Getting Started Quick Guide

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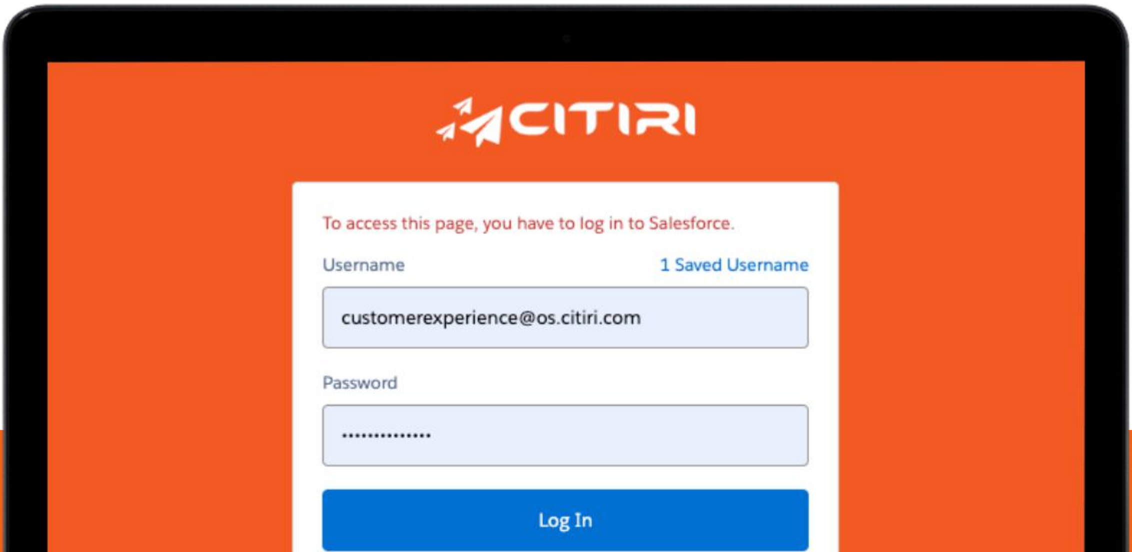
New User Setup

To access Citiri, follow the checklist items below:

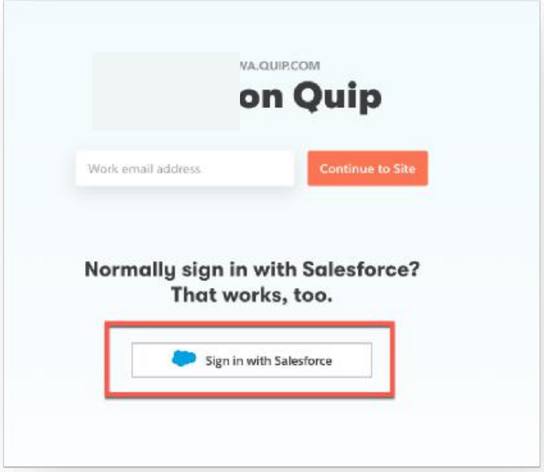
- Look for login credentials in your inbox (check Spam Folder also)
- Follow the enclosed instructions in the email to set your password
- Supported Browsers: Microsoft Edge | Google Chrome | Mozilla Firefox
- Org URL: -citirios.lightning.force.com (*BOOKMARK THIS SITE)
- UserName: Your Work Email Address
- Let us know if you need login/password assistance @ support@citiri.com
- You are ready!



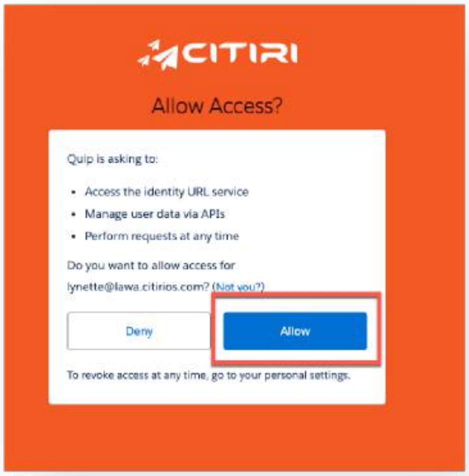
New User Setup (Quip)

Step 1: In Citiri, click on the 'Take the Last Step' link at the top of the page.

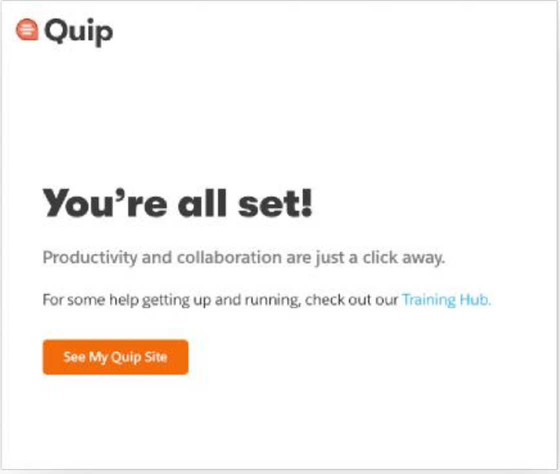
Step 2: Click the 'Sign in with Salesforce' button



Step 3: Click the 'Allow' button.



Step 4: Once you receive this message, you are all set.



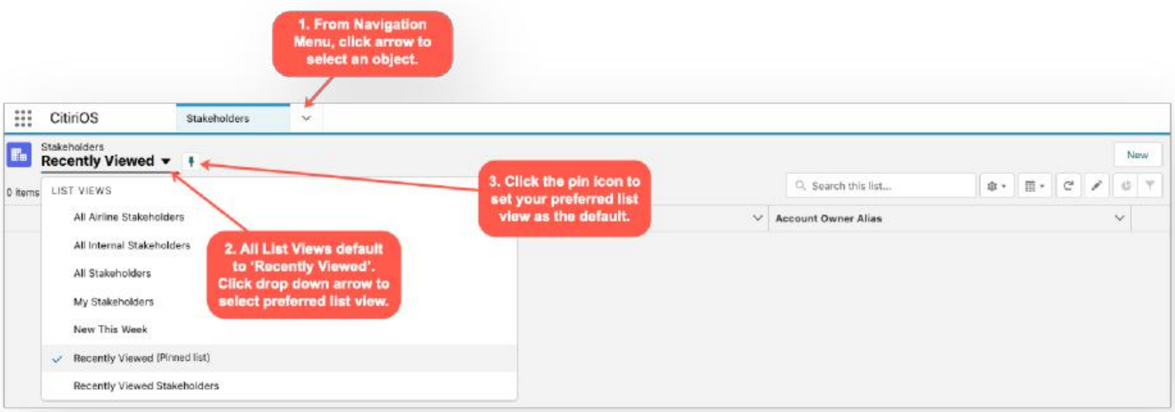
Getting Started in Citiri

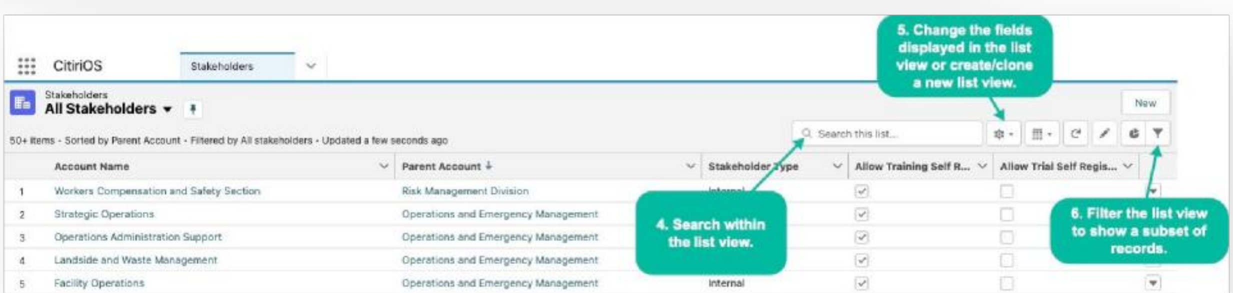
Navigation

The header section provides a series of navigational features, search features and helpful tools and shortcuts.

List Views

List Views give users the ability to create and, more importantly, customize a list of records on an object. The list allows filters to be used to simply create a list of just the records that fit within one or multiple filters, or just to see a list of all records.

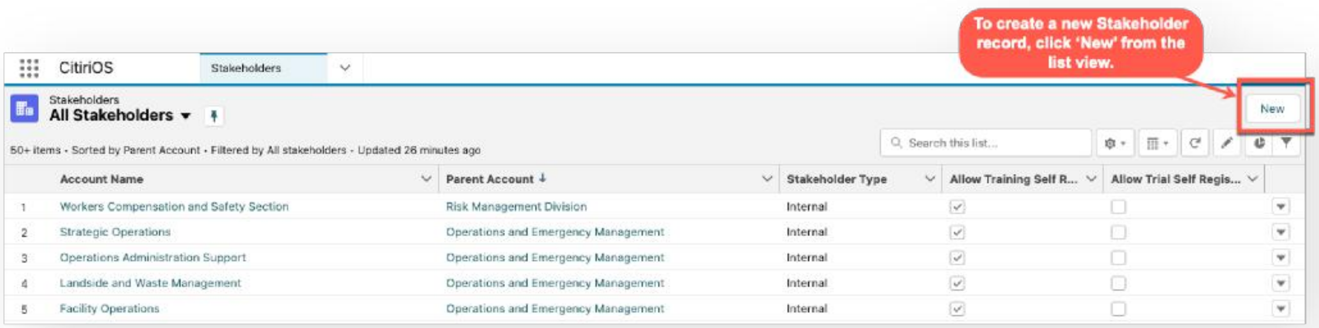


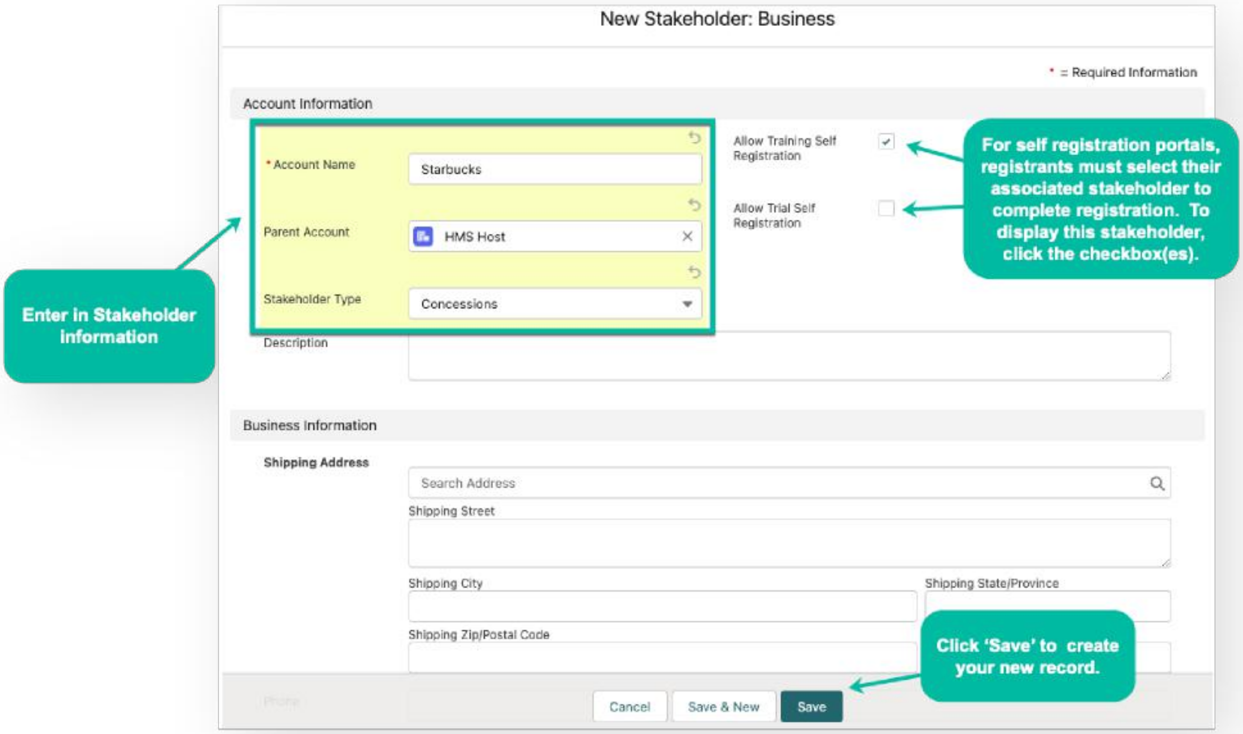


Stakeholders & Contacts

Stakeholders

Stakeholders are companies, entities or departments within an organization.

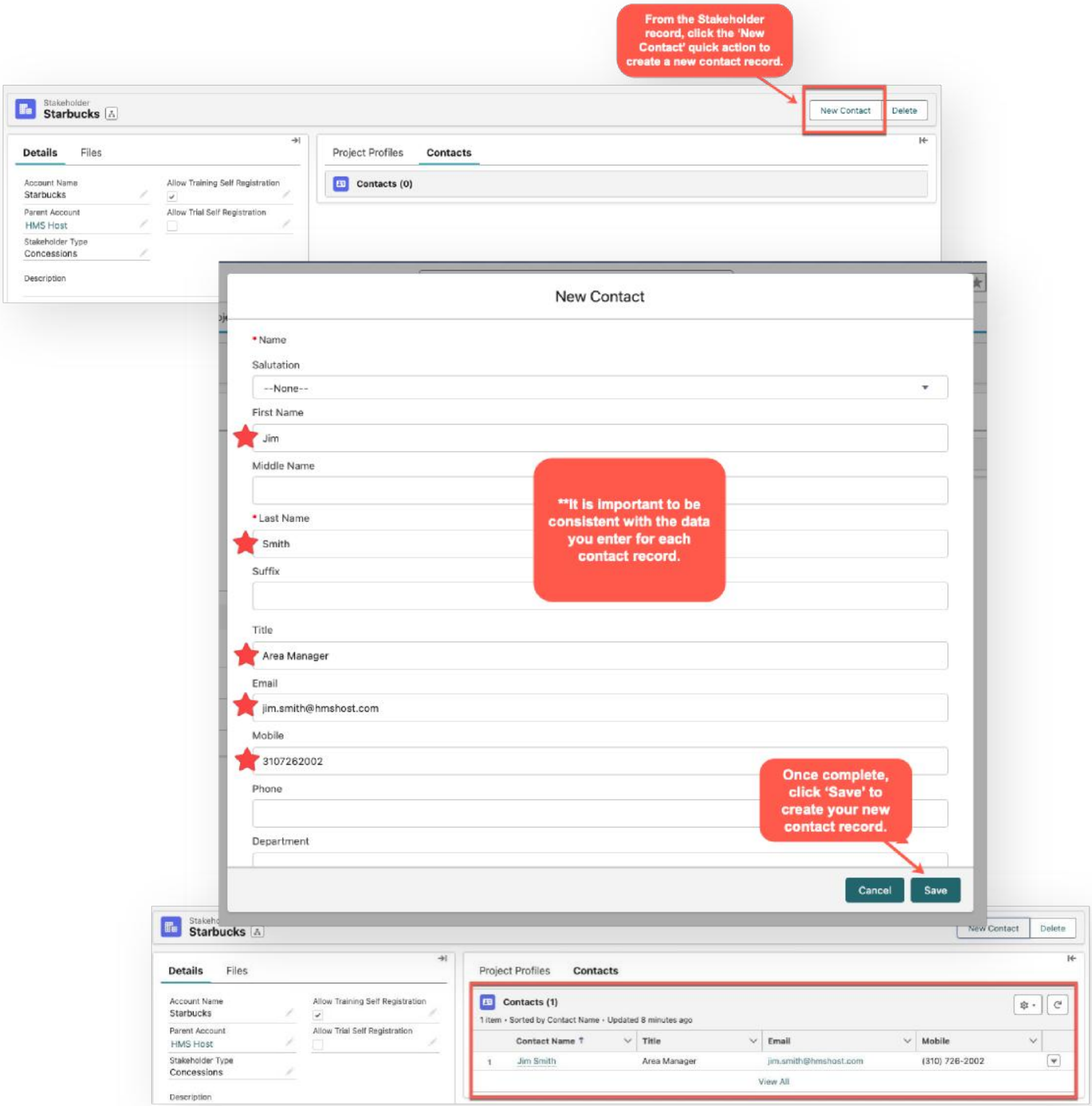




Stakeholders & Contacts

Contacts

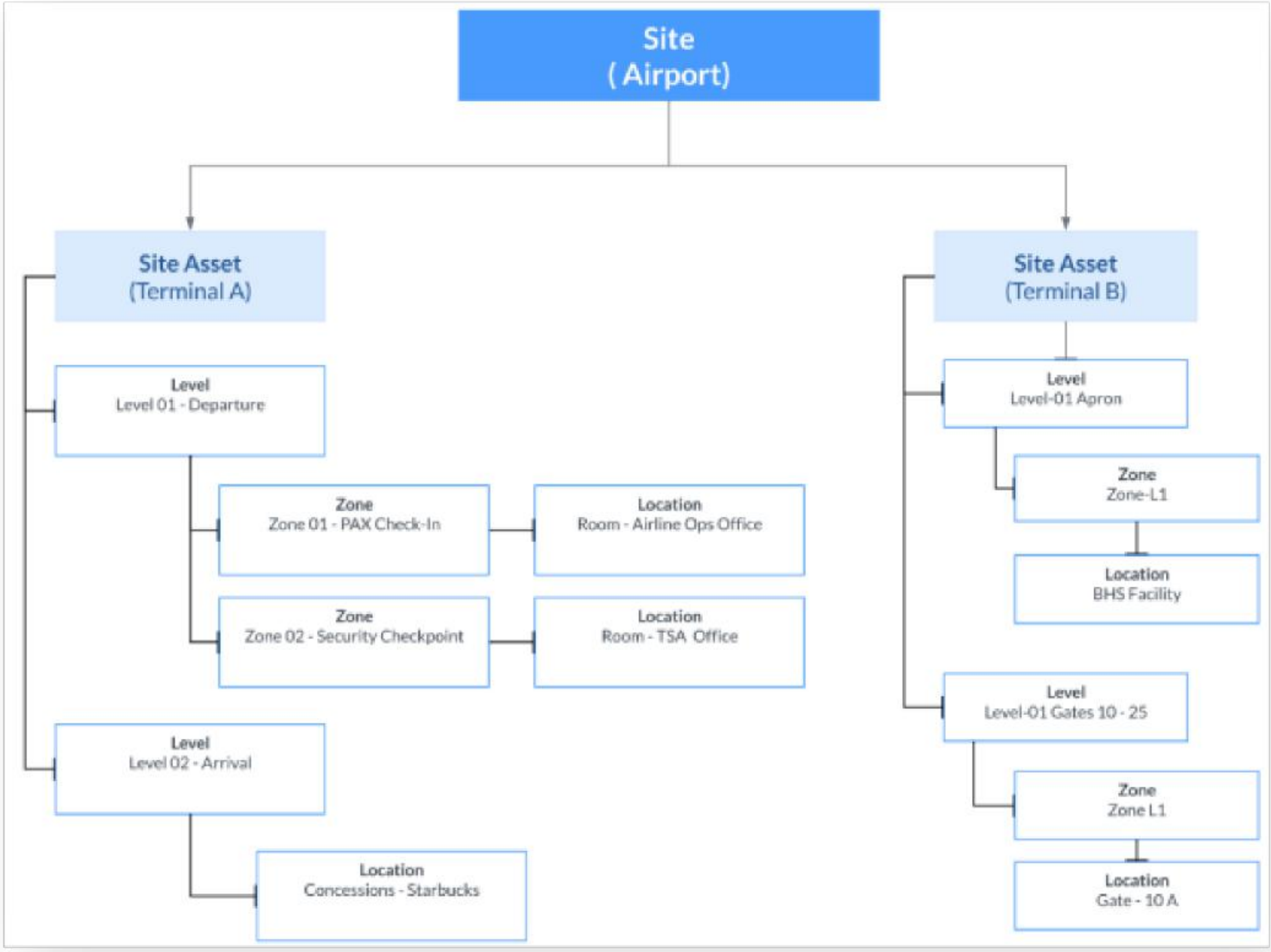
Contacts are individuals/employees in a company, entity, or department within an organization (Stakeholder).



Sites to Locations

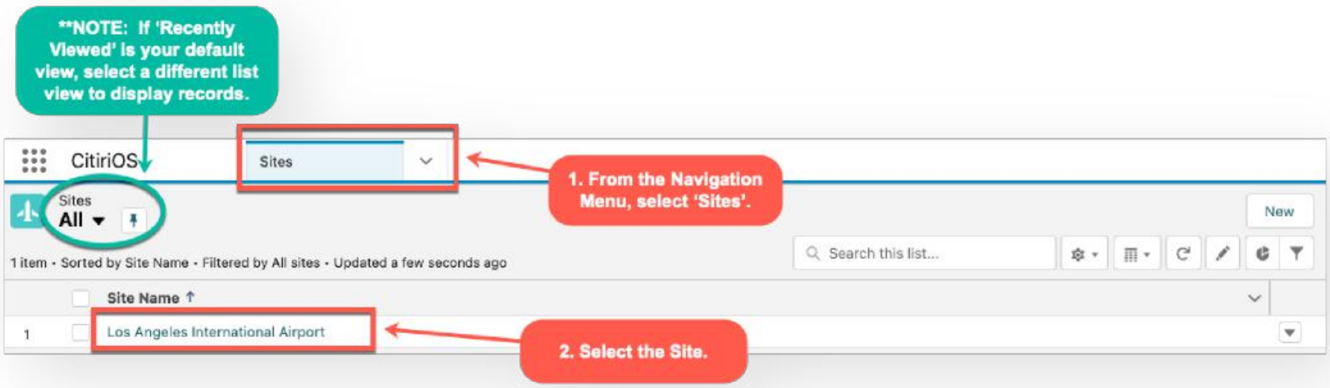
Hierarchy Overview

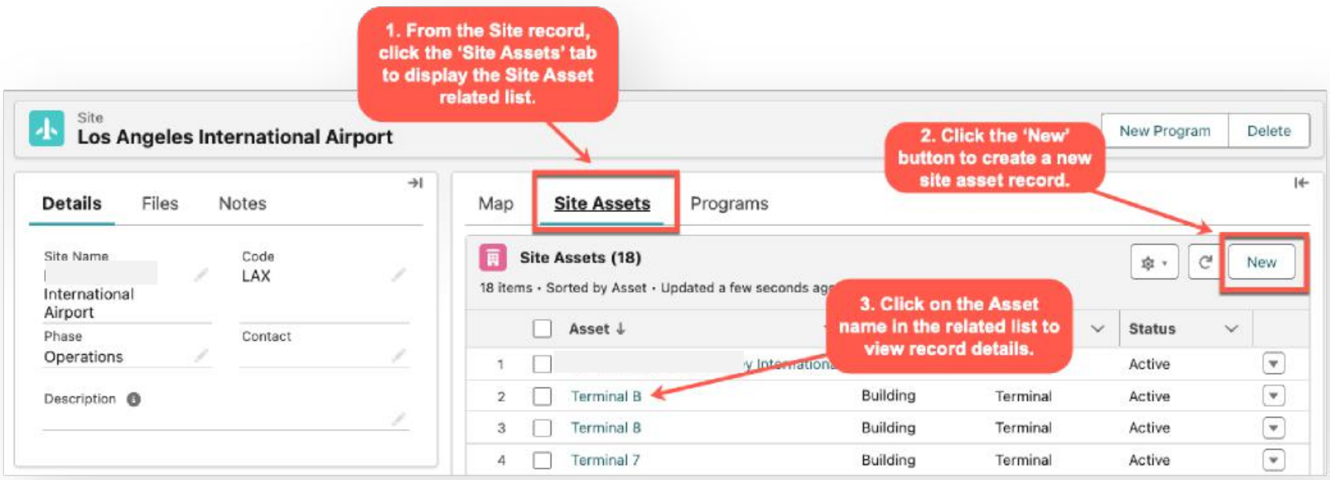
A Site is considered a campus. Within a campus you may have multiple physical structures, known as Site Asset(s). Examples of Site Assets are Terminals, Concourses, Runways, Fire Stations, or Parking Garages. Each Site Asset may have Levels. Examples of Levels are Departure Level, Arrivals Level, Apron Level, or Ground Level. Within each Level you may have Zones. And within each Zone you may have multiple Locations. Examples of locations are Check-in Counters, Offices, Restrooms, Holdrooms, Gates, Storage, Concessions, or Lounges. Not every Level may have Zone(s). However, locations must exist.



Sites to Locations

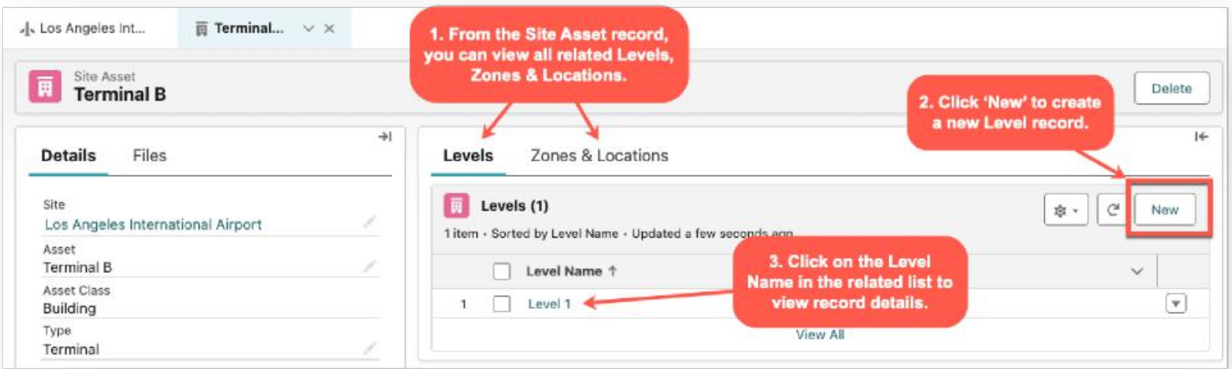
Working with Sites



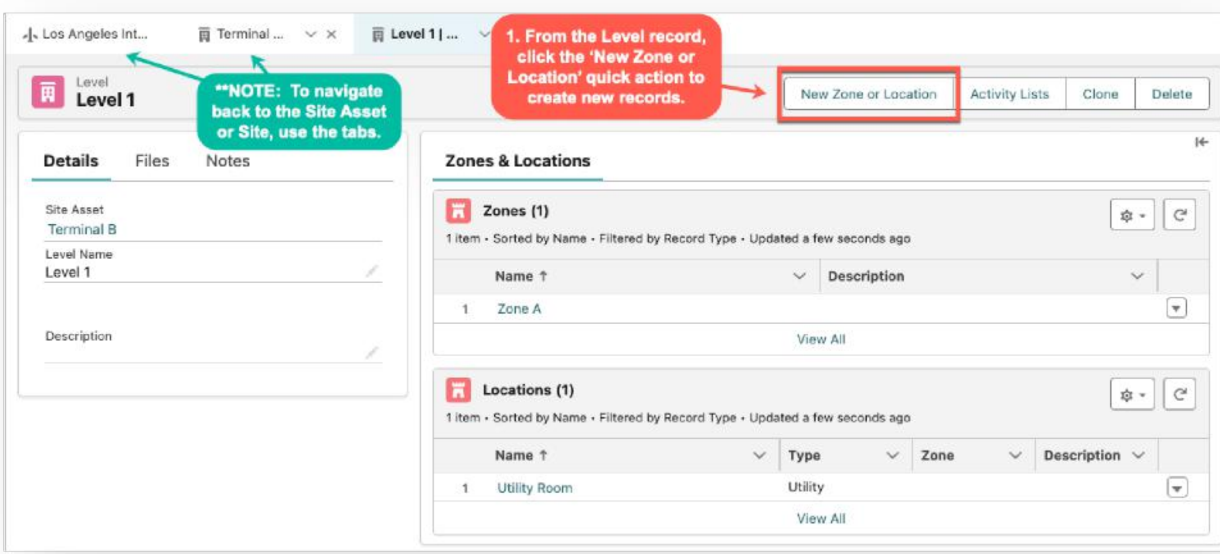


Sites to Locations

Working with Site Assets



Working with Levels

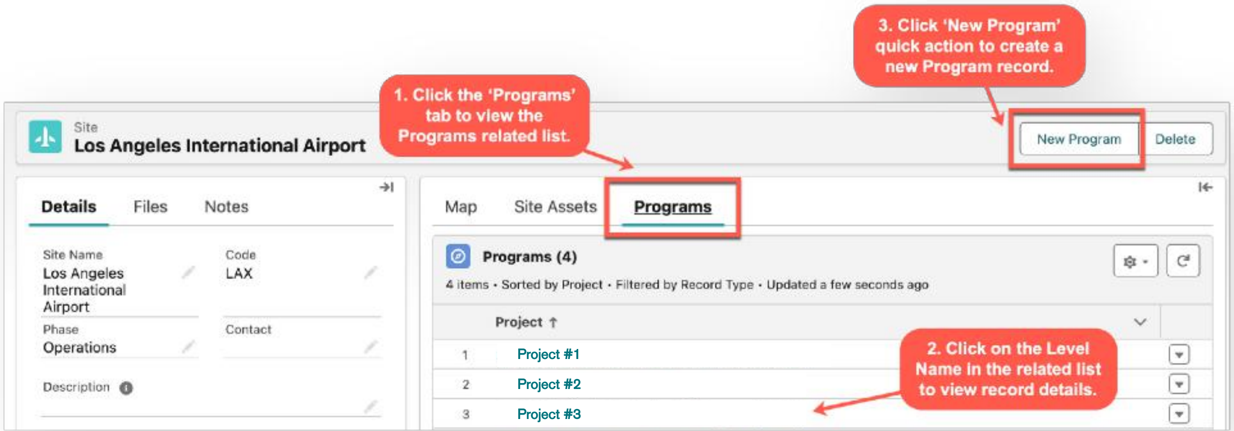


Programs & Projects

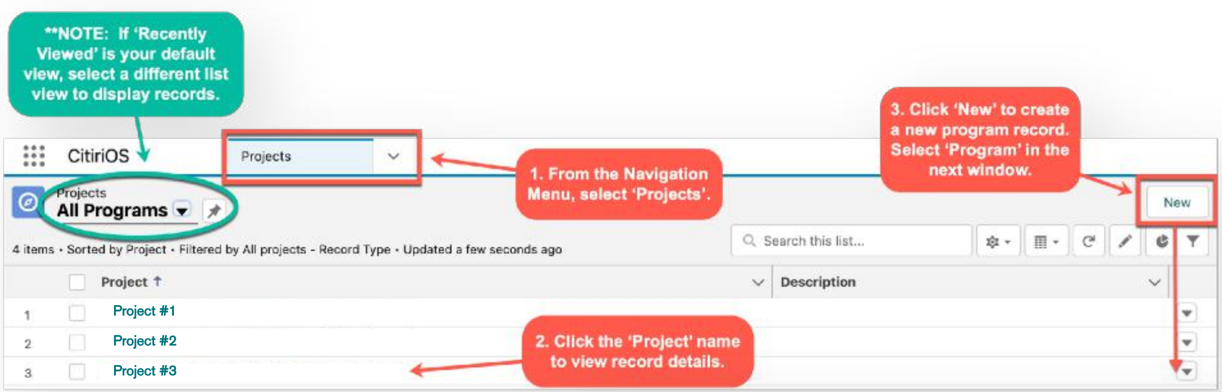
Programs

A Program record helps to group a collection of projects typically based on a capital program and/or funding source. Programs should always be related to the Site record.

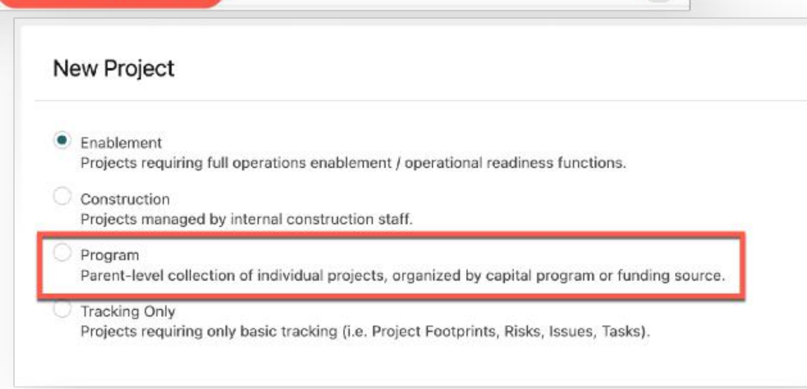
Access Programs from Site Record



Access Programs from List View



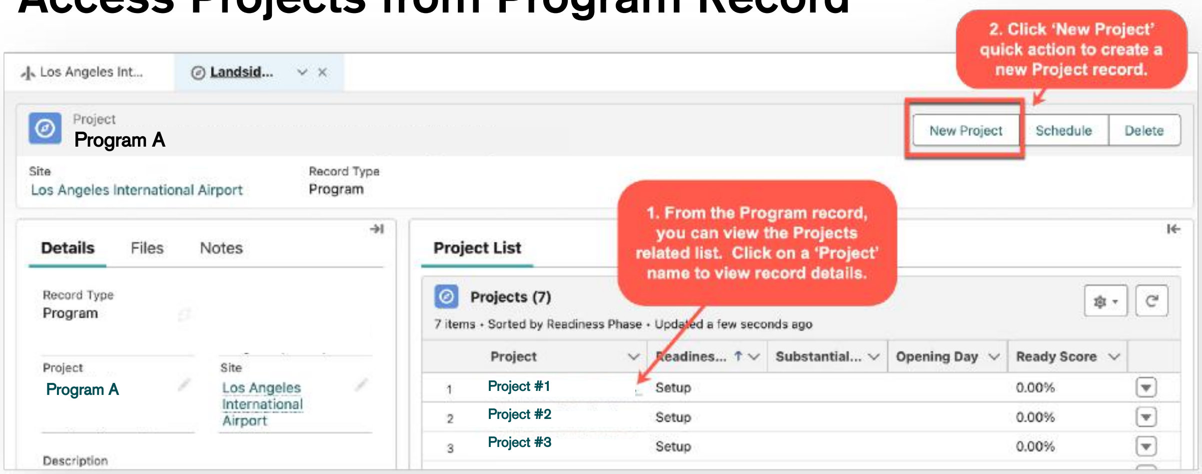
"If I'm trying to create a new program, why does it say 'New Project'?" Programs and Projects share the same object. However, their function is defined by their record type (i.e. Program, Project, Construction, Tracking Only).



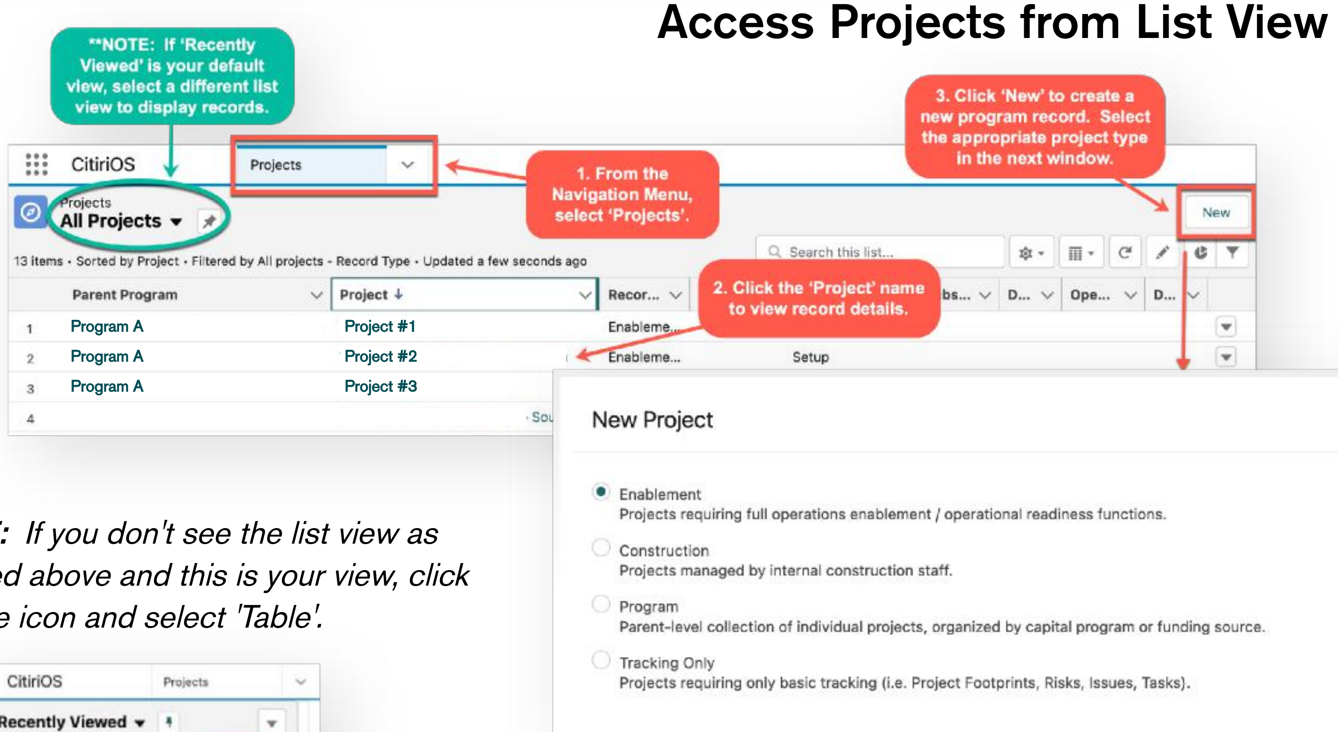
Programs & Projects

Create a New Project

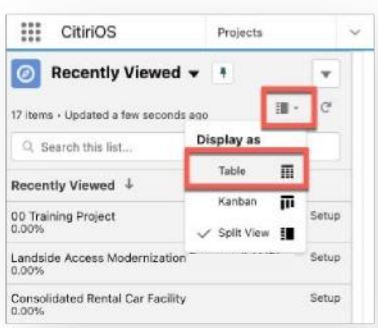
Access Projects from Program Record



Access Projects from List View

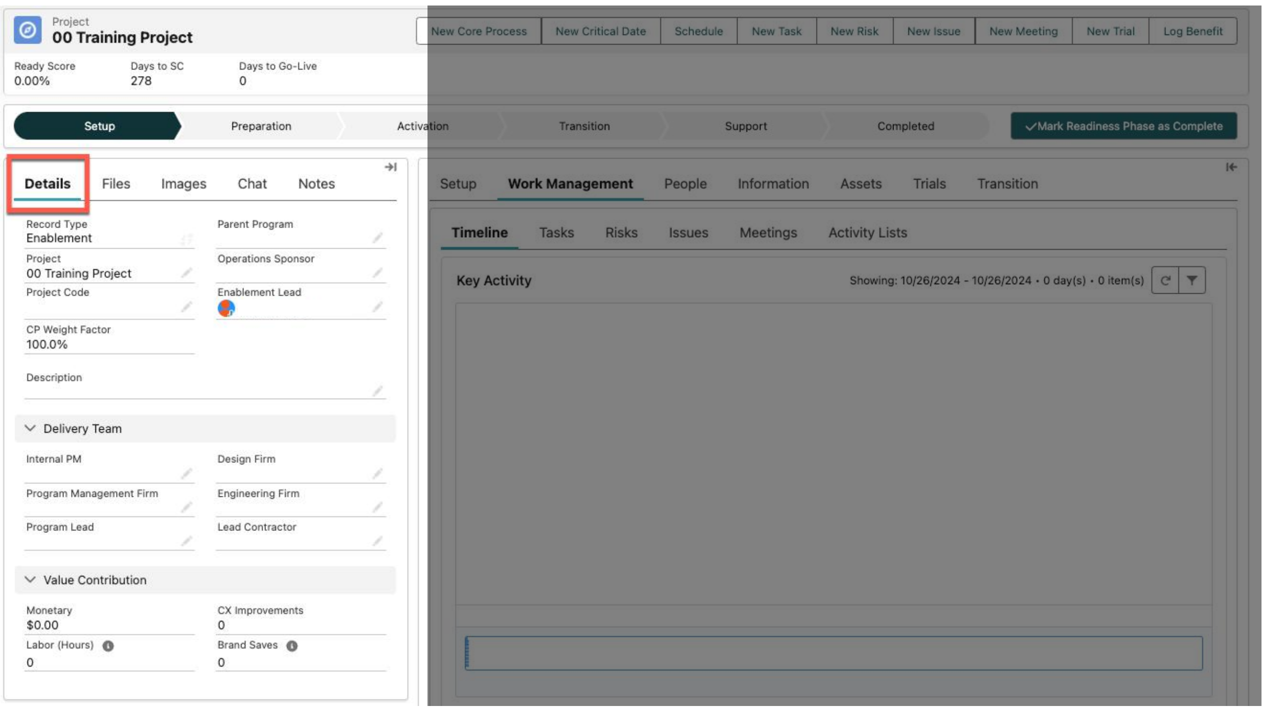


***NOTE:** If you don't see the list view as displayed above and this is your view, click the table icon and select 'Table'.*

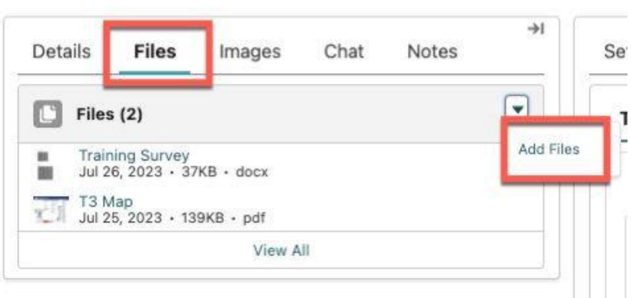


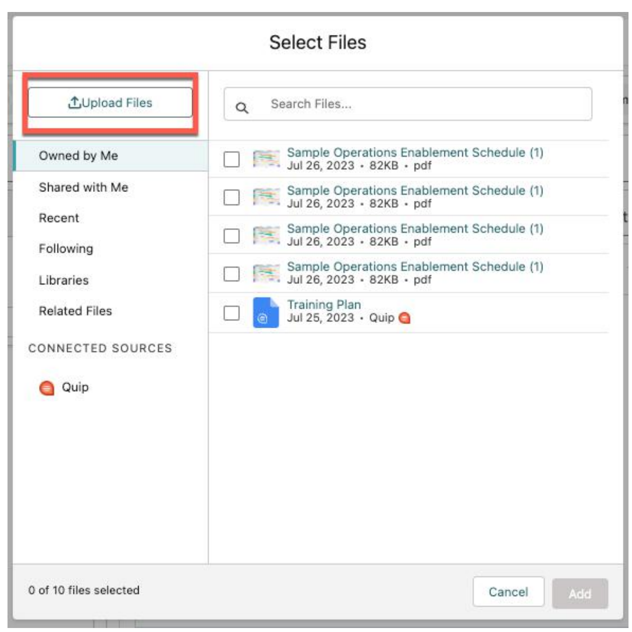
Working with Project Records

Details serves as the record profile and includes parent related records, responsible parties and other important data points to reference.



Files provides a way to upload and store documents related to this record.

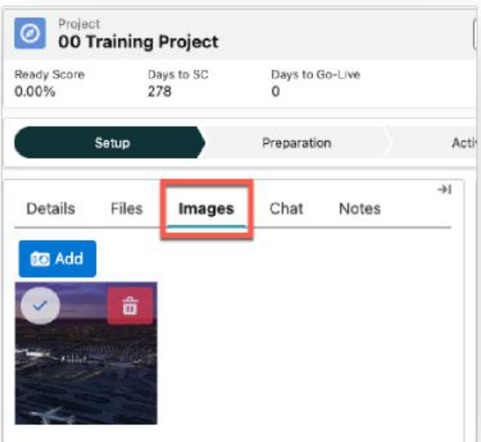




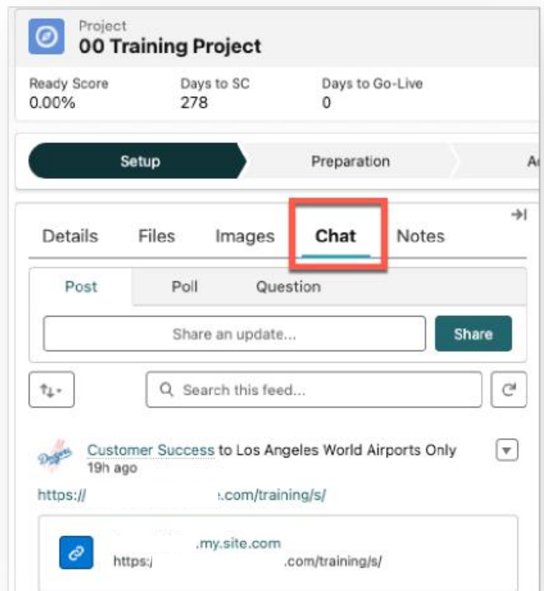
Project Setup

Working with Project Records

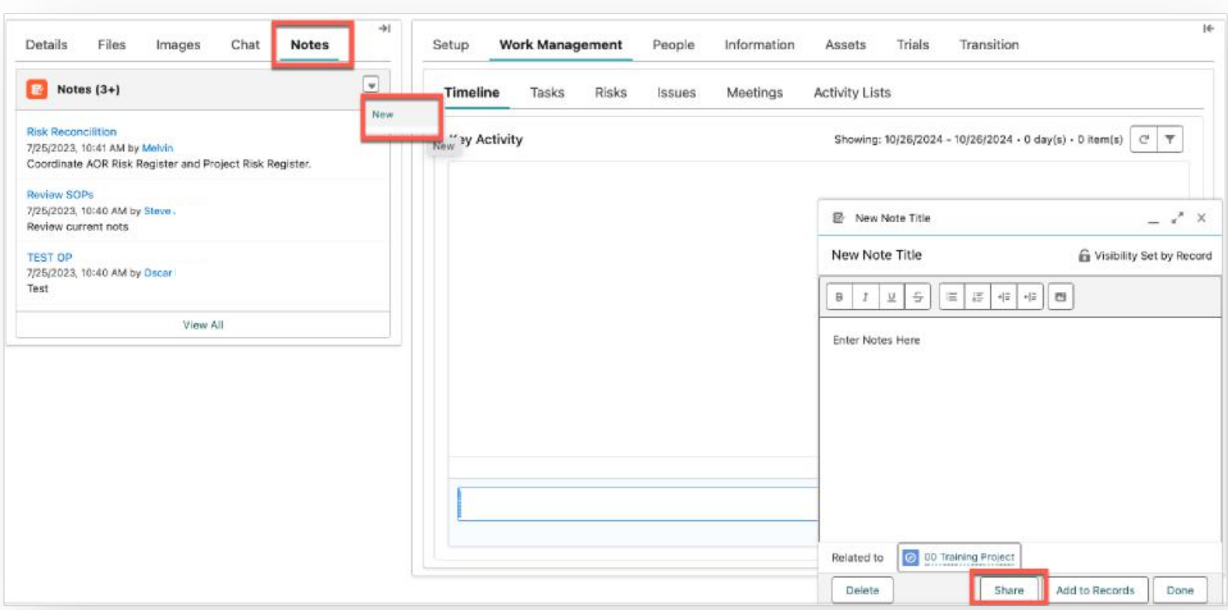
Images provides a way to upload photos related to this record.



Chat offers a way to collaborate with others. Use '@[PersonName]' or '@[GroupName]' to begin a conversation.



Notes serves as a scratchpad or sticky note to log a thought related to this record. Notes are private unless you choose to share.



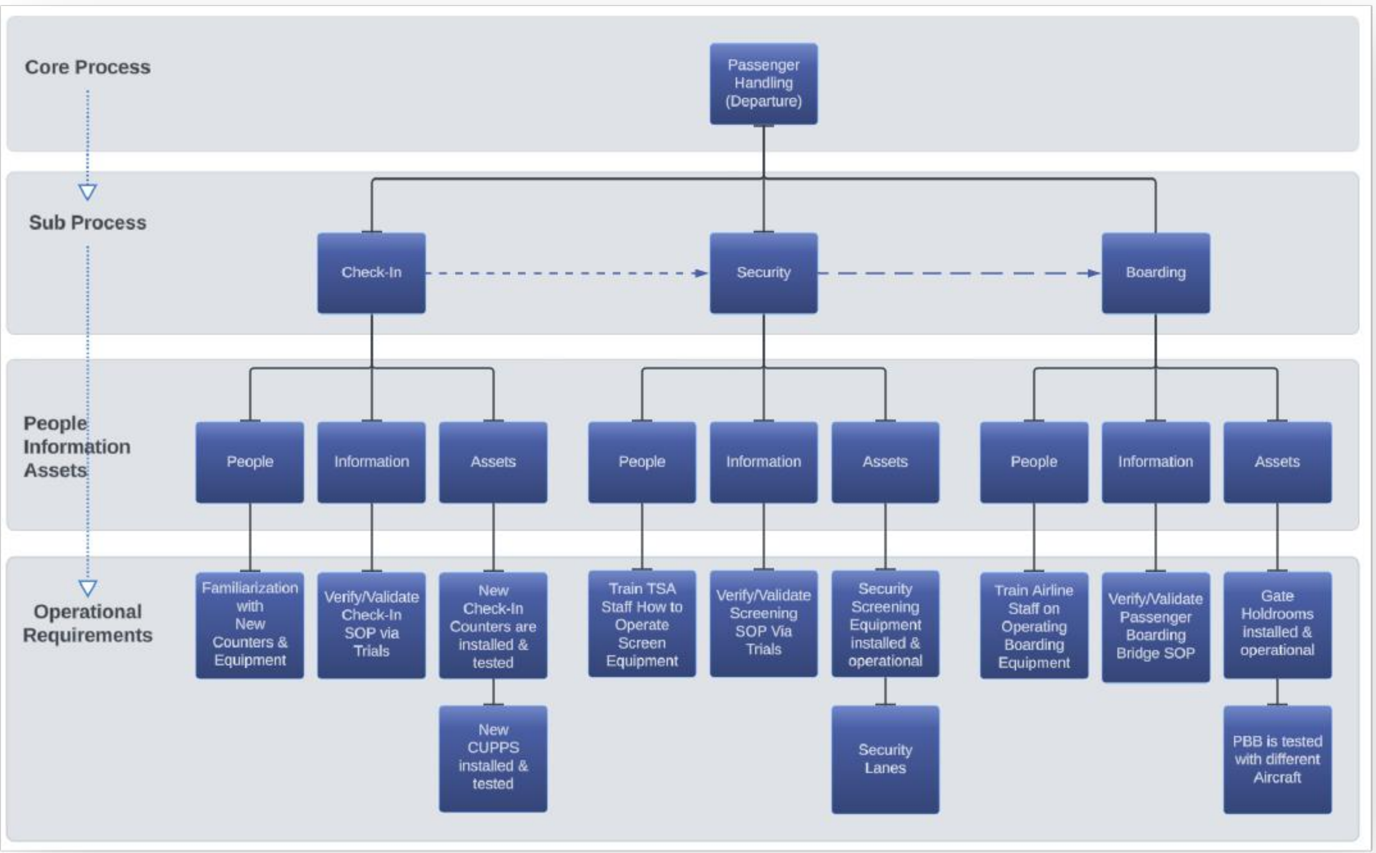
Project Setup

Core Process Development

Core Processes represent the core operational functions of the project. Once Core Processes are identified, Sub Processes (the sub elements of each core function) need to be defined. For each Sub Process, the team, along with Stakeholders, must define the Operational Requirements which encompasses the following elements:

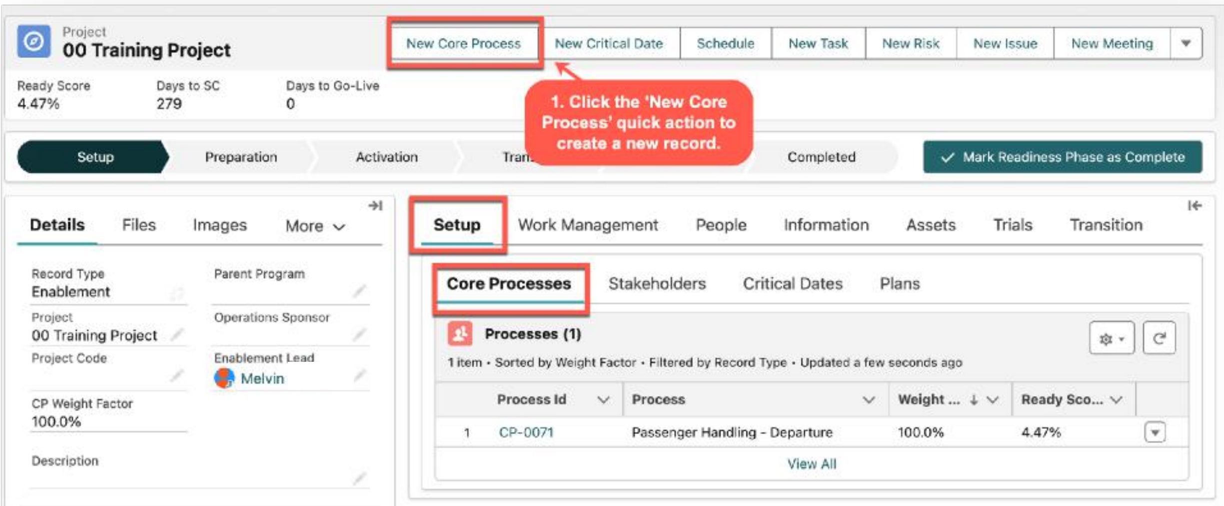
- People (Staffing & Training)
- Information (Procedures, Contracts, & Information Updates)
- Assets (Facilities, Systems, & Interfaces).

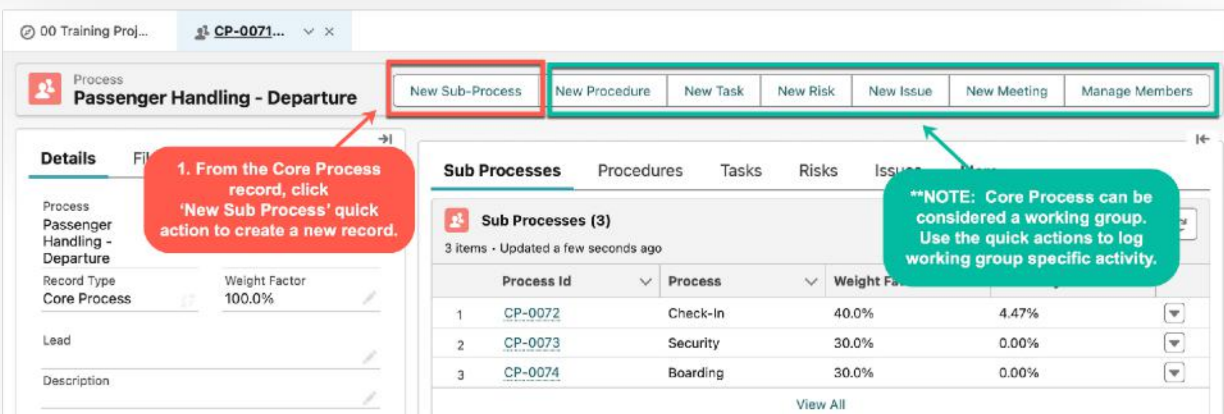
When all Operational Requirements are properly Verified (in place), Validated (functional) and Authenticated (integrated trials), you are operationally ready.

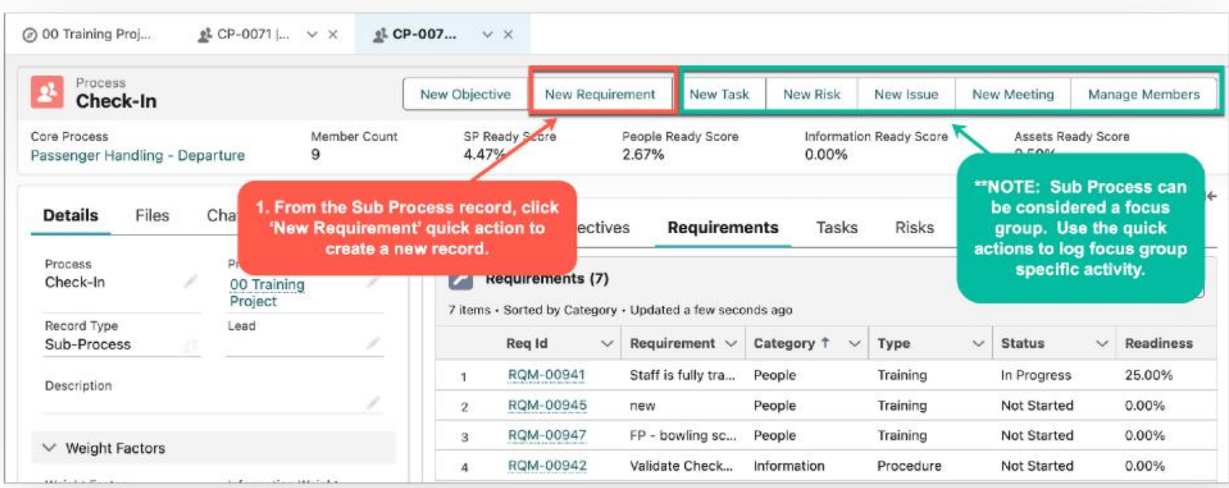


Project Setup

Core Process Development

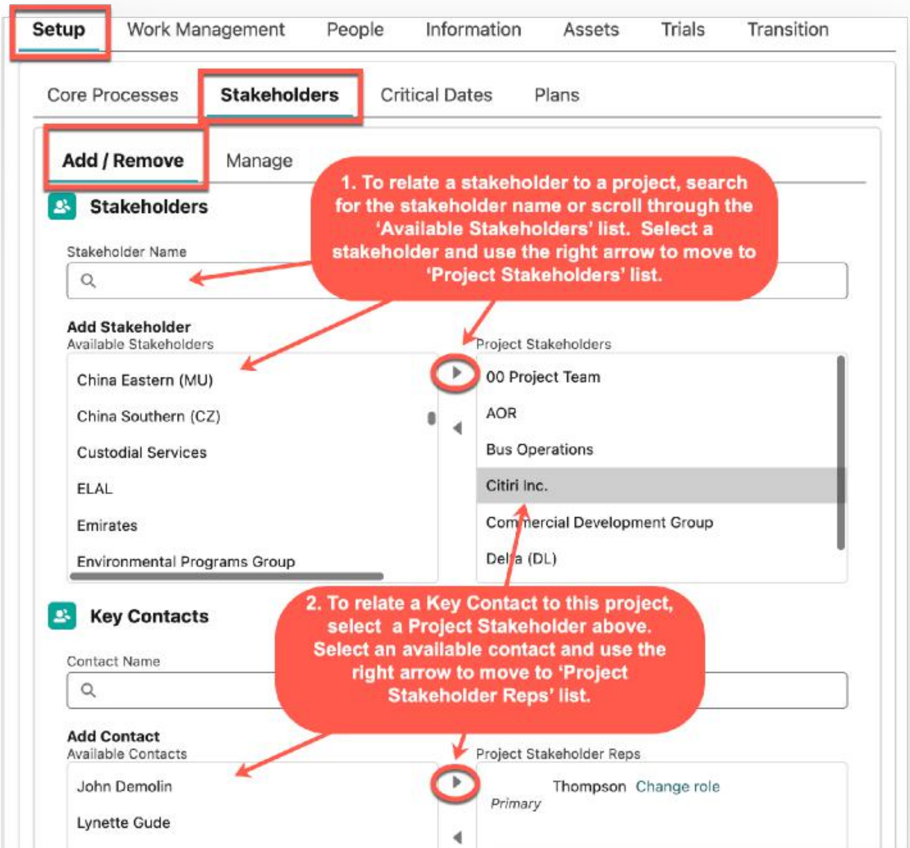


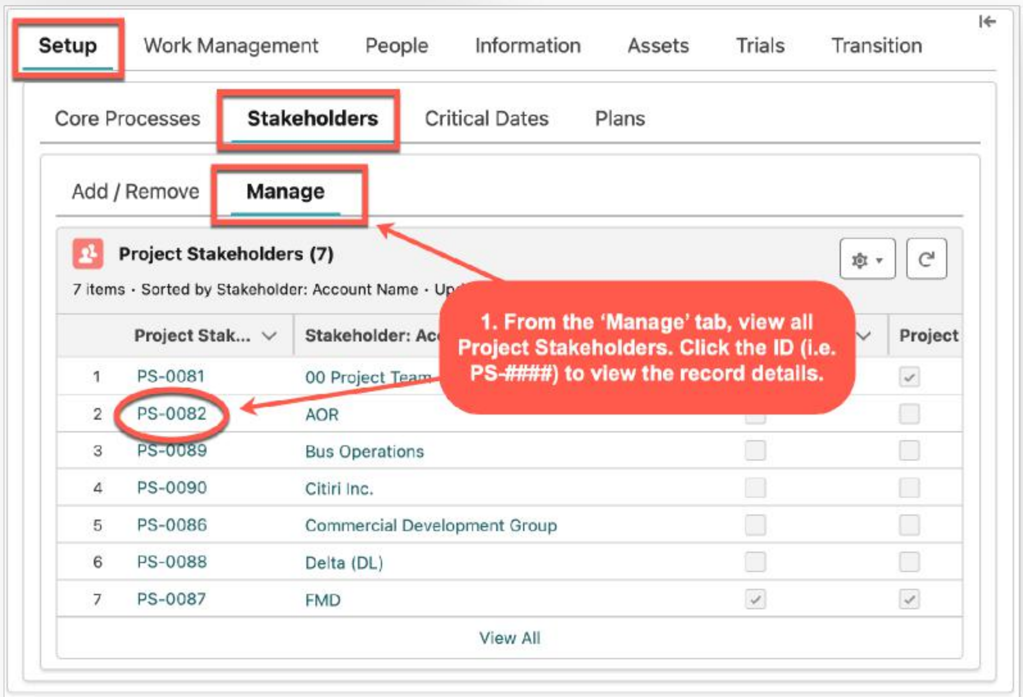




Project Setup

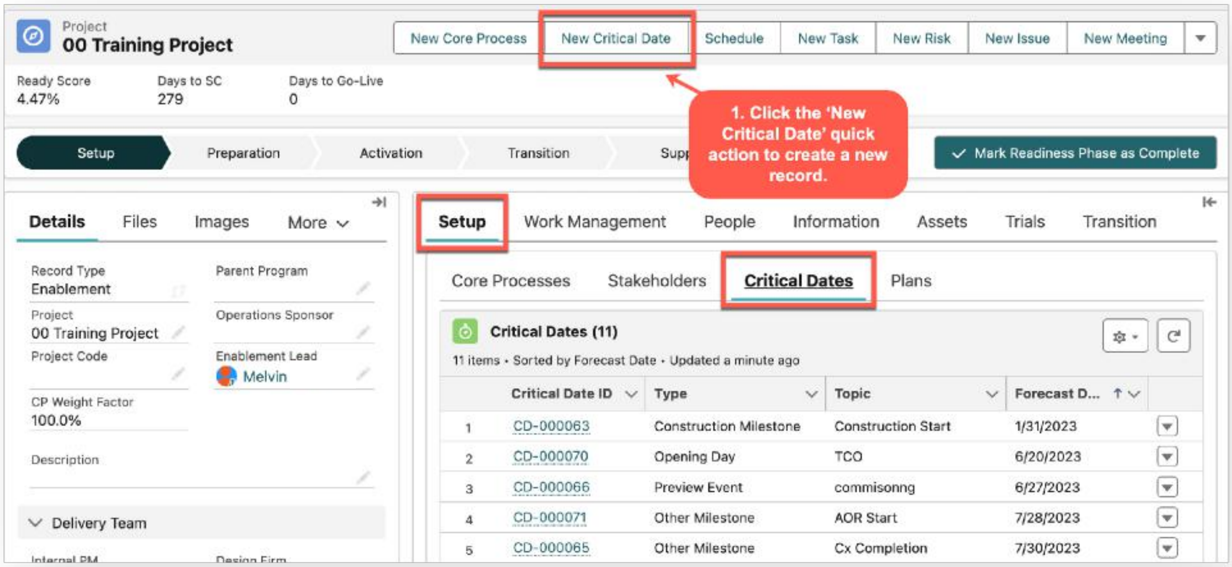
Project Stakeholders



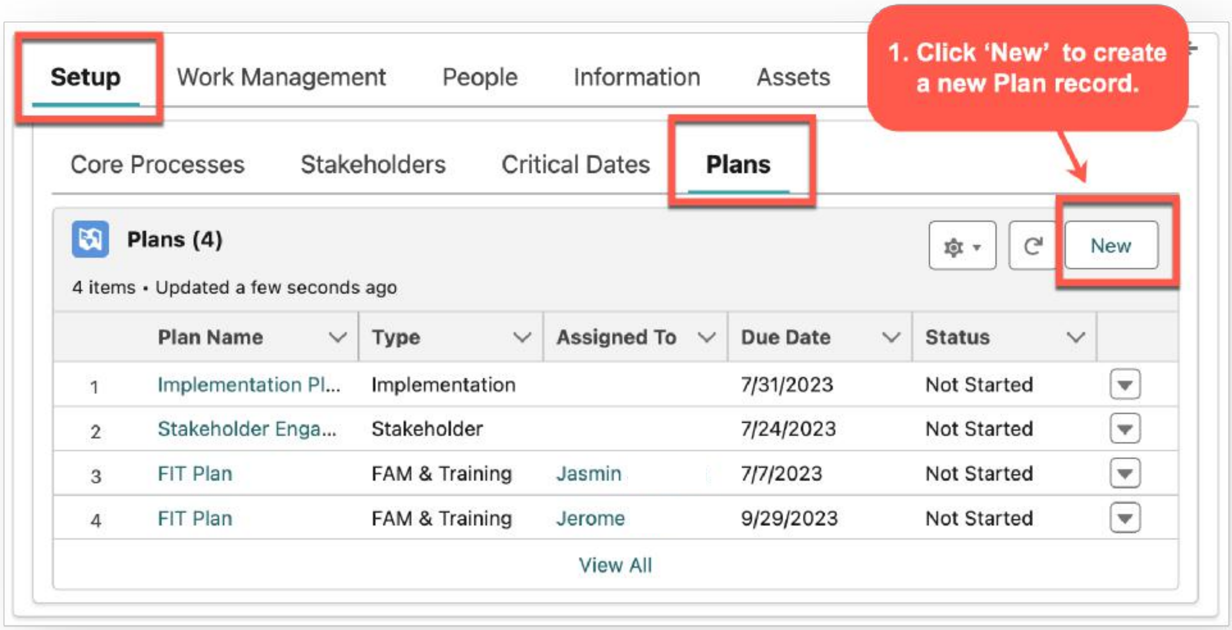


Project Setup

Critical Dates

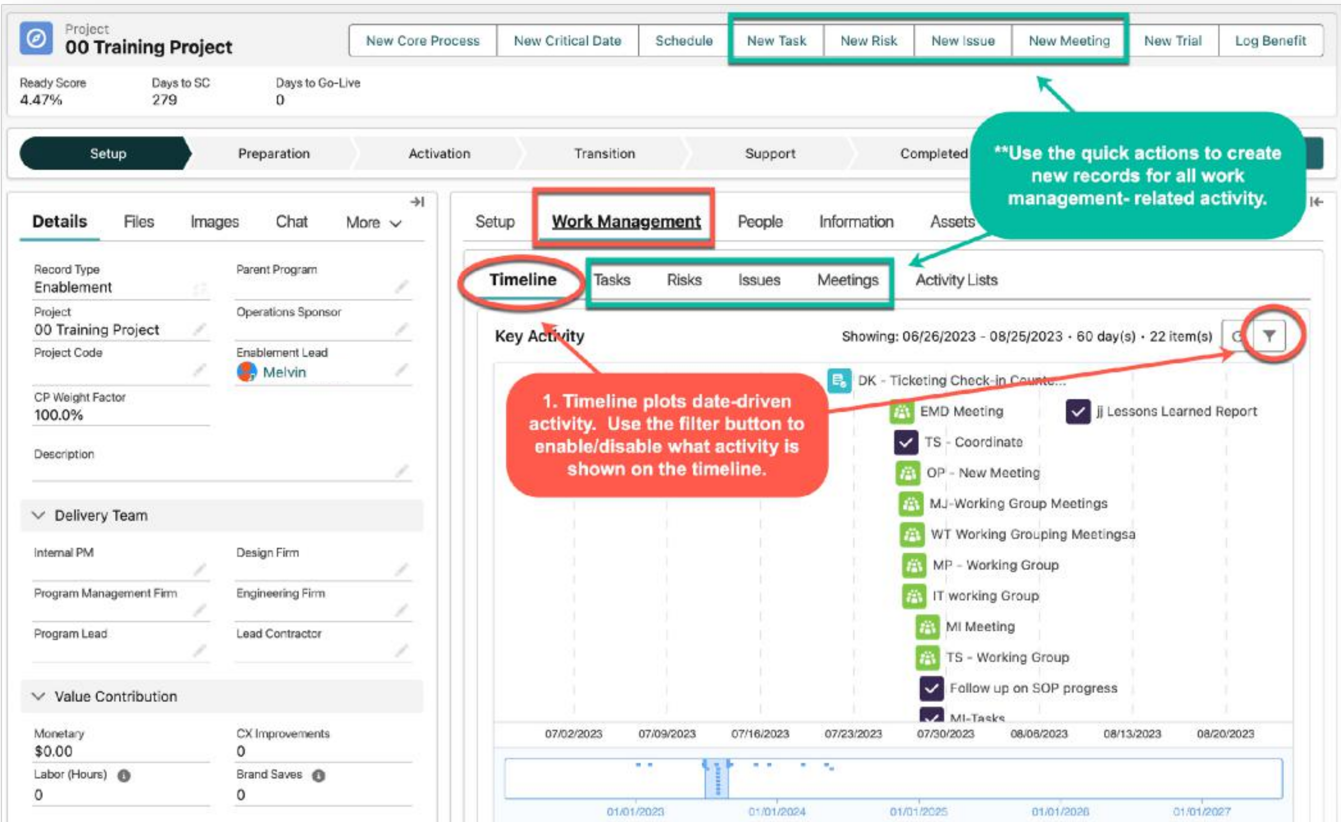


Plans

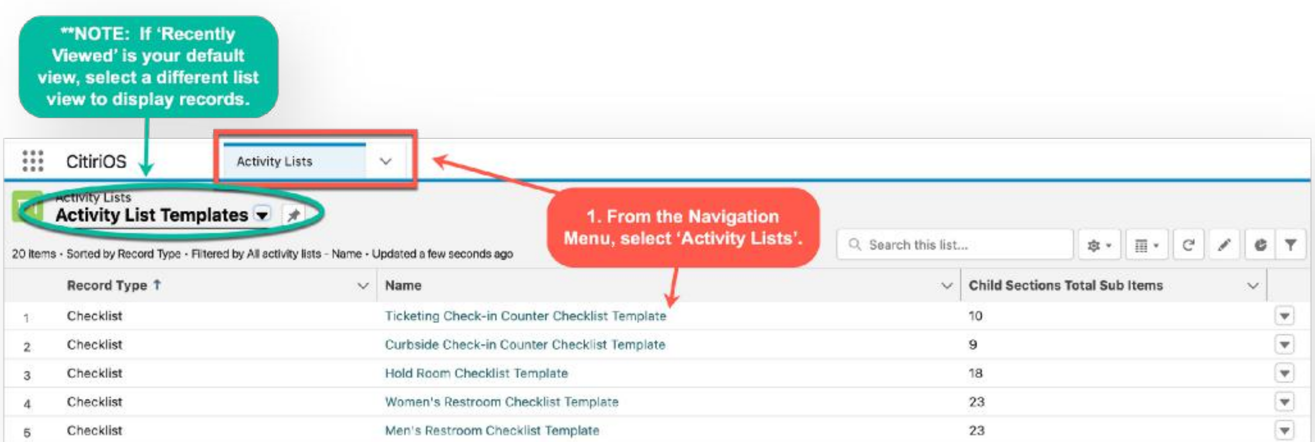


Work Management

Working with Work Management Activity

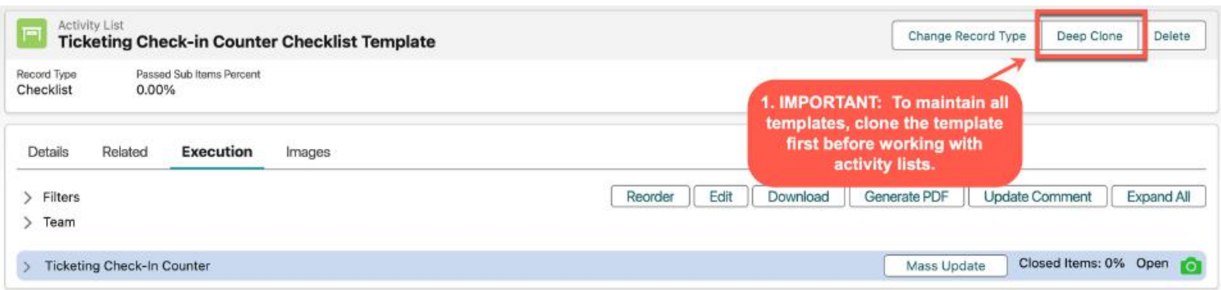


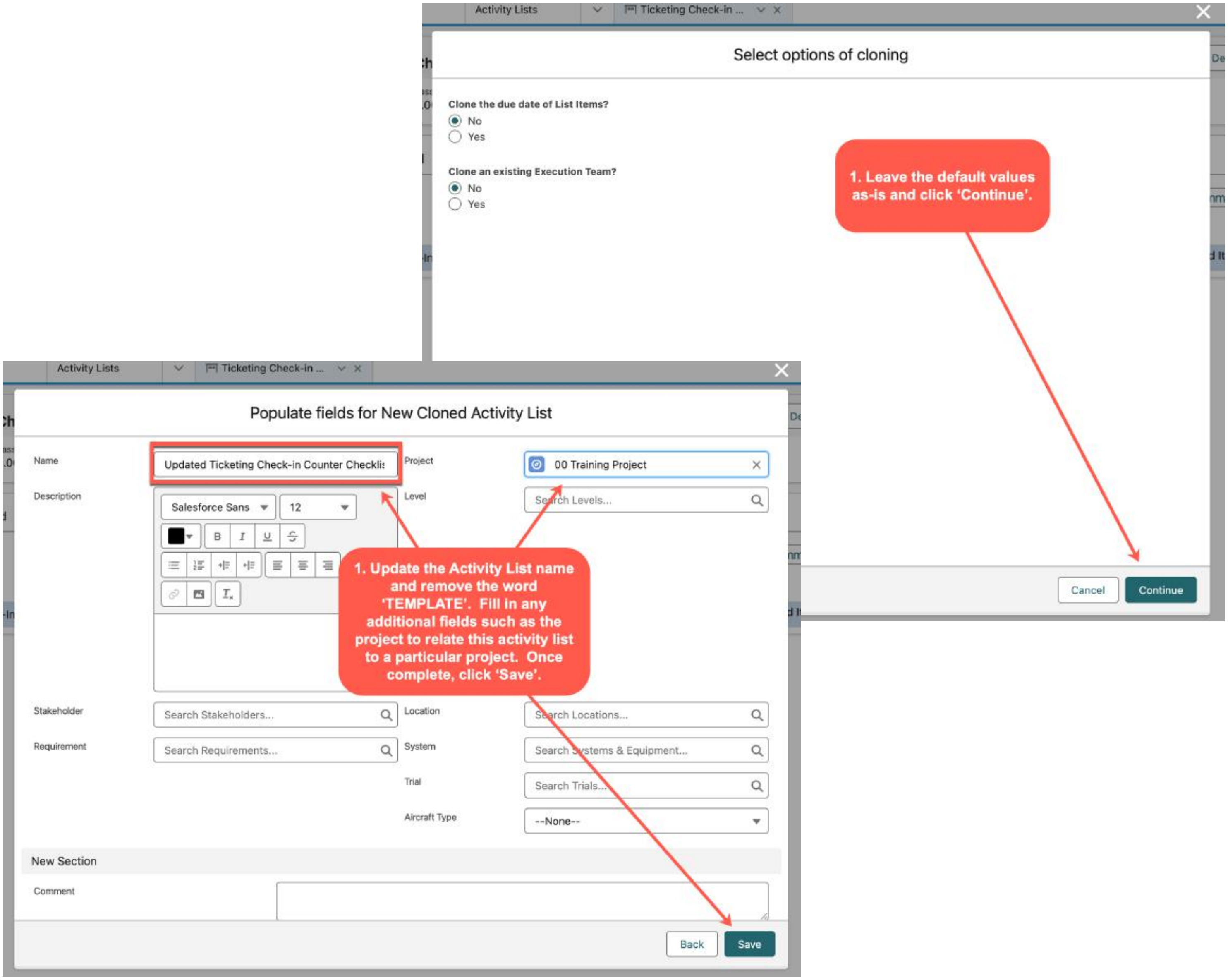
Working with Activity Lists



Work Management

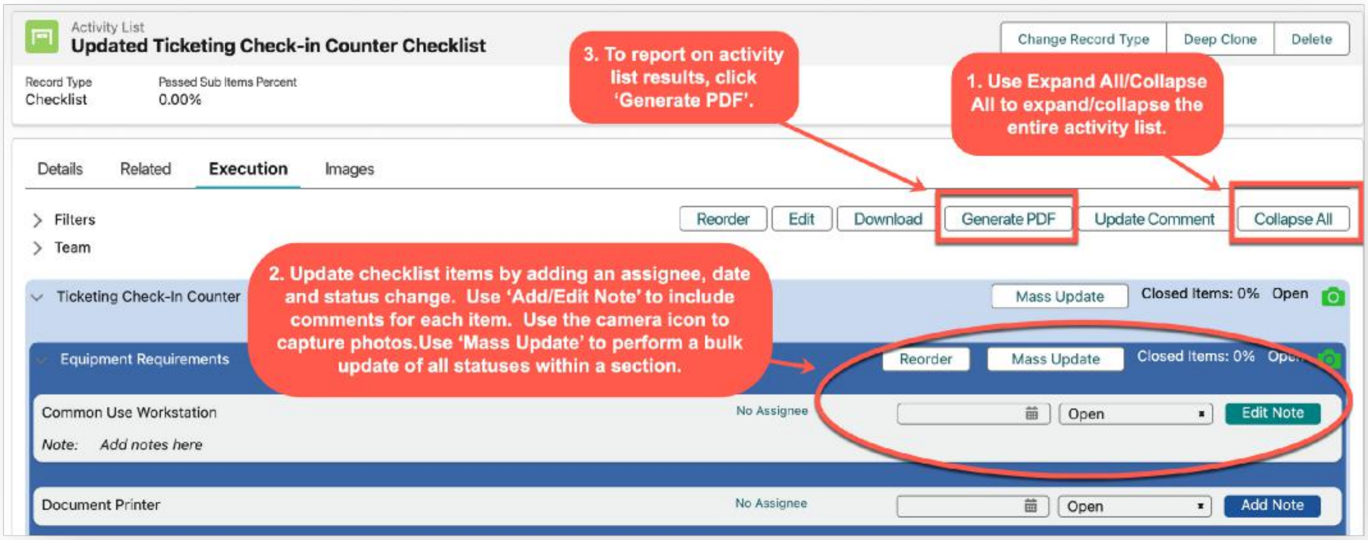
Working with Activity Lists





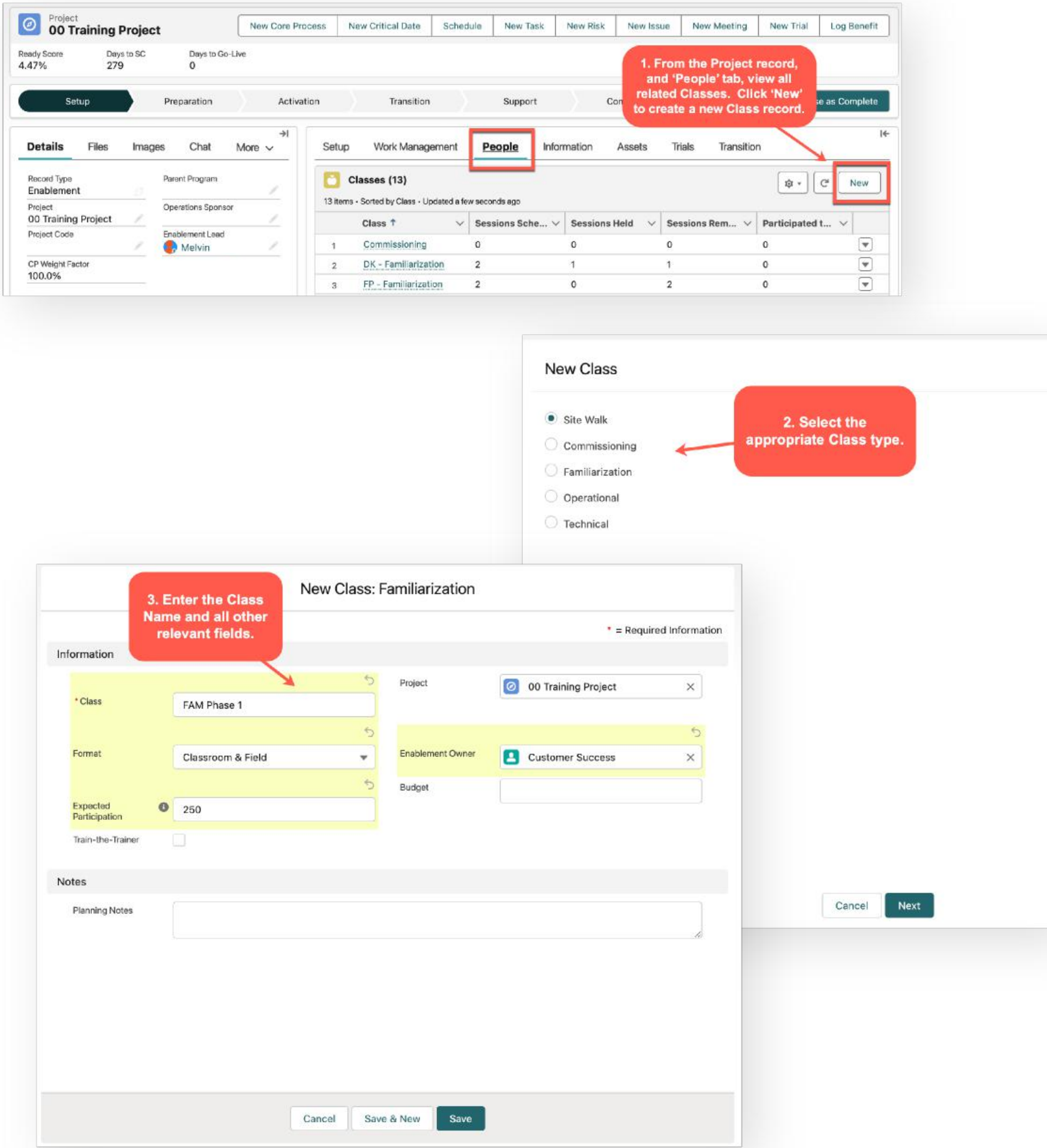
Work Management

Working with Activity Lists

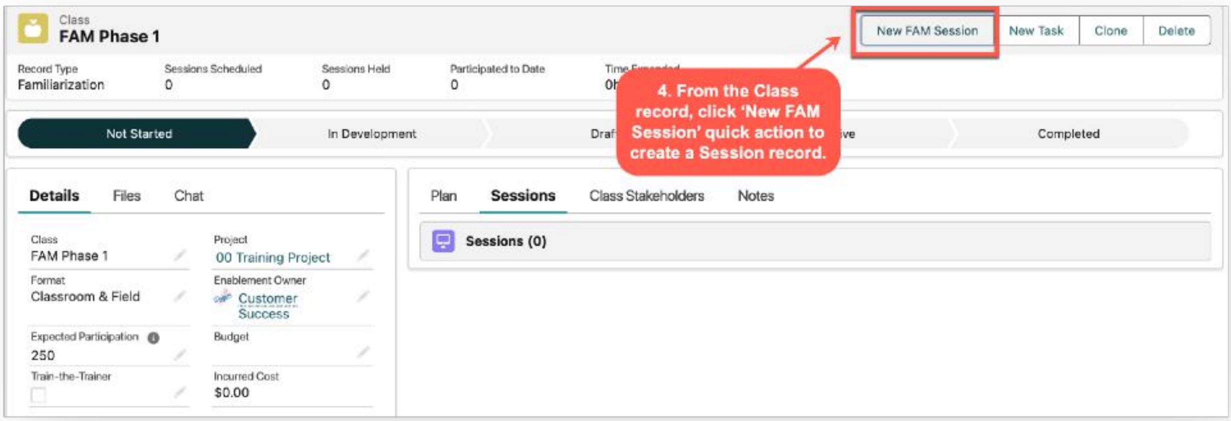


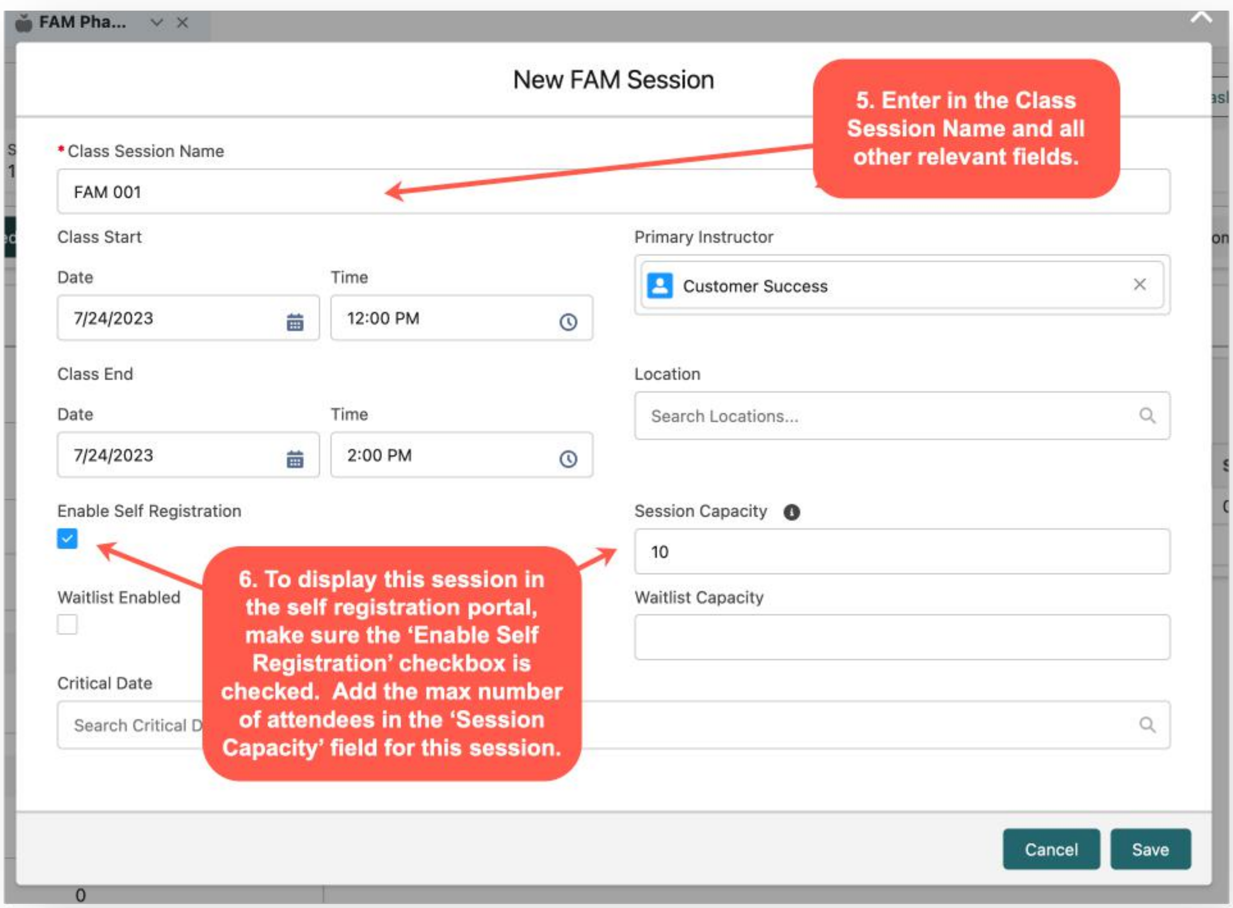
People - FIT Development

FIT Preparation - Create a Class

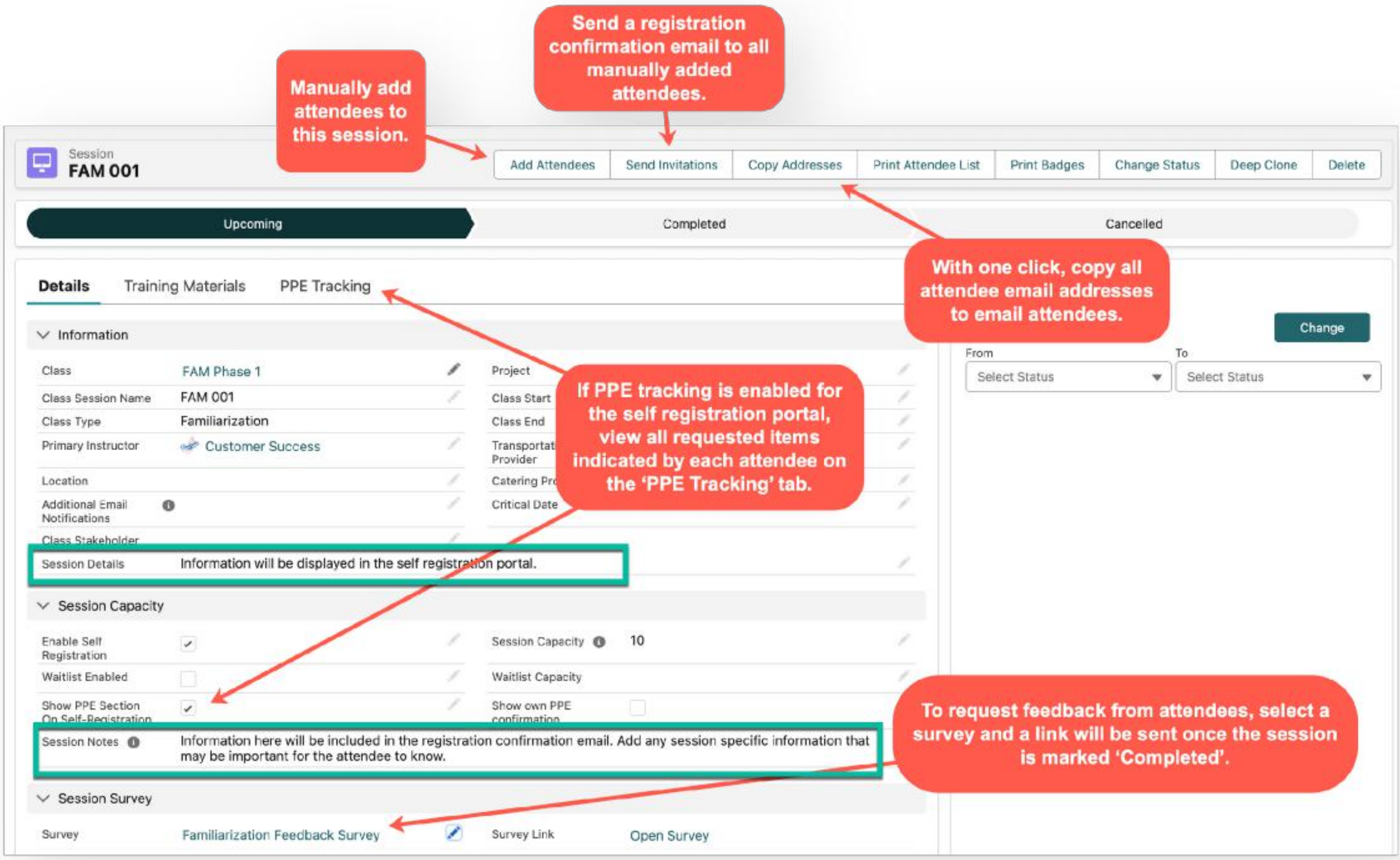


FIT Preparation - Create a Session



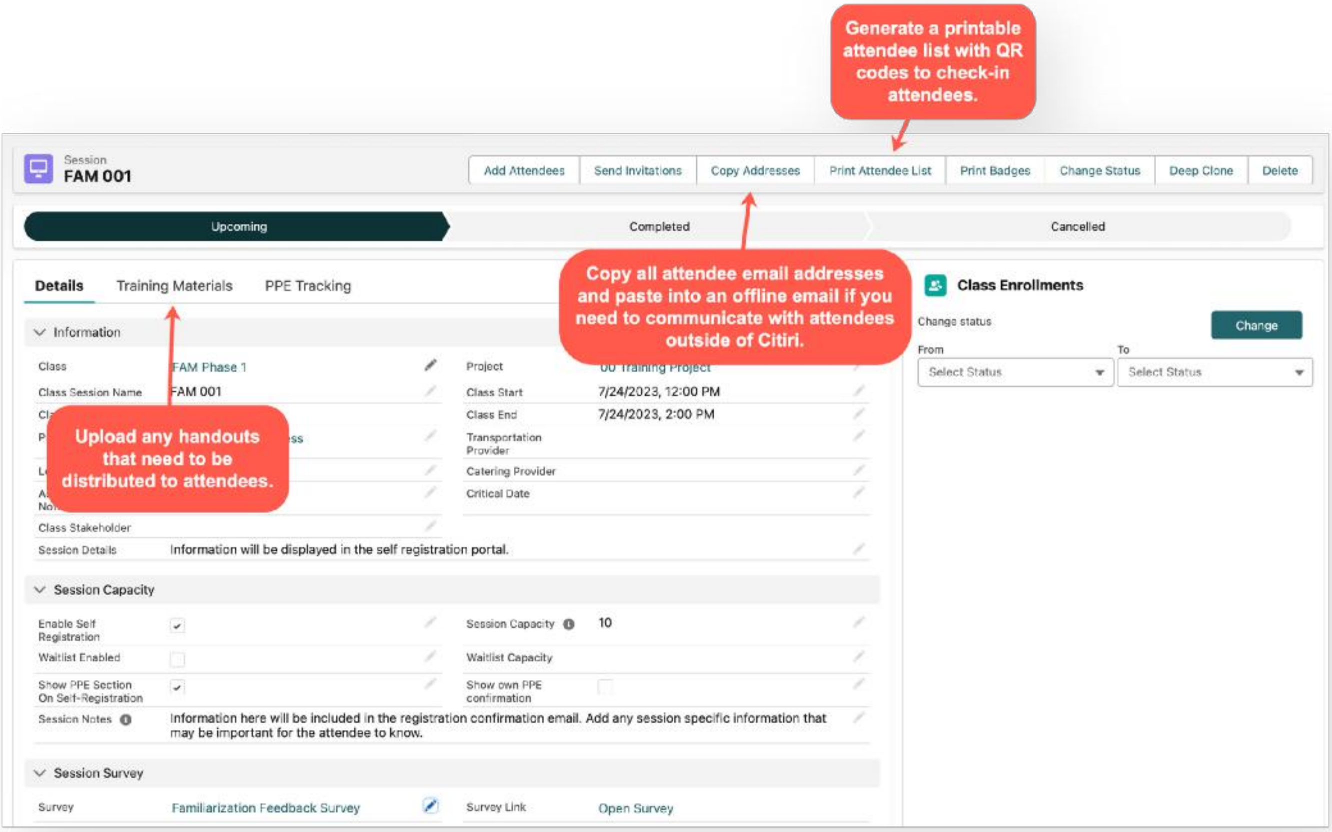


FIT Preparation - Working with Sessions

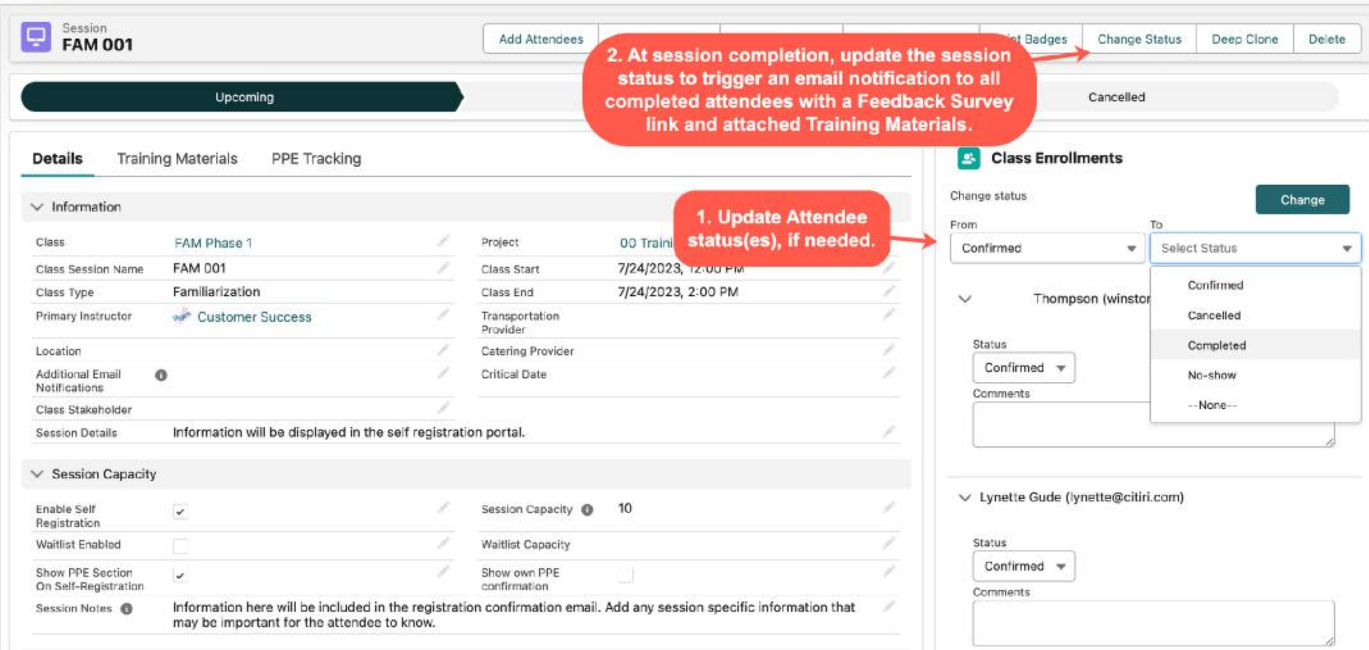


People - FIT Development

FIT Execution



FIT After Actions



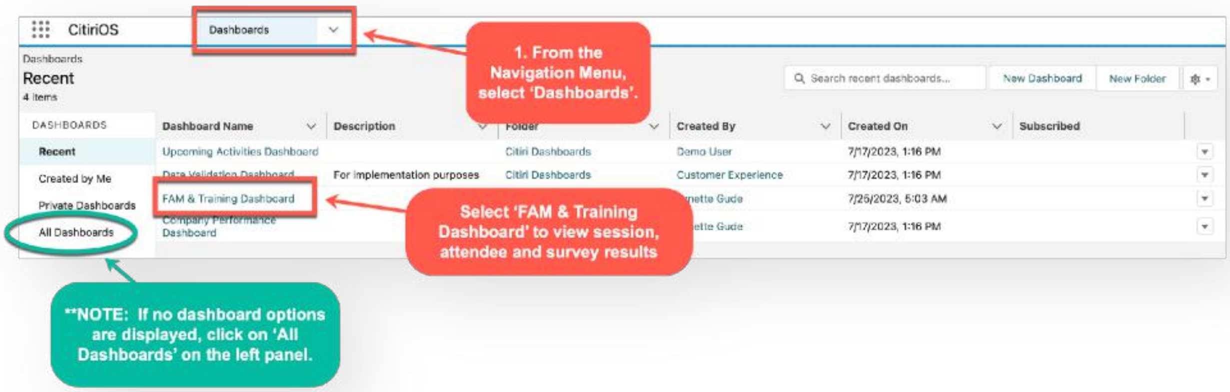
Class Enrollment Statuses

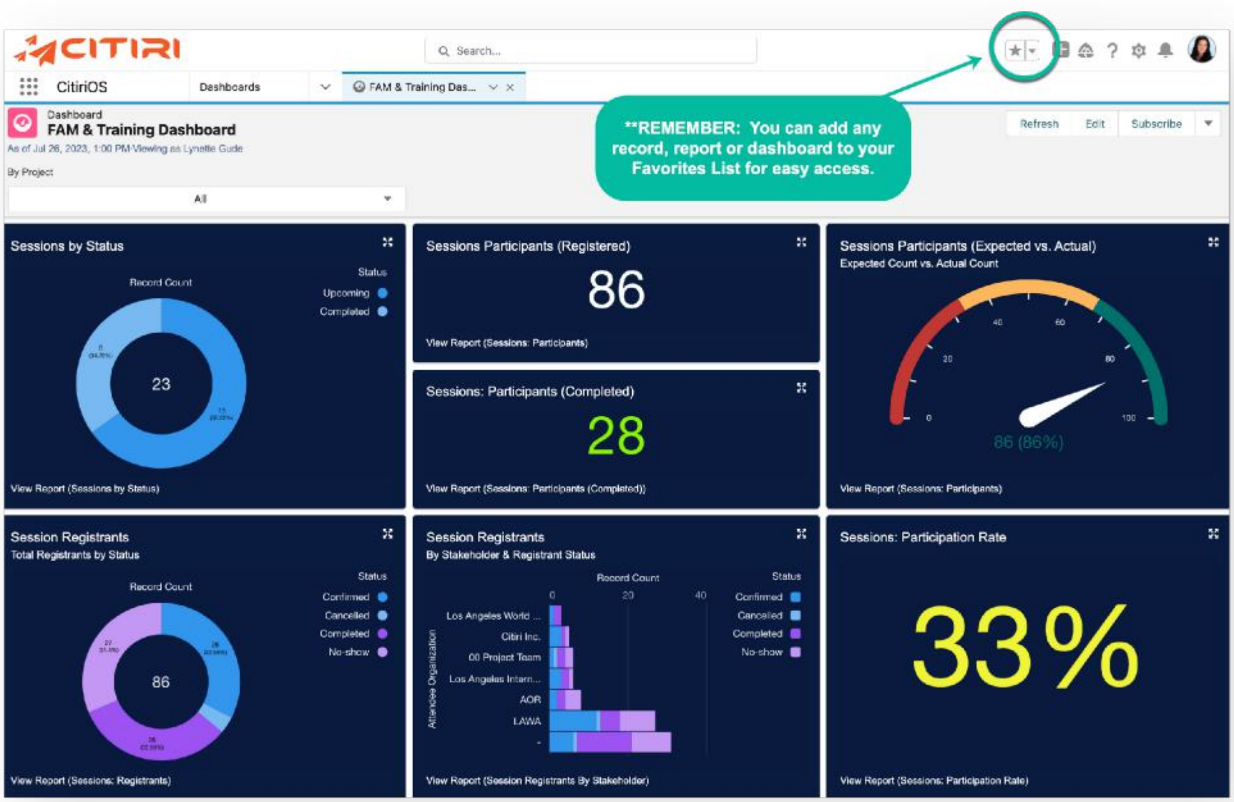
- **Confirmed:** Once a registrant is added to a session, they are assigned a 'Confirmed' status and an confirmation email is sent to them with session details, a QR code for check-in and an option to cancel their registration if they are no longer able to attend.
- **Cancelled:** If a registrant decides to cancel their registration via the link in their confirmation email, their status will auto-update to 'Cancelled'.
- **Completed:** At check-in, once the registrants QR code is scanned, their status will auto-update to 'Completed'.
- **No-Show:** Once a session is completed and the team updates the session status, all remaining registrants with a 'Confirmed' status will auto-update to 'No-Show'.

****The team always has the ability to manually update statuses, as needed if QR codes are not used at time of check-in.**

People - FIT Development

FIT After Actions - Review Session Results





People - FIT Development

FIT After Actions - Review Session Results