D&C PROJECT MANAGEMENT TRACKER

User Guide

Design and Construction Project Team Updates

A two-minute start

1. Open the link supplied by your Administrator. Use your assigned tracker User ID and password when the tracker sign-in page appears.

2. If prompted at first sign-in, replace the temporary password with your own private password. Do not share another person's account.

3. Choose a Business Unit, then open **Projects** for the meeting register or **Portfolio** for the summary.

4. Search for a familiar project. Double-click its row for details; double-click **Activity Update** for the separate editor and history.

At the top of every working page

Control	What it does
Photo or initials	Opens **Profile & settings**: photo, job title, location, mobile phone and Change password.
Door / exit image	**Sign off**. The tooltip appears immediately; the tracker session ends when sign-off succeeds.
Refresh	Reloads records, clears filters, selects All business units and restores default columns and source order. It is not Sign off.
Export CSV	Downloads the **full project register**, not just the filtered table. See page 6.
+ Add project	Creates a capital or development record; available to Editors and Administrators.

QUICK HELP

Use **Help & PDF Guide** in the left navigation, then **PDF User Guide** to download this guide. A hosting access screen, if present, is separate from the tracker account.

1. Find the right workspace

Workspace	Use it for
Portfolio	Current-work totals, budget, attention items, business-unit bars and clickable donut. Click summary cards to open the related workspace.
Projects	Capital projects in familiar major-project groups; meeting updates, status, risk, schedule and alternate column sets.
Development Pipeline	Initiative #, development lead, requestor, due dates, estimates and Activity Update; promote approved work.
Cost Control (CC)	CAPP inputs, approved budget, anticipated final cost and calculated variances.
Risk Register (RR)	Budget and schedule risk across capital and development work, including Not Rated.
Admin	Administrator-only user directory, credentials, roles, Business Unit Permissions and audit activity.
Help & PDF Guide	The built-in quick reference and downloadable guide.

Use the compact filter bar

The Business Unit label and buttons sit on the left; search and available filters are on the right. The selected unit follows you between the project workspaces. Search expands with the window up to a comfortable reading width.

Status and **Risk** have the immediate tooltips **Filter Status** and **Filter Risk**. The column control says **Alternate Columns**. Search matches are highlighted yellow in table text.

Projects, Cost Control and Risk share search/status/risk filters. Development Pipeline has its own search and status filter. Admin has separate user search, role and account-status filters.

Read Portfolio correctly

Current projects means Active, On Hold or Closeout. Needs Status records remain visible but are excluded from current-work counts. The original import contained 74 records; live totals change as records are updated or added.

The donut and its color key are inside the business-unit chart panel. Click a segment or key to open Projects for that unit. Drag the top summary cards to reorder them; that preference is kept in the current browser.

2. Edit details and Activity Updates

Open the right editor

Action	Result
Double-click a data row	Opens the same project or development details as the ••• button. In Admin it opens the user editor.
Click an in-row control	Status, risk and cost inputs retain their direct-edit behavior. They do not need a row double-click.
Click Activity Update text	Edits the current narrative in place. Click elsewhere to save changed, nonblank text.
Double-click Activity Update	Opens the larger narrative editor and complete project history. Use **Save dated update** to post.

Post an update

1. Confirm the correct project and business unit before typing.

2. Write current progress, the issue or decision, the responsible person and the next milestone. Include the event date in the text if it differs from the date you are posting.

3. Save by clicking outside the inline text, or choose **Save dated update** in the larger editor.

4. Confirm the saved text and newest history entry. If a save reports an error, verify the record before retrying.

DATES & HISTORY	New updates receive the current server date (UTC) and signed-in author. Earlier imported narratives retain their source reporting dates. The editor does not provide a backdated reporting-date picker.

Correcting an already-saved update

The current narrative can be edited, but a saved correction is a **new dated entry**. Earlier history entries are read-only in the present interface. Add a clear correction that identifies what changed; do not assume the earlier entry has been overwritten or removed.

Reading history does not post an update. Inline saving skips unchanged text; **Save dated update** adds an entry. Use Close when you are only reviewing.

TEST CAREFULLY	Use an approved, clearly labeled test record for practice. Random test text saved in a real project can remain in its history. Record unexpected duplicates or authorship for Administrator review.

3. Development, cost and risk

Add a record and complete its details

Choose **+ Add project**, select Capital or Development, and enter the name, business unit, major-project heading, identifier, lead and opening narrative. Save, then open the details editor to complete the remaining fields.

Promote approved development work

1. Open **Development Pipeline**. Use Initiative # to identify the record and review its Activity Update history.

2. Select the row's **Promote** button after the work has been approved.

3. Enter the business unit, CAPP number, project manager and major-project heading; confirm **Promote to Project**.

4. The record becomes an Active capital project. Complete its capital cost and schedule fields in Projects or Cost Control. The project identity, development details and history remain available.

Cost Control: enter inputs, review formulas

Field	Meaning
A&E / Pre-Con; Construction; Add-CAPP	Editable approved-capital components. Add-CAPP is cumulative.
Total Approved Budget	Calculated as Pre-Con + Construction + Add-CAPP.
AFC	Anticipated Final Cost: the best current forecast for the whole project, not just remaining invoices.
Variance / % variance	AFC minus approved budget; percentage uses approved budget as the denominator. Positive variance means forecast cost exceeds budget.

Some imported values reflect the original workbook. If a result appears wrong, verify the input records and any original workbook formula before changing a value.

Risk Register: all levels remain visible

Budget and schedule risks are separate: **High, Medium, Low** or **Not Rated**. The highest of the two determines each record's summary category. Search and filters narrow the displayed population; they do not delete records.

Use High for attention, Medium for monitoring, Low for assessed lower risk, and Not Rated for an assessment still needed. Confirm the team's shared rating criteria before relying on comparisons.

4. Admin and personal settings

Administrator: create or update an account

1. Open **Admin**; choose **+ Add user**, **Edit**, or double-click the user row.

2. Confirm name, **User ID**, email, role, account status and site access status. User ID and email are separate fields; changing email alone does not change User ID.

3. Record the Business Unit Permissions assignment. Add a profile photo if available, or retain the person's initials.

4. For a new password or reset, enter the temporary password and re-enter it in the confirmation box. Use at least 10 characters with uppercase, lowercase, a number and a special character.

5. Choose **Save user**. Give the assigned User ID and temporary password to that person privately. Saving an account does not send an invitation email.

PASSWORDS	Leave both password boxes blank to retain the existing password. Saved passwords are stored as one-way hashes and cannot be retrieved. A reset creates a new temporary password; it does not reveal the old one.

What each role can do

Viewer: reads project information and history. **Editor:** updates project fields and activity. **Administrator:** also manages the user directory, credentials and audit activity. Keep recovery access available before changing your own sign-in details.

IMPORTANT LIMIT	**Business Unit Permissions currently records an assignment; it does not yet restrict the project data that an authorized user can access.** The Business Unit filter is a display aid, not an access-control boundary. Per-unit enforcement must be implemented and verified before restricted sharing.

User: change your profile or password

Click your photo or initials at the top right to open **Profile & settings**. You can update your photo, job title, location and mobile phone. Name, email and User ID are read-only here; ask an Administrator to change them.

Upload a JPG, PNG or WebP photo up to 5 MB, then save. **Use initials** removes the photo after saving. For a password change, select **Change password**, enter the current password and confirm the new one. Use the door icon to sign off.

5. Export, test and plan the transition

What Export CSV actually includes

Export CSV downloads the complete project register. It does not apply the on-screen Business Unit, search, Status or Risk filters. Filter the downloaded file in Excel if needed, and check its contents before sending it to anyone.

The CSV contains current project data and selected previous-update information, not the complete dated history, user credentials, photos or audit trail. It is **not a full backup**. The application requires an authorized session to export.

Continue using the workbook during evaluation

The tracker began from the August 28, 2026 workbook snapshot. A recurring workbook-upload or automatic synchronization screen is **not currently implemented**. Moving the tracker to another server does not automatically add that function.

Keep one authoritative workbook during evaluation. A developer can build a controlled importer with stable project identifiers, change previews, duplicate prevention, conflict review and an audit trail. Take a recoverable snapshot before importing.

Before final transition, reconcile the latest records, confirm access and support, and agree a cutoff for workbook edits. Avoid parallel editing without reconciliation.

A short acceptance checklist

Check	Expected result
Navigation & filters	Each workspace opens; filters and yellow search highlights behave as expected.
Details & history	Row double-click opens details; Activity Update opens its separate editor/history.
Save & refresh	An approved test edit persists after reload with the correct author and save date.
Profile & sign-in	Photo or initials appear; password change and sign-off work for the intended user.
Export	CSV opens and contains the full register; no expectation of a filtered export.
Permissions & readiness	Role behavior is checked. Per-unit restrictions and repeat imports are treated as pending work.

FEEDBACK Record the project, action, expected and actual result. Include a screenshot if useful, with passwords hidden.