

## INSTANCE SPECIFIC CONFIGURATION AND SETUP

### Admin Tab

- The **Admin Tab** allows you to make instance wide customizations
- **Role Permissions** and **Asset Options** are defined
- **Company, Staff,** and **User** lists can be found and edited
  - **Staff** is a record of a person. All **Staff** belong to a **Company**
  - **User** gives a **Staff** login credentials and access to the instance
    - All **Staff** of a particular **Company** have the potential to be assigned to any **Project** for that **Company**.
    - Also, **Staff** that are part of **Company** listed as a Partner on a given **Project** have potential to be assigned to that **Project**.
    - For access to a **Project** a **Staff** member must have **User** credentials created and must be assigned to the **Project**.
    - Beyond this access, an individual **User's Role Permissions** further organize their ability to interact with the data within a **Project**.
- The **Model Library** is accessible here as well. Edits can be made with relevant permissions.

## PROJECT SPECIFIC CUSTOMIZATION

### Projects Tab

- The **Projects Tab** allows you to create **Projects** and assign **Staff** to them
- After **User Accounts** have been created **User Activation Emails** can be sent out to new **Users** who have not logged in yet
- **Asset Field Settings** are accessible here as well
  - Up to 96 new, customized **Asset Fields** can be added to each of the four **Asset Classes** in addition to the default **Fields** which also show up on the list. **Custom Fields** can be shared across **Asset Classes**
  - **Fields** can be displayed or hidden, set as required and colored based on their importance
  - Also, helpful hints can be added to **Asset Fields** and will display when a **User** hovers over the **Field** when viewing or editing the **Asset Details** screen

### Assets Tab

- The **Assets Tab** allows navigation to detailed **Asset** information as well as the **Dependency Analyzer**

### Planning Tab

- The **Planning Tab** allows you to view lists of and create **Bundles** and **Events**

### Tasks Tab

- The **Tasks Tab** allows you to view lists of and create **Tasks** manually
- During **Events, Runbooks** generated using a **Recipe** can be found here in various forms

### Dashboards Tab

- **User Dashboard** acts as a homepage for **Users** and gives an overview of the particular **Users** involvement
- **Planning Dashboard** acts as a high level view of the **Project** the **User** has selected
- **Event Dashboard** acts as a low level view of a particular **Event** taking place within a **Project**

## DISCOVERY

### DATA IMPORT AND EXPORT

- **Export** an Excel template document from **Asset Tab**
- Normalize client data, populate Excel template
  - Track normalization in **Data Mapping Specification**
- Select file and check **Assets** before clicking **Import**
- **Manage Batches** to check data. click both **Review** and **Process**
- After data is entered find & update **Asset Details** using **Asset Tab**
- **Dependency Imports** post immediately

### SME INTERVIEW & AAQ SURVEYS

- Search **Asset Table** for specific assets
- Click Asset name, enter **Asset Details**
- **Edit** to update **Asset** information
- Manually create **Asset** in **Asset Table**
- Create **Tasks** in **Asset Details**
  - Follow-up **Tasks** for missing info

## VALIDATION AND CONSISTENCY

- **Validation Status** of **Assets** allows for tracking progress in various location in TransitionManager
  - **Discovery:** assets that have not been validated. The data is from the initial data import
  - **Validated:** assets that have all non-dependency information validated
  - **DependencyReview:** assets that have some accurate dependency information
  - **BundleReady:** assets with accurate information; they are ready to be grouped for a move event.
- Plan out how to populate specific fields especially **Custom Fields** and **Dependency Types**. Consistently gathered data will subsequent project phases much more efficient and effective

## ANALYSIS & PLANNING

### BUNDLE

- Every **Asset** is in a **Bundle**; there is a default **Bundle** in every project. A **Bundle** is a group of **Assets**

### DEPENDENCY GROUP

- **Assets** that have dependencies to each other. **Dependency Groups** are created in the **Dependency Analyzer**

### DEPENDENCY ANALYZER

- Click **Regenerate** button to generate dependency groups
- Select criteria in the **Dependency Grouping Control** to consider or ignore **Connection Types** and **Statuses**
- **All** - Contains all assets in the project
- **Remnants** - Assets that do not have a **Connection Type** selected in **Dependency Grouping Control** criteria
- **Grouped** - contains all assets in the **All** except for those in the **Remnants** group.
- Additional Groups are interdependent of each other and ordered based on their **Asset** count

## EXECUTION

### RUNBOOK CREATION

- **Tasks Tab, Cookbook**, allows us to run a **Recipe** against an **Event**

### TABLETOP

- Mock move **Event** to iron out potential issues with **Runbook**
- Resources login to TM, complete and confirm **Event Tasks**

### EVENT DASHBOARD AND WORKFLOW TRACKING

- Choose **Workflows**, and duration, within specific **Bundle Details**
- Once chosen, **Event Dashboard** will display **Workflows**

### PRE-EVENT CHECKLIST

- **Pre-Event Checklist**, allows us to check the proposed **Event** plan
- Check **Project, Event** and **Bundles**
  - Duration + Assignment
- Confirm **Groups** and **Teams**
- Determine potential **Asset** errors
- Find errors in **Runbook Tasks**