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To obtain this publication in alternative format, please contact the Washington Technology Solutions (WaTech) ADA coordinator, Chris Britton, at 360.407.8437 or chris.britton@watech.wa.gov.
Technology Overview

The Washington State Information Technology (IT) Project Dashboard utilizes several technologies in order to display the dashboard to the public. The diagram below demonstrates these different technologies.

1. All data is entered into and stored in the Salesforce database. The public does not have access to the Salesforce database. Only users who have been granted a login to Salesforce can log in and enter data.

2. Salesforce and Apptio are integrated to send information about projects to Apptio and pull financial information back from Apptio into Salesforce.

3. Salesforce has a technology called Salesforce Communities that is built on top of their platform. This technology is used to display information to external/public users.
   - The Salesforce Community gets its data from Salesforce.
   - The Salesforce Community also houses the Tableau dashboard.
   - The Salesforce Community is publicly available.

4. Tableau is a dashboard technology.
   - The data for displaying on the dashboard comes from Salesforce and is regularly loaded into the Dashboard for display.
   - The dashboard is housed on the Salesforce Community.
   - The Tableau Dashboard is also publicly available.
Logging into Salesforce

Salesforce is the location where all data is entered. The public does not have access to Salesforce directly. The public can only access the data displayed through the community and the Tableau Dashboard. Users who have been granted a login to Salesforce can log in to the system using the following process.

First time login

1. On first login, an administrator will send an email to the user through the Salesforce software to verify your account. The email will look like this:

   ![Welcome to Salesforce email](image)

   Welcome to Salesforce!
   Click below to verify your account:
   Verify Account
   To easily log in later, save this URL:
   https://nailjameson.salesforce.com
   username:
   nailjameson@rightcloud.com
   Agate, welcome to Salesforce!

2. Click **Verify Account**.

3. Create your password and security question and click **Change Password**.

   NOTE: If you are unable to reach this screen or receive a message that the link has expired or already been used, please contact the Salesforce administrator that set up your account to receive a new reset password link.
Subsequent logins

1. Go to this website for subsequent logins: `waocio.my.salesforce.com`.

   ![Salesforce login page]

2. Enter your username and password, then click **Log In** to complete the process.

Forgot your password?

2. Click the **Forgot Your Password?** link.
3. Enter your username and click continue.

4. You will receive an email with instructions to reset your password. The email will look like this:

Salesforce recently received a request to reset the password for the username neil.jamison@eightscloud.com.vend2. To finish resetting your password, go to the following link. This link expires in 24 hours.

https://ocio--vend2.my.salesforce.com/secur/forgotpassword.jsp?r=00D2D0000000M052D0000003WC0ECjuKMvwPMDBdEMkOwMMDAwMDAwTWREp8wMkcwUDAwMDAwMFEDWFp6ZwA7NTJEMDAwMDAwZVOMwzBt9483342/4SEP40R-8Hlu1jB0cQfIfS8aDBAOdKtHgQIQPPUdBS5g7wgl5gDu1089TdMYzm08HuMFA8MC0keB436l1K1NQ2AmI.mnnvDM1kFxzlBW3y5MIXA2tSECju2&display=page&fpota=9479e899-b-aefdf-41e3-a576-46841aa26ab3c9e407b-dead-419ec-97fe-f8e1be34e9dd

If you didn’t ask for your password to be reset, contact your Salesforce administrator.

5. Verify your identity by answering your security question.

6. Enter a new password. Note: If you run into issues while attempting to complete this process contact your system administrator.
Finding Instructions and Resources

Instructions and resources available on the dashboard

1. Instructions and resources are available on the dashboard site: waciportal.force.com/s/.
2. Click on the **Resources and Instructions** link.

3. On this page, the following instructions and resources are accessible.
• **Navigation Instructions.** Instructions and guidance for how to effectively navigate the Washington State Information Technology Project Dashboard.

• **Lessons Learned.** This repository compiles lessons learned from Washington State IT projects under OCIO oversight completed since fiscal year 2019.

4. Additionally, an interactive glossary can be found on the page.

   a. Use the **Search this list...** box to search for a specific term.

   b. Use the list menu next to **All** to filter to just certain types of definitions.
c. For particularly long definitions click on the **Definition name** to see the full definition.

| 2 | Administrative Financial Approval | Approval from OPM and OCIO for an agency project that includes an administrative and/or financial system. An administrative and/or financial system is one where the primary purpose is to provide one of the following business functions: general ledger, accounts receivable, budget, human resource or payroll. Systems that merely store information, provide business intelligence... | Document Type |

Additional resources

Additional resources can be found on the [IT Project Dashboard Resources](#) page on the OCIO website. These include:

- [New users tip sheet](#).
- [What’s changed? Summary](#).
- [Frequently asked questions (FAQ)](#).
- [Dashboard demonstration live recording](#).
- [Dashboard training for agency project managers live recording](#).
- [Dashboard training for agency project managers live recording](#).
Submitting Questions and Feedback

1. Navigate to the dashboard site: waciportal.force.com/s/.
2. Click on the Feedback link.

![Dashboard Image]

3. Complete the feedback form and click on Submit Feedback.

4. Feedback will be submitted to, and responses will come from:
   - Project information or questions: OCIOConsultants@ocio.wa.gov.
   - Technical information or concerns: OCIOTBMPogramOffice@ocio.wa.gov.
   - Other or both: OCIOConsultants@ocio.wa.gov and OCIOTBMPogramOffice@ocio.wa.gov.

The information is also stored in Salesforce in the Feedback object accessible by System Administrators.
Finding Project Data and Information

1. Upon first logging into the system the Home Screen will display.

2. Dashboard Lightning will be indicated in the upper left.
   a. If not, click on the non-dot waffle icon just beneath the cloud logo.
   b. Select **Dashboard Lightning** from the drop-down menu.
3. Across the top is the menu of available tabs. To access project information, click on the Projects tab.

![Dashboard Lightning...](image)

4. Select a list view to pin as the default view. This is a personal choice so each user can pin a different list view.
   
a. Click the “V” list icon to the right of **Project and Recently Viewed** on the left.
   
   ![Projects Recently Viewed](image)

   b. Select **All Projects** and click the pin icon so that All Projects is now your pinned list view. From now on, each time you visit this tab it will default to showing you all projects. You can change this to a different default at any time by selecting a different view and pinning it.
   
   ![Projects All Projects](image)

   c. To view a particular project’s details, Click into the Project Name column.

![Projects All Projects](image)
d. View the Project's details on the left and the related information on the right.

5. To find a specific project, the best method is to search for it using the Global Search bar at the top. Type in a search term and hit enter.

6. Click on the project name to get to the Project Details.

Note: To view the same project on the front end, public facing dashboard, follow these steps.
Office of the Chief Information Officer  
June 22, 2021

b. Click on the Project Dashboard button.

c. Select the project from the drop-down menu. The search box may be used to filter the list of results to just those containing the search term:

d. Additionally, the list of projects is filtered by Project Status. Click the "List filtered by Project Status – click here to modify" link to change which projects are available in the drop-down menu:
Entering a New Project (OCIO Administrators only)

If you have permission, you can enter a new project in the system. If you do not have permission, this is entered by your OCIO consultant.

1. Click on the Projects tab and click the New button.

2. Fill out the New Project form.
   a. For the Account field enter the state agency related to this project.

   For the Project Hierarchy Type be sure to choose the correct type. All projects that are not part of a program should use Project (Stand-Alone). This is the majority of all projects. Projects that are part of a program will use one of three options.

   - **Program (Top Layer)** should be used to create a parent record that encompasses the entire program. A program may have up to three layers and this is the top layer.

   - **Parent Project (Middle Layer)** is used to indicate a middle layer project. A single program may have multiple
projects representing different areas or agencies.

- **Subproject (Bottom Layer)** is the third layer. A single middle layer project may have multiple subprojects.

b. Enter the necessary information in the *Information and Reporting Detail* sections of the page.

c. If desired enter information into the *Current Project Status* and *Additional Information* sections.

d. Click *Save* to save the project to the database.
Updating Project Information (OCIO Administrators only)

If you have permission, you can update the Project Information by following the steps below. If you do not have permission, this is entered by your OCIO consultant.

1. Navigate to the project as described in the Finding Project Data and Information section of this document.
2. On the project detail screen, click the Edit button to switch to the edit screen.
3. Update the desired information and click Save.
Adding Project Leadership Records

1. Navigate to the project as described in the Find Project Data and Information section of this document.

2. On the right side of the screen, the related list of Project Leadership records is displayed. Click New to enter a new project leadership record.

3. This will provide a screen to associate a contact to this Project.
4. Search for the contact by typing the individual’s name into the **Contact** box and hitting enter. A search results screen will appear from which the appropriate contact can be selected.

5. In some cases, the desired contact may not be found in the system.

   If after searching, it is determined the contact needs to be added, cancel out of the search screen to return to the **New Project Leadership** screen. From here click into the **Contact** field.

   a. Click the **+ New Contact** link, fill out the new Contact field and be sure to associate it to the correct state agency in the **Agency Name** field.
NOTE: If a new Agency needs to be created please contact the System Administrator.

b. Click **Save**. The contact record should populate into the Contact field.

6. Once a **Contact** is selected, choose a **Role** from the drop down and click **Save**.
7. To edit an existing Project Leadership role, scroll all the way to the right in the Project Leadership box and choose **Edit** from the drop-down menu on the record you wish to edit.

8. After the next data refresh, the project leadership record will appear on the Project Dashboard as illustrated here (for illustration purposes only).
Uploading a Project Document

1. Navigate to the project as described in the Finding Project Data and Information section of this document.

2. On the right side of the screen, the related list of Project Document records is displayed. Click **New** to enter a new project document record.

3. Fill out the form. Different fields are required based on which selections are made; the system will indicate for you which fields are required.
4. After filling out the required fields upload a file by clicking the **Upload Files** button.

5. Select a file and click **Open**.

6. Wait for the file to finish uploading and then click **Done**.

Note: Only one file can be uploaded per Project Document record. If you attempt to upload another file it will overwrite the first file. If you accidentally uploaded the wrong file just upload the correct file by using the Upload Files button again.
7. After the next refresh, the project document uploaded will appear on the Project Dashboard sorted by Document Type and then by Date Received.
Uploading Technology Budget Amendments and Viewing Amendment Summaries (OCIO Administrators only)

Technology Budget Amendments are Project Document records of a certain type. OCIO administrators are the only ones who upload technology budget amendments. While dashboard contributing users can view and have access to these data entry screens, they do not upload technology budget and amendment documents. Dashboard contributing users only view technology budget amendment documents and summaries from the public facing dashboard.

1. To upload a Technology Budget Amendment, when creating a new project document select the Document Type as either Technology Budget Amendment (Non-Gated) or Technology Budget Amendment (IT Pool).

2. The system will require several additional questions to be answered as illustrated below.
3. The technology budget amendment documents and summaries will appear on the public facing dashboard in the Summary of Technology Budget Amendments section.
Entering Project, OCIO and QA Assessments

If you have permission you will be able to add Project Assessment, OCIO Assessment or QA Assessment records from the Project Detail screen.

1. Navigate to the project as described in the Find Project Data and Information section of this document.

2. On the right side of the screen, one or more related lists of assessment records are displayed. All three of the sections work similarly. Click New to enter a new assessment record of the desired type.

3. Select the status of the Scope, Schedule, Budget and Overall Health by choosing from the picklist menus.
4. Enter text descriptions for each of the assessments in the appropriate boxes. There is a 255-character limit for Scope, Schedule and Budget. There is a 1,000-character limit for Overall Health Assessment Narrative.

5. Provide a Date Entered.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scope Assessment</strong></td>
<td>Green</td>
</tr>
<tr>
<td><strong>Schedule Assessment</strong></td>
<td>Green</td>
</tr>
<tr>
<td><strong>Budget Assessment</strong></td>
<td>Green</td>
</tr>
<tr>
<td><strong>Overall Health Assessment</strong></td>
<td>Green</td>
</tr>
<tr>
<td><strong>Overall Health Assessment Narrative</strong></td>
<td>November 2, 2020 is go live day for the launch of the Improved enterprise learning management system. The Learning Center (TLC). TLC is an upgrade to meet the training needs of agencies across Washington. Project</td>
</tr>
<tr>
<td><strong>Date Entered</strong></td>
<td>11/2/2020</td>
</tr>
</tbody>
</table>
6. If entering a QA Assessment, use the lookup to indicate the QA Provider. If you are unable to find the QA Provider, please contact OCIOConsultants@ocio.wa.gov.

7. The information entered in the QA Provider will show up on the Dashboard in the Assessments section in the hover:

8. Click **Save** to complete the entry of the assessment.
Linking to a project webpage

2. Click on the Project Dashboard.
3. Select the desired project from the drop-down menu and then press Go. These tips can be used to more easily find the project in the list:
   a. The search box may be used to more easily find a project by name.
   b. If the agency for the project is known, searching by the 3-character agency abbreviation will limit the list to just projects for that agency.
   c. If the project status is known, clicking the "List filtered by Project Status – click here to modify" link allows limiting the list of projects to just those of the selected statuses.
4. Copy the URL from the browser window (see sample below).
   wacioportal.force.com/s/projectdashboard?Project%20Selector=LMS%20Upgrade
5. Share this hyperlink as desired.
Exporting Data

1. Navigate to the dashboard: waciportal.force.com/s/.

2. Click on the Dashboard button for the dashboard you wish to export data from (i.e., statewide, program, agency, project).

3. If the dashboard requires selecting a Program, Agency or Project do that next. Select the desired project from the drop-down menu and then press Go. These tips can be used to more easily find the project in the list:
   a. The search box may be used to more easily find a project by name.
   b. If the agency for the project is known, searching by the 3-character agency abbreviation will limit the list to just projects for that agency.
   c. If the project status is known, clicking the "List filtered by Project Status – click here to modify" link allows limiting the list of projects to just those of the selected statuses.

4. Where you see icons for Excel or PDF, click on these icons for a download of the data that is used to generate the chart or graph. For accessibility options, see Appendix B: Accessibility.
Here is an example of a PDF icon.

5. The data then will be exported to a .csv or .pdf file to be opened in your browser. Browsers vary in their behavior but many of them will download to the bottom left corner of the screen.

   a. Download may take a few seconds. At the bottom left corner of your screen you may see a message while the data is downloading.

   Waiting for public.tableau.com...

   b. After download, the file will appear wherever your normal browser downloads appear, often in the lower left corner of your screen.
Appendix A: Changes in Dashboard Terminology

This appendix details the document type, key performance indicator, project status and project type terminology that is changing in the 2021 version of the Washington State Information Technology Project Dashboard compared to prior versions. Hyperlinks are provided to link you to definitions for each of the new terms. These terms and definitions are also available in the dashboard Glossary.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Type</td>
<td>Agency QA Response</td>
<td>QA - Agency Response</td>
<td>No Change</td>
</tr>
<tr>
<td>Document Type</td>
<td>Amended Investment Plan</td>
<td>Investment Plan Amendment</td>
<td>No Change</td>
</tr>
<tr>
<td>Document Type</td>
<td>IT Pool - Amended Technology Plan/Investment Plan</td>
<td>Removed</td>
<td>No Change</td>
</tr>
<tr>
<td>Document Type</td>
<td>IT Pool - Amended Technology Budget</td>
<td>Technology Budget Amendment (IT Pool)</td>
<td>No Change</td>
</tr>
<tr>
<td>Document Type</td>
<td>IT Pool - Technology Implementation Plan/Investment Plan</td>
<td>Removed</td>
<td>No Change</td>
</tr>
<tr>
<td>Document Type</td>
<td>ITPA - IT Project Assessment</td>
<td>ITPA (Information Technology Project Assessment)</td>
<td>No Change</td>
</tr>
<tr>
<td>Document Type</td>
<td>Policy Waiver Request</td>
<td>Policy Waiver Request/Response</td>
<td>No Change</td>
</tr>
<tr>
<td>Document Type</td>
<td>Technology Budget - Non-Gated - Amended</td>
<td>Technology Budget Amendment (Non-gated)</td>
<td>No Change</td>
</tr>
<tr>
<td>Key Performance Indicator</td>
<td>Budget</td>
<td>Total Planned Spend</td>
<td>No Change</td>
</tr>
<tr>
<td>Key Performance Indicator</td>
<td>None</td>
<td>M&amp;O Start Date</td>
<td>No Change</td>
</tr>
<tr>
<td>Project Status</td>
<td>Active – IT Pool</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Project Status</td>
<td>Cancelled – IT Pool</td>
<td>Cancelled</td>
<td></td>
</tr>
<tr>
<td>Project Status</td>
<td>Complete – IT Pool</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Project Status</td>
<td>On-Hold – IT Pool</td>
<td>On Hold</td>
<td></td>
</tr>
<tr>
<td>Project Status</td>
<td>Proposed – IT Pool</td>
<td>Proposed</td>
<td></td>
</tr>
<tr>
<td>Project Status</td>
<td>On Hold</td>
<td>Separated into:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>On Hold – Agency</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>On Hold – OCIO</td>
<td></td>
</tr>
<tr>
<td>Project Status</td>
<td>Cancelled</td>
<td>Separated into:</td>
<td></td>
</tr>
</tbody>
</table>
Cancelled – Agency  
Cancelled – OCIO  
Gated – Non-IT Pool  
Gated - IT Pool  
Non-gated  

Appendix B: Accessibility

This appendix details features that have been incorporated into the dashboard to make it more accessible by all users.

**CSV and PDF Icon**

CSV and PDF Icons indicate downloadable content. To interact via keyboard, tab to the item and select ‘Enter’. This will bring up a dialogue box that provides alternate instructions to download the content.
Information Icon

Information Icons provide important information on hover. This is also made accessible by using the keyboard to focus on the icon and select ‘Enter’. This will bring up a window that provides the same information.

![Budget vs. Actual Spend by Fiscal Year](image)

Downloading Visualizations

You can download visualizations in tabular format or learn more information by focusing and selecting ‘Enter’ on different elements. For example, by focusing on this bar chart and selecting ‘Enter’ I have a choice to download as a text file.
### View Data

<table>
<thead>
<tr>
<th>YEAR (Fiscal Date)</th>
<th>Agency Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>Accountancy, State Board of</td>
</tr>
<tr>
<td>2020</td>
<td>Accountancy, State Board of</td>
</tr>
<tr>
<td>2019</td>
<td>Accountancy, State Board of</td>
</tr>
<tr>
<td>2021</td>
<td>Accountancy, State Board of</td>
</tr>
<tr>
<td>2020</td>
<td>Accountancy, State Board of</td>
</tr>
<tr>
<td>2019</td>
<td>Accountancy, State Board of</td>
</tr>
</tbody>
</table>

Showing first 6 rows.

Download all rows as a text file