
Yes	No	
		STEP 1: MITS PART login
		STEP 2: PART questions management
		STEP 3: Add/Edit PART programs
		STEP 4: Manage follow-up actions
		STEP 5: Assign questions to a PART

---------========== END OF CHAPTER 8 ==========---------

9. Training Conclusion

This chapter concludes the MITS PART training. During this training, we covered the following major topics:

Topic 1: How to access PART online
Topic 2: How to manage the PART summary and the milestone approval process
Topic 3: How to manage PART Explanations/Evidence and the approval process
Topic 4: How to manage PART performance measures and the approval process
Topic 5: Reporting Functions
Topic 6: Calendar Functions
Topic 6: PART Management Functions

If you have any additional questions regarding the topics we covered during your training, this is the open discussion time for your questions.

It is recommended that you keep this training manual for your records in case you wish to refer to the manual as you use the PART module.

From the team at eSpherical.com, we greatly appreciate your time and efforts in learning the PART module.

-------======= END OF TRAINING MANUAL =======-------