AGS

AGS CLOUD
PROJECT ASSESSMENT MODULE
STEP-BY-STEP TUTORIAL

WELCOME

Hello, and welcome to this step-by-step tutorial on how to use the AGS Cloud Project Assessment Tool.

We hope this step-by-step tutorial will be a great learning process for helping you understand how to use this module, as well as understanding the overall infrastructure of the tool.

If you have any questions or if you need additional features and capabilities to be developed for you, just contact us through our website, and your question or request will be routed to the right contacts.

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AGS CLOUD VS EXCEL

Did You Buy the Cloud or Excel Version?

AGS' Project Assessment Tool is available in both a cloud version that is accessible online via any device AND a downloadable Excel tool.

Each tool will have a slightly different look. However, both will offer the same features, pages, database columns, analytics, and templates. The main difference is how you access them.

This tutorial uses images from the AGS Cloud version of the Project Assessment Module, which will include additional navigation related to the AGS Cloud website.

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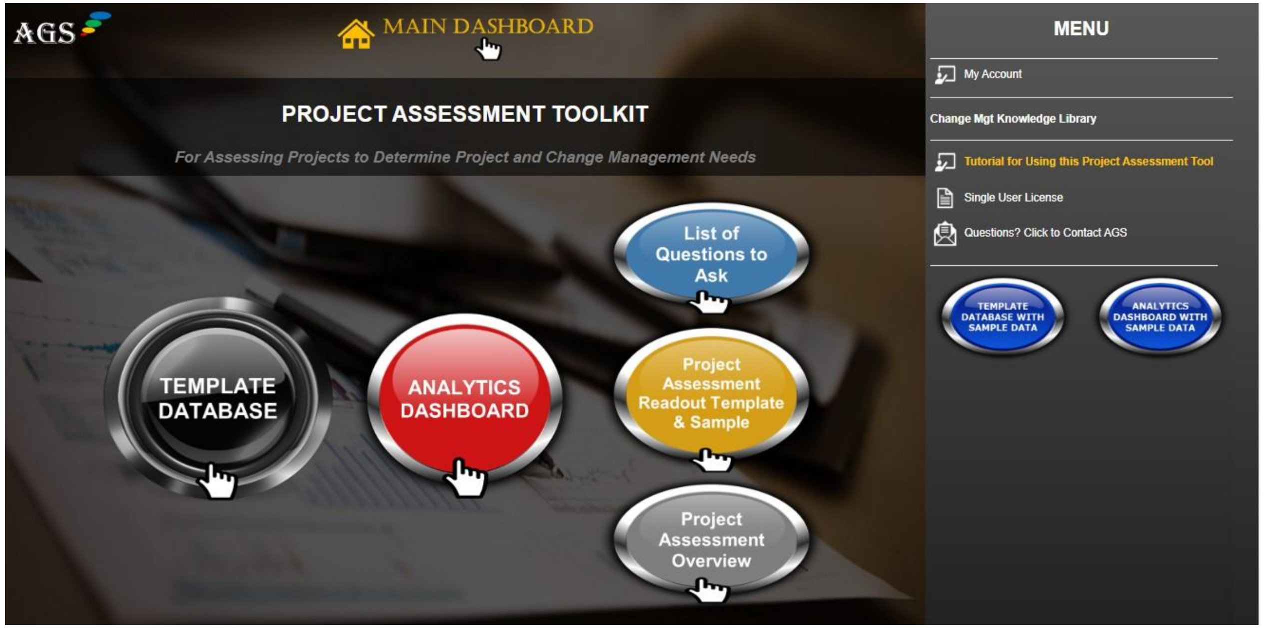
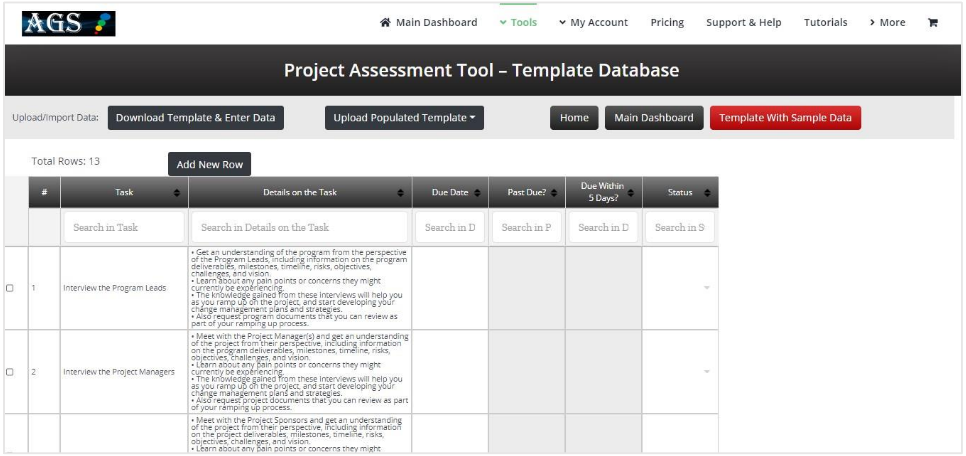
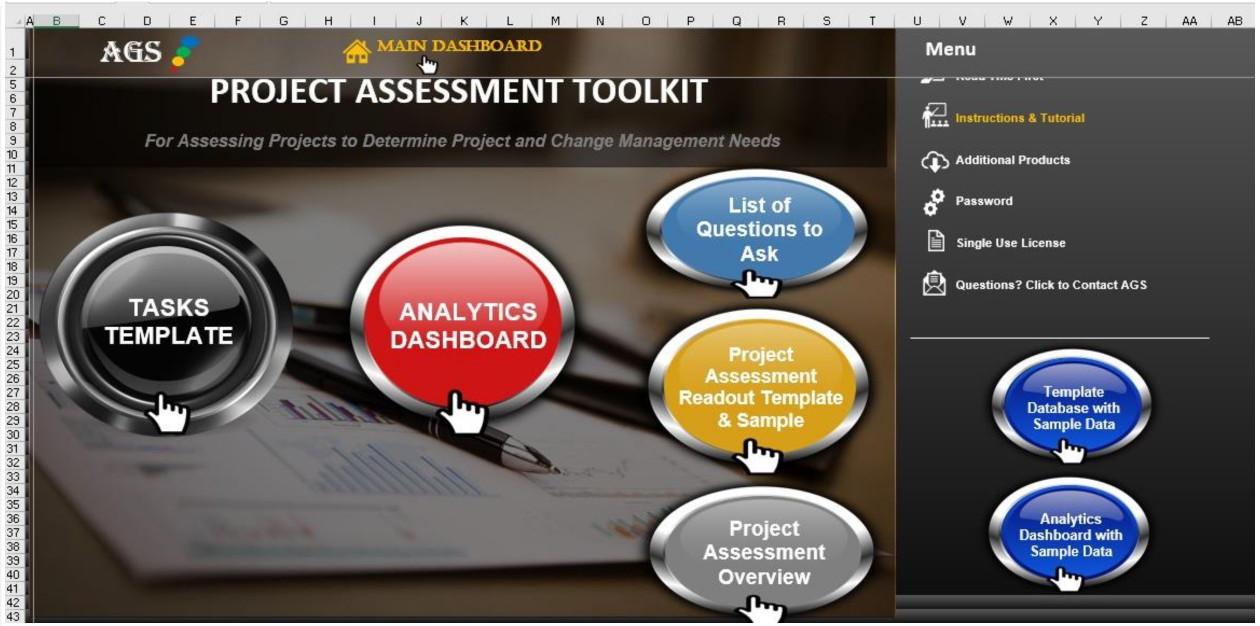
AGS CLOUD VS EXCEL

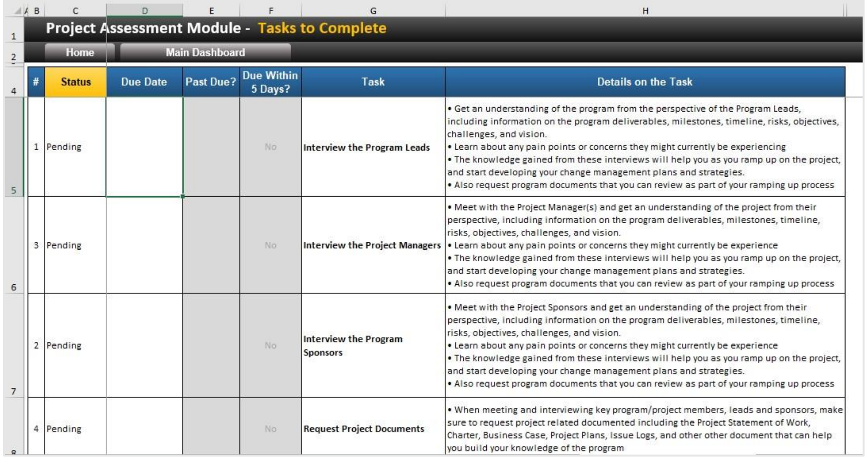
AGS Cloud Version





AGS Excel Version





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PROJECT ASSESSMENT

When you initially join a project as a Change Manager, Program Manager, or a Project Manager, your first priority will be to conduct a thorough review of the project. This needs to be done before (or in parallel to) conducting a stakeholder assessment, a change impact analysis and a change readiness assessment.

The goal of conducting a project analysis is to understand the scope, scale, timeline, and overall objectives of the project. This knowledge then allows you to better develop and implement the project management deliverables or the change management deliverables that are critical to support the project and make it successful.

Without doing a project assessment, you will always be one step behind, and will always be playing catch-up. This is not an ideal state for you if you are a Project Manager, Program Manager, or Change Manager that has been assigned a new or an existing project.

PROJECT ASSESSMENT TOOL
HOME PAGE OVERVIEW

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AGS CLOUD MAIN DASHBOARD

When you open the AGS Cloud Tool for the first time after subscribing, you will land on the Main Dashboard page.

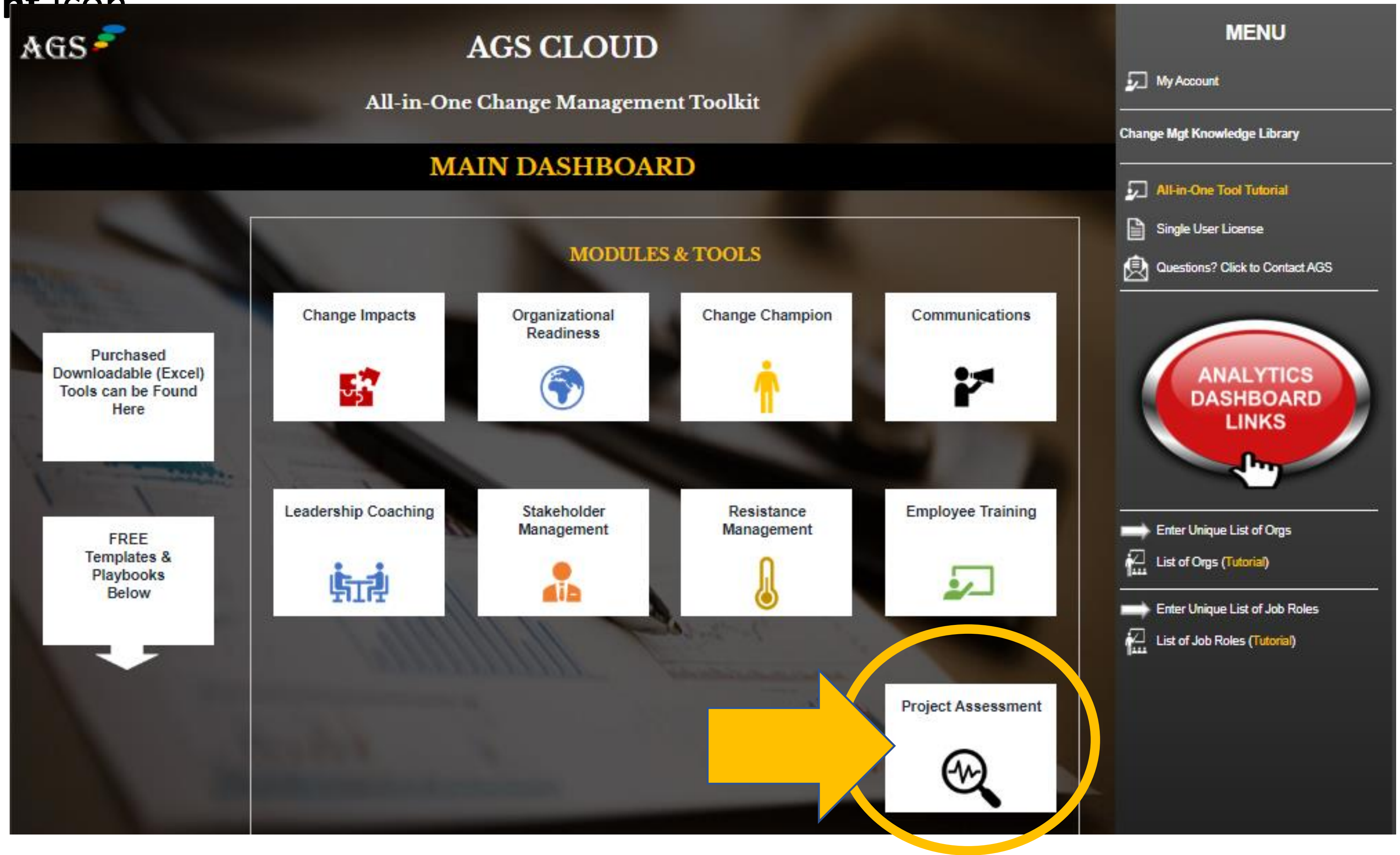
This main dashboard is your command central for the AGS Cloud platform. If you've purchased the All-in-One version of AGS cloud, all modules will be activated.

If you've purchased any of the modules individually, then only the modules you've purchased will be activated.

For this tutorial, we will start with an overview of the module's Home Page.

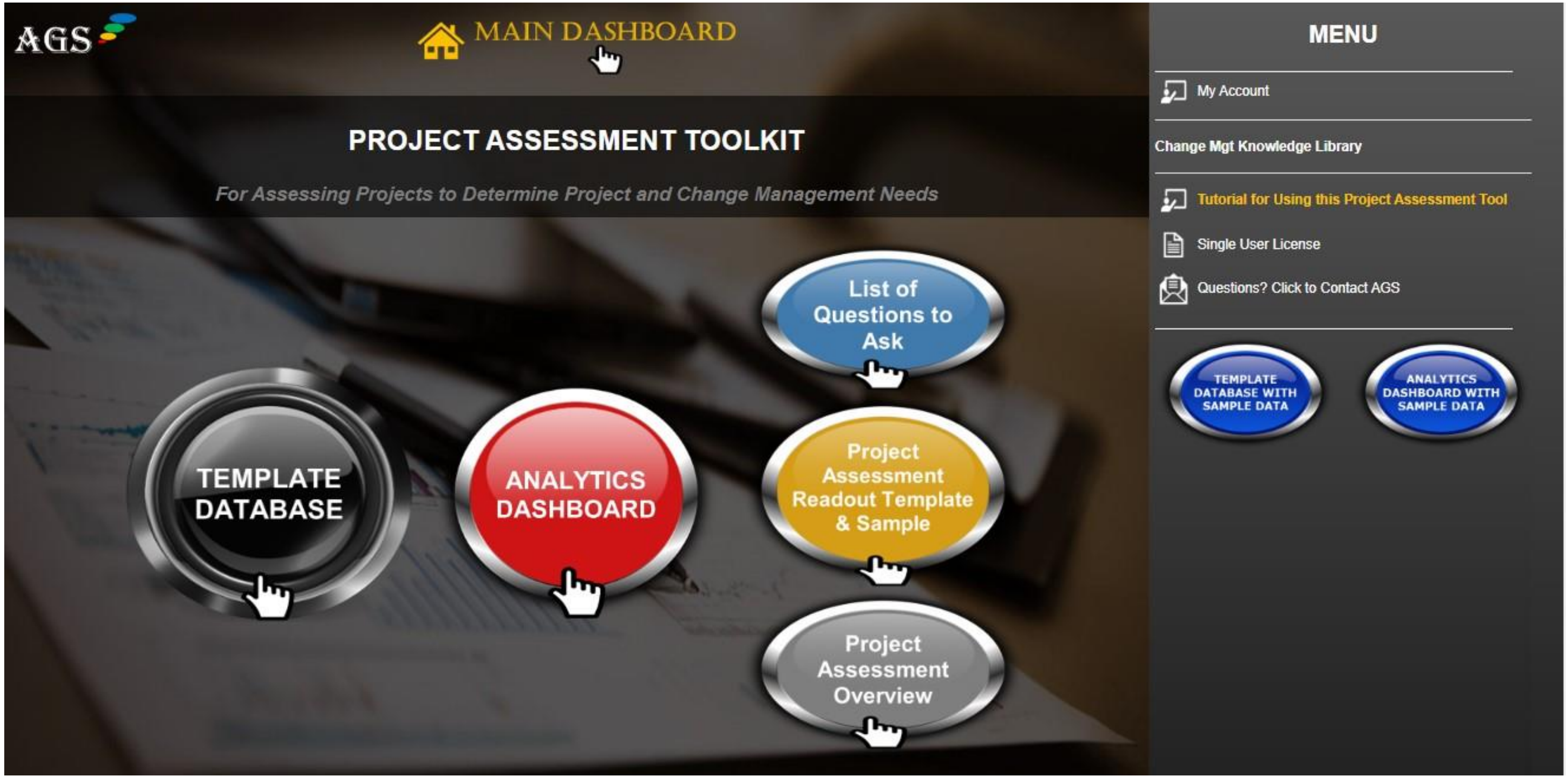
PROJECT ASSESSMENT MODULE

Get to the home page of the Project Assessment Module by clicking the **Project Assessment icon**



HOME PAGE

The project assessment module gives you the tools you need to successfully kick off your change project by identifying things like project scope, challenges, benefits, and more.



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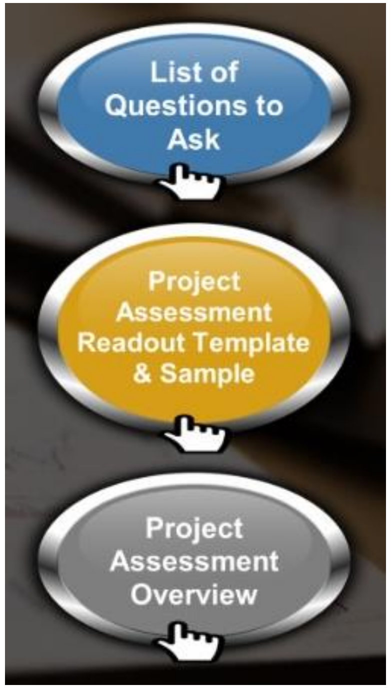
HOME PAGE

In each of our modules, you'll find two main areas, the **Template Database** where you enter data, and the **Analytics dashboard** where you can see your data come to life with real-time analytics.

All of our modules have additional features and guides. You'll see three in this module:

- List of Questions to Ask
- Project Assessment Readout Template & Sample
- Project Assessment Overview



We will go over each of these areas in detail shortly in this tutorial.

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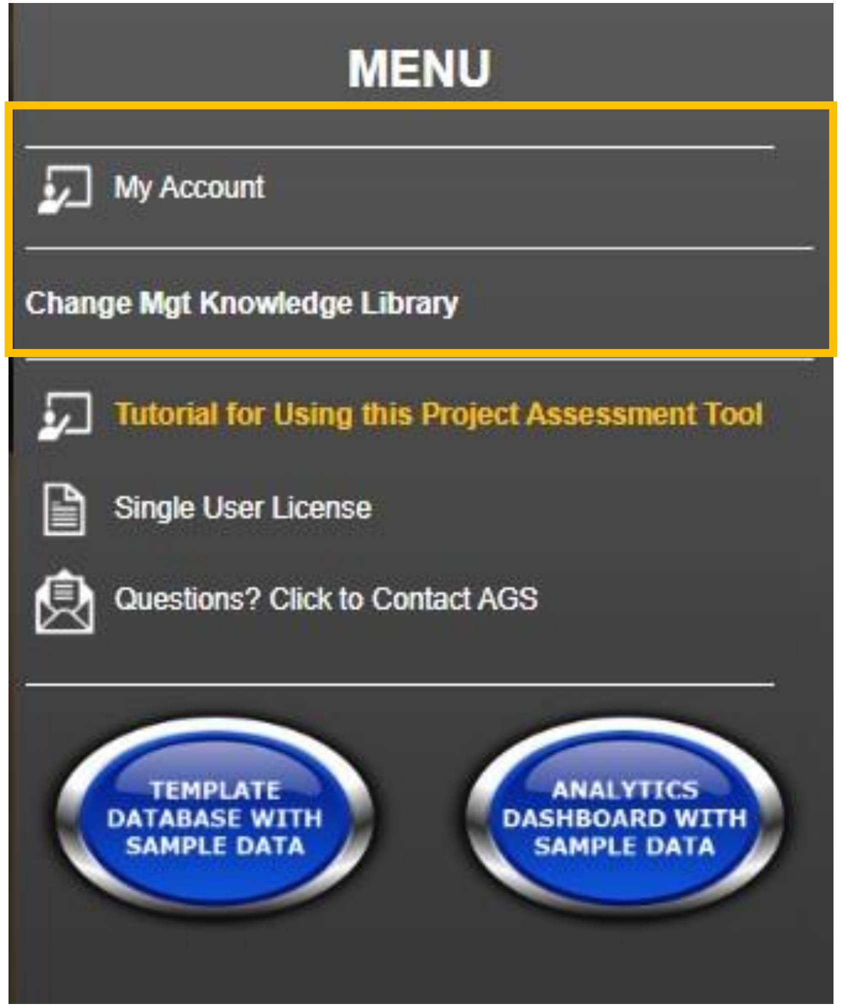
HOME PAGE | MENU COLUMN

Next, to the right of the interface, you'll find the **Menu** column.

The first item is the **My Account** link, this takes you to your AGS Cloud account administration page where you can access all your account settings and information. (We have a separate tutorial for the My Account page.)

The next link on the menu column, is the **Change Management Knowledge Library**. Our library holds a treasure trove of change management articles and information that you can reference. It's import to know that this link is only accessible if you have purchased a Value-Add Service add on with your subscription.

You can find details on adding a Value-Add Service on the AGS Cloud pricing page.

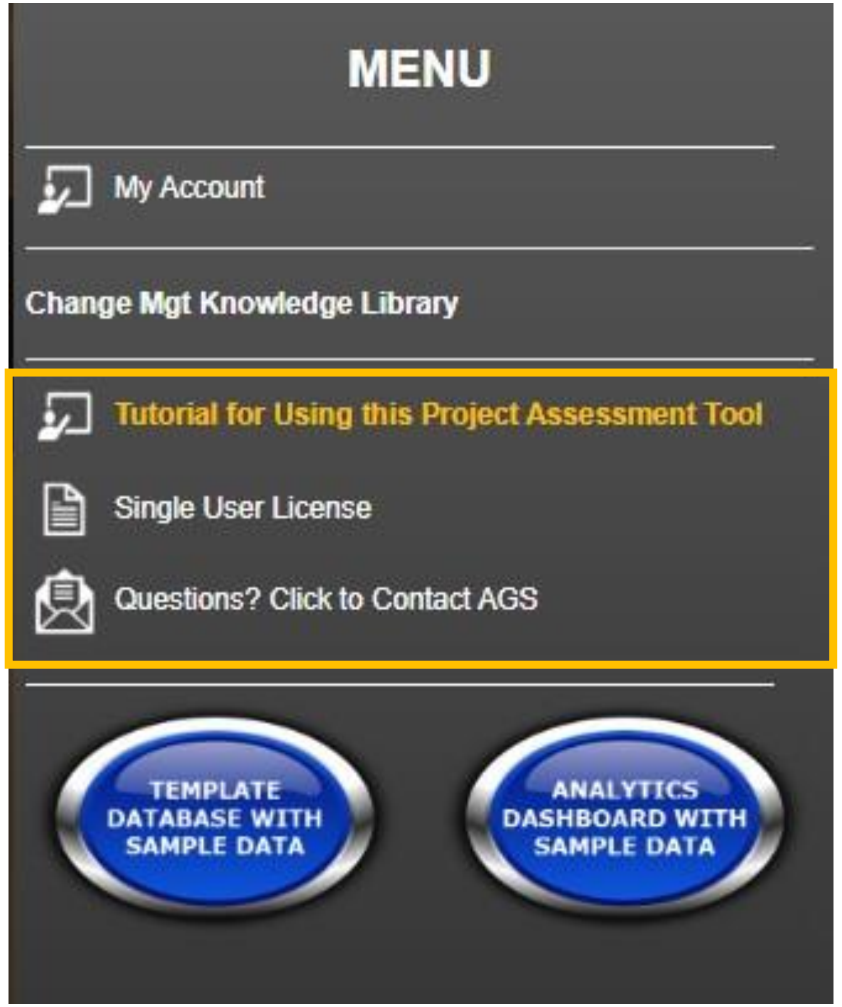


HOME PAGE | MENU COLUMN

Next, you'll find a link to a downloadable tutorial for using this Project Assessment Tool.

You can review the **Single User License** policy at the next link. Briefly, each user must have their own license to use the AGS Cloud tool. You can invite other users to share your account and collaborate with you online simultaneously, however each user must purchase their own subscription.

If you have any questions while using AGS Cloud, just click the **Questions? Click to Contact AGS** link.



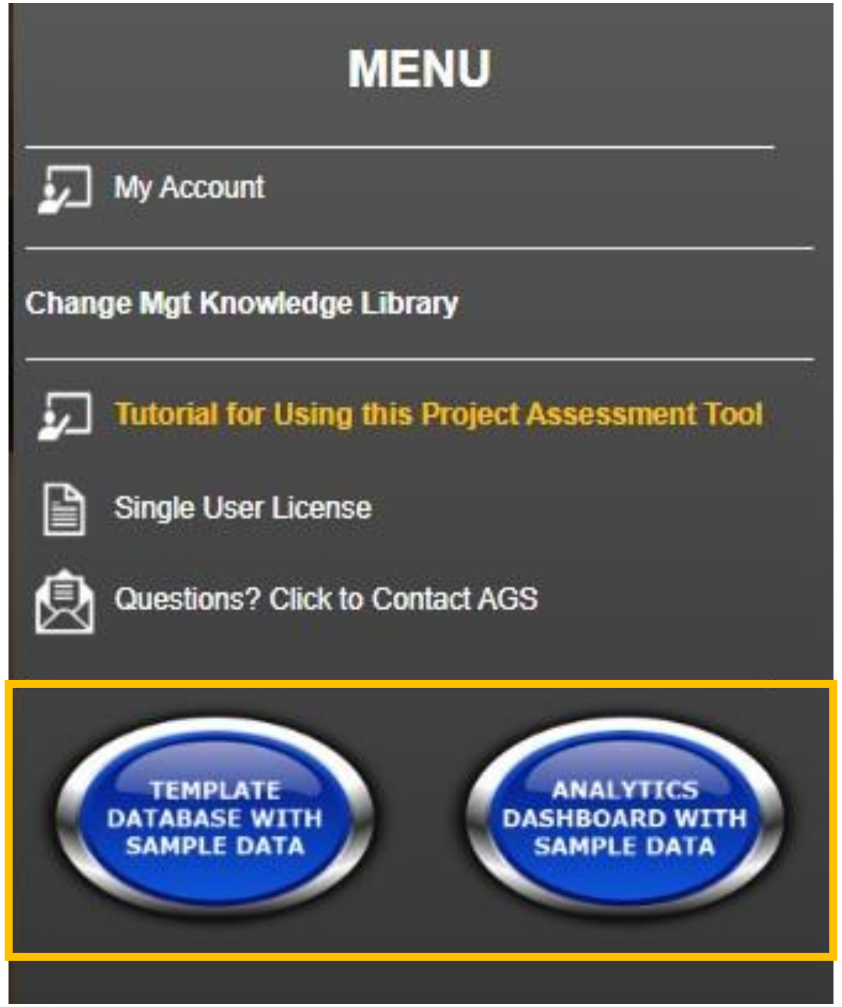
HOME PAGE | MENU COLUMN

The next items on the Menu column are the sample data buttons.

While using this tool, you can always view sample data for both the Template database and the Analytics Dashboard.

The sample data helps give you an idea of how you can enter your own data.

Clicking on these two blue buttons will take you to either of the sample data pages. We will discuss these two pages in detail later on as part of this tutorial.



END HOME PAGE OVERVIEW

And that covers the high-level overview of the Menu column on the module's Home page.

Next, we are going to review the template database where you will enter your data.

On the Home page, clicking on the **Template Database** button will take you to that page.

PROJECT ASSESSMENT TOOL
(HOME PAGE OVERVIEW)

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TEMPLATE DATABASE

Conducting an assessment of a project involves understanding and documenting the nature of the change that the project is looking to implement.

This involves assessing the project scope, scale, designs, program objectives, and factors driving the need for the company to implement the change now. It also includes assessing the program's:

- Deliverables (design-build-test-deploy)
- Milestones
- Problem statements
- Statement of work (SoW)
- The expected solutions
- The risks of not changing now

The project assessment also includes understanding the project's implementation governance (who's who?).

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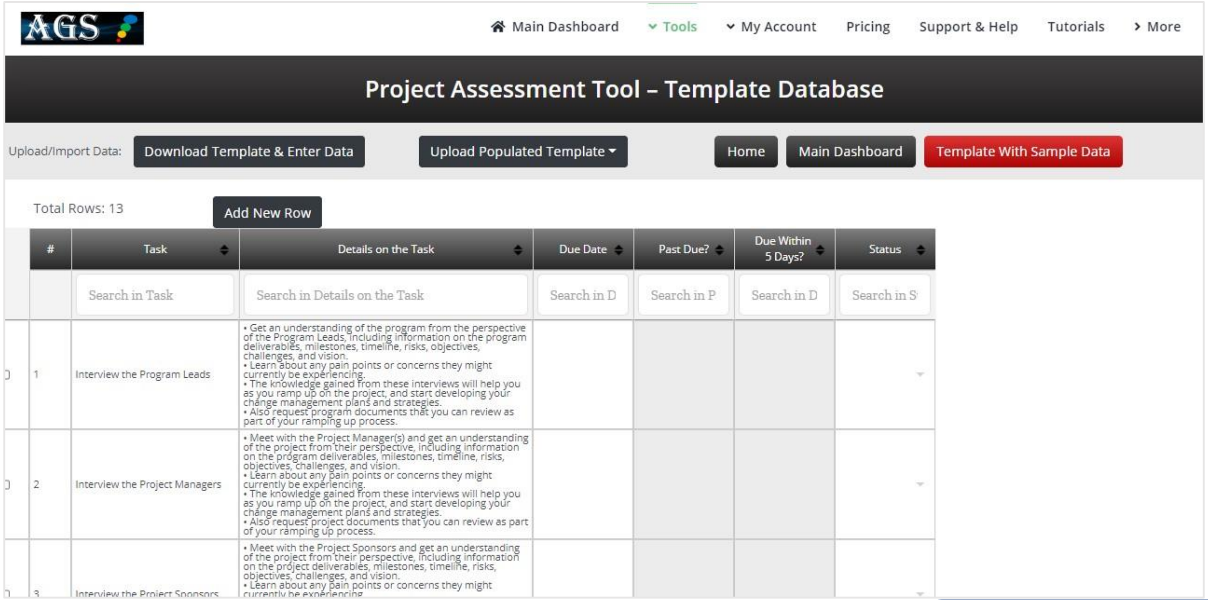
TEMPLATE DATABASE

When you initially open the database for the first time after purchasing your AGS Cloud subscription, certain columns will be blank because nothing has been entered yet.

To illustrate what this Template Database will look like as you start entering information, we'll be reviewing the version that includes the sample data.

But first, let's go through some navigation instructions.



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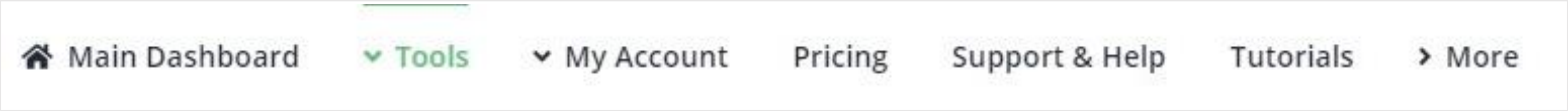
TEMPLATE DATABASE | NAVIGATION

The top links are as follows:



- **Main Dashboard** takes you back to your command central of AGS Cloud; where you can access all the modules and free templates. You'll find the Main Dashboard link on all pages, near the top.
- The **Tools** link is a way to jump to each of the modules, databases, and analytics within your subscription.
- **My Account** links you to your AGS Cloud account administration page and helpful FAQs.
- **Pricing** takes you to the main pricing page for all AGS products.
- If you need help while using AGS Cloud, just click the **Support & Help** link.
- All the videos and downloadable PDF tutorials for each area of AGS Cloud are located at the **Tutorials** link.
- Clicking on **More** will give you additional options, like how to contact AGS support.

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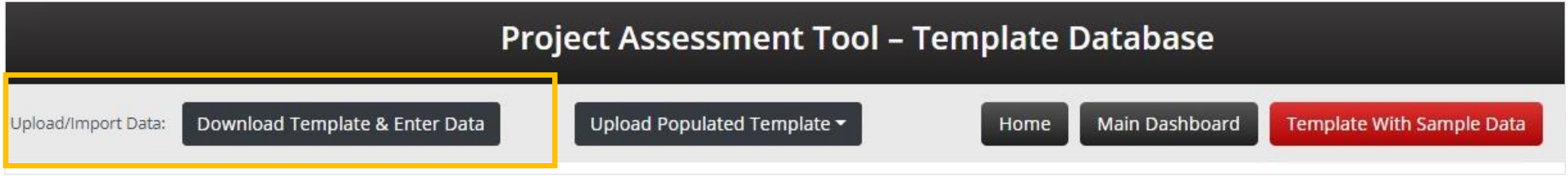
TEMPLATE DATABASE | NAVIGATION

Note: You can also use your “**Back**” button in your browser to go back to a previous page.

Now, let’s drop down to look at the row of buttons.



You’ll find in each database that you have the option to upload a spreadsheet to populate all the information. You can also enter it manually.

To populate the database from a spreadsheet, you’ll first want to click the button to **Download Template & Enter Data**, which is going to download an Excel template with the correct columns you need for uploading it to the Project Assessment Template Database.

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TEMPLATE DATABASE | DOWNLOAD

Please use our Excel template when uploading your data into the database. You can get it by clicking the **Download Template & Enter Data** button to get the template. It has all the columns that will match each field in the database.

We include details in the template to get you started. You can delete or add to these. Save when done editing, then upload.

Project Assessment - Tasks to Complete - Use This Template to Upload Data into the Online Table

Ignore these 2 columns. These are auto-calculating columns

Task	Details on the Task	Due Date	Past Due?	Due Within 5 Days?	Status
Interview the Program Leads	• Get an understanding of the program from the perspective of the Program Leads, including information on the program deliverables, milestones, timeline, risks, objectives, challenges, and vision. • Learn about any pain points or concerns they might currently be experiencing. • The knowledge gained from these interviews will help you as you ramp up on the project, and start developing your change management plans and strategies. • Also request program documents that you can review as part of your ramping up process.				
Interview the Project Managers	• Meet with the Project Manager(s) and get an understanding of the project from their perspective, including information on the program deliverables, milestones, timeline, risks, objectives, challenges, and vision. • Learn about any pain points or concerns they might currently be experiencing. • The knowledge gained from these interviews will help you as you ramp up on the project, and start developing your change management plans and strategies. • Also request project documents that you can review as part of your ramping up process.				
Interview the Project Sponsors	• Meet with the Project Sponsors and get an understanding of the project from their perspective, including information on the project deliverables, milestones, timeline, risks, objectives, challenges, and vision. • Learn about any pain points or concerns they might currently be experiencing. • The knowledge gained from these interviews will help you as you ramp up on the project, and start developing your change management plans and strategies. • Also request project documents that you can review as part of your ramping up process.				
Request Project Documents	• When meeting and interviewing key program/project members, leads and sponsors, make sure to request project related documents, including the Project Statement of Work, Charter,				

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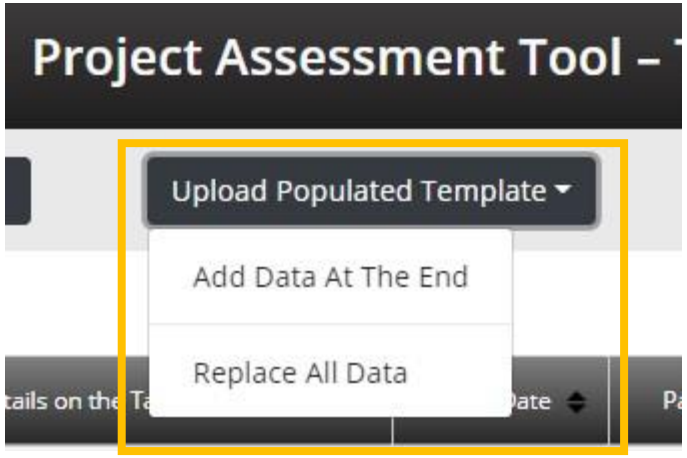
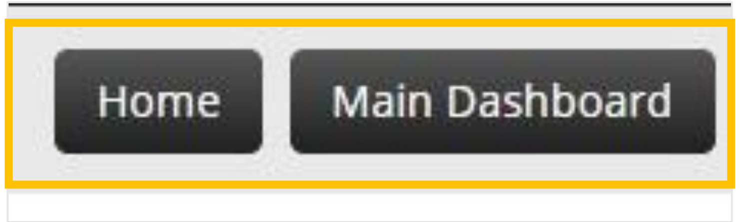
TEMPLATE DATABASE | NAVIGATION

The next button is the one you'll use to upload your populated Excel file, the **Upload Populated Template** button.



You can choose to insert all the uploaded spreadsheet data at the end of any existing data or replace everything in the database with your upload.

An important distinction is between the **HOME** button and the **MAIN DASHBOARD** button.



Home keeps you inside the Project Assessment module. It will take you back to the module's home page. The **Main Dashboard** button takes you to the command central – AGS Cloud's Main Dashboard where you can access all the modules.

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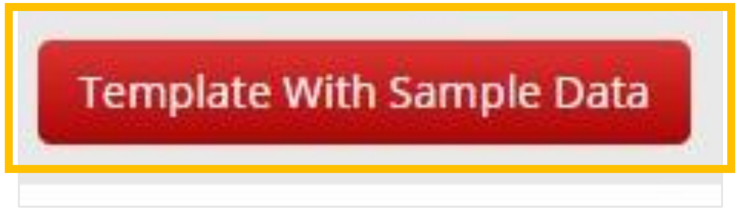
TEMPLATE DATABASE | NAVIGATION

The **Template With Sample Data** button contains a database filled with sample data as a visual and educational aid.



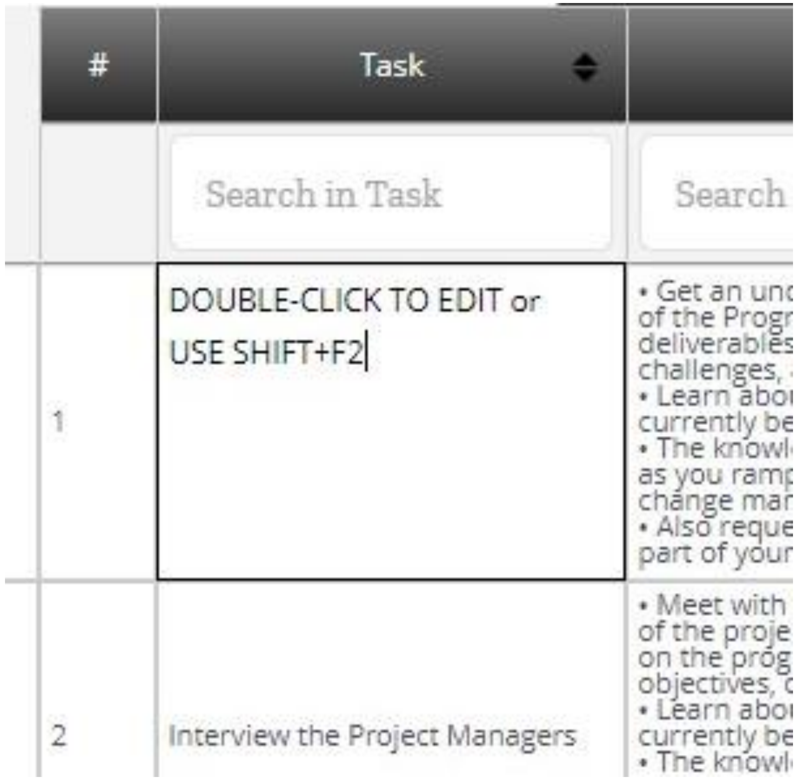
This is the same page you can also access by clicking that blue sample data button from the Home page menu column.

Before we go over each individual column, let's discuss navigation inside the database page.

TEMPLATE DATABASE | NAVIGATION

Template Database Navigation Cheat Sheet:

- To edit any cell: Double-click to edit OR use Shift+F2
- Tab will tab you to the next cell on the right
- Shift+Tab will tab to the next cell on the left
- Up arrow to move up
- Down arrow to move down
- Left arrow to move left
- Right arrow to move right



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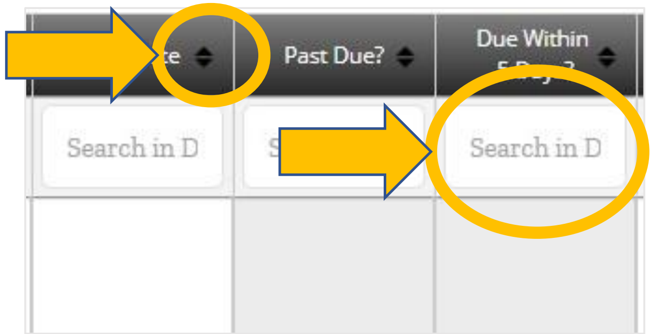
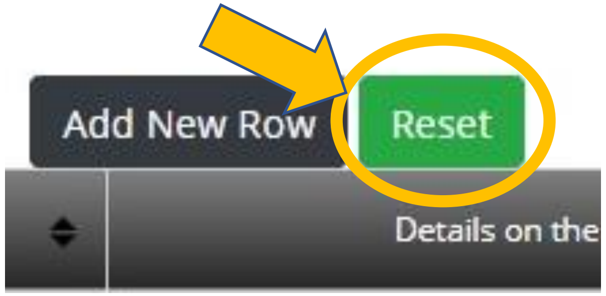
TEMPLATE DATABASE | NAVIGATION

At the top of each column you can click the black arrow to sort. Click to sort in ascending order and click again to sort in descending order.



You can use the search box to filter results by your search term. You can search/filter multiple columns at a time.

When you sort or search, a **RESET** button will appear at the top. You can use this to reset and clear any filters.



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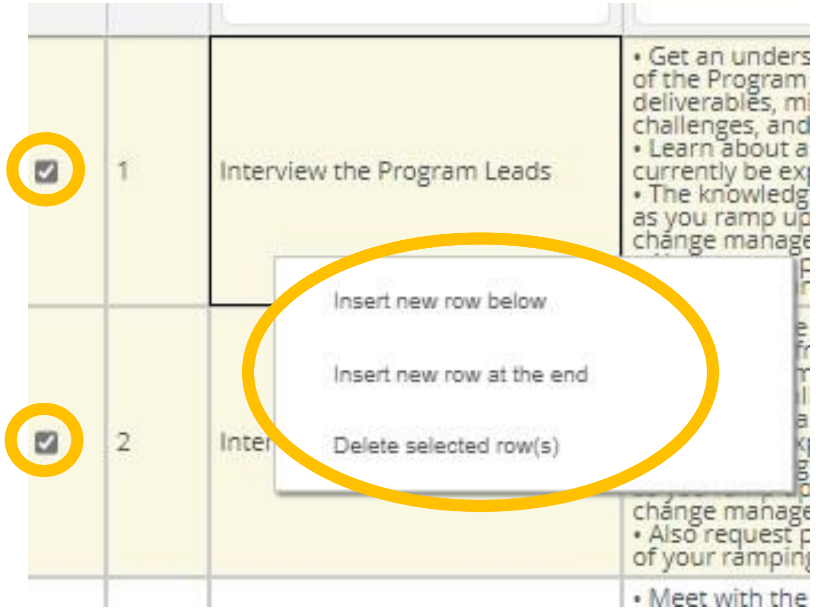
TEMPLATE DATABASE | NAVIGATION

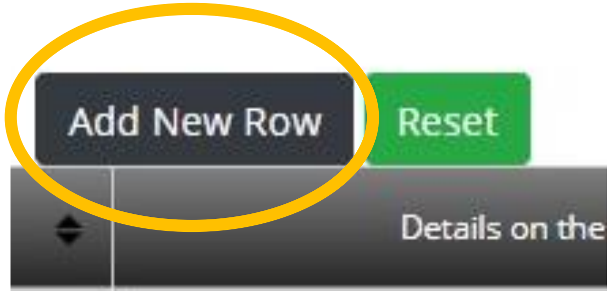
You have three options in the right-click menu:

- Insert new row below selected row
- Insert new row at the end of all your data
- Delete selected row(s)

You can check the box on the far left to select several rows at a time if you'd like to delete several at once.

You can also add a new row by using the **Add New Row** button at the top or bottom of the database.





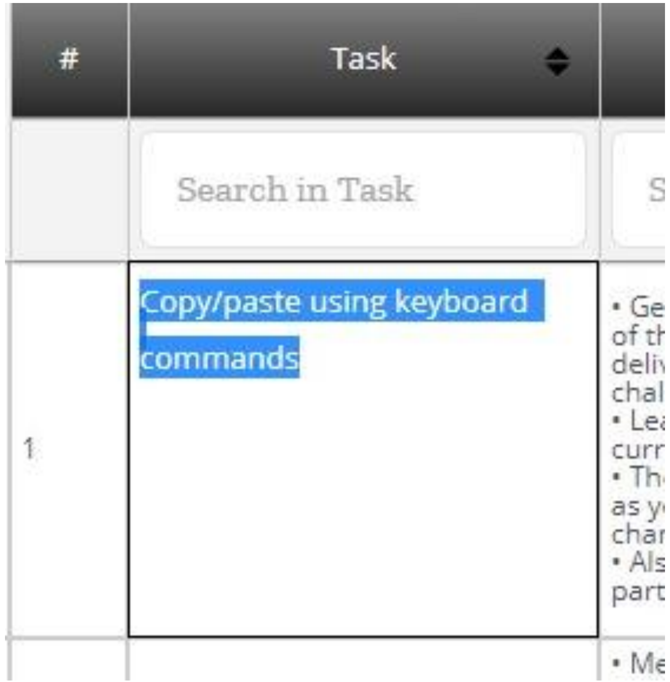
TEMPLATE DATABASE | NAVIGATION

You also have the ability to copy/paste data from one cell to another.

Just double-click into the cell, highlight the text and then you'll need to use the keyboard command for copy (Control+C for Windows or Command+C for Mac).

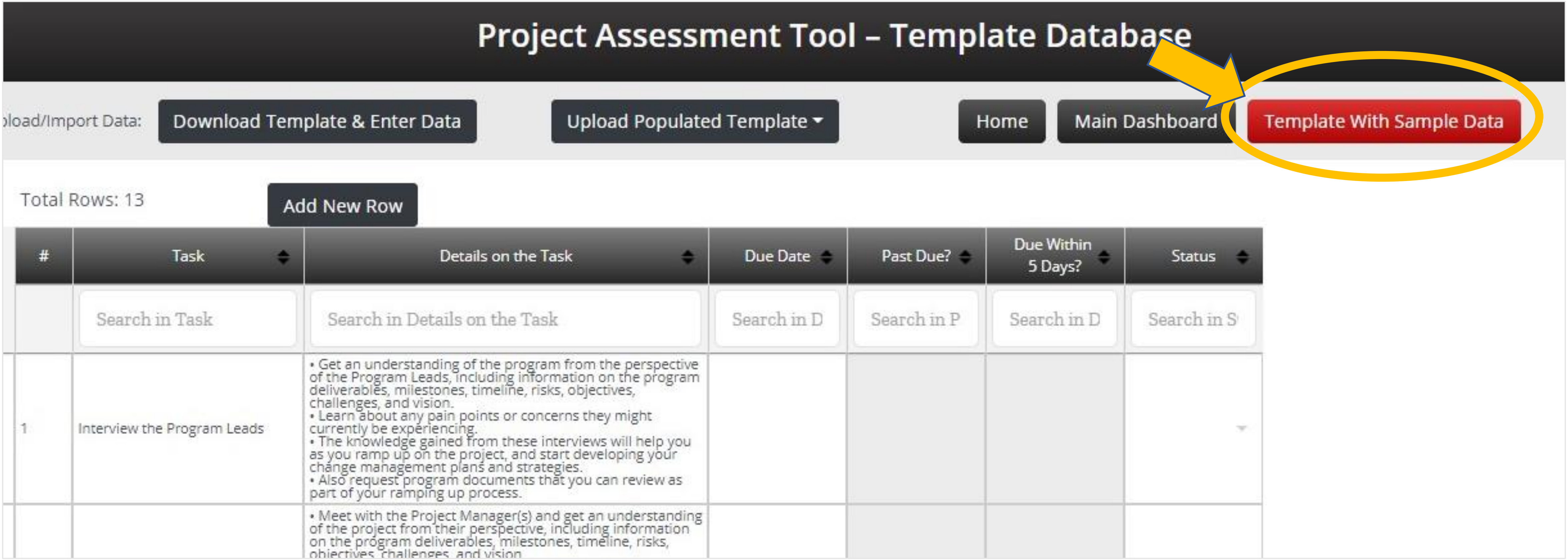
Then to paste, just double-click into another cell and use keyboard command for paste (Control+V for Windows or Command +V for Mac).

There is no SAVE button. That's because AGS Cloud saves your work in the database for you automatically. You never have to worry about exiting and not having your work saved.



TEMPLATE DATABASE

Click the **Template With Sample Data** button to view an example using sample data for educational purposes. This will give you an idea of how you can enter your own data.



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TEMPLATE DATABASE

Below is a populated Template Database that has sample dummy data for illustration purposes. Each of the columns shown below will be reviewed in detail in the slides below.

Project Assessment Tool – Template Database With Sample Data

Home | Main Dashboard | Template Database

Total Rows: 13

Add New Row

#	Task	Details on the Task	Due Date	Past Due?	Due Within 5 Days?	Status
	Search in Task	Search in Details on the Task	Search in D	Search in P	Search in D	Search in S
1	Interview the Program Leads	• Get an understanding of the program from the perspective of the Program Leads, including information on the program deliverables, milestones, timeline, risks, objectives, challenges, and vision. • Learn about any pain points or concerns they might currently be experiencing. • The knowledge gained from these interviews will help you as you ramp up on the project, and start developing your change management plans and strategies. • Also request program documents that you can review as part of your ramping up process.	08-11-2020	Yes	No	TBD
2	Interview the Project Managers	• Meet with the Project Manager(s) and get an understanding of the project from their perspective, including information on the program deliverables, milestones, timeline, risks, objectives, challenges, and vision. • Learn about any pain points or concerns they might currently be experiencing. • The knowledge gained from these interviews will help you as you ramp up on the project, and start developing your change management plans and strategies. • Also request project documents that you can review as part of your ramping up process.	08-11-2020	Yes		Completed

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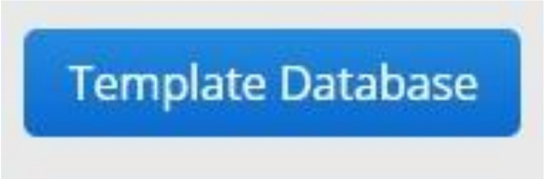
TEMPLATE DATABASE

Once you're on the Sample Template Database, to get back to your data, you just click the **Template Database** button at the top.



The 1st column is the row numbering column - **#**. The system handles this automatically for you. It will auto number as rows are added or deleted.

The 2nd column is the **Task** column, where you enter the name of the tasks associated with your project assessment.

To guide you, AGS has filled in 13 standard tasks based upon change management best practices for project assessment. We'll discuss these more on the next slide.

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TEMPLATE DATABASE

There are 13 tasks filled in on the Tasks column. You can edit any of the tasks, add more tasks, or delete tasks as needed from the main template database that holds your data.

Both the Template Database and Template Database With Sample Data give you a jump start on your project with the following tasks related to conducting a Project Assessment:

1. Interview the Program Leads
2. Interview the Project Managers
3. Interview the Project Sponsors
4. Request Project Documents
5. Review the Project Statement of Work (SoW)
6. Review the Project Charter
7. Review the Project Plan
8. Review the Project Roadmap
9. Review the Project Work Breakdown Structure (WBS)
10. Meet with Key Stakeholders
11. Meet with Other Project Resources
12. Identify Project Tools
13. Enter Due Dates for Tasks on This Spreadsheet

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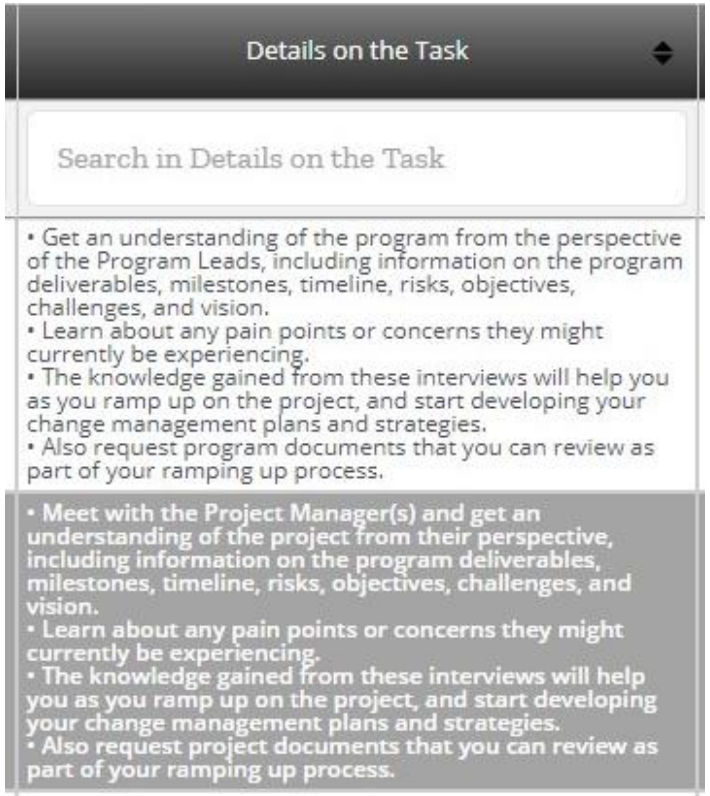
TEMPLATE DATABASE

The 3rd column is the **Details on the Task** column. This is where you will fill in more details on exactly what needs to be done for each task. This includes the objective for each task, notes and comments on the objective, and other helpful information that will assist you in completing the task.

You'll note that the AGS team, which has over 15 years of experience in change management, has filled in suggested details on each of the 13 tasks that are pre-filled for you.

On the Template Database where you enter your own data, you can use these task details as a guide or edit, add to, or delete any of these to fit your own change project assessment needs.



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TEMPLATE DATABASE

The next four columns are designed to help you keep track of each project assessment task.

Set the task due date in the **Due Date** column.
The **Past Due?** and **Due Within 5 Days?** columns will be populated automatically for you by the AGS Cloud system based upon your due date relative to today's date.

In the Status column, you can designate the task status as:

- In-Progress
- Pending
- Completed
- TBD (To Be Determined)

Due Date	Past Due?	Due Within 5 Days?	Status
Search in D	Search in P	Search in D	Search in S
08-11-2020	Yes	No	TBD
08-11-2020	Yes		Completed

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END TEMPLATE DATABASE

And that covers the high-level overview of the Project Assessment Template Database.

The data input into this Template Database will feed into the Analytics Dashboard automatically.

To get to the Analytics Dashboard, just click on the “**Home**” button at the far left-hand side of the page to be taken back to the Home page of this module. Then, click on the **Analytics Dashboard** button.

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PROJECT ASSESSMENT TOOL
ANALYTICS DASHBOARD OVERVIEW

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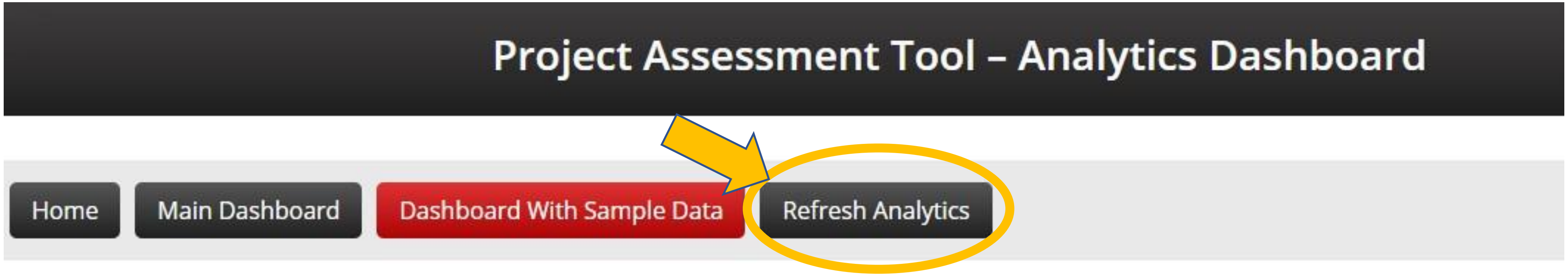
ANALYTICS DASHBOARD

When you initially open the Tool for the first time after subscribing, the Analytics Dashboard will be blank as nothing has been entered into your Template Database yet.

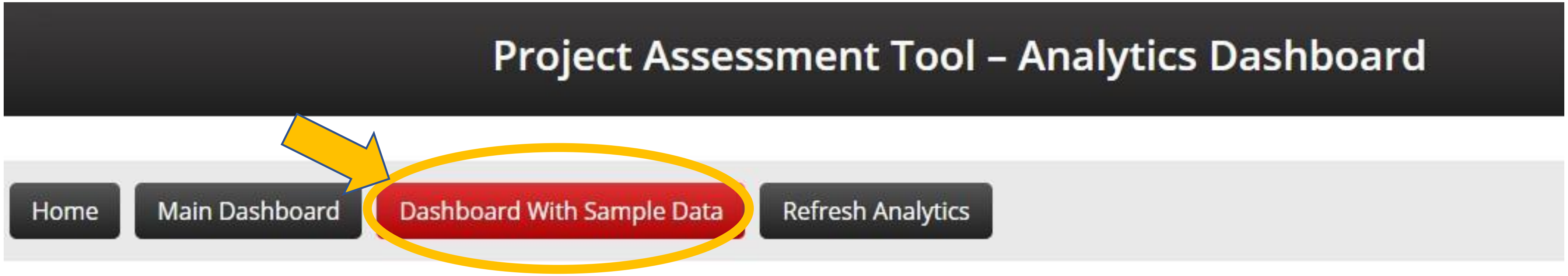
However, as you start entering information into the Template Database, the respective charts, data, and metrics will start to show on the Analytics Dashboard.

Data comes in automatically, but you can also use the **Refresh Analytics** button just to be sure all changes are reflected.

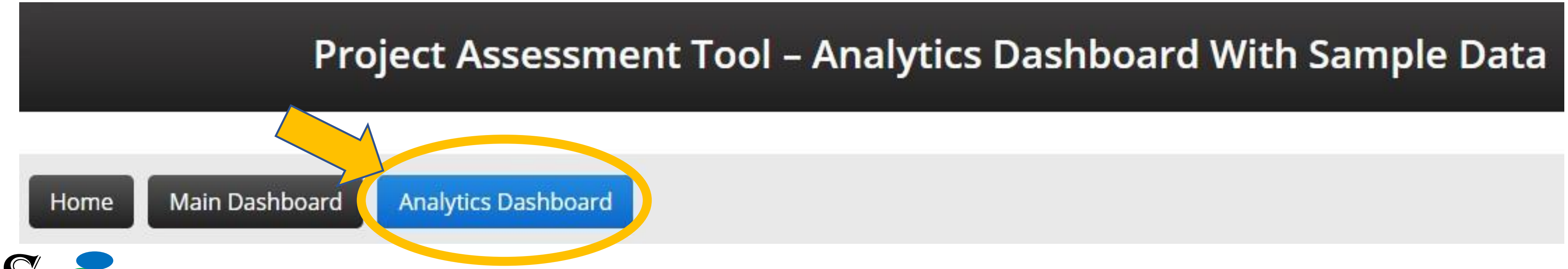


ANALYTICS DASHBOARD

To illustrate what this Dashboard will look like as you start populating your Template Database, click on the tab that says **Dashboard With Sample Data** to view a sample dashboard.

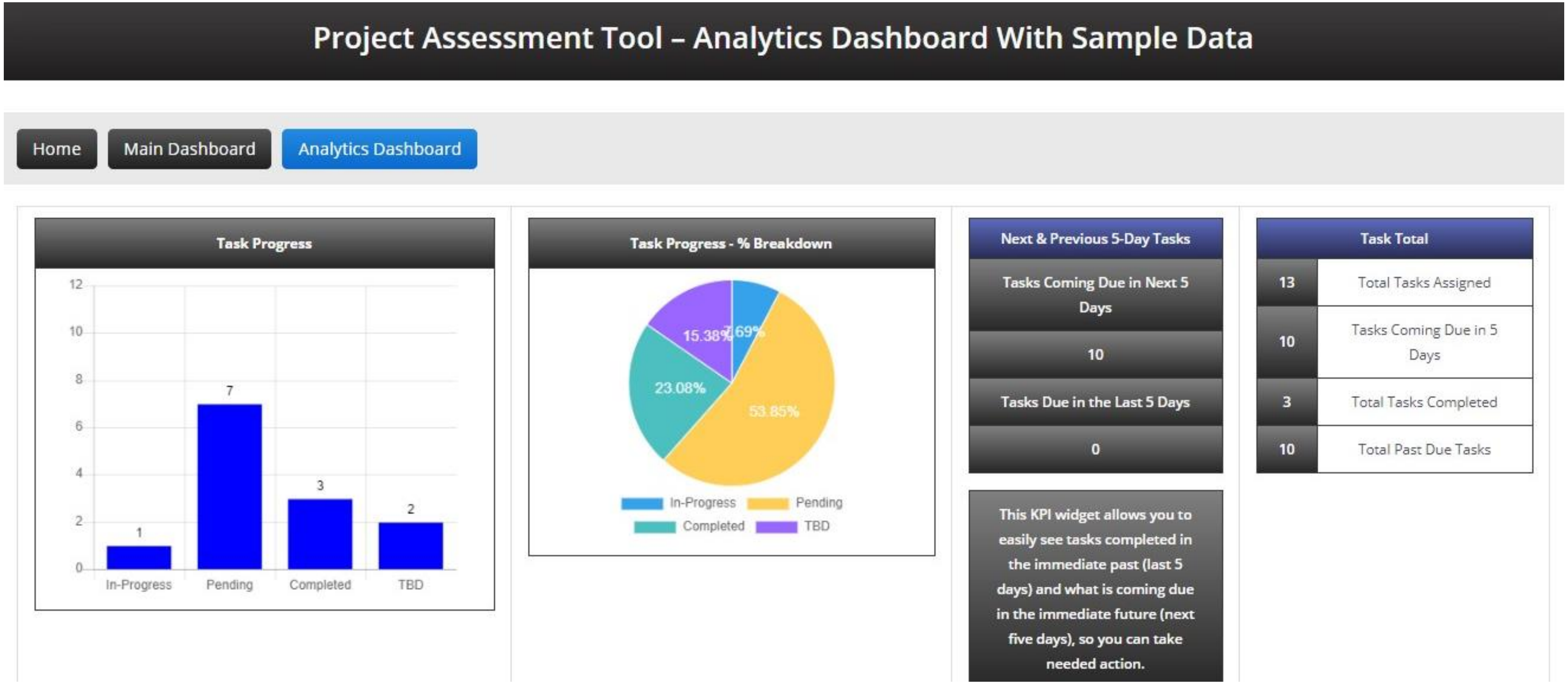


Once on the Analytics Dashboard With Sample Data, you can get back to your live dashboard anytime by clicking the **Analytics Dashboard** button at the top.



ANALYTICS DASHBOARD

Okay, so we are now looking at the **Sample Analytics Dashboard**, populated with our sample data.



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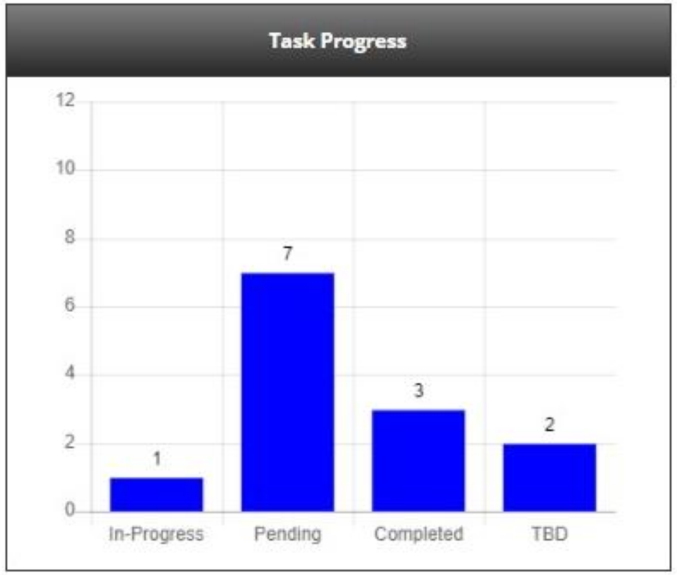
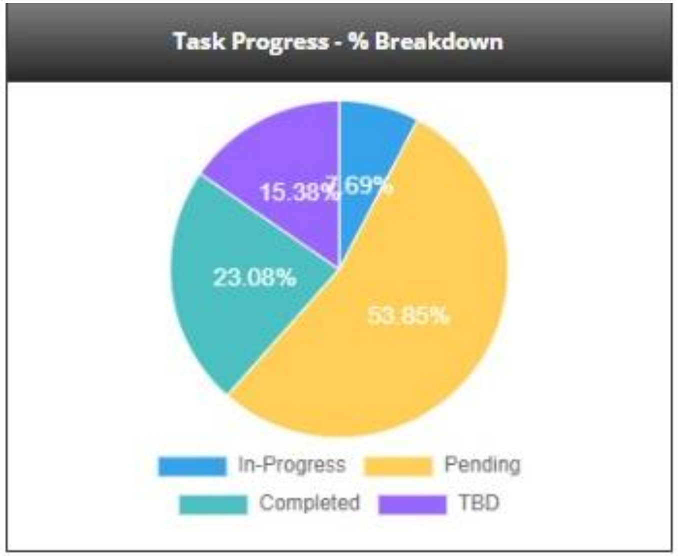
ANALYTICS DASHBOARD

The first analytics section is a **Task Progress** bar chart that tells you how many tasks you have that are In-progress, pending, completed, or that have TBD status.



To the right, is the **Task Progress - % Breakdown**, which gives you another helpful view of your project assessment tasks. This pie chart view tells you the percentage of all your tasks that are at each status.



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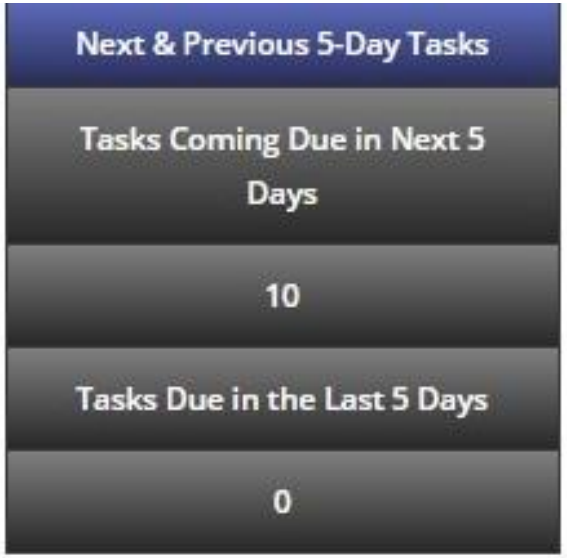
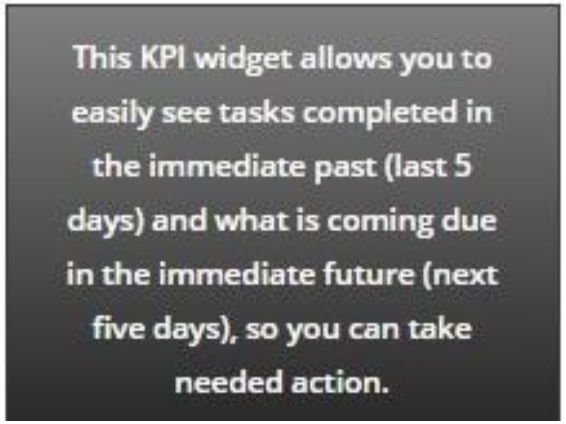
ANALYTICS DASHBOARD

The next analytics KPI is a table for **Next & Previous 5-day Tasks**. It provides you with a view of your most urgent tasks that need attention.

At the top, you'll find a count of tasks that will be due 5 days from today's date (today, being the date you view the information).

Beneath that, is a count of the tasks that were due within the last 5 days from today's date.





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ANALYTICS DASHBOARD

The final analytics on the dashboard is the **Task Total** table.

This table gives you a snapshot view of:

- All tasks that are listed in your database
- Tasks coming due in 5 days
- Total tasks that have been completed
- Total tasks that are past due

Task Total	
13	Total Tasks Assigned
10	Tasks Coming Due in 5 Days
3	Total Tasks Completed
10	Total Past Due Tasks

This is a helpful window into what items need your attention and your progress on task completion.

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END ANALYTICS DASHBOARD

And that covers the high-level overview of the Project Assessment Analytics Dashboard.

To go back to the module Home page, scroll to the left and click the "**Home**" button.

Next, we will review the three additional project assessment resources that you have in this tool.

Would you like to see more views? More charts? Different KPIs or formatting? Just click to contact AGS for a quote.

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PROJECT ASSESSMENT TOOL
ADDITIONAL RESOURCES OVERVIEW

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ADDITIONAL RESOURCES

Within each module of AGS Cloud are additional guides and resources designed to help you save time and give you valuable information about that specific change management area.

In the Project Assessment Module, there are three additional resources that we will be taking a closer look at next.

1. List of Questions to Ask
2. Project Assessment Readout Template & Sample
3. Project Assessment Overview

LIST OF QUESTIONS TO ASK

When conducting an assessment of a project it is essential that you meet with the primary project sponsor(s), project managers, and other key stakeholders.

The questions on the **List of Questions to Ask** page will guide you in asking the pertinent questions needed to understand the type of change, the size of the change, what is changing, and other critical project scope questions.

On this page, you will find 18 questions to guide your project assessment. You can also download the questions in PDF or Microsoft Word format from this page.

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READOUT TEMPLATE & SAMPLE

When you click the **Project Assessment Readout Template & Sample** button, you'll be taken to a page where you can download a PowerPoint template to present your project assessment to key stakeholders, sponsors, and executives, and others.

You will also find a downloadable PDF sample, which is already filled in with sample data and is designed to guide you in how you can fill in your own presentation in the PPT document.

This is a real time-saver, as it already has the Project Assessment Readout formatted into a presentation for you, all you need to do is fill in your data and company branding.

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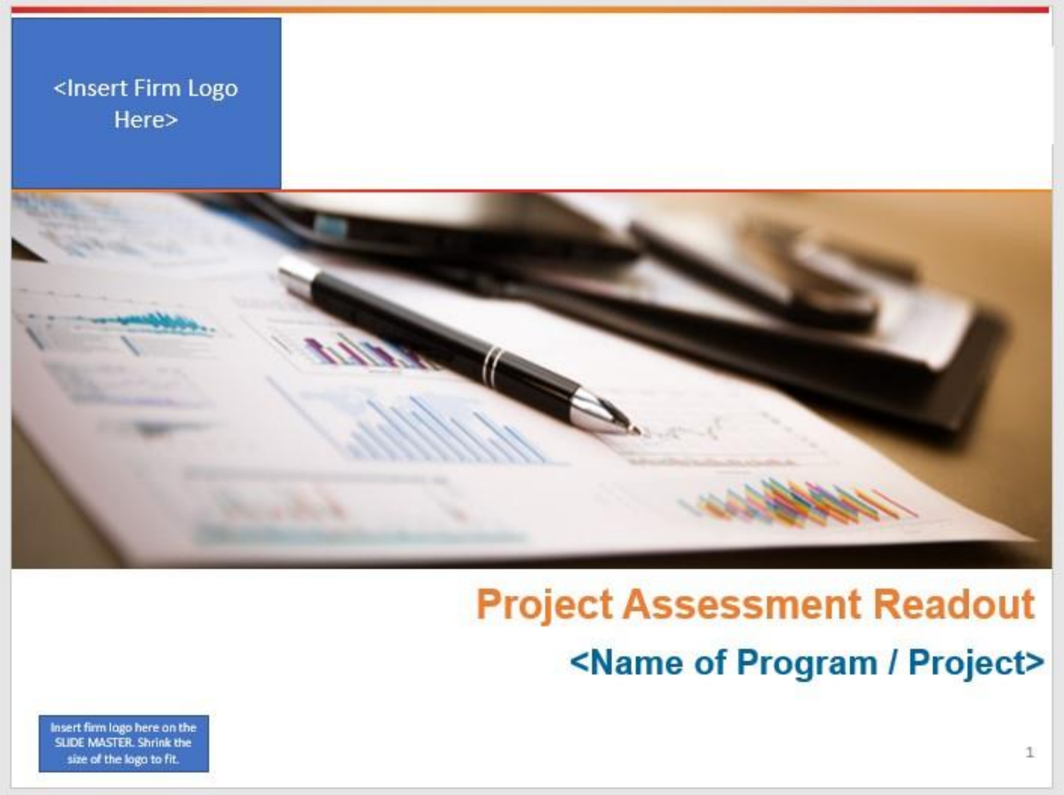
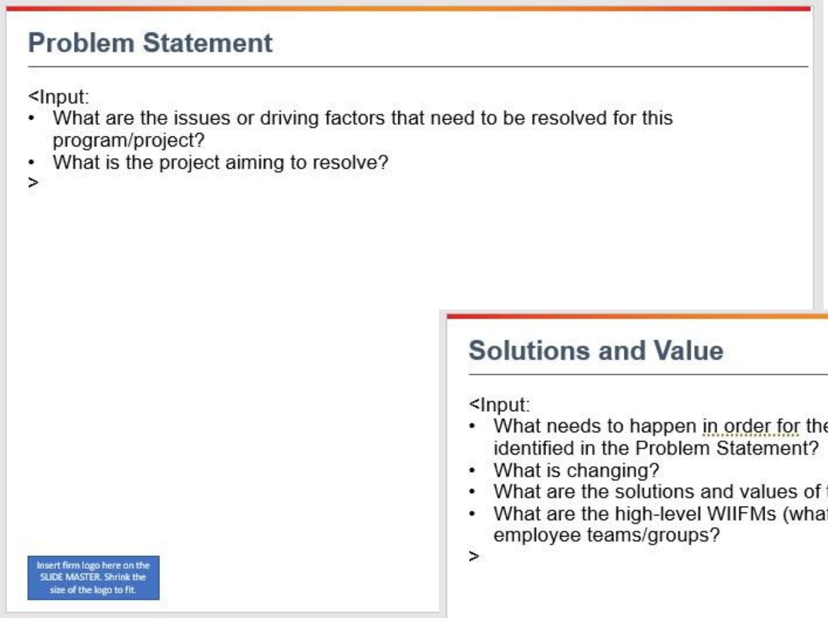
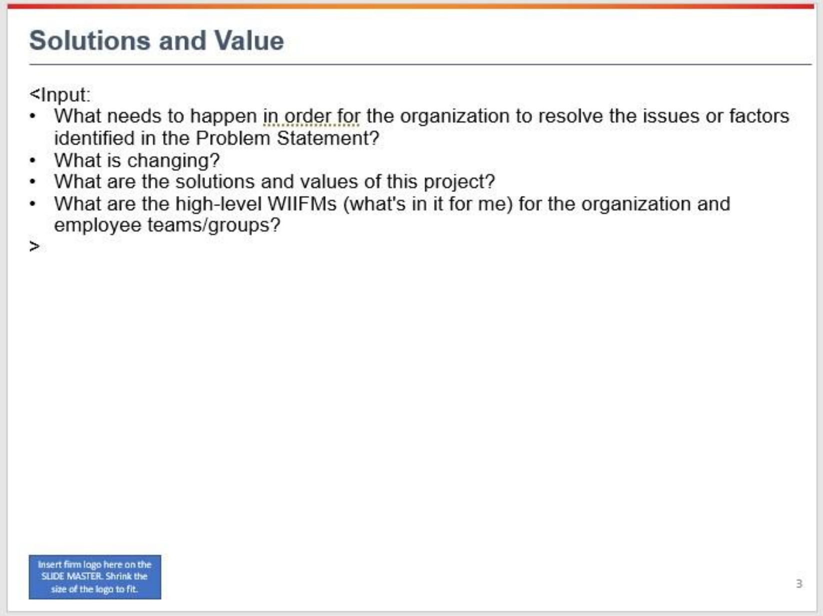
READOUT TEMPLATE & SAMPLE

Here are a few of the slides contained in the Project Assessment Readout Template.







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PROJECT ASSESSMENT OVERVIEW

The **Project Assessment Overview** page is a guide that provides you with a step-by-step overview, and everything you need to know for conducting a successful assessment of a project for project management or organizational change management.

If you’re new to change management or project assessment, this page is a great place to start.

CONCLUSION

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AGS CLOUD CONTACT

We hope this step-by-step tutorial has been a great learning process for helping you to understand how to use the Project Assessment Module, as well as understanding the overall infrastructure of the tool.

If you have any questions or if you need additional features and capabilities to be developed for you, just click below to visit our contact page to send us a message, and your question or request will be routed to the right contacts.

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