

# Acquisition Dashboard

## Standard Operating Procedure for Quad Charts

*Advent Business Company Inc.*



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APPROVALS		
Approver Title	Approver Name	Date
Vice President	Jyoti Gupta	02/01/2020

CHANGE HISTORY			
Revision #	Date	Name	Description of Change
0.0	01/01/2020	Mary Purcell	Initial SOP
0.1	02/01/2020	Mary Purcell	Revised per COR recommendations
0.2	02/18/2020	Mary Purcell	Revised per COR requirements
0.3	02/24/2020	Mary Purcell	Revised per COR recommendations
0.4	03/05/2020	Mary Purcell	Revised per COR recommendations
0.5	04/07/2020	Rajesh Gupta	Renamed and added processes for PAE, OA and Senior leadership
0.6	04/08/2020	Rajesh Gupta	Added a process for OA
0.7	04/13/2020	Rajesh Gupta	Revised per COR recommendations
0.8	04/17/2020	Mary Purcell	Revised per COR recommendations
1.0	07/27/2020	Rajesh Gupta	Released for Prototype Phase



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## 1. OVERVIEW

In July 2016, the Office of Acquisition (OA) Acquisition Policy and Oversight (APO) directorate initiated a Quad Chart cycle and template for the Program Acquisition Executives (PAEs) across the CBP acquisition portfolio to provide periodic three-page updates (Quad Charts) on the current status of each acquisition program to the CBP Component Acquisition Executive (CAE). **The purpose of the bimonthly Quad Chart is to provide more frequent updates and transparency** into CBP acquisition programs in between the approximate six-month gaps of the biannual CBP Portfolio Review (PR) cycle. Program Offices report color-coded program status and trends for each category on a bimonthly basis. Program Managers provide comments for each category, a summary of key takeaways, the status of upcoming milestones, and the latest data on Budget, Spend Plan, Obligation YTD yield, and Execution Forecast in a Quad Chart.

## 2. PURPOSE

This SOP defines the tasks required by the Program Offices to report program information on a bimonthly basis.

## 3. DEFINITIONS

**APO** – Acquisition Policy and Oversight.

**Bimonthly** – Every other month. (January, March, May, July, September, November)

**BPMN** – Business Process Model and Notation Diagram.

**OA** – Office of Acquisition.

**PAE** – Portfolio Acquisition Executive.

**PM** – Program Manager.

**Quad Chart** –The Quad Chart is a three-page document providing an update on the current status of an acquisition program.

## 4. SCOPE

This SOP details the steps required by the PM, APO, PAE, and Senior leadership to enter the data for the bimonthly Quad Chart PowerPoint report. The Quad Chart is not considered complete until the PAE approves the document and provides his/her assessment of the program.

**Supported Browser** – Chrome, Firefox, Edge, and Safari

**Timeout** – 60 Minutes (when a user is idle)



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## 5. RESPONSIBILITY

**5.1 Program Office Role** – Program Office personnel access the following processes in the Quad Charts folder of the Acquisition Dashboard to manage and report program information.

- **Program Description** – Provides a form to maintain static program description. The information may be edited/updated when required.
- **Upload Program Graphic** – Allows PM to upload one graphic in .png format in a size not to exceed 4.5” x 4.7” for Slide 1 of the Quad Chart PowerPoint report.
- **Update program status (stoplight categories, milestones, key takeaways)** – Allows PM to report status and trends of Stoplight Categories, upcoming Milestones for the next 12 months, and Key Takeaways.
- **Update Funds Execution Status** – Allows PM to upload an Excel file with Quad Chart data to generate a graph. In addition to the graph, it allows for updates/comments to the budget/spend plan/obligation(s)/execution to appear in a column on the right side of Slide 3.
- **Program Office reviews Current Quad Chart and Notify PAE** – Allows PM to review three system-generated PowerPoint slides and notify PAE via email that they are ready for assessment comments.
- **Program Office reviews Historical Quad Charts** – Allows PM to review historical Quad Charts of their program.
- **Program Office reviews Historical Stoplight Categories Comments**– Allows PM to review historical Stoplight Categories of their program.

**5.2 Portfolio Acquisition Executive Role** – PAE accesses the following processes in the Quad Charts folder of the Acquisition Dashboard to review and assess programs.

- **PAE assessment of Current Quad Chart** – Allows PAE to review Quad Chart data, provide an assessment comment and sends an email to PM to update the Quad Charts if required. The Dashboard adds the comment to the bottom of Quad Chart Slide 1. The Dashboard sends an email notification to OA when all programs are assessed.
- **PAE reviews Historical Quad Charts** – Allows PAE to review Quad Charts of their office.
- **PAE reviews Historical Stoplight Categories Comments** – Allows PAE to review Stoplight Categories of their programs and reported date.

**5.3 Office of Acquisition Role** – Office of Acquisition (OA) accesses the following process in the Quad Charts folder of the Acquisition Dashboard to review programs.

- **Email Quad Charts to Senior Leadership or other users**– Allows OA to review and send Quad Charts via email attachments for the selected Dates Reported, Programs, and Offices to senior leadership or any other stakeholders.
- **OA reviews Quad Charts** – Allows review of Quad Charts of any program, PAE and program level.
- **OA reviews Stoplight Categories Comments** – Allows review of comments of the Stoplight Categories of any program and reported date.



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**5.4 Senior Leadership Role** – Senior leadership accesses the following process in the Quad Charts folder of the Acquisition Dashboard to review programs.

- **Senior leadership reviews Quad Charts** – Allows review of Quad Charts of any program, PAE and program level.
- **Senior leadership reviews Stoplight Categories Comments** – Allows review of comments of Stoplight Categories of any program and reported date.

## 6. PROCEDURE

Advent's Help Desk creates new user accounts and provides access rights based on the user's role on the request of the Office of Acquisition. The user receives an email with a link (<https://enablement.us>) to access the Dashboard along with a user name and password from [support@enablement.us](mailto:support@enablement.us). The user name is the same as the user's CBP official email ID.

The password is system generated and encrypted so it is fully secure, still users are encouraged to change it periodically from the login page. The Dashboard supports the last two release versions of Chrome, Firefox, Edge and Safari. Chrome is recommended as it provides the best performance, speed and layout controls. The cloud-enabled Dashboard can also be accessed from your personal devices including mobiles, tablets, and laptops.

For any workflow related issues, users can replicate the issue in a preprod environment at <https://enablement.cc> with mock data which enables support personnel to troubleshoot and resolve issues as support personnel cannot access prod processes and the database is fully encrypted.

**Dashboard support:** Monday - Friday (except Federal Holidays), 9 am - 5 pm EST, phone (202) 765-3173. Issues are to be resolved within four (4) hours of the initial call within normal business hours. The hours after normal business hours will not be included in the requirement of four (4) hours for an issue to be resolved. Requests received outside of business hours will be resolved within 4 hours on the next business day.

### 6.1 Program Office Role

**6.1.1 Program Description** - Add/Update Program Information for Slide 1 of the Quad Chart PowerPoint report

- Login to the Acquisition Dashboard via the recommended Chrome browser at <https://enablement.us>
- Click the **Quad Charts** folder to display a list of processes.
- Click **Program Description** to display the **Program Description** form.
- Initially, the Program Manager completes the following fields on the **Program Description Information** form:
  - Program\* - This is system-generated and non-editable based on the role of the user.
  - Program Abbreviation\* - Abbreviation of Program Name
  - Program Manager\* - Program Manager Name
  - Enacted Amount\*
  - PAE Email
  - Program Manager Email\*




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- Program Deputy Email (optional)
- Requested Amount\*
- Program Level\*
- Program Type\*
- Acquisition Type
- Office
- Program LoB
- ALF Phase\*
- Program Description\*

**Note:** The asterisk indicates fields used to populate the system-generated Quad Chart PowerPoint report.

- Subsequently, for bimonthly reporting, the Program Manager updates fields on the **Program Description** form as necessary.
- When a field displays a validation alert, then its data is not updated.

#### 6.1.2 Upload Program Graphic - Uploads an image file for Slide 1 of the Quad Chart PowerPoint report.

- From the **Quad Charts** folder, click **Upload Program Graphic**.
- The Dashboard displays the current graphic.
- Click **Upload New Graphic** to update the current graphic.
- Click the icon , select an image file to upload, and then click **Open**.

**Note:** Upload one image file (4.5" X 4.7") in .PNG format. Other image formats are blocked and cannot be uploaded.

- Click **Upload File** to upload the new file and return to the Dashboard Home.

#### 6.1.3 Update program status (stoplight categories, milestones, key takeaways) - Captures data required for Slide 2 of the Quad Chart PowerPoint report.

- From the **Quad Charts** folder, click **Update program status (stoplight categories, milestones, key takeaways)** to display the **Update Categories** form.
- Click in any of the following fields in a category row to make desired changes: **Color\***, **Trend\***, **Include in Report**, and **PM Comments** (limit 148 Characters).

**Note:** PM Comments are required for "Red" and "Yellow" categories and/or categories with Include in Report? set to 'Y'.

- Click **Report Milestones** to open the **Update Milestones** form.

**Note:** Report Milestones is enabled when there are no validation errors in the Update Categories form.

- Click the  icon to add a new milestone **Planned Quarter\***, **Planned Year\***, and **Event Description\***.


**Note:** The Dashboard limits the Event Description to 120 characters.

- Click the delete icon  to remove a milestone.




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f. Click **Report Key Takeaways** to open the **Update Key Takeaways** form.

g. Click the  icon to add a new **Title\*** and **Comments\***.

**Note:** Titles are limited to 60 Characters) and Comments are limited to 231 Characters.

h. Click the delete icon  to remove a Title and/or Comment.

6.1.4 **Update Funds Execution Status** - Uploads Quad Chart financial numbers and notes into a secure database. This data is used to build Slide 3.




The “template” sheet must be completed to provide Quad Financials for all 12 months.

Notes are optional. They are auto bulleted and displayed on the right side of the graph to specify significant changes. There is no need to remove the “sample” sheet and comments. An updated spreadsheet can be uploaded to overwrite previous financial data or notes.

a. From the **Quad Charts** folder, click **Update Funds Execution Status**.

b. Select a **Date Reported** from the **Select Reporting Period** form.

c. Click **Set Period** to open the **Download Template** form.

d. Click the  icon to download the template.

e. Complete the template and save the file.

f. Click **Upload Financials** to open the **Upload Quad Chart** form.

g. Click the  icon, select a completed Quad Chart excel file to upload, and then click **Open**.

h. Click **Upload to DB** to upload the file and return the Dashboard menu.

6.1.5 **Program Office reviews Current Quad Chart and Notify PAE** - The Dashboard builds, persists the Quad Charts in the DB, and displays all three Quad Chart slides for PMs to review and determine whether to send an email notification to the PAE that Quad Charts are ready for their assessment.

a. From the Quad Charts folder, click **Program Office reviews Current Quad Chart and Notify PAE**. The Dashboard displays all three of the Quad Chart slides.

b. Click **Send Email** to notify PAE via email and return to the Dashboard. The quad chart is not sent as attachment.

6.1.6 **Program Office reviews Historical Quad Charts** - The Dashboard allows PMs to select a date of the previously reported Quad Charts and displays all three Quad Charts slides for review.





a. From the Quad Charts folder, click **Program Office reviews Historical Quad Charts**. The Dashboard displays all the dates in reverse chronological order.

b. Select a Date and click **Get Selected Program**. The Dashboard displays a Quad Chart.





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- c. Hover on to the Quad Chart to get download  and print  icons on the top right of the page and Fit to width  or Fit to page  to manage the zoom for viewing.

**Note:** The above icons are available on Chrome, Firefox and Edge. Right-click on Safari browser to display a drop-down for similar functionalities.

- 6.1.7 **Program Office reviews Historical Stoplight Categories Comments** - The Dashboard allows PMs to select a date of the previously reported Stoplight Categories and displays them for review of the comments provided by the Program Office for the stoplight categories.

- From the Quad Charts folder, click **Program Office reviews Stoplight Historical Categories Comments**. The Dashboard displays all the dates in reverse chronological order.
- Select a Date and click **Get Selected Program**. The Dashboard displays Stoplight Categories, Colors, Trends, Included in Report, and PM Comments.

## 6.2 Portfolio Acquisition Executive Role

- 6.2.1 **PAE assessment of Current Quad Chart** - The Dashboard allows PAEs to select a program and displays all three Quad Chart slides for review and allows them to add an assessment comment and decide whether to approve or send an email notification to the PM for any updates.

- From the Quad Charts folder, click **PAE assessment of Current Quad Chart**. The Dashboard displays a list of programs the PAE office has not assessed or approved yet or a message that no programs are remaining for review when all programs are assessed and approved.
- Select a program for assessment, and then click **Get Quad Chart**. The Dashboard displays all three of the Quad Chart slides.
- Click **Get Unreported Comments** to review the stoplight categories comments not included in the quad chart. The Dashboard displays a list of unreported comments that were not included in the Quad Chart or displays a form to provide PAE Assessment.
- Click **Get PAE Assessment** to get a form to provide **PAE Assessment** for Quad Chart Slide #1, **Approve Quad Charts** (Yes/No), and **Review Comments** (optional)

**Note:** Review Comments is included in the body of an email when the quad chart is not approved and the program manager is required to update and resubmit the quad chart.

Upon PAE approval (i) the submitted quad chart is locked and cannot be updated (ii) Financial number and notes are archived and purged so a new spreadsheet must be uploaded (iii) the Dashboard creates a copy of the current stoplight categories, milestones and key takeaways to allow the PM to update them for the next reporting period.

- Click **Build Email** to auto notify the PM and Deputy approval decision via a system-generated email and return to the Dashboard.

**Note:** When all the programs are approved, the Dashboard automatically sends an email notification to the OA that Quad Charts of an office is ready for review.

- 6.2.2 **PAE reviews Historical Quad Charts** - The Dashboard allows PAEs to select a program and date of the previously reported Quad Charts and displays all three Quad Charts slides for review.





- From the Quad Charts folder, click **PAE reviews Historical Quad Charts**. The Dashboard





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displays the Select Programs of an Office form.

- b. Select one or many items from the drop-down lists.
- c. Click **Mapper for a Program**. The Dashboard displays a Quad Chart when only one date and program is selected or a list of Quad Charts when multiple Quad Charts are retrieved.
- d. Select a Quad Chart to display from the header dropdown list.
- e. Hover on to the Quad Chart to get download  and print  icons on the top right of the page and Fit to width  or Fit to page  to manage the zoom for viewing.

**Note:** The above icons are available on Chrome, Firefox and Edge. Right-click on Safari browser to display a drop-down for similar functionalities.

**6.2.3 PAE reviews Historical Stoplight Categories Comments** - The Dashboard allows PAEs to select a Date and a Program of the previously reported Stoplight Categories and displays them for review.

- a. From the Quad Charts folder, click **PAE reviews Historical Stoplight Categories Comments**. The Dashboard displays all the dates in reverse chronological order.
- b. Select a Date, a Program and click **Get Selected Program**. The Dashboard displays Stoplight Categories, Colors, Trends, Included in Report, and PM Comments.

### **6.3 Office of Acquisition Role**

**6.3.1 Email Quad Charts to Senior Leadership or other users** – Send Quad Charts via email attachments for the selected Dates Reported, Programs, and Offices.





- a. From the Quad Charts folder, click **Email Quad Charts to Senior Leadership or other users**. The Dashboard displays the Get Programs form.
- b. Select one or many items from the drop-down lists, and then click **Get Files**. The Dashboard displays a Quad Chart when only one Quad Chart is returned by the selection criteria or a list of Quad Charts when multiple Quad Charts are retrieved.
- c. Select a Quad Chart to display from the header dropdown list if more than one Quad Chart is retrieved.
- d. Click **Build Email** to get an email form.
- e. Complete **Send to, Copy to, Bcc to, Subject, and Message Body**, and then click **Email Quad Charts** to return to the Dashboard menu.

**6.3.2 OA reviews Quad Charts** - The Dashboard allows OA to select one or many programs, PAEs, program levels, and dates reported to review Quad Charts.

- a. From the **Quad Charts** folder, click **OA reviews Quad Charts**. The Dashboard displays the Select Office and Programs form.
- b. Select one or many items from the drop-down lists, and then click **Get Selected Programs**. The Dashboard displays a Quad Chart when only one Quad Chart is returned by the selection criteria or a list of Quad Charts when multiple Quad Charts are retrieved.
- c. Select a Quad Chart to display from the header dropdown list if more than one Quad Chart is retrieved.



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- d. Hover on to the Quad Chart to get download  and print  icons on the top right of the page and Fit to width  or Fit to page  to manage the zoom for viewing.





**Note:** The above icons are available on Chrome, Firefox and Edge. Right-click on Safari browser to display a drop-down for similar functionalities.

- 6.3.3 **OA reviews Stoplight Categories Comments** - The Dashboard allows the OA to select a Date and a Program of the previously reported Stoplight Categories and displays them for reviewing all of the comments associated with the stoplight categories provided by the Program Office.

- From the Quad Charts folder, click **OA reviews Stoplight Categories Comments**. The Dashboard displays all the dates in reverse chronological order.
- Select a Date, a Program and click **Get Selected Program**. The Dashboard displays Stoplight Categories, Colors, Trends, Included in Report, and PM Comments.

## 6.4 Senior Leadership Role

- 6.4.1 **Senior leadership reviews Quad Charts** - The Dashboard allows senior leadership to select one or many programs, PAEs, program levels, and dates reported to review Quad Charts.

- From the Quad Charts folder, click **Senior leadership reviews Quad Charts**. The Dashboard displays the Select Offices and Programs form.
- Select one or many items from the drop-down lists, and then click **Get Selected Programs**. The Dashboard displays a Quad Chart when only one Quad Chart is returned by the selection criteria or a list of Quad Charts when multiple Quad Charts are retrieved.
- Select a Quad Chart to display from the header dropdown list.
- Hover on to the Quad Chart to get download  and print  icons on the top right of the page and Fit to width  or Fit to page  to manage the zoom for viewing.

**Note:** The above icons are available on Chrome, Firefox and Edge. Right-click on Safari browser to display a dropdown for similar functionalities.

- 6.4.2 **Senior leadership reviews Stoplight Categories Comments** - The Dashboard allows Senior leadership to select a Date and a Program of the previously reported Stoplight Categories and displays them for reviewing all of the comments associated with the stoplight categories provided by the Program Office.

- From the Quad Charts folder, click **Senior leadership reviews Stoplight Categories Comments**. The Dashboard displays all the dates in reverse chronological order.
- Select a Date, a Program and click **Get Selected Program**. The Dashboard displays Stoplight Categories, Colors, Trends, Included in Report, and PM Comments.



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## 7. TRAINING

Advent Business Company Inc. provides the following training for all licensed personnel as well as ongoing product support via Helpdesk.

- 7.1 Standard Operating Procedures
- 7.2 Onsite formal classroom training
- 7.3 How to videos - <https://adventbusiness.com/quad-chart/>

## 8. REFERENCES

- 8.1 Business Process Model and Notation ([BPMN](https://www.omg.org/spec/BPMN/2.0/PDF)). Applicable specifications are available at <https://www.omg.org/spec/BPMN/2.0/PDF>
- 8.2 Enablement®. Capabilities for workflow automation are available at <https://adventbusiness.com/enablement/>