



GSAS  
GATE

## User Manual 2016



[www.gord.qa](http://www.gord.qa)

# User Manual 2016

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**Crafting a Green Legacy**



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## 1.1 General use

This chapter explains the usage of the general parts of the application.

### 1.1.1 Logging in to GSASgate

GSASgate can only be accessed with a valid [linkme.qa](http://www.linkme.qa) account. Users that do not have an account should first create one via [http://www.linkme.qa/general/register\\_start.asp](http://www.linkme.qa/general/register_start.asp).

### 1.1.2 My projects & certifications

Click on the “My projects & certifications” link in the main menu to get an overview of all certifications by project. Only projects and certifications you have access to will be shown here.

### 1.1.3 My tasks

The “My tasks” page shows a list of your unfinished tasks. Clicking on a task description will redirect you to the page in GSASgate where you can perform the necessary action(s) to complete the task. The “Resource” column contains breadcrumbs to the page the task is related to. Some tasks also have a due date.

Using the filter on the right of the page, you can view tasks by project, certification, etc. After a task is completed by the user, that task will automatically be deleted by the system.

**The task system is an important core feature of GSASgate. It is highly recommended that users frequently check for new tasks and complete them as soon as possible. This will result in a smooth certification process flow.**

**Projects & certifications**

Show 25 Per Page Show / hide columns Copy CSV Excel Print

Project Code	Project Name	Certification Name	Certification Status	Certification Active	Certification Typologies
QA-001	Project Y	Letter of Conformance 2.1	Certified	No	Healthcare 2.1
TBC	Project X	Letter of Conformance 2.1	Activating	Yes	Commercial 2.1 Core + Shell 2.1

Showing 1 to 2 of 2 entries Previous 1 Next

New project

Figure 1 “My projects & certifications” page

## 1.1.4 Audit log

### 1.1.4.1 Audit log page

The “Audit log” page contains a chronological history log relating your projects and all underlying resources. There are two types of audit log records:

- **System message:** these messages are generated by the system in response to a user event in the application. System messages have a grey background color.
- **User comment:** these messages represent direct user input. User comments are usually, but not always, related to system messages. User comments generated by the project team have a green background color. User comments generated by the GSAS trust team have an orange background color.

Every log record is linked to a specific resource, e.g. a project, a certification, a requirement, etc. Breadcrumbs to the resource are displayed above the audit log message next to the date and time it was created on and the user it is related to.

Using the filter on the right of the page, you can view audit logs by project, certification, user, date etc.

.....

**The audit log system is a powerful core feature of GSASgate. Using the correct filter, a lot of valuable information can be derived from the audit log page.**

.....

The screenshot shows the 'My tasks' page. On the left, there is a table with the following data:

Description	Resource	Due date
Allocate criteria requirements to project team members	Projects / Project X / Letter of Conformance, 2, 1 (Submitting)	-

On the right, there is a 'Tasks filter' sidebar. It contains a 'Project' dropdown menu currently set to '- All Projects -'. Below the dropdown are two buttons: 'Apply filter' (with a funnel icon) and 'Remove filter' (with an 'X' icon).

Figure 2 “My tasks” page

### 1.1.4.2 Audit log buttons

In addition to the audit log page, you can find audit log buttons on several pages of the application. These buttons typically reside in the top right corner of a resource information box. By clicking on one of these buttons, a window with audit logs directly concerning that resource will be opened.

**Notice that audit logs from underlying resources will not be displayed in this window. For a full overview of a resource and its underlying resources, users need to utilize the audit log page.**

For a detailed overview of the audit log page, see “1.1.4.1 Audit log page”.

For example, by clicking on one of the buttons in the figure below, audit logs directly concerning the “Letter of Conformance” certification will be shown. Audit logs linked to underlying criteria or requirements of the certification will not be displayed.

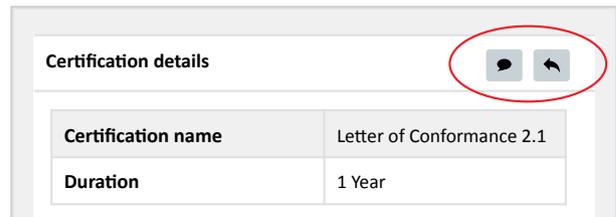


Figure 4 Audit log buttons in the “Certification details” box

The button on the right will display all audit log messages for this resource, while that on the left will only display user comments.

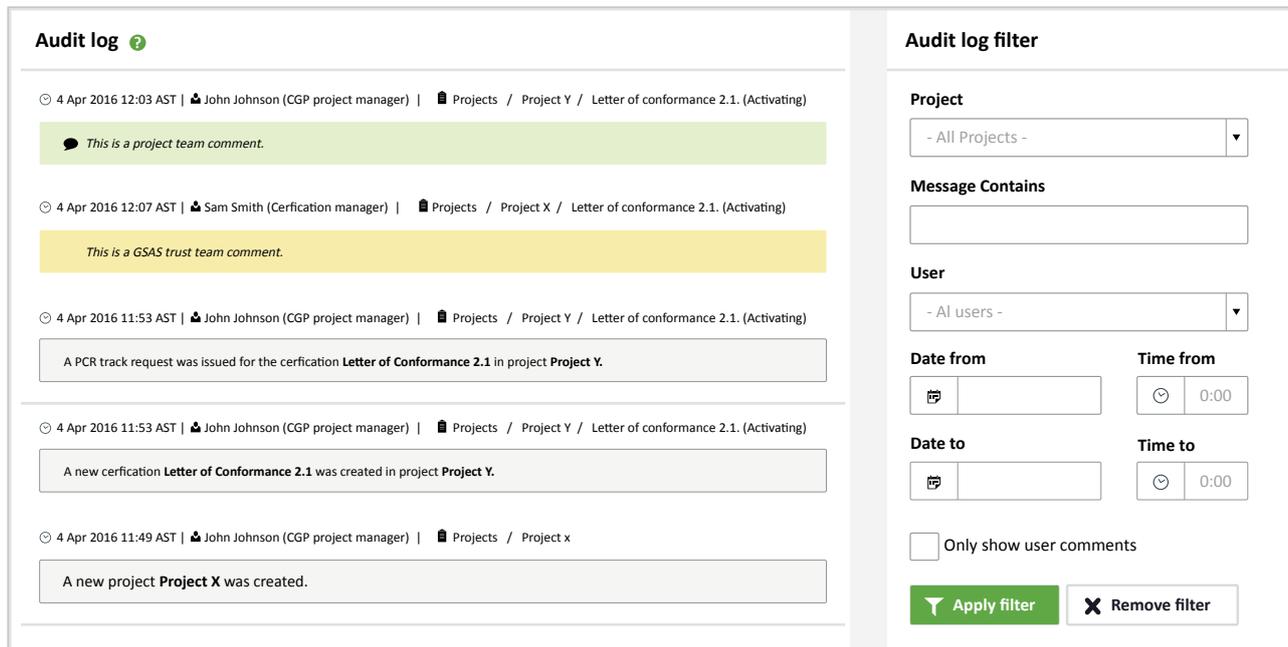


Figure 3 “Audit log” page

### 1.1.5 My preferences

On the “My preferences” page you can change your e-mail notification settings. You can specify for which types of audit logs and tasks you want to be notified by email. Some settings are application wide while others are specified on a project level.

To reduce the amount of mails that is sent to GSASgate users, most notifications will be bundled in a daily email. Users will however be notified immediately of some important events, e.g. when a user is added to a project.

#### User E-mail Notifications

**i** Below you can select for which types of audit log and task events a notification must be included in the digest e-mail. Some event types can be specified on a per project basis. These event types will be visible after first selecting a project. Changes will only be saved for the currently selected projects.

**Project independent notification preferences**

- Project created
- New task

**Project dependent notification preferences**

- All Projects -

 Update Preferences

Figure 5 “My preferences” page

## 1.2 Certification workflow

To acquire a certificate all steps of the certification workflow have to be completed. This paragraph explains what a typical certification flow looks like.

### 1.2.1 Creating a project

To apply for a certificate a CGP project manager has to navigate to a project page. If not starting from an existing project, he or she needs to create a project first. This can be done by clicking on the “New project” button on the “My projects & certifications” page. Only users with a CGP license can create projects.

After the user fills out the project details form, the project will be created. By default the user will have the “CGP project manager” role. For a detailed description of application and project roles.

### 1.2.2 Applying for a certificate

A CGP project manager can apply for a certificate by navigating to the project page and clicking on the “Apply” button next to the preferred certificate.

After filling out the details of the certificate, the certification is registered.

### 1.2.3 Certification statuses

During the certification flow the status of a certification will advance. Depending on this certification status the system will create tasks for certain users related to the project. For a detailed description of the task system, see “1.1.3 My tasks”.

The “Certification status” box on the certification page displays the current status of the certification at the top and all previous statuses below. On the left of every status there is an icon that indicates who will need to take action while the certification has this particular status. A green icon is used to indicate that the project team will have to take action, while an orange icon indicates that some user(s) of the GSAS trust team will need to take action.

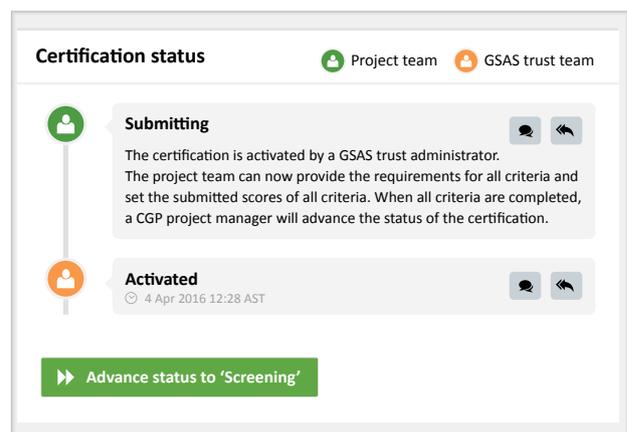


Figure 6 Certification status box on a certification page

By clicking on one of the audit log buttons on the right of a status, you will be redirected to the audit log page. A filter will be active that will show you all audit logs of the certification and its underlying resources created when the certification had this particular status. For a detailed overview of the audit log page, see “1.1.4.1 Audit log page”.

The following list describes all certification statuses. Although these statuses are chronologically ordered, some statuses can be skipped.

- **Activating:** The certification is registered. After payment is received, a GSAS trust administrator will advance the status of the certification.
- **Submitting:** The certification is activated by a GSAS trust administrator. The project team can now provide the requirements for all criteria and set the submitted scores of all criteria. When all criteria are completed, a CGP project manager will advance the status of the certification.
- **Screening:** The project team has completed all criteria. After the GSAS trust team has screened the criteria input, a GSAS trust certification manager will advance the status of the certification and provide screening comments.
- **Submitting after screening:** The GSAS trust team has screened and commented the criteria input. The project team can process this feedback by editing the existing criteria input. When all criteria are completed, a CGP project manager will advance the status of the certification.
- **Verifying:** The project team has completed all criteria. The GSAS trust team will now review all criteria input and set the the achieved scores of the criteria. After all criteria are verified, a GSAS trust certification manager will advance the status of the certification.
- **Acknowledging:** The GSAS trust team has verified all criteria. A CGP project manager will now decide to accept all scores or apply for appeal. After this, the certification status will be advanced.
- **Processing appeal payment:** An appeal was requested by a CGP project manager. After payment is received, a GSAS trust administrator will advance the status of the certification.
- **Submitting after appeal:** An appeal was requested by a CGP project manager. The project team can now (re)provide the requirements for all criteria and set the submitted scores of all criteria. When all criteria are completed, a CGP project manager can advance the status of the certification.
- **Verifying after appeal:** The project team has completed all criteria. The GSAS trust team will now review all criteria input and set the the achieved scores of the criteria. After all criteria are reviewed, a GSAS trust certification manager will advance the status of the certification.
- **Acknowledging after appeal:** The GSAS trust team has verified all criteria. After a CGP project manager acknowledges the achieved scores, he will advance the status of the certification.
- **Approving by management:** The GSAS trust team approved this certification. The GSAS trust management will now give their approval and advance the status of the certification.
- **Approving by top management:** The GSAS trust management approved this certification. The GSAS trust top management will now give their approval and advance the status of the certification.
- **Certified:** The GSAS trust team has issued this certification.
- **Not certified:** The GSAS trust team has denied this certification.

Depending on the current status of a certification a user will be responsible for advancing the certification to the next status. This can be done by clicking on the “Advance status to ...” button in the “Certification status” box.

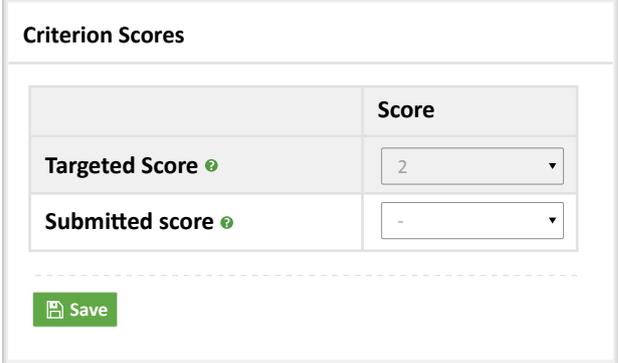
## 1.2.4 CGP project manager responsibilities

This paragraph describes the main responsibilities of a CGP project manager in GSASgate.

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### 1.2.4.1 Setting targeted scores

In the “Submitting” phase a CGP project manager can set the targeted scores of criteria. This can be done by navigating to a criterion page and changing the “Targeted score” field in the “Criterion scores” box.



	Score
Targeted Score ⓘ	2 ▾
Submitted score ⓘ	- ▾

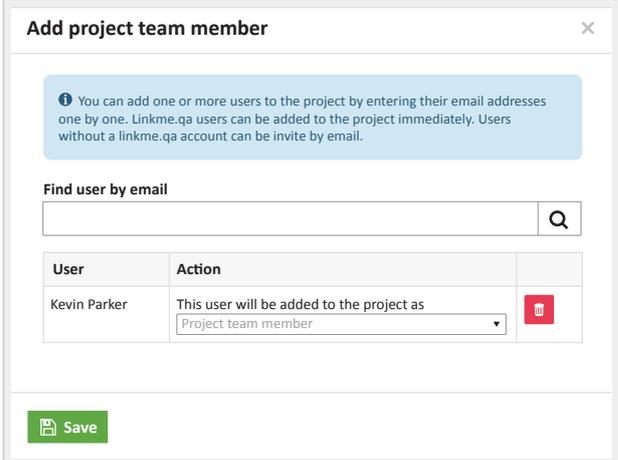
 Save

Figure 7 Setting targeted scores

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### 1.2.4.2 Adding members to the project team

In the “Submitting” phase a CGP project manager can add other team members to the project. This can be done by clicking on the “Add team member” button in the “Project team” box on the project page.



**Add project team member** ✕

**ⓘ** You can add one or more users to the project by entering their email addresses one by one. Linkme.qa users can be added to the project immediately. Users without a linkme.qa account can be invite by email.

Find user by email  

User	Action	
Kevin Parker	This user will be added to the project as Project team member ▾	

 Save

Figure 8 Adding members to the project team

### 1.2.4.3 Allocating project team responsibility

In the “Submitting” phase a CGP project manager will have to allocate responsibility of criteria requirements to project team members. This can be done by clicking on the “Allocate project team responsibility” button on the certification page.

Using the form on the next page, the CGP project manager can select requirements and assign them to a member of the project team. A due date can be set as well.

Figure 9 Allocating project team responsibility

### 1.2.4.4 Reviewing documents

In the “Submitting” phase, after a project team member has uploaded a document, a CGP project manager will need to review the document. This can be done by clicking on the status of a document in the “Documentation” box on a criterion page.

- **Approved:** the document was approved by a CGP project manager.
- **Rejected:** the document was rejected by a CGP project manager. The project team member that uploaded this document will have to re-upload a new version.

The following list describes all document statuses:

- **Awaiting approval:** the document was uploaded by a project team member and is waiting for approval.

File name	File size	Uploaded by	Upload date	Status	Actions
a-textfile.txt	1.49 KB	Kevin Parker	4 Apr 2016 12:45 AST	Approved	
blank.pdf	8.64 KB	Kevin Parker	4 Apr 2016 12:45 AST	Awaiting approval	

Figure 10 Reviewing documents

### 1.2.4.5 Submitting criteria

In the “Submitting” phase, after all requirements are provided by the project team and all criteria documents are reviewed by the CGP project manager, a CGP project manager will have to submit the criterion. This can be done by clicking on the “Submit criterion” button on the criterion page.

Please note that, at this stage, the submitted criterion will not be reviewed by the GSAS trust team yet. The GSAS trust team will start reviewing after all criteria are submitted by the project team and after the certification status is advanced by the CGP project manager.

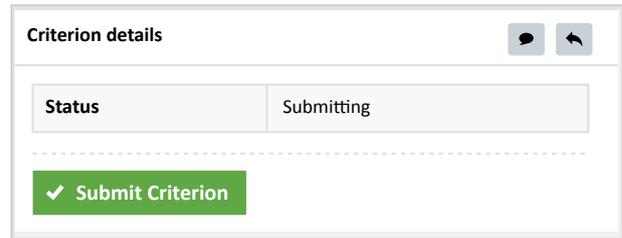


Figure 11 Submitting criteria

## 1.2.5 Project team member responsibilities

This paragraph describes the main responsibilities of a project team member in GSASgate.

### 1.2.5.1 Uploading documents

In the “Submitting” phase a project team member will have to upload documents in order to complete his or her assigned criteria requirements. This can be done by dropping files

in the “Upload documentation” box on a criterion page. The uploaded documents will now be reviewed by a CGP project manager.

#### Upload documentation

 Drop files here or click to upload documentation.

File name	File size	Upload progress	Actions
a-textfile.txt	1.5 KB	<input type="text"/>	
blank.pdf	8.8 KB	<input type="text"/>	

#### Additional requirements

#### Notes to support the documentation

Figure 12 Uploading documents

### 1.2.5.2 Providing requirements

In the “Submitting” phase, after the required documents were uploaded, a project team member will have to change the status of requirements that were assigned to him or her

to “Provided”. This can be done by clicking on a requirement in the “Your requirements” box on a criterion page.

The screenshot shows a user interface titled "Your requirements" with a help icon. It contains two requirement entries. The first entry is checked and reads "Letter signed/stamped by Authorities, municipalities, if any, that provide services." It has a "Responsibility" dropdown set to "Kevin Parker", a "Due date" field with a calendar icon, and a "Status" dropdown set to "Provided". Below this entry are two buttons: a green "Save" button and a red "Refuse this requirement" button. The second entry is unchecked and reads "On-site Infrastructure Drawings." It also has a "Status" dropdown set to "Provided".

Figure 13 Providing requirements

### 1.2.5.3 Setting submitted scores

In the “Submitting” phase a project team member can set the submitted scores of criteria. This can be done by navigating to a criterion page and changing the “Submitted score” field in the “Criterion scores” box.

The screenshot shows a "Criterion Scores" interface with a table. The table has two columns: the first column contains labels and the second column is titled "Score".

	Score
Targeted Score ?	3
Submitted score ?	2

Below the table is a green "Save" button.

Figure 14 Setting submitted scores

## Contact Us

If you have additional questions about GSASgate, don't hesitate to contact:  
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**Thank you.**