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Portlight Technology (Pty) Ltd

# ProFormance functionality overview

A high level overview of the functionality in Portlight Technology's project and portfolio management product - ProFormance

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# ProFormance Functionality Overview

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## 1. Introduction

- 1.1. ProFormance is a project management tool used to capture, track, and report on ideas or projects, captured in a common SQL Server database. Portfolios, programs and projects are tracked according to schedule and cost. ProFormance interfaces with financial systems like SAP and incorporates a full document management facility with version control, audit trail, release strategies and system generated e-mail notifications, underpinned by strong multilevel reporting.

## 2. Architecture

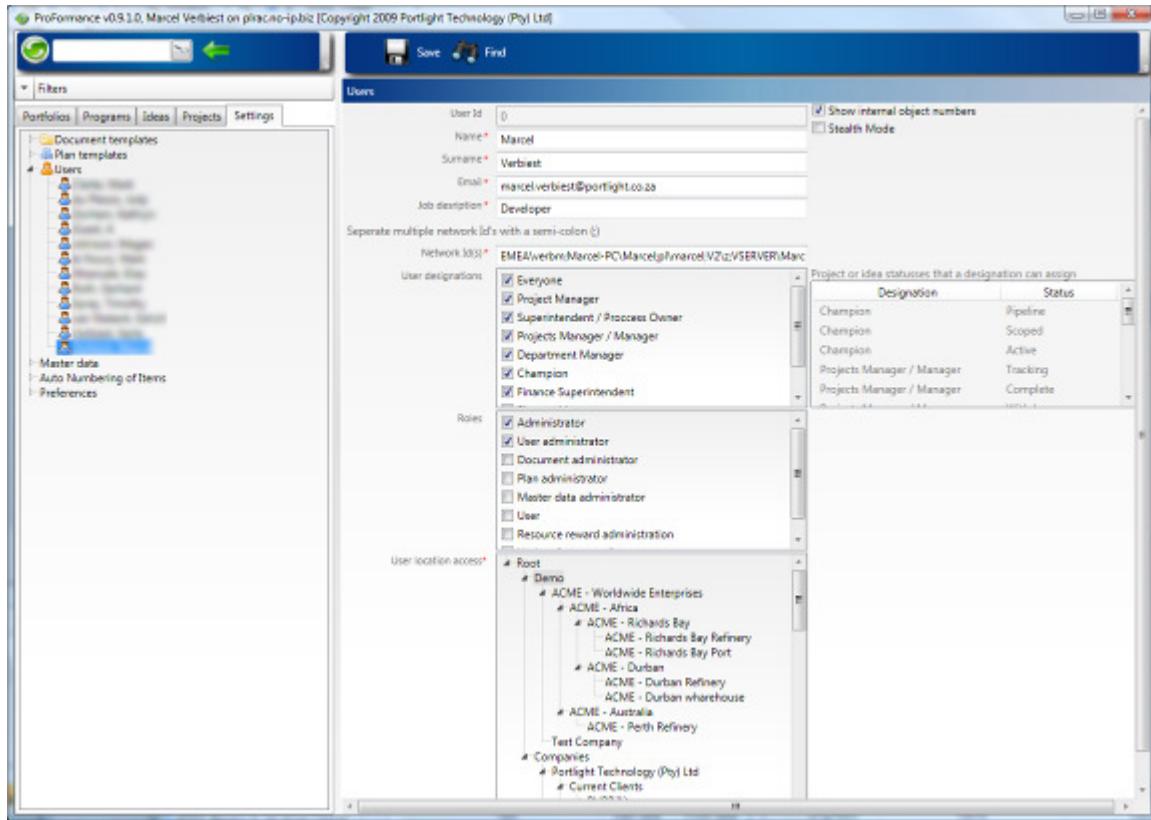
- 2.1. ProFormance is a WPF based application developed on Microsoft's Windows Presentation Foundation platform providing a rich user experience.
- 2.2. The client application is installed on the user's computer by either publishing / assigning it through Microsoft Active Directory or manual installation.

## 3. Overview of module functionality

- 3.1. Base Product (required)
  - 3.1.1. ProFormance base product framework, including scheduling and financial modules for capital project management.
- 3.2. Workflow
  - 3.2.1. Integrated workflow module, for email notifications on all actions throughout the system. Document approvals and document sequencing enabled when the Document Management module is installed.
- 3.3. Document Management
  - 3.3.1. Full integrated document management, direct interfacing with Microsoft Word 2003 and later, audit trail and version control.
- 3.4. Web interface
  - 3.4.1. Enables the general population at an organisation to capture ideas, raise and view register items and view basic reports. Users of the web interface module do not need a per user license.
- 3.5. Six Sigma
  - 3.5.1. Six Sigma project management methodology.
- 3.6. Earned Value Management
  - 3.6.1. Earned value dashboard and reports.
- 3.7. Commissioning
  - 3.7.1. Track and schedule systems, and packages for large commissioning projects.

## 4. ProFormance overview

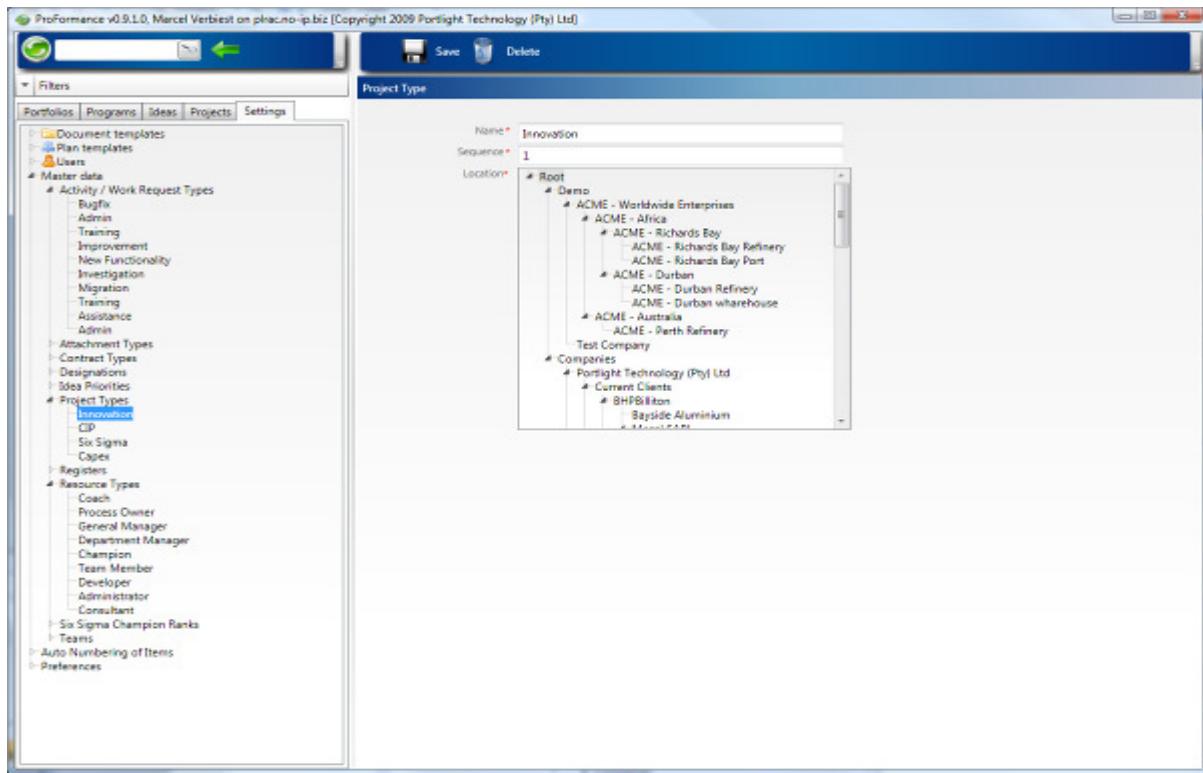
### 4.1. Security



**Figure 1 User security**

- 4.1.1. ProFormance offers multiple security profiles providing granular control over user interaction with the system. Roles vary from full site administrator to read only profiles.
- 4.1.2. The system is capable of recognizing a user's domain login credentials eliminating the need for logging on more than once.
- 4.1.3. ProFormance allows for different security profiles, which would allow the following:
  - 4.1.3.1. Full administration
  - 4.1.3.2. User administration
  - 4.1.3.3. Document administration
  - 4.1.3.4. Plan (schedules) administration
  - 4.1.3.5. Master data administration
  - 4.1.3.6. Normal user
  - 4.1.3.7. Resource rewards administration
  - 4.1.3.8. Update of forecasted milestones
- 4.1.4. Document and plan approval can be assigned to users by assigning designations for each document or plan template.
- 4.1.5. Users can be assigned to different levels of the organisation, where they will only be able to interact with locations, projects, contracts, etc. from that level onwards.

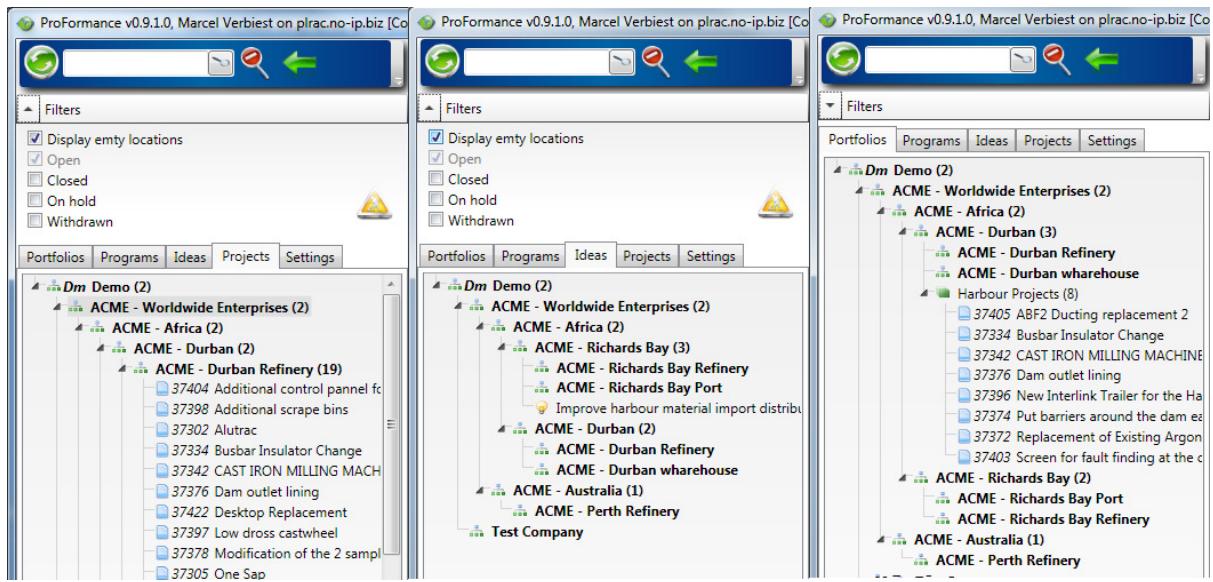
## 4.2. Master data



**Figure 2 Master data**

- 4.2.1.1. Most master data used in field lists are configurable.
- 4.2.1.2. ProFormance has the ability to have auto numbers assigned to different items, which can be set up for different locations in the organisation.
- 4.2.1.3. Rename, disable or change the sequence of reports in the system.
- 4.2.1.4. Customise tab names in the system.
- 4.2.1.5. Many more customisable features.

## 4.3. Tree view



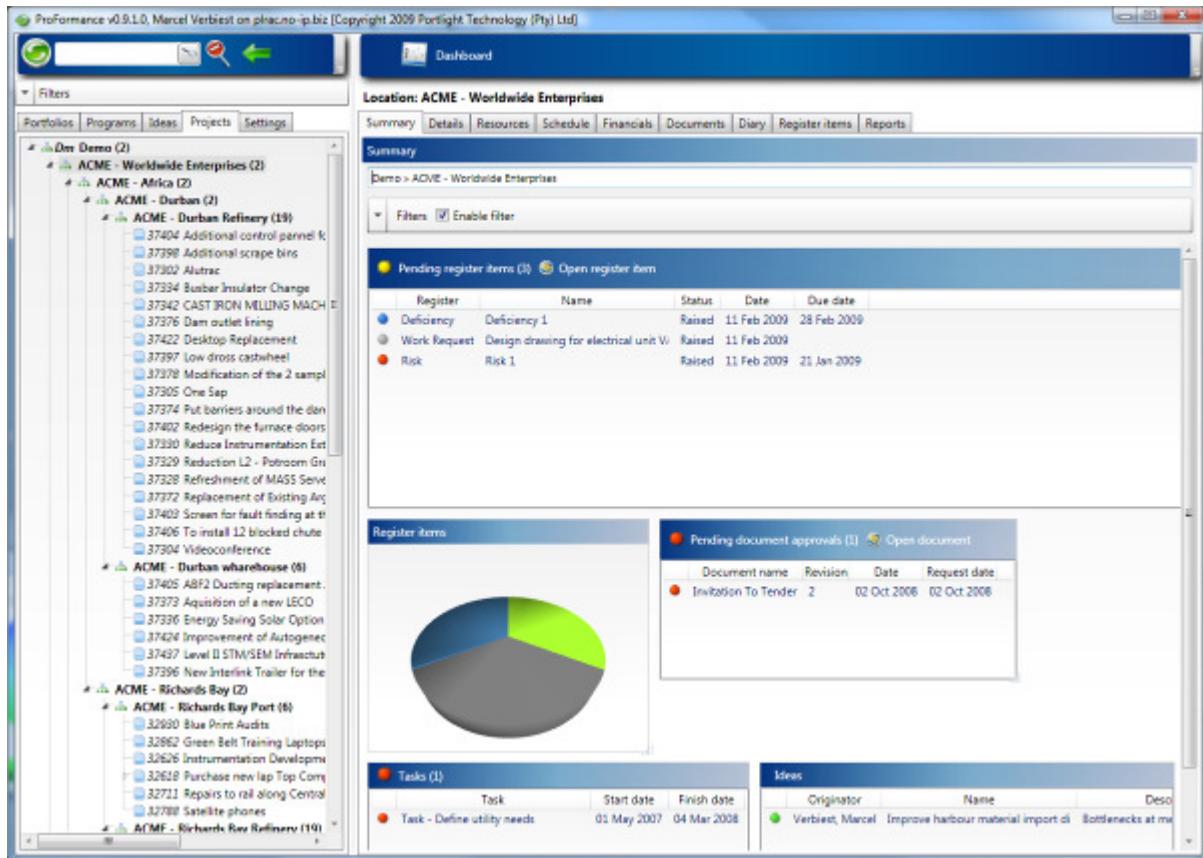
**Figure 3 Tree view - Projects, Ideas and Portfolios**

- 4.3.1.1. Users will see a hierarchical tree structure, representing the physical or functional layout of their organization.
- 4.3.1.2. Users will only see the part of the organization that they have been assigned via ProFormance's security mechanism.
- 4.3.1.3. Filters for the tree view make complex organizational elements more concise, while the full text search capability allows the user to search for specific words / phrases present in the tree.
- 4.3.1.4. The tree view window has the following tabs:
  - 4.3.1.4.1. Portfolios
    - 4.3.1.4.1.1. The user has the ability to create any number of portfolios which allows him / her to logically group projects.
    - 4.3.1.4.1.2. The system is able to report across portfolios. This is as simple as clicking on a portfolio and running the report. All roll-ups function automatically.
  - 4.3.1.4.2. Programs
    - 4.3.1.4.2.1. The user has the ability to create any number of programs which allows him / her to logically group projects according to criteria.
  - 4.3.1.4.3. Ideas
    - 4.3.1.4.3.1. The ideas tab displays a hierarchical tree view of all locations with their ideas raised. These ideas can also come from ProFormance's web interface.
  - 4.3.1.4.4. Projects
    - 4.3.1.4.4.1. The projects tab displays a hierarchical tree view of all locations with their elements, like locations, projects, contracts etc.
  - 4.3.1.4.5. Settings

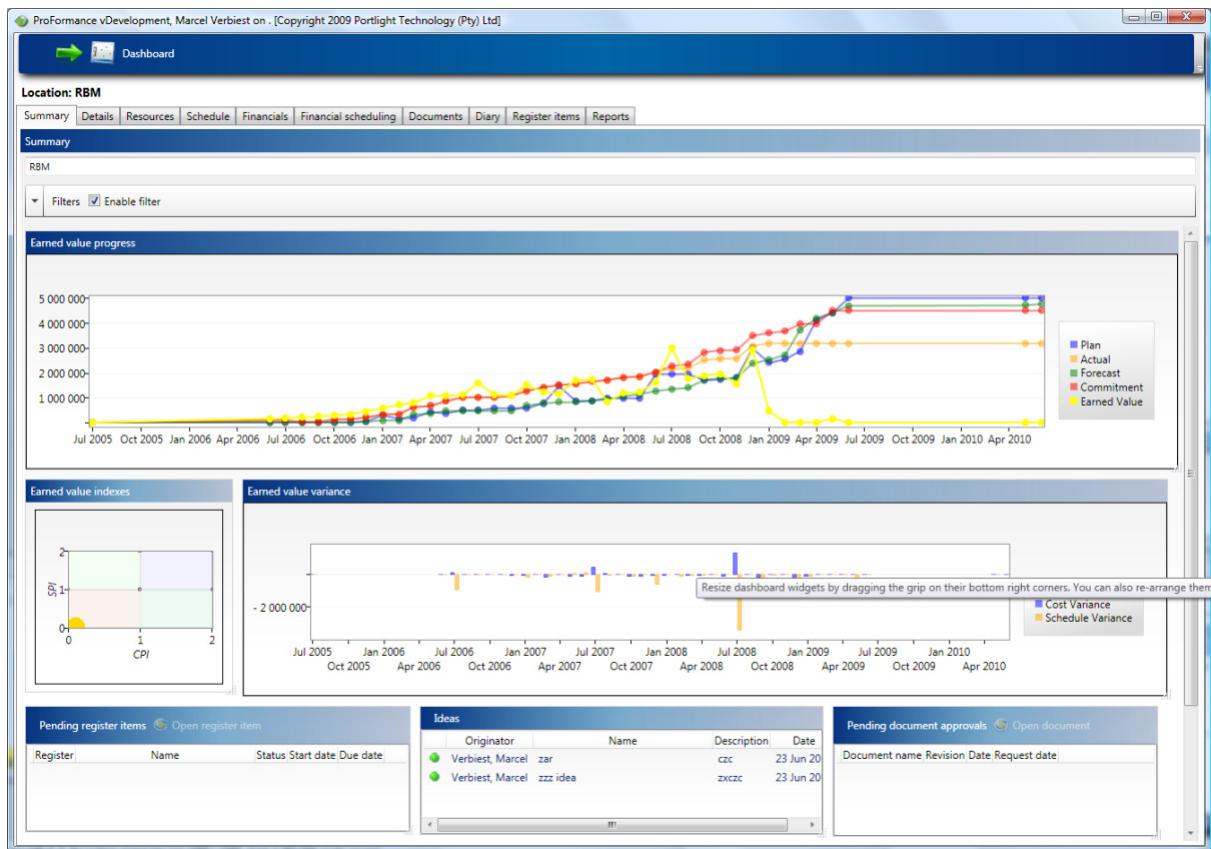
4.3.1.4.5.1. The settings tab contains all settings, including user rights assignment, adding / editing of document and project plan templates and updating of master data.

## 4.4. Details window

### 4.4.1. Summary tab



**Figure 4 Dashboard**



**Figure 5 Earned Value Dashboard**

- 4.4.1.1. The dash board contains a number of independent information blocks (widgets) to display summary information. A user can hide, display or move these widgets around (to personalize his/her summary pages). Data displayed in these widgets would typically be open items, open register items, tasks, documents for approval, register items etc. and may be displayed as bar / pie charts or tabulated data with traffic lights showing whether items are upcoming / due / behind schedule.

#### 4.4.2. Details tab

The screenshot shows the ProFormance software interface. On the left, there's a navigation pane with a tree view of projects and tasks. The main area is titled "Six Sigma Project: Improve casting filter efficiency". It has tabs for Summary, Details, Documents, Diary, Register items, and Reports. The Details tab is active. Below the tabs, there are several sub-tabs: Pipeline, Scope, Team, Metric, Milestones, and Tracking. The Pipeline sub-tab is selected. The pipeline details include:

- Capturer: Marcel Verbiest
- Number/Code: 37302
- Name: Improve casting filter efficiency
- Description: Improve casting filter efficiency
- Originator: Verbiest, Marcel
- Process owner: Verbiest, Marcel
- Champion: Verbiest, Marcel
- Belt: Yellow Belt
- General manager: Verbiest, Marcel
- Type: Innovation

There are checkboxes for "Is this an 'Energy Efficiency' idea?" and "Does this problem / solution occur in other locations?". A potential value of 5500000 is listed. A risk matrix table is shown:

Priority*	Safety Risk	Business Risk	Financial Risk	Notes
<input type="radio"/> Low	<input type="radio"/> Low	<input type="radio"/> Low	<input checked="" type="radio"/> Medium	Has a monthly likelihood of an incident occurring with a Major consequence.
<input type="radio"/> Medium	<input type="radio"/> Medium	<input checked="" type="radio"/> Medium	<input type="radio"/> High	
<input checked="" type="radio"/> High	<input type="radio"/> High	<input type="radio"/> High	<input type="radio"/> High	

Priority Total: 81

Status: Registered

Figure 6 Item details

4.4.2.1. Item details are entered on this tab.

4.4.2.2. The level of details displays varies for each item type, e.g.:

4.4.2.2.1. Capital projects

4.4.2.2.1.1. More fields than for example locations.

4.4.2.2.2. Six Sigma projects

4.4.2.2.2.1. Details view contains sub-tabs:

4.4.2.2.2.1.1. Pipeline sub-tab

4.4.2.2.2.1.2. Scope sub-tabs

4.4.2.2.2.1.3. Team sub-tab

4.4.2.2.2.1.4. Metrics sub-tab

The screenshot shows the ProFormance software interface. The left sidebar shows a tree view of projects and tasks. The main panel is titled "Six Sigma Project: Improve casting filter efficiency". It has tabs for Summary, Details, Documents, Diary, Register items, and Reports. The Details tab is active. Below the tabs, there are sub-tabs: Pipeline, Scope, Team, Metric, Milestones, and Tracking. The Metric sub-tab is selected. The metric details table includes:

Metric	Description	Unit of measure	Baseline	Target
Metric 1	Liquid throughput	ton p/h	0.75	1.4
Metric 2	Energy used	MW	3	11

Sigma level: Sigma 6

Figure 7 Metrics (KPI's)

#### 4.4.2.2.2.1.5. Milestones sub-tab

#### 4.4.2.2.2.1.6. Tracking sub-tab

#### 4.4.2.2.3. Commissioning projects / systems

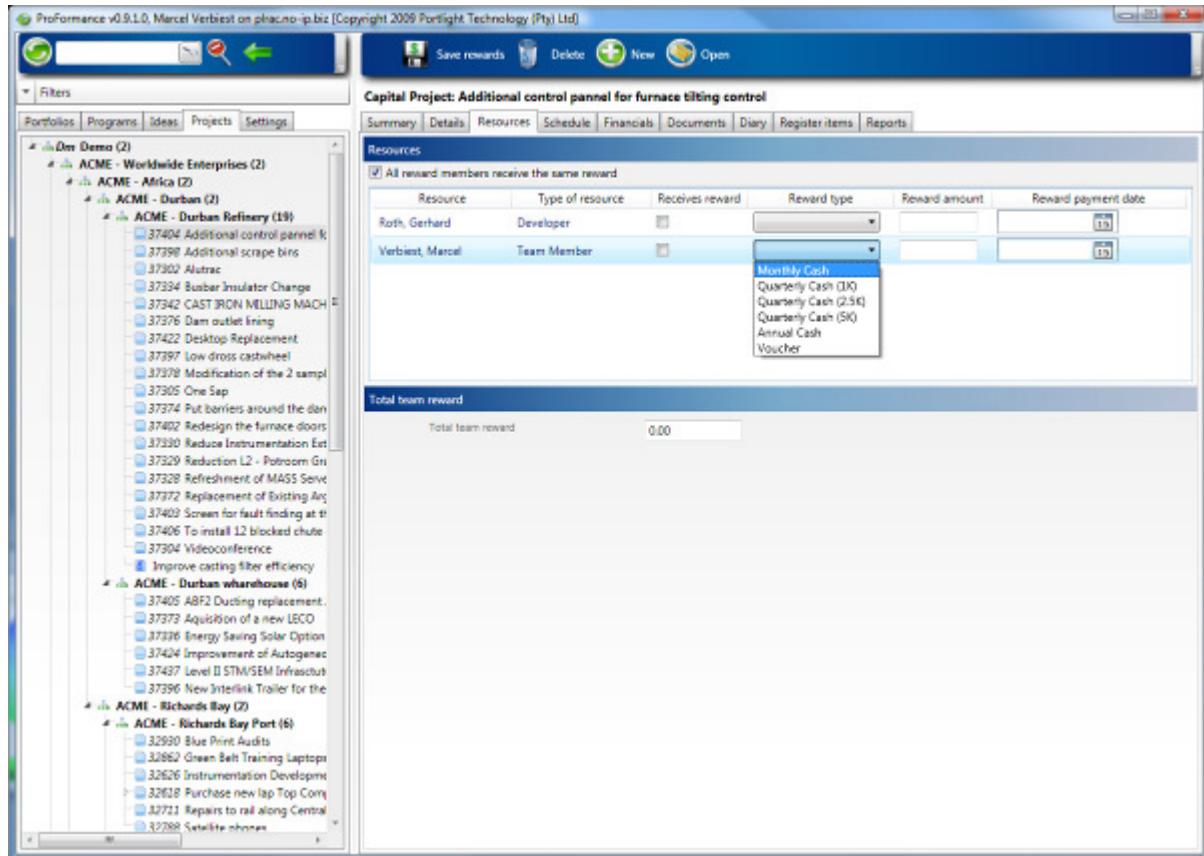
##### 4.4.2.2.3.1. Details view contains sub-tabs:

###### 4.4.2.2.3.1.1. Systems sub-tab

###### 4.4.2.2.3.1.2. Packages sub-tabs

###### 4.4.2.2.3.1.3. Documents to review sub-tab

### 4.4.3. Resources tab



**Figure 8 Resources**

- 4.4.3.1. Resources may be added to projects which allow them to book hours against the project.
- 4.4.3.2. These resources make up the project team.
- 4.4.3.3. ProFormance has the ability to assign rewards to resources.

#### 4.4.4. Schedule tab

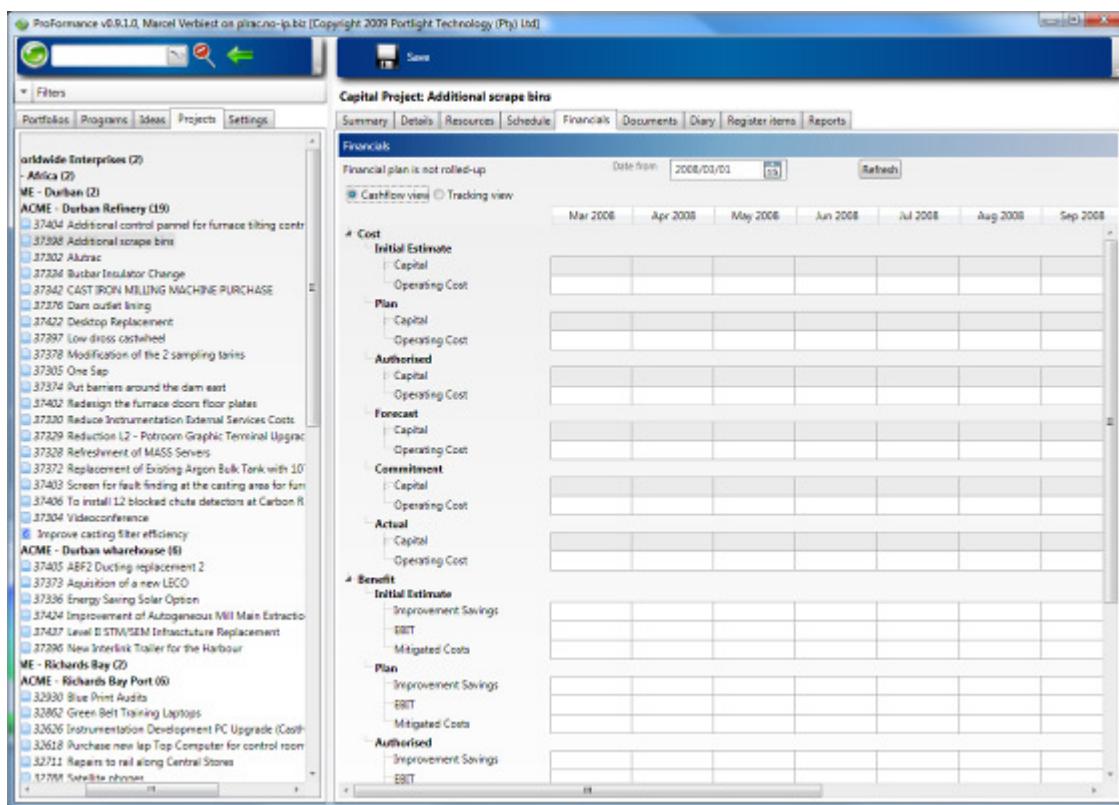
Milestone	Baseline		Revised		Actual	
	Start date	Finish date	Start date	Finish date	Start date	Finish date
Started	2009/02/01	2009/02/03	2009/02/01	2009/02/03	2009/02/01	2009/02/03
Investigation	2009/02/04	2009/02/27	2009/02/10	2009/02/25	2009/02/15	2009/02/15
Authorised	2009/02/17	2009/02/28	2009/02/17	2009/02/28	2009/02/17	2009/02/28
Implementation	2009/03/01	2009/03/27	2009/03/01	2009/03/27	2009/03/01	2009/03/27
Completed	2009/03/30	2009/03/31	2009/03/30	2009/03/31	2009/03/30	2009/03/31
Review	2009/04/01	2009/02/10	2009/02/10	2009/02/10	2009/02/10	2009/02/10
Closed	2009/04/13	2009/04/13	2009/04/13	2009/04/13	2009/04/13	2009/04/13

Figure 9 Schedule

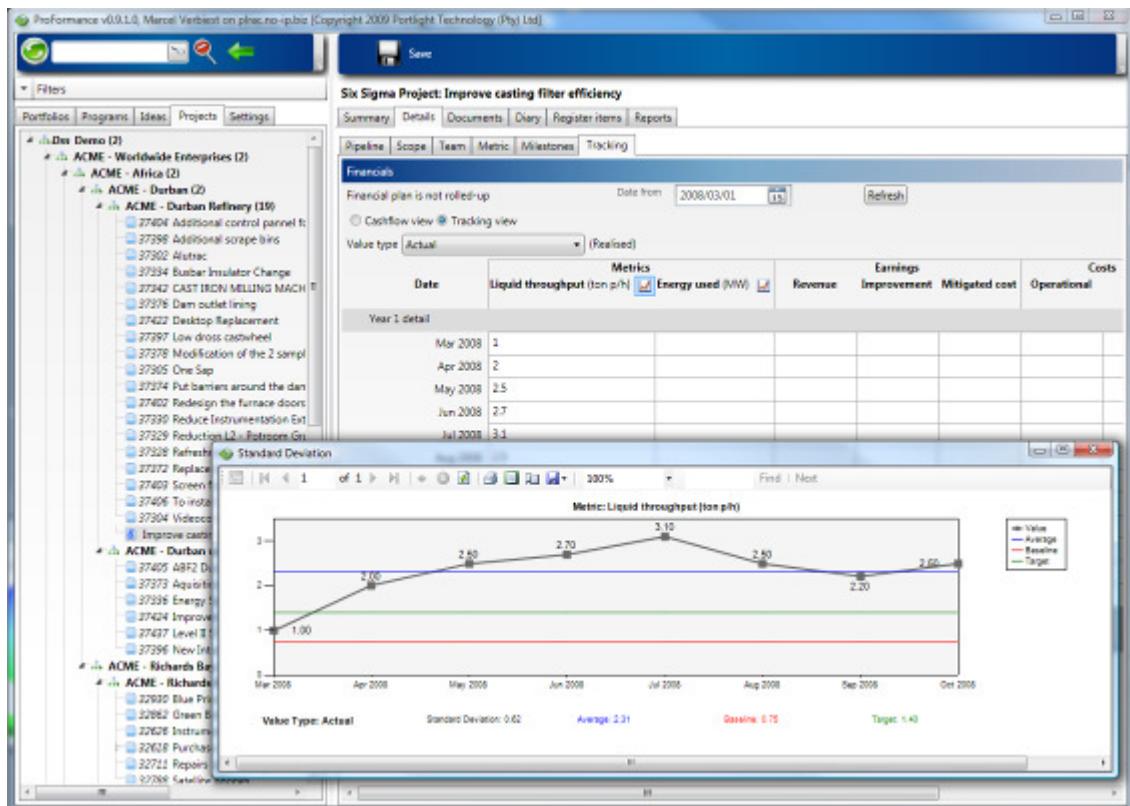
Figure 10 Schedule summary for locations

- 4.4.4.1. MS Project can be used to track tasks and milestones. These project files come from templates set up in ProFormance.
- 4.4.4.2. Manual entry of milestones is also possible, but will disable using a template MS Project plan.
- 4.4.4.3. Key milestones are pre-linked to the correct milestone and in the case of the user deleting a key milestone; the system will prompt the user to specify a new key milestone to replace the deleted one. This concept of key milestones facilitates cross project / contract reporting. Projects are compared utilizing these key milestones, allowing true “apples with apples” reporting.
- 4.4.4.4. Schedule and actual dates are automatically updated for the projects in ProFormance, allowing true rollup reporting across a portfolio of projects whilst project plans are saved centrally with full security, backup and audit trail of every change made.

#### 4.4.5. Financials tab



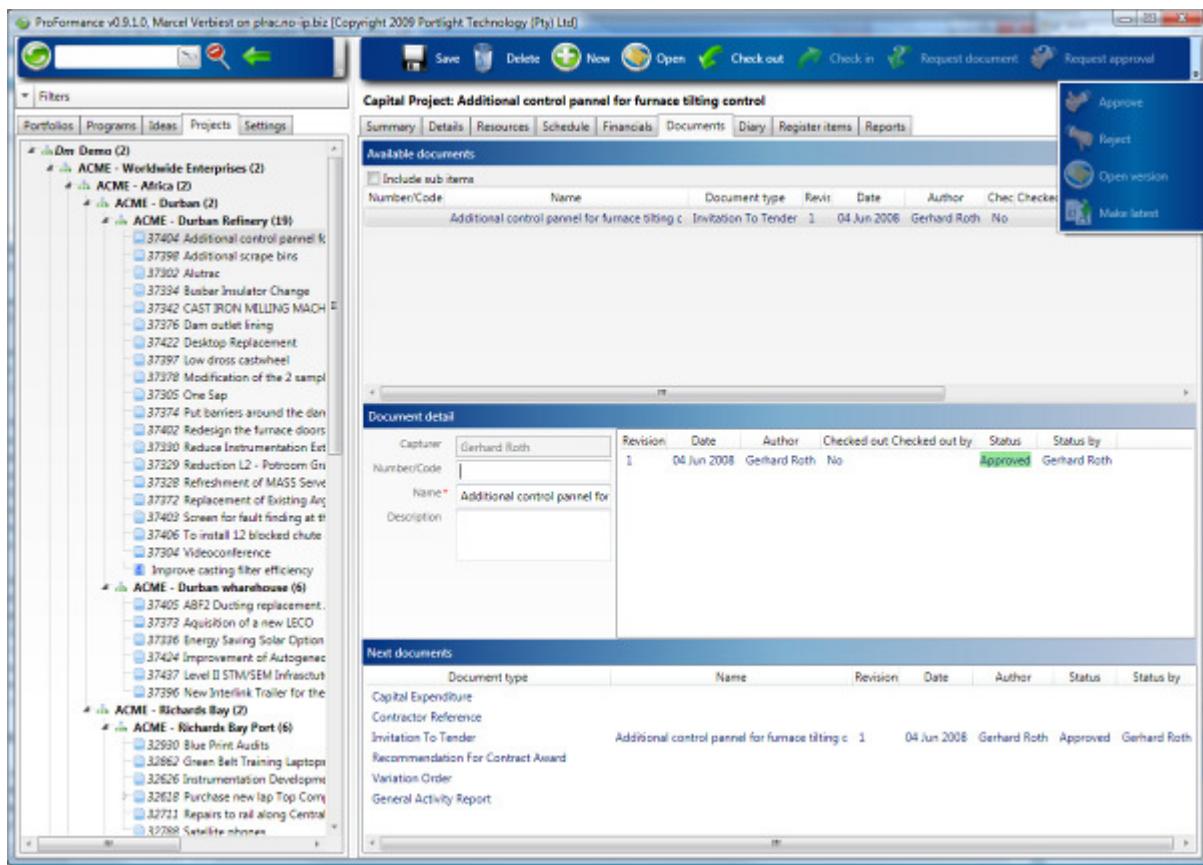
**Figure 11 Financials - cash flow view**



**Figure 12 Financials - tracking view**

- 4.4.5.1. Project costs can be read directly from financial systems like SAP through ProFormance's RFC interface, or may be entered manually, in cases where no SAP interfacing is possible.
- 4.4.5.2. Projected benefits / savings on projects can also be tracked.
- 4.4.5.3. All financial figures roll up automatically and the user can drill-down to the underlying values by double clicking on a roll up value.
- 4.4.5.4. The user can adjust the period for viewing financials.
- 4.4.5.5. The user can choose between a cash flow and a financial tracking view. The financial tracking view includes project metrics (in the case of Six Sigma projects).
- 4.4.5.6. Budgeting fields are also part of the financials tab (budget approval year, budget approval reference number and the approved budget) to facilitate in budget overrun and cash flow reports, as well as tracking of budgets being re-assigned to other projects.

#### 4.4.6. Documents tab



**Figure 13 Documents from templates**

- 4.4.6.1. ProFormance offers a comprehensive document management system that allows each site to define their own document templates that may be attached to virtually any level of the organization's hierarchy.
- 4.4.6.2. Editing is done via MS Word.
- 4.4.6.3. All documents are archived in a secure, central, controlled location with audit tracking and security. ProFormance can also interface with other document control systems such as SharePoint or Documentum. This, however, requires a level of customisation due to the document repositories not being standard everywhere.
- 4.4.6.4. Version control allows full audit trail of when documents were changed, and by whom, whilst the "Checkout" feature allows only one team member at a time to make changes to any specific document.
- 4.4.6.5. A user can also use the "Request document" function to send an email notification to the person that currently has the document "Checked out".
- 4.4.6.6. Once finished, the user may then choose to check it in, which means multiple users working on the same project, won't need to duplicate documents.
- 4.4.6.7. The e-mail notification feature permits excellent communication between team members as well as between project managers and management and the user will receive e-mail notification when:
  - 4.4.6.7.1. A document is ready to be approved.
  - 4.4.6.7.2. A document has been approved.

#### 4.4.7. Diary tab

The screenshot shows the ProFormance v0.9.1.0 software interface. The main window title is "Capital Project: Additional control panel for furnace tilting control". The top menu bar includes Save, Delete, New, Open, Email, Check out, Check in, Request document, and a toolbar with icons for Open version, New comment, and Open comment.

The left sidebar displays a tree view of projects and tasks:

- Demo (2)
  - ACME - Worldwide Enterprises (2)
    - ACME - Africa (2)
      - ACME - Durban (2)
        - ACME - Durban Refinery (19)
          - 37404 Additional control panel k
          - 37398 Additional scrap bins
          - 37302 Alutrac
          - 37334 Busbar Insulator Change
          - 37342 CAST IRON MILLING MACH
          - 37376 Dam outlet fitting
          - 37422 Desktop Replacement
          - 37397 Low dross castwheel
          - 37379 Modification of 2 sample
          - 37305 One Sap
          - 37374 Put barriers around the dan
          - 37402 Redesign the furnace doors
          - 37330 Reduce Instrumentation Est
          - 37329 Reduction L2 - Potroom Gri
          - 37328 Refreshment of MASS Serv
          - 37372 Replacement of Existing Arg
          - 37403 Screen for fault finding at th
          - 37406 To install 12 blocked chute
          - 37304 Videoconference
          - 37305 Improve casting filter efficiency
        - ACME - Durban wharehouse (6)
          - 37405 ABF2 Ducting replacement.
          - 37373 Aqudition of a new LECO
          - 37336 Energy Saving Solar Option
          - 37404 Improvement of Autogener
          - 37437 Level II STM/SEM Infrastruct
          - 37396 New Interlink Trailer for the
      - ACME - Richards Bay (2)
        - ACME - Richards Bay Port (6)
          - 32690 Blue Print Audits
          - 32662 Green Belt Training Laptop
          - 32626 Instrumentation Developm
          - 32638 Purchase new lap Top Com
          - 32711 Repairs to rail along Central
          - 32788 Satellite phones

Available attachments							
Number/Code	Name	Attachment type	Revision	Indexed	File name	Date	Attached by
DSC_1570.JPG	General	1	No	DSC_1570.JPG	04 Jun 2008	Gerhard Roth	Project - 37404 Additional control
Sample E-mail.htm	General	1	No	Sample E-mail.htm	04 Jun 2008	Gerhard Roth	Project - 37404 Additional control
Document Scan.pdf	General	1	No	Document Scan.pdf	04 Jun 2008	Gerhard Roth	Project - 37404 Additional control
SCAN1279_000.tif	General	1	Yes	SCAN1279_000.tif	04 Jun 2008	Gerhard Roth	Project - 37404 Additional control

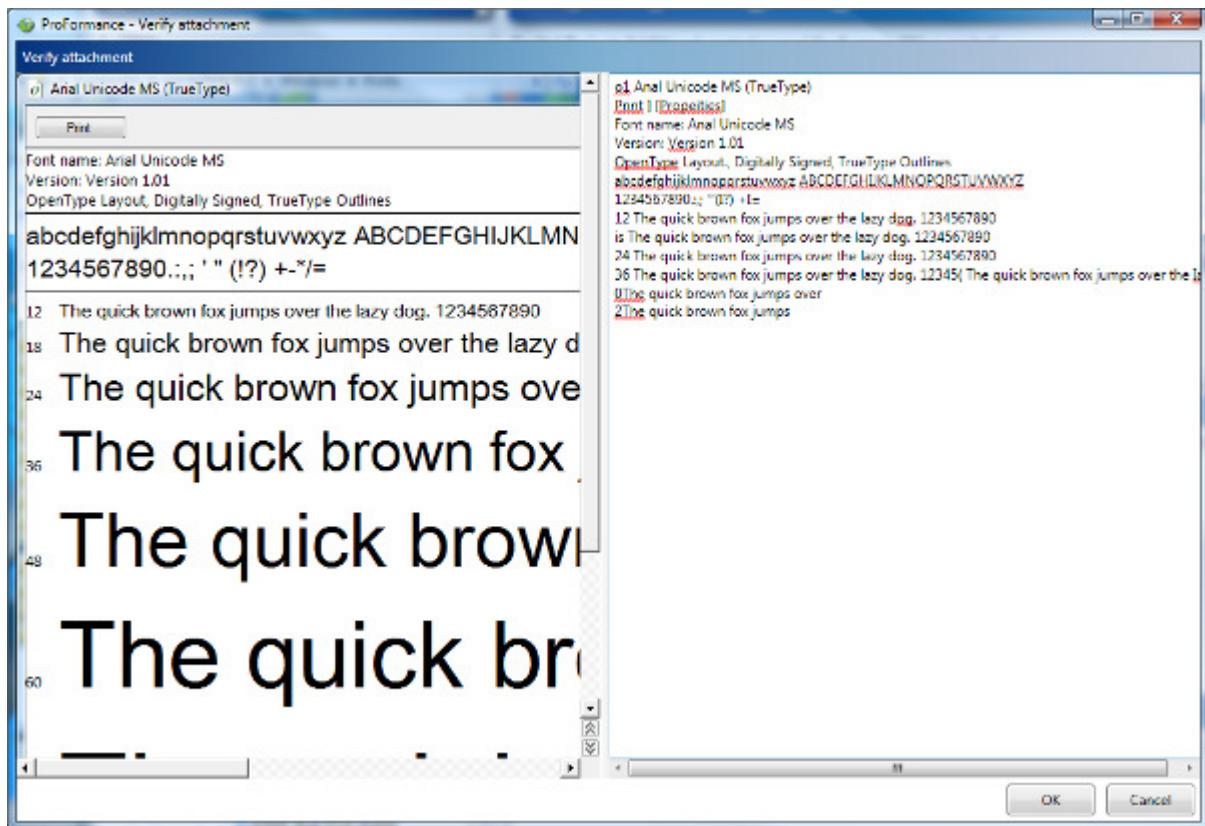
  

Attachment detail					
Capturer	Number/Code	Name *	Description	Revision	Date
Gerhard Roth	37304	SCAN1279_000.tif		1	04 Jun 2008
				Author	Gerhard Roth
				Checked out	No
				Status	None
				Status by	

Comments			
Comment no.	Date	Capturer	Comment
1	04 Jun 2008	Gerhard Roth	Test comment 01

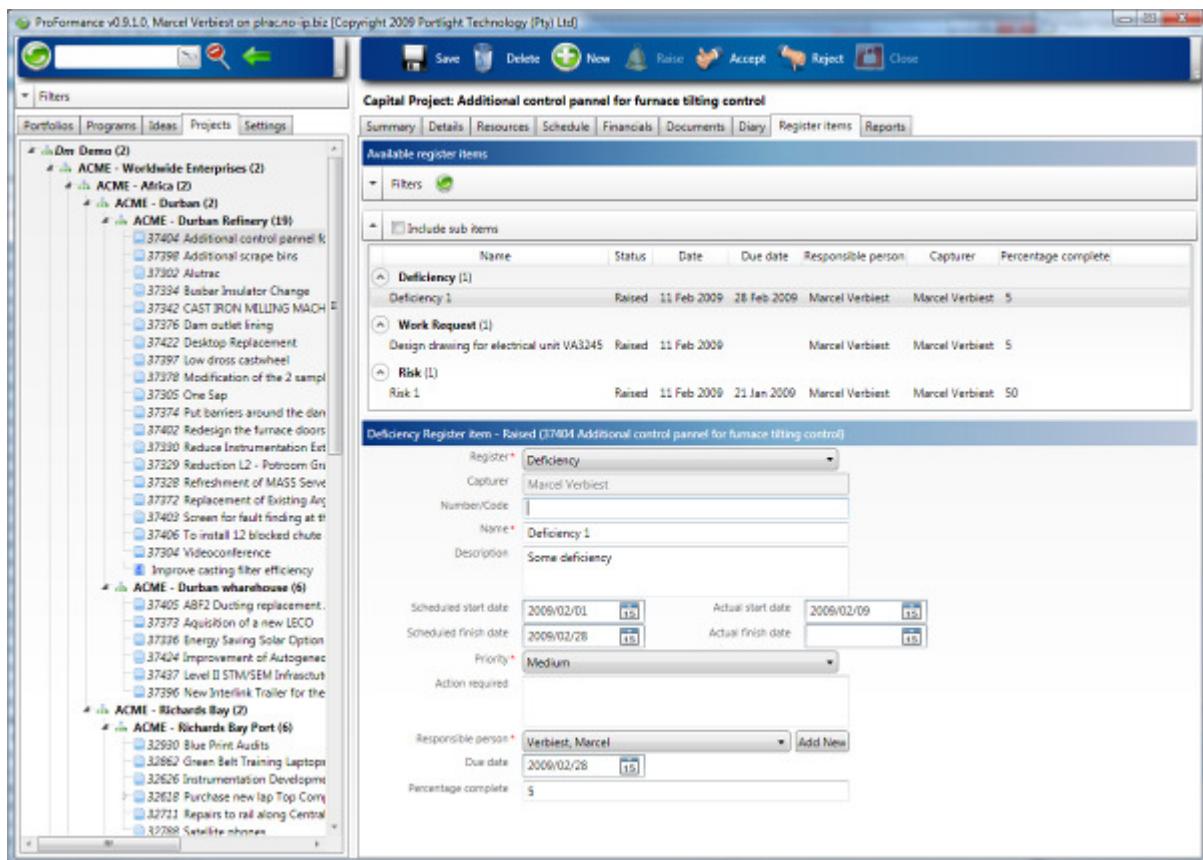
Figure 14 Diary - attachments and comments



**Figure 15 Attachments - optical character recognition**

- 4.4.7.1. This document management feature lets you attach any file to items. The attached file is saved in the system's SQL database and may be opened in its native format. These attachments also have version control.
- 4.4.7.2. OCR (Optical Character Recognition) indexes scanned legacy documents making them fully searchable (requires Microsoft Office Document Imaging to be installed on the user's computer).
- 4.4.7.3. The user may also enter project comments which helps ensure continuity when projects are taken over by other specialists as well as providing management with a good idea of the project's status.

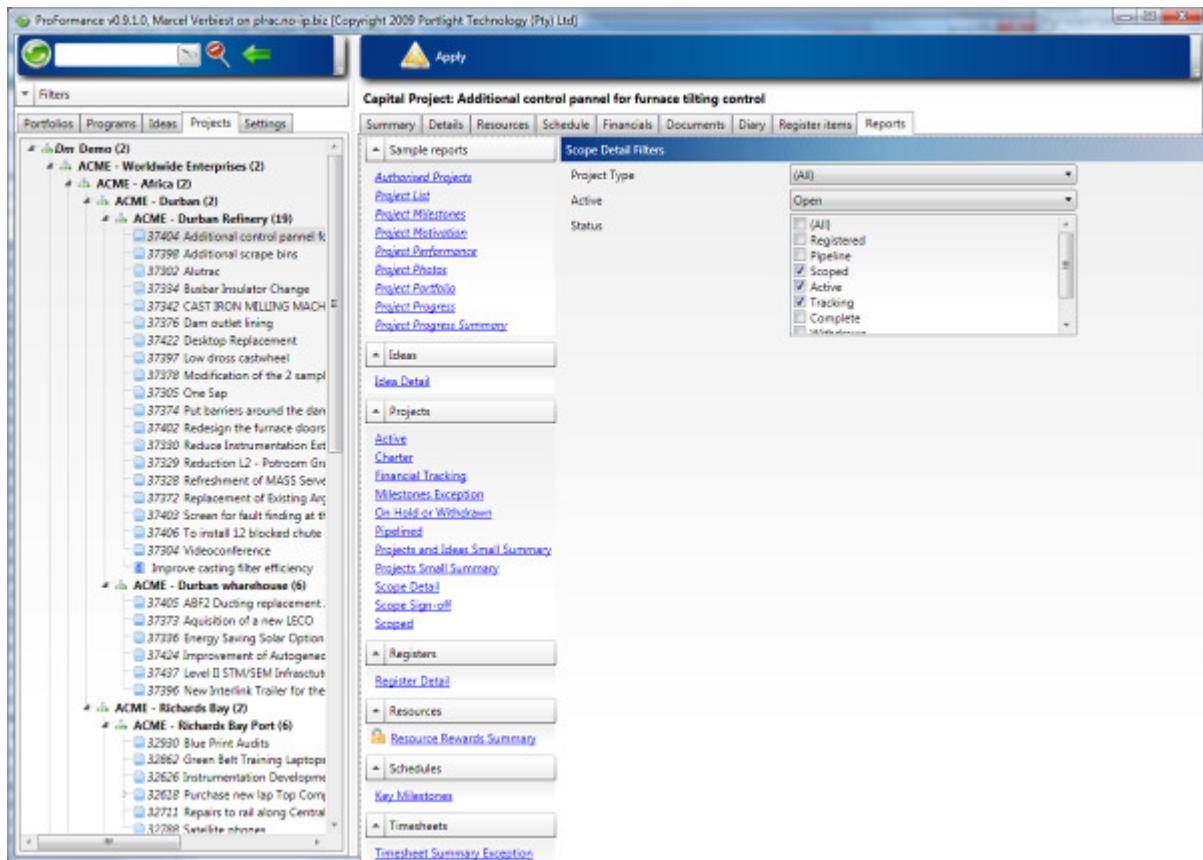
#### 4.4.8. Register Items tab



**Figure 16 Register items**

- 4.4.8.1. Register item categories are configurable and allow a mechanism of tracking items assigned to resources on the project.
- 4.4.8.2. Register items are underpinned by the e-mail notification mechanism meaning that the user will be notified of pending register items which have been raised against him / her. The user may then accept the register item, or reject it, with a rejection reason. The originator will receive notification via a system generated e-mail and the resource will have the register item appear on his / her dash board with the appropriate traffic light status indicator.
- 4.4.8.3. Filters allow the user to filter for register items with the following statuses:
  - 4.4.8.3.1. Accepted
  - 4.4.8.3.2. Completed
  - 4.4.8.3.3. Raised
  - 4.4.8.3.4. Rejected
  - 4.4.8.3.5. None

#### 4.4.9. Reports tab



**Figure 17 Reports and filters**

- 4.4.9.1. ProFormance offers a wide variety of reports which may be filtered to customize the view. All reports are generated in native Microsoft Report Writer format, and can be exported to .pdf format or .xls format so that users may manipulate the raw data.
- 4.4.9.2. Reports filter and roll up according to the selected location or item in the active tree view.
- 4.4.9.3. Dashboard status indicators and reports are useful for the manager, the team leader and the project manager.
  - 4.4.9.3.1. The manager: ProFormance showcases a section specially designed for managers. It contains statistics and reports for multiple projects rolled up into a summary view. The manager then has the ability to drill down as deep as he / she likes to investigate the status of individual projects or portfolios.
  - 4.4.9.3.2. The team leader: Different filter selections provide a view of the status of a portfolio of projects managed by his / her team or area of responsibility, with drill-down capability to investigate problem areas highlighted in specific projects.
  - 4.4.9.3.3. The project manager: Project status and progress is easily tracked and reported.
  - 4.4.9.3.4. ProFormance comes with a variety of bundled reports, and the ability exists to add reports to ProFormance for different clients.

#### 4.4.10. Reports Samples

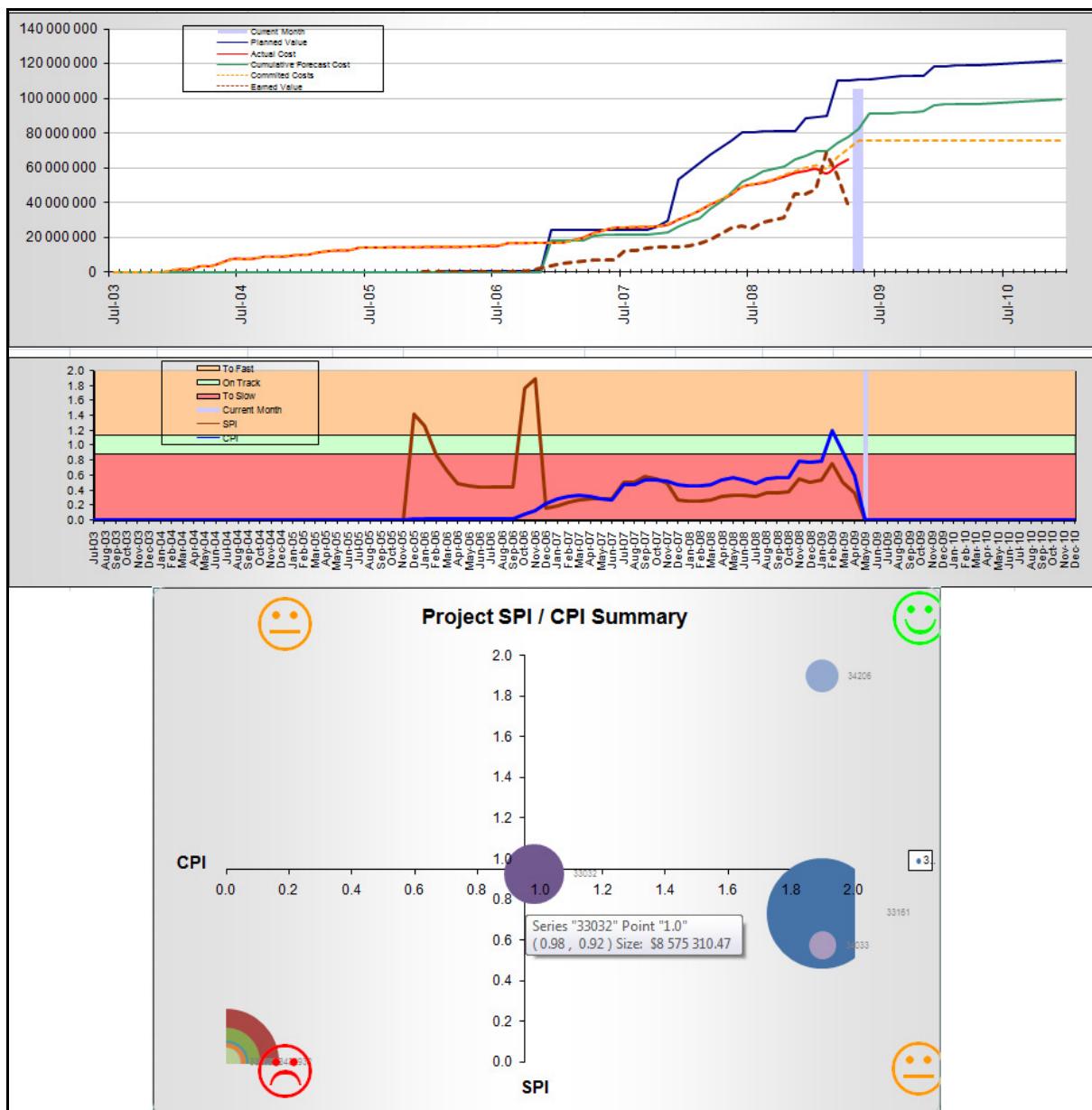
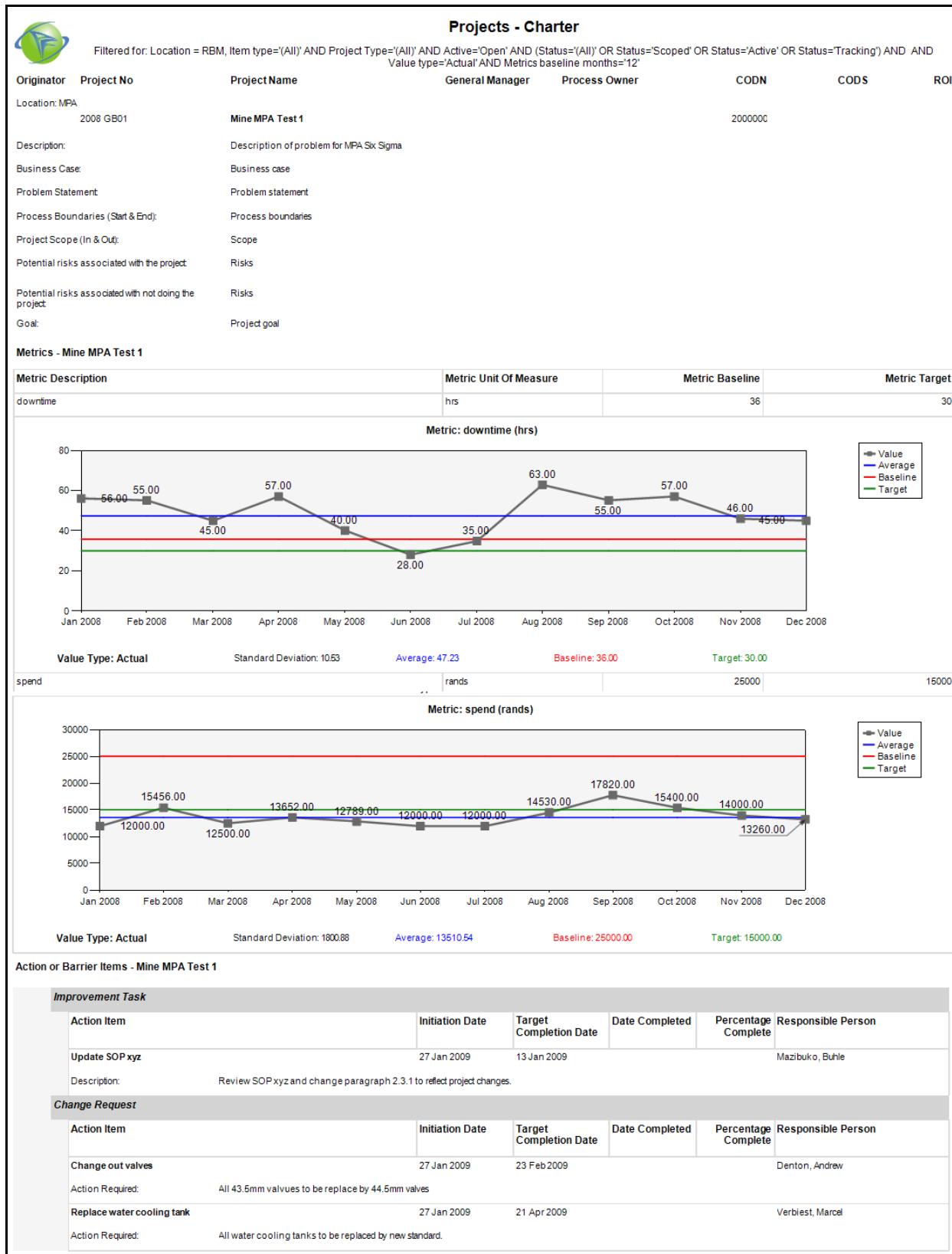


Figure 18 Earned Value reporting

Register Detail													
Filtered for: Location = RBM, (Status='Accepted' OR Status='None' OR Status='Raised' OR Status IS NULL)													
Originator	Location	Item Name											
Testing Marian Currie													
<b>ProFormance Root</b>													
<b>Improvement Task</b>													
Action Item		Status	Initiation Date	Target Completion Date	Date Completed	Percentage Complete	Responsible Person						
Conduct post implementation review of CIP		Raised	22 Jan 2009	13 Feb 2009		30	Curran, Pat						
Originator	Idea	Item Name											
Engineering Design Solutions (EDS) Marian Currie CIP 01													
<b>Eng Test 1</b>													
<b>Risk Assessment</b>													
Action Item		Status	Initiation Date	Target Completion Date	Date Completed	Percentage Complete	Responsible Person						
dfdg		None	14 Jan 2009				Currie, Marian						
Originator	Idea	Item Name											
Furnaces Marian Currie CIP-1-FP													
<b>CIP test 1 Marian</b>													
<b>Improvement Task</b>													
Action Item		Status	Initiation Date	Target Completion Date	Date Completed	Percentage Complete	Responsible Person						
implement SOP		None	16 Feb 2009	30 Apr 2009			Currie, Marian						
Description: ensure item 2 is put into SOP and implemented													
<b>Non-conformance</b>													
Action Item		Status	Initiation Date	Target Completion Date	Date Completed	Percentage Complete	Responsible Person						
Rotables not conforming		None	17 Feb 2009	30 Apr 2009									
Description: aflynn;ahf													
Action Required: Contact stores and arrange													
Time: 24-May-2009 14:19(GMT +2)		User: marcel-pclmarcel		Report: RegisterDetailReconReport		Lang: en-ZA	Page 1 of 3						

**Figure 19 Register items outstanding**



**Figure 20 Project charter**

**Projects - Milestones Exceptions**

Filtered for: Location = RBM, Item type='(All)' AND Project Type='(All)' AND Active='Open' AND (Status='(All)' OR Status='Active') AND Exceptions only='Yes'

Project No	Project Name	General Manager	Champion	Belt
Location: Casthouse department				
31695	New slab moulds for Hydro and large hulets formats			
Milestones - New slab moulds for Hydro and large hulets formats				
Task Name	Milestone	Due Date	Actual Finish Date	
Completed	Completed	05 Jan 2009		
Closed	Closed	09 Feb 2009		
Project No	Project Name	General Manager	Champion	Belt
Location: Casthouse department				
31562	Siphon pipe wash bay - Casthouse Metal Receiving			
Milestones - Siphon pipe wash bay - Casthouse Metal Receiving				
Task Name	Milestone	Due Date	Actual Finish Date	
Started	Started	10 Dec 2007		
Started	Started	10 Dec 2007		
Project No	Project Name	General Manager	Champion	Belt
Location: Hotside Section				
33980	Minor abulution facilities for Hotside area of Casthouse			
Milestones - Minor abulution facilities for Hotside area of Casthouse				
Task Name	Milestone	Due Date	Actual Finish Date	
Completed	Completed	19 Aug 2008		
Completed	Completed	28 Aug 2008		
Closed	Closed	30 Aug 2008		

Figure 21 Milestone exceptions

**Resource Rewards Summary Report**

Filtered for: Location = RBM, (Date=01-Jan-2009)

Reward Payment Month	Employee No	Resource Name	Reward Amount	Reward Type
March 2009	00000001	Hansen, John	5000	Annual Cash 10K
April 2009	00000001	Hansen, John	200	Voucher
April 2009	00000011	Jones, William	600	Voucher
April 2009	00000040	Stander, Ben	200	Voucher
April 2009	00000050	Broosan, Dennis	1000	Monthly Cash 1K
April 2009	00000050	Broosan, Dennis	5000	Quarterly Cash 5K
April 2009	00000050	Broosan, Dennis	200	Voucher
April 2009	00000140	Connolly, Sean	200	Voucher
April 2009	00000170	Christie, Alan	200	Voucher
April 2009	00000170	Gurney, Phil	10000	Annual Cash 10K
April 2009	00000170	Ergenbeck, Wayne	200	Voucher
April 2009	00000180	Ernstsen, Mike	200	Voucher
April 2009	00000187	Gummadi, Michael	200	Voucher
April 2009	00000195	Gummadi, Srinivas	200	Voucher
April 2009	00000200	Hartling, Steen	2500	Quarterly Cash 2.5K
April 2009	00000200	Hartling, Steen	400	Voucher
April 2009	00000210	Jacobs, John	200	Voucher
April 2009	00000210	Lam, Jim	200	Voucher
April 2009	00000220	McDonald, Eugene	200	Voucher
April 2009	00000220	Wigton, Joshua	200	Voucher
April 2009	00000220	Wigton, Jennifer	200	Voucher
April 2009	00000230	Montana, Benjamin	200	Voucher
April 2009	00000230	Oosthuizen, Yvonne	200	Voucher
April 2009	00000230	Patterson, Karen	200	Voucher
April 2009	00000230	Scholes, W.	200	Voucher

Figure 22 Resource rewards

## 5. ProFormance web interface

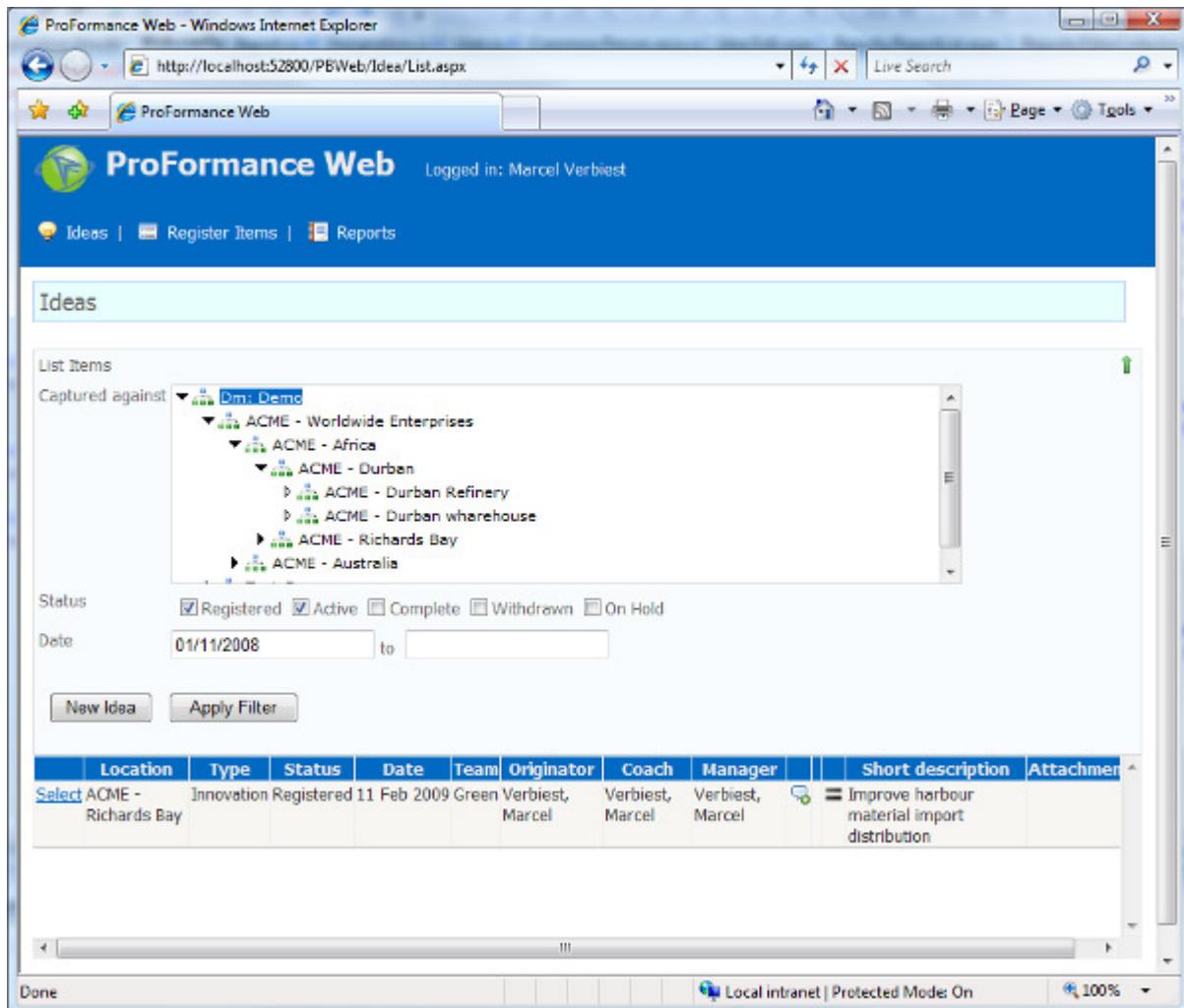


Figure 23 Web interface for non ProFormance users

- 5.1. The web interface is available to all persons on a site / location, not just ProFormance users.
- 5.2. The web interface allows for the following functionality:
  - 5.2.1. Idea / innovations capture.
    - 5.2.1.1. Users can capture ideas or innovations which will be assigned to the selected coaches / facilitators that are users in ProFormance. The selected user will also be notified via email.
    - 5.2.1.2. When these users open ProFormance, the ideas will be on their dashboard, and further action can be taken, e.g. reject the idea, create a project from the idea or manage the idea as a "team fix" instead of a full blown project.
  - 5.2.2. Register items capture
    - 5.2.2.1. Users can capture register items (deficiencies, punch lists, risks, etc.) which will be assigned to the selected responsible persons that are users in ProFormance. The selected user will also be notified via email.

5.2.2.2. When these users open ProFormance, the register items will be on their dashboard, and further action can be taken, e.g. reject the item; re-assign the item or action the item.

### 5.2.3. Basic reports

5.2.3.1. There are basic reports available to all persons with access to the web interface, regardless if they are users in ProFormance or not.