

Transaction Activities Database User Guide

Instructors: Don Suzuki and Dan Gabel Contacts: suzuki@lanl.gov, dggabel@lanl.gov

The Enterprise Support & Computer Education Group

Author:D. SuzukiE-Mail:suzuki@lanl.govRevision:[1.2] - [03/20/2006]Template:2006.03

Contents

Transition Activities Database (TAD)	1
Introduction	
System Access	1
Resources	1
Accessing the Database	2
Viewing Activities	
Running Reports	5
The Default Report	5
Running Other Reports	5
Report Actions	7

Introduction

Actions related to the LANL transition will be tracked as activities in the Transition Activity Database. The database will provide activity information to LANL and LASO users.

The activities, assignments and status information will be uploaded into TAD from a LANL/LASO Primavera database. The system will send an email to designated individuals notifying them each time the database is reloaded. Users will see bulletins in the system, which will display the date and time of the last update.

This guide provides instructions for accessing the system, viewing and reporting the activity, tasks and subtask information.

System Access

TAD users will be authorized to view only the WBS (Work Breakdown Structure) activities, tasks and subtasks that are priority "A", based upon each user's respective privileges. The privileges can range from access to all items to a more limited view. The privileges are determined by the LANL Administrator, Milan Njegomir, and the LASO Coordinator, John Gallegos for their respective organizations.

System access to the Transition Activities Database will be performed by a system administrator.

Resources

Contacts:

Training and Support	
Dan Gabel, Instructor IM-2	667-3126
Don Suzuki, Instructor IM-2	606-0825
Issues and Access	
Milan Njegomir, LANL	665-1080
John Gallegos, LASO	665-8439

Accessing the Database

- 1. Open Microsoft Internet Explorer on a PC.
- 2. Enter the URL: <u>https://tad.lanl.gov</u>.
- 3. Login using your Z Number and CryptoCard passcode.
- 4. On the Contract Transition Team Website page, the Bulletins page will display the time and date of the last activity data upload. You can also access Bulletins by clicking on **Bulletin**, then **Bulletins** under **Transition Links** in the frame on the left hand side of the window.
- 5. Click the Transition Activities Database link to view activities and reports.
- 6. Click the Activities Database link to view activities and tasks.
- 7. Click the Activities Database Reports link to run reports.



Figure 1. Transition Team Website Page 1

Viewing Activities

To view activities do the following:

- 1. Click the Transition Activity Database link.
- 2. Click the Activities Database link.
- 3. Click either the View Activities by NNSA/LASO or View Activities by LANL WBS links to see a list of either the LASO or LANL WBS and description.

Note: There will be a number next to the WBS number and description, which will indicate how many of the activities are matched (cross walked) to the LANL or LASO WBS.

- 4. Click on the WBS number and description to view the associated activities.
 - a. The Activities Database List will display the number of activities you are authorized to see.
 - b. The list displays the Functional WBS, the activity description, the person responsible, and a **View Report** link.

To view a report of the activity:

Click the **View Report** link to display an Activity Detail Report that will show the activity description, start and end dates, and contract information. For instructions to size the display, download to a specific format, printing the report or to run additional reports see the Reports section on page 5.

To view cross walk activities:

Click the links below **Cross Walk WBS:** to bring up the associated Activities Database List for that WBS.

Transition - Microsoft Internet E	xplorer			
File Edit View Favorites Tools H	elp			
🌀 Back 🝷 🐑 🔹 🛃 🏠	Search S	🛧 Favorites 🚱 🔗 🍓 🗵 🔹 💭		
Address 🕘 https://tad.lanl.gov/Act/index.	cfm		💙 🄁 Go	Links »
Google -	G Search •	🦚 😽 Check 👻 🔍 AutoLink 🕤 🗐 AutoFill 🏹 Options 🖉	2	• •
Close Window		Transition Activities Databas	se	
Transition Activities Database View Activities Database Activities Database 1.04/Transition Project (4) 1.02+Communications (3) 1.03-Legal (1) 1.04-Human Resources, Labor R	NNSA/LA	Activities Database List SO WBS: 1.0 authorized to view 4 activity records in this WBS.		
1.05Information Technology and 1.06Budget, Finance and Audit (\$ 1.07Procurement and Personal I	Functional WBS	Activity	Responsibility Rep	ort
1.08Safeguards and Security (6) 1.09Emergency Preparedness, (1.10-Sefety and Health (6)	1.0	Provide Project Documentation (PMP, TP, Zipper Plan, Engagement Approach) to NNSA	Marquez <u>Viev</u> Rep	⊻ ort
1.11- Environmental Management 1.12- Counterintellegence and Cou	1.0	UC, LLC, NNSA agree on Issues Management Approach and Database	Zerkle <u>Viev</u> Rep	<u>v</u> iort
1.13Laboratory Programs (3) 1.14Laboratory Operations (4) 1.15Post Suspension/Resumptic	1.0	Draft Advanced Understanding (dual agreement) on Closeout w/NNSA	Nelson <u>Viev</u> Rep	⊻ ort
View Activities by LANL WBS Activities Database	1.0	Create Plan for Preparing for FY08 Kansas City Meeting	Peery Viev Rep	⊻ ort
1.1-Transition Management (3) 1.2:04.42-Intellectual Property (2 1.2:04.45-Payroll (7) 1.2:04.45-Payroll (7) 1.2:04.7.1-Work Authorizations 1.2:04.7.2-Transition Cost Tracl 1.2:04.8-Property Accounting (1 1.2:04.4:0-Financial Reporting (1 1.2:04.4:0-Financial Reporting (1 1.3-PAD Operations (1)	Cross Walk W 1.1Transition 1.4.1.7FY08	/BS: Management Budget Kansas City Meeting Plan		
Index.cfm?FuseAction=ActivityList&FK_F.	AWbs=1		🔒 🥩 Internet	.;;

Figure 2. Activities Database List

Running Reports

The Default Report

To view the default Behind Schedule report:

From the Contract Transition Team Website window, click the **Transition Activity Database** link, then **Activities Database Reports.** This will display the Behind Schedule Report.

TAD Reporting Dashboard - Microsoft Internet Explorer					
File Edit View Favorites Tools Help					1
🕝 Back 👻 🕥 👻 📓 🚮 🔎 Search 👷 Favorites	🛛 🖉 🖓 🕅	0 • 🗔 🕷	1 3		
Address 🕘 https://tad.lanl.gov/TADReporting/Dashboard.aspx?Report=/TA	DReports/rptActivityListBehi	indSchedule&Use	erID=193338	🖌 🔁 Go	Links »
Coogle - 💽 Search - 😻 🏘 Check - 🖄 AutoLink - 🗐 AutoFill 🛃 Options 🖉					•
This site might require the following ActiveX control: 'Microsoft SQL Server :	2000 Reporting Services' from	m 'Microsoft Cor	poration'. Click	here to install	×
Report: Choose A Report					^
Generate Report Zoom: 100%.	Format: H	TML I	v		
	2 2 2 <u>2</u> 2				
Activitie	s List: Beh	nind S	chedu	ule	
Activitie	s List: Beh	bind Sol	ched (Start Dates <i>Planned</i>	LIE	Ba
Activitie	s List: Beh	Baseline 12/21/2005	Chedu Start Dates Planned	Actual	Ba:
Activitie Activity Compile List of Required Transition Actions and Get LASO Buy-In Determine Cash-out vs. Balance Transfer Options	s List: Beh Responsibility Angelo CF0 / LC / UCOP	Baseline 12/21/2005 2/6/2006	Chedu Start Dates Planned 3/8/2006	Actual 12/21/2005	Ba: 1/1 3/6
Activitie Activity Compile List of Required Transition Actions and Get LASO Buy-in Determine Cash-out vs. Balance Transfer Options Develop List of Legacy Closeouts	s List: Beh	Baseline 12/21/2005 2/6/2006 2/6/2006	Chedu Start Dates Planned 3/8/2006	Actual 12/21/2005	Ba: 1/1 3/6
Activitie Activity Compile List of Required Transition Actions and Get LASO Buy-In Determine Cash-out vs. Balance Transfer Options Develop List of Legacy Closeouts Transition / Convert P-Card Process	S List: Beh	Baseline 12/21/2005 2/6/2006 2/15/2006	Chedu Start Dates Planned 3/8/2006	Actual 12/21/2005 3/1/2006 3/1/2006	Ba: 1/1 3/6 3/1 5/1
Activitie Activity Compile List of Required Transition Actions and Get LASO Buy-in Determine Cash-out vs. Balance Transfer Options Develop List of Legacy Closeouts Transition / Convert P-Card Process Transition LAFD Agreements	S List: Beh	Baseline 12/21/2005 2/6/2006 2/15/2006 2/15/2006	Chedu Start Dates Planned 3/8/2006 	Actual 12/21/2005 3/1/2006 3/1/2006	Ba: 1/1 3/6 3/1 5/1
Activitie Activity Compile List of Required Transition Actions and Get LASO Buy-in Determine Cash-out vs. Balance Transfer Options Develop List of Legacy Closeouts Transition / Convert P-Card Process Transition LAFD Agreements 3/16/2006 2:46:39 PM	S List: Beh	Baseline 12/21/2005 2/6/2006 2/15/2006 2/15/2006 SE ONL	Chedu Start Dates Planned 3/8/2006 	Actual 12/21/2005 3/1/2006 3/1/2006	Ba: 1/1 3/t 5/1 5/1
Activitie Activity Compile List of Required Transition Actions and Get LASO Buy-in Determine Cash-out vs. Balance Transfer Options Develop List of Legacy Closeouts Transition / Convert P-Card Process Transition LAFD Agreements 3/16/2006 2:46:39 PM	S List: Beh	Baseline 12/21/2005 2/6/2006 2/15/2006 2/15/2006 SE ONL	Chedu Start Dates Planned 3/8/2006 	Actual 12/21/2005 3/1/2006 3/1/2006	Ba: 1/1 3/E 3/1 5/1
Activitie Activity Compile List of Required Transition Actions and Get LASO Buy-in Determine Cash-out vs. Balance Transfer Options Develop List of Legacy Closeouts Transition / Convert P-Card Process Transition LAFD Agreements 3/16/2006 2:46:39 PM	S List: Beh	Baseline 12/21/2005 2/6/2006 2/15/2006 2/15/2006 SE ONL	Chedu Start Dates Planned 3/8/2006 (Actual 12/21/2005 3/1/2006 3/1/2006	Ba: 1/1 3/t 3/1 5/1

Figure 3. Default Behind Schedule Report

Running Other Reports

To generate other reports:

1. Click on the Report drop down box labeled Choose a Report from any completed report,

Or

- 2. On the Transition Activities Database window, click the **Reports**, then **Reports** links.
- 3. Choose one of the following reports.
 - All (Dump) A complete list of all activities you have authority to view
 - Behind Schedule Activities that are overdue
 - Finished Completed activities
 - In Progress Currently being worked on
 - Late Finish Finished after the due date
 - Late Start Started after the start date
 - New New activities

🗿 TAD	Reporting Dashboard - Microsoft Internet Explorer	
File Ed	dit View Favorites Tools Help	
G Bad	ck • 🕥 • 💌 😰 🏠 🔎 Search 👷 Favorites 🤣 😥 • 🍓 📝 • 🗔 🏭 🖄	
Address	🥘 https://tad.lanl.gov/tadreporting/dashboard.aspx 🛛 💽 🔁	Go Links »
Google	🛛 🔽 Search 🔹 🥨 👫 Check 🔹 🕅 AutoLink 🔹 🗐 AutoFill 🌄 Options 🖉	🔁 •
🕥 This s	ite might require the following ActiveX control: 'Microsoft SQL Server 2000 Reporting Services' from 'Microsoft Corporation'. Click here I	o install 🗙
Report:	Choose A Report	^
۲	Activities List: Rehind Schedule Activities List: Finished Activities List: In Progress Activities List: Late Finish Activities List: Late Start Activities List: New Print Activities List: New	
1		~
Dopo	A 🔿 Tekonol	
Done	El 🔮 Internet	

Figure 4. Choose a Report Window

Report Actions

Once your report is displayed you can choose to take the following actions:

- Zoom Choose the size of the displayed report from the drop down box.
- Format To download the report to a specific format. Format options are:
 - HTML displayed in your browser window
 - Acrobat Adobe Acrobat PDF Format
 - Excel Microsoft Excel Format Note: Data can be downloaded to an Excel spreadsheet for sorting or data manipulation.
- Print Click this button to print the report.
- Click the ^(M) button to display your previous report

🗿 TAD	Reporting Dashboard - Microsoft Internet Exp	lorer 💦				
File E	Edit View Favorites Tools Help					
🕝 Ba	ack 🔹 🕥 - 💌 🗟 🏠 🔎 Search 🤸	Favorites 🤣 😥 - چ 🔟 - 🛄 鑬 🦓				
Address	l https://tad.lanl.gov/tadreporting/Dashboard.aspx?Re	port=/TADReports/rptActivityList8UserID=193338				
Report:	Choose A Report					
-						
	Activity:	Activity:				
	Responsibility:	Type of Start Date:				
	Type of Close Date?	After Start Date:				
	Before Start Date	After Close Date:				
	Before End Date:	Limit Activity Status To: 🛹				
	New By Days:					
(**)	Generate Report Zoom: 100	Format: HTML Print	*			
		OFFICIAL USE ONLY				
	Activities List: All					

Figure 5. Examples of Other Actions