Work Instruction
Process Admin Tool for Amendments, Revisions and Studies Projects

Purpose
The purpose of this work instruction is to outline the functionality available in the Process Admin (PA) tool, including:

- Search for a project
- Open the Workflow History
- Change a project status
- Unclaim an activity
- Transfer an activity
- Update project data

The steps outlined in this work instruction are applicable for Studies, Revisions and Amendment projects, except to update project data.

For information to update Revisions and Amendments projects, refer to work instruction steps 41-55. For information to update Studies projects, refer to work instruction steps 51 to 90. For more information on the Process Admin tool for Studies projects, refer to the Studies Process Admin quick reference guide (QRG).

Prerequisites
- A Studies, Revisions or Amendments project has been created in the MIP

Navigation

| Via Menu Path | Log in to the MIP ➔ Process Admin |
Work Steps

1. Log in to the MIP and click the Process Admin tab

   ![Project Search](image)

   There are three ways to search for a project:
   1. Use the dropdown boxes to filter for a set of projects
   2. Enter part of the case number (wild card) to filter for all cases that include the specific text
   3. Enter the full case number

   The first section of the work instruction outlines the steps to search for a project using the dropdown boxes to filter for a set of projects.

   ![Help Icon](image)

   To search for a project using the dropdown boxes:
   1. Select the Project Type (required field)
   2. Select the Status
   3. Select the Region
   4. Select the Organization
   5. Click Search

2. Click the Project Type dropdown box and select the applicable option
Project Status Options:

**Active** - An in-progress project anywhere in the workflow.

**Closed/Terminated** - A project that does not continue processing through the workflow. The case is terminated somewhere in the workflow.

**Completed** - A project that has gone through the workflow from beginning to end (all workflow steps are completed).

**Inactive** – Only applicable to Revisions and Amendments projects, when a project has yet to be assigned a project resource or the project is awaiting requested data and/or fees.

**On-hold** – Only applicable to Studies projects, a temporarily removed project from the Work Item List. On-hold projects are included in KPI 1 and 2 calculations (if there are actual and/or projected dates in the MIP).

**Suspended** – Only applicable to Revisions and Amendments projects, a project is suspended due to data and/or fees or a violation.

**Withdrawn** - A project that does not continue processing through the workflow. The case is terminated somewhere in the workflow because the requester wishes to withdraw their revision request.

3. Click the Status dropdown box and select the applicable option
4. Click the Region dropdown box and select the applicable option
5. Select the Organization dropdown box and select the applicable option
6. Click on: Search to start the search
Note there may be multiple pages of projects.

7. The MIP displays a list of projects that fit those criteria.

The next section of the work instruction outlines the steps to search for a project using a wildcard search.
To search for a project using the wild card search:
1. Enter part of the Case Number
2. Select the Project Type
3. Click Search

This is considered a wild card search and the MIP will search for any projects that include the text string.

8. Enter part of the Case Number

9. Click the Project Type dropdown box and select the appropriate option

10. Click on: to view a list of projects that include a partial case number

11. The MIP displays a list of projects that fit those criteria.

Note there may be multiple pages of projects.
The next section of the work instruction outlines the steps to search for a project using a full project number.

12. Enter the exact case number

13. Click the Project Type dropdown box and select the appropriate option

14. Click on: Search

Note: the Case Number field is case sensitive.
The next section of the work instruction outlines the steps to open the Workflow History.

15. Click the Project Name link to open a new Workflow History window.

16. A new window opens with the workflow history.
The next section outlines the process to change the project status.

17. Click the radio button next to the case number

18. Click on: Change Project Status
### Project Type

#### Amendments or Revisions

**Withdrawn** - A project (case) that does not continue processing through the workflow. The case is terminated somewhere in the workflow because the requester wishes to withdraw their request. The project will still appear in reports so that its history can be reviewed. These cases will have a reporting status of Closed.

**Removed** - A project (case) that should not exist in the workflow and does not appear in reports. The project is manually terminated by Process Admin or MIP Help. An example would be if Project Admin opened up a duplicate case, the duplicate would be closed and have the status Removed.

**Closed** - A project (case) that does not continue processing through the workflow. The case is terminated somewhere in the workflow for reasons other than Withdrawn. The project still appears in reports so that its history can be reviewed. The reporting status of Closed includes cases with the status Suspended, Withdrawn, and Closed/Terminated.

### Studies

**On-hold** - A project that is temporarily removed from the Work Item List. On-hold projects continue to show up in reports and are included in KPI 1 and 2 calculations (if there are actual and/or projected dates in the MIP).

**Closed** - A project that does not continue through the workflow process and is terminated somewhere in the workflow. A closed project will still show up in reports so that its history can be reviewed. If there are actual preliminary and/or effective dates associated with a closed project they will be included in the actual KPI 1 and 2 calculations.

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19. Click the Status dropdown box and select the appropriate option

20. Click Continue to move to the Review Changes screen

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Click Cancel to not save any entered data and return to the previous screen.
21. Click to enter required Change Notes

22. Click Continue to move to the Complete screen

23. Click on: Complete to save changes

The next section outlines the process to unclaim an activity.

24. Click the numbered link in the Total column
25. Click the radio button next to the activity to unclaim

26. Click on: **Unclaim** to return the activity to the Work Item List of any potential user.

    Click **Continue >** to move forward with the changes and follow the same steps to complete an update as show in this work instruction, steps 20-23.

    If no changes were made, click **Cancel** to return to the Update Study Project options

The next section outlines the process to transfer an activity to a different user.

27. Click the Total number link
28. Click the radio button next to the activity to Transfer

29. Click on: Transfer

30. Click to enter the new owner's MIP user ID

31. Keep the Send Email Notification checkbox checked to send an email notification to both the user performing the transfer and the new owner of the task; uncheck the box to not send an email

32. Click on: Continue > to move to the Review Changes screen
The next section outlines the options to update an Amendments or Revisions project.

33. Click the radio button next to the case number to update

If a Revisions case, the button is **Update Revision Project**

34. Click on: **Update Amendment Project**

The options available to update a Revisions or Amendments project are:

- Reassign Project Resources
- All Data Received

35. Click the Reassign Project Resource link
Reassign vs. Transfer:
Reassigning the resource will make all task lead activities appear on the selected resource's Work Item List.
Transferring only transfers one activity to a different user.

36. Use the dropdown boxes to update the Project Resource Workgroup and/or Resource Name

Click to move forward with the changes and follow the same steps to complete an update as shown in this work instruction, steps 20-23.

If no changes were made, click to return to the update project options
The All Data Received link only appears after a date has been entered in the All Data Received field in the Review Data Received activity.

37. Click the All Data Received link

38. Click on: Modify to update the All Data Received date

39. Click to enter a new date

40. Click on: Modify to save the changes
Click **Continue >** to move forward with the changes and follow the same steps to complete an update as show in this work instruction, steps 20-23.

If no changes were made, click **Cancel** to return to the Update Study Project options.

The next section of the simulation outlines the functionality for each link in the Update Study Project section of PA.

There are two levels of Process Admin users:
1. Study Process Administrator
2. Study Process Administrator Auditor

The only difference is that the Auditor has the Update Study Project button.
Before the project is obligated, the only link available is Project Scoping Information.

42. Click the Project Scoping Information link
There are three different sections of this screen:

1. **Project** - allows the user to update the project name. The organization type and organization cannot be updated because the scoping tasks are already complete.

2. **Baseline Cost and Schedule**
   - enter additional costs in the top section
   - click Modify or Delete to change previously entered information

3. **Actual Cost and Schedule**
   - enter additional costs in the top section
   - click Modify or Delete to change previously entered information

43. Click on: ![Modify](Modify.png) to update the previously entered baseline and/or actual cost and schedule information

When you click Modify, the previously entered data is removed from the table. Always click Add Cost to re-add it to the table before continuing. If you click Continue before Add Cost, all previously entered information will be lost.

44. Click on: ![Add Cost](Add_Cost.png)
45. Confirm the change displays and click on: to move to the Contact List screen

Tips for the Contact List screen:

Names are not required. Titles can be used in these fields, especially if turnover is likely in the position.

Be consistent with names and titles across all projects. For example, don’t use Bob Smith as RSC Manager for this project and Mr. B. Smith in a different project.

FEMA Regional Engineer and FEMA Regional Floodplain Manager are fields that appear in MARS reports.

Click to move forward with the changes and follow the same steps to complete an update as show in this work instruction, steps 20-23.

If no changes were made, click to return to the Update Study Project options.
46. Confirm the transaction successfully completed and click on: [Cancel] to return to the main screen.

47. Click the Add an Area/Community link.
Note: Additional communities cannot be added to a county-wide project and vice versa; a county-wide project cannot be added to a single or multiple community project. At least one area is required.

48. Use this screen to add additional communities to the project.

Click **Continue >** to move forward with the changes and follow the same steps to complete an update as show in this work instruction, steps 20-23.

If no changes were made, click **Cancel** to return to the Update Study Project options.
49. Click the Data Development Tasks link

The option to delete a task or add a task is only available before the project moves to Preliminary Map Production. The X icon and Add Task button are not longer available when the Manage Preliminary Map Production activity is generated.

50. Click the twistie to open a specific task
Note: Actual cost and schedule information has not yet been entered for this task. Only baseline information can be updated when actual cost and schedule information is not set.

51. Click on: 📂 to enter the activity
52. Click on: ![Image] to update the previously entered information
53. Click to update the Baseline Task End Date

Always click Add Cost before continuing. If you continue before clicking Add Cost, all previously entered information will be lost.

54. Click on: Add Cost
Always click Add Task before continuing. If you continue before clicking Add Task, all previously entered information will be lost.

55. Click on: **Add Task**

Data development tasks can only be added until the project moves to Produce Preliminary Map Products. Once that section of the workflow has started, no additional tasks can be added to the project.
56. Click on: [Add Task] to add an additional data development task

57. Enter the task, organization and area information

Always click Add Area before continuing. If you continue before clicking Add Area, all previously entered information will be lost.

58. Click on: [Add Area]

59. Enter Baseline Cost and Schedule information for this task

Always click Add Cost before continuing. If you continue before clicking Add Cost, all previously entered information will be lost.

60. Click on: [Add Cost]
61. Add additional baseline cost and schedule information, as applicable.

- Baseline Task Start Date: 12/03/2006
- Baseline Task End Date: 02/03/2007
- Cost Type
- Amount
- Federal Fiscal Year
- Contract or Agreement Number
- Task Order Number

Add Cost

Independent QA
- Independent QA is required for this task
- Organization Type
- Organization

62. Add Independent QA information, as applicable

63. Click on: Add Cost

64. Add additional IQA cost and schedule information, as applicable.

Always click Add Task before continuing. If you continue before clicking Add Task, all previously entered information will be lost.

65. Click on: Add Task
Click **Continue >** to move forward with the changes and follow the same steps to complete an update as shown in this work instruction, steps 20-23.

If no changes were made, click **Cancel** to return to the Update Study Project options.
66. Click the Prelim and Post-Prelim Tasks link

Alert: Actual cost and schedule information cannot be updated through PA until the corresponding workflow activity is complete. (i.e., you cannot update actual cost and schedule information for Preliminary Map Products through PA while the Preliminary Map Products activity is still available on a user’s Work Item List)

67. Click the twistie to open the specific activity

68. Click on: to open the activity
69. **Click on:** to update the organization type and organization and/or add and/or modify the baseline organization and cost and schedule information. 

Even if no changes have been made, always click Add Cost to add the existing data back to the project. If you don’t click Add Cost, all previously entered information will be lost.

70. **Click on:** to save the changes

Even if no changes have been made, always click Add Area to add the existing data back to the project. If you don’t click Add Area, all previously entered information will be lost.

71. **Click on:**
Click **Continue >** to move forward with the changes and follow the same steps to complete an update as show in this work instruction, steps 20-23.

If no changes were made, click **Cancel** to return to the Update Study Project options.

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72. Click the Letter Dates link.

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73. Click on:
Actual dates cannot be updated until the project is complete. Use the workflow tasks to add the actual dates.

**Note:** The Projected FIRM Effective Date is updated to six months after the Projected LFD Date.

74. Click to update the Projected Preliminary Date and/or Projected LFD Date.

75. Click on: **Modify** to save the data

Click **Continue >** to move forward with the changes and follow the same steps to complete an update as shown in this work instruction, steps 20-23.

If no changes were made, click **Cancel** to return to the Update Study Project options

76. When complete in the Update Study Project section, click on: **Cancel** to return to the main screen

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Results

All Revisions, Amendments, and Studies PA functionality has been outlined in this simulation.

Last updated: March 2009