



BASIC SHARPCLOUD INTRODUCTION

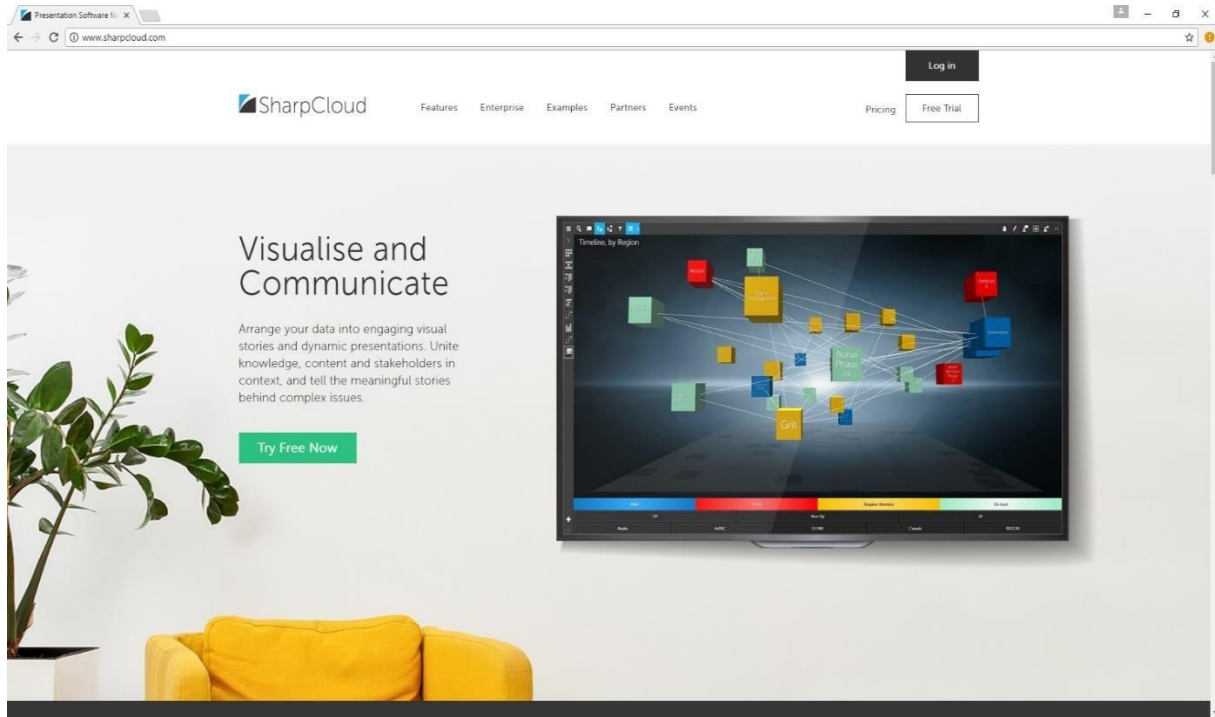
Updated August 2018

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Logging into your SharpCloud Account

1. Go to www.sharpcloud.com



2. Click the "Log in" button at the top right



3. Click "O365 / Azure AD Sign in"



4. Enter your @hawaii.gov email address

SharpCloud

Work or school, or personal Microsoft account

Keep me signed in

Sign in

Back

Can't access your account?

5. If prompted, select "Work or school account"

It looks like derek.a.deponte@hawaii.gov is used with more than one account. Which account do you want to use?



Work or school account

Created by your IT department
derek.a.deponte@hawaii.gov

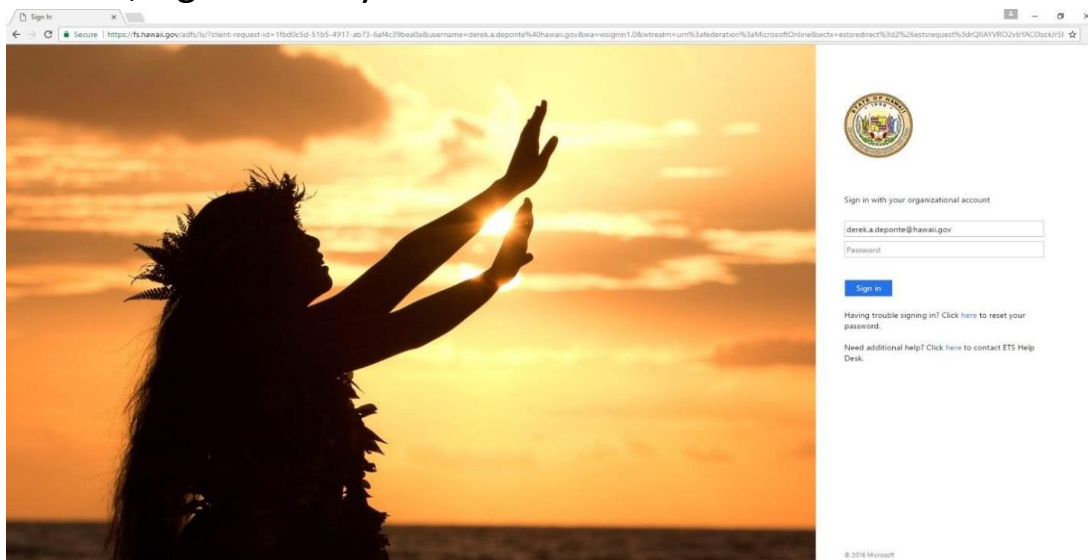


Personal account

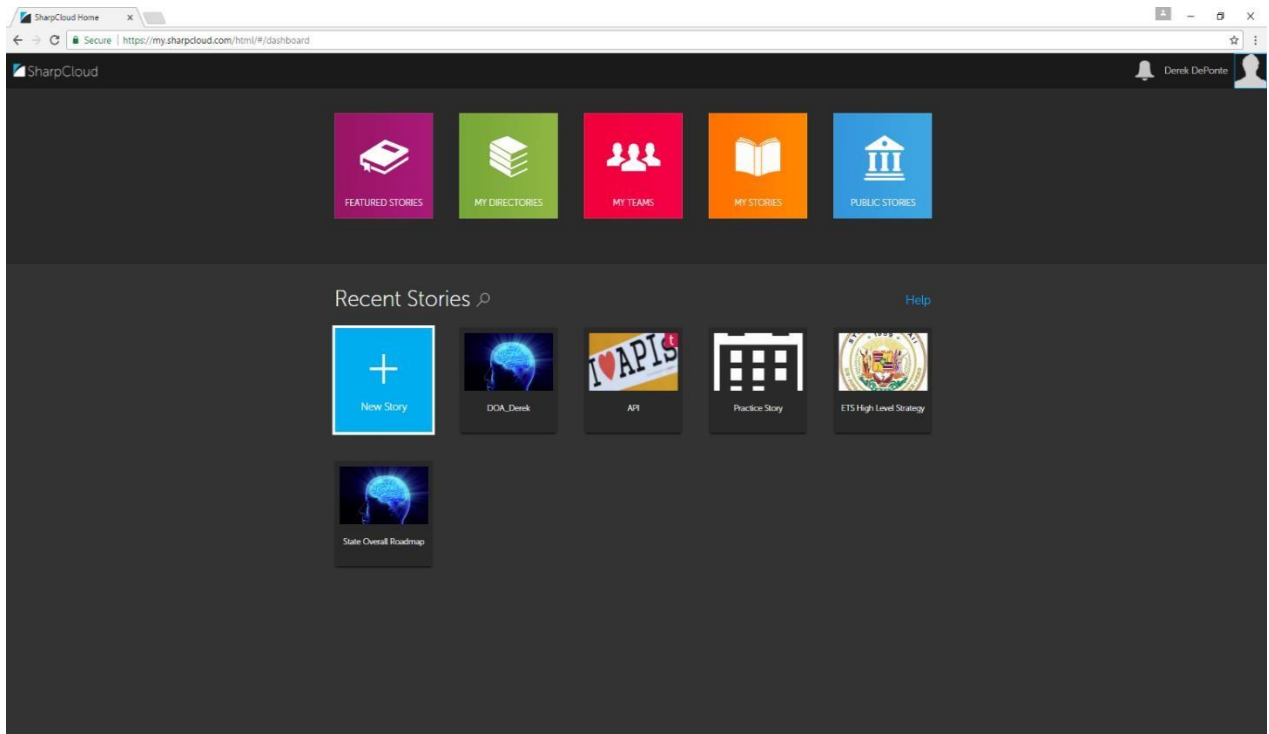
Created by you
derek.a.deponte@hawaii.gov

Back

6. You will be redirected to the Hawaii.gov ADFS Login Portal with the Hula Dancer; sign in with your O365 credentials

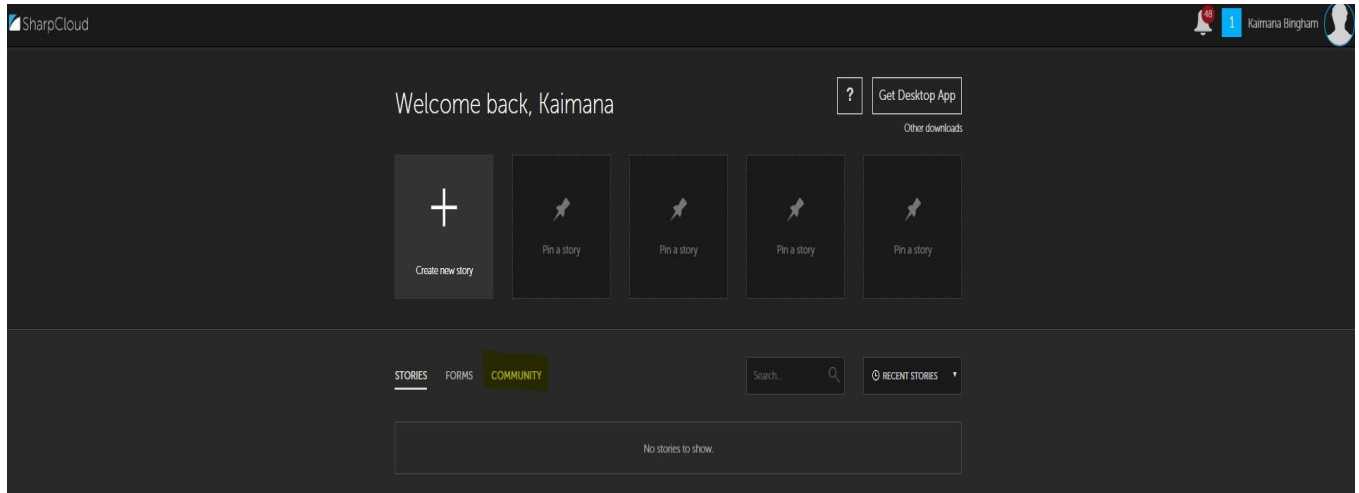


7. When logged in, the main page will look like this:

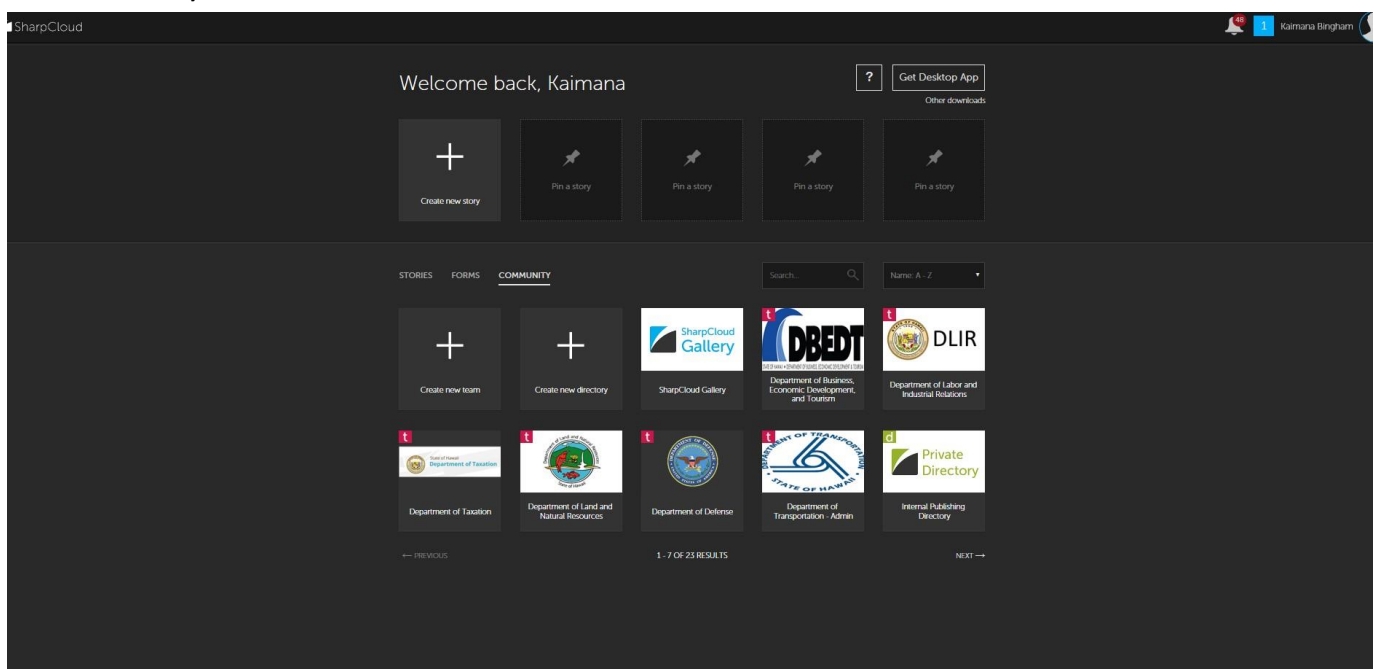


Viewing your roadmap

1. Once logged into SharpCloud, click on **“COMMUNITY”**

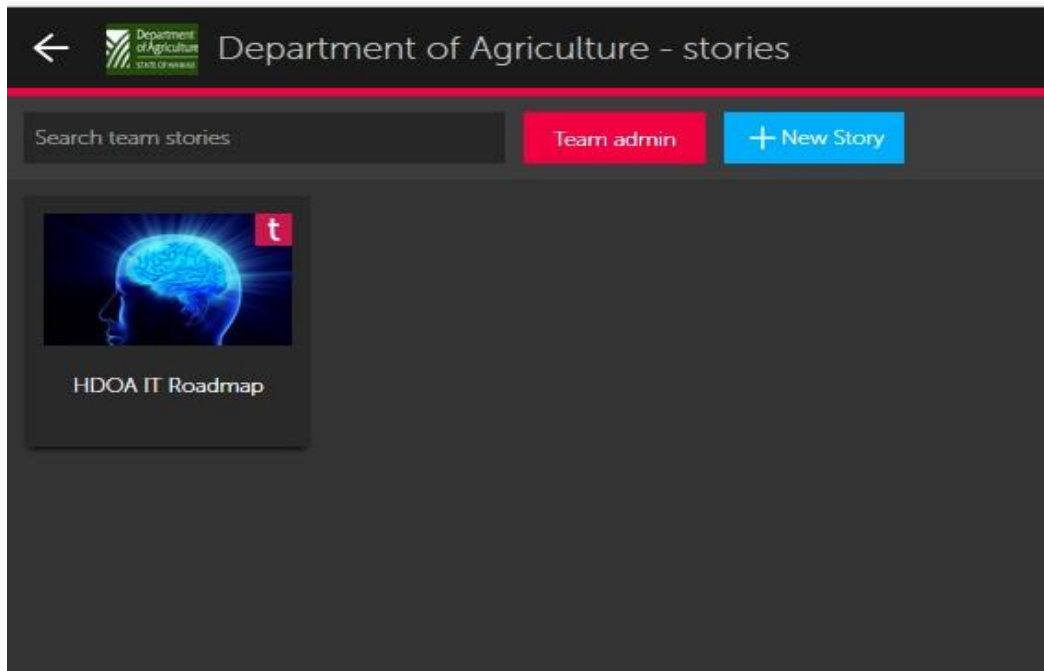


2. In the **“COMMUNITY”** area you should see your department name (i.e. ETS, DAGS, etc.); click on it

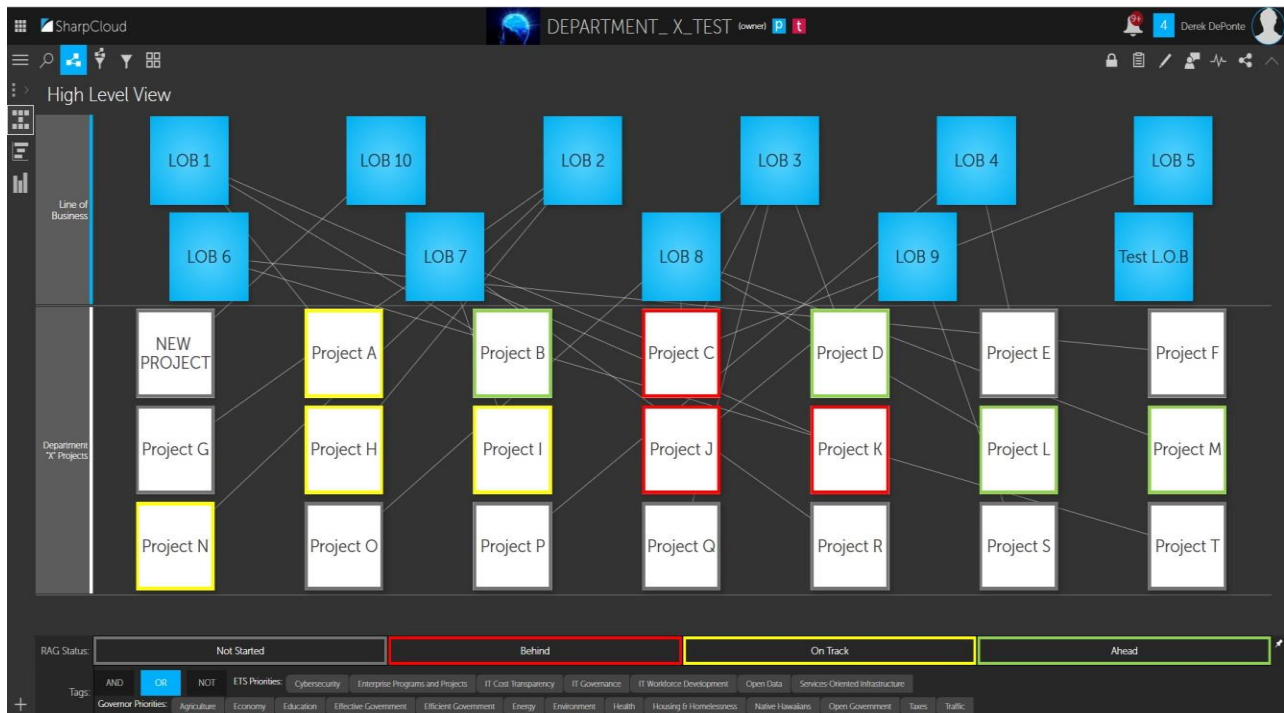


3. On the next page, you will see all SharpCloud stories owned by the team

- ETS has already created the “IT Roadmap” SharpCloud story for each department which will appear within your team

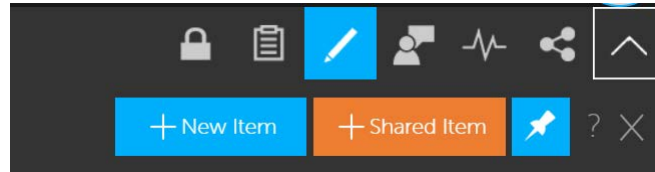


- Once you open it, your Roadmap will look like the screenshot below:

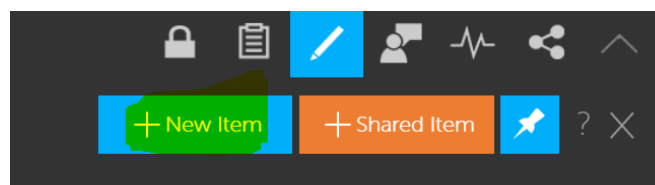


Adding new items to your SharpCloud Roadmap

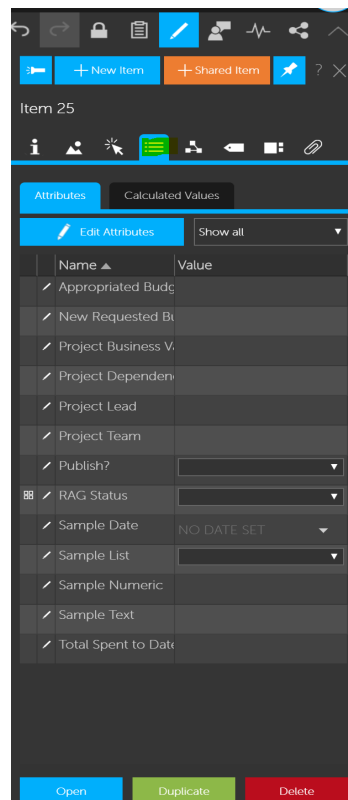
1. Click the **Edit Pencil** button at the top right of the page



2. Choose the **New Item** text box



3. Fill out as much information as possible (Note; you can edit/add more later) and click **Open**

A screenshot of the SharpCloud Roadmap 'Item 25' form. The form is dark grey and has a title bar that says 'Item 25'. Below the title bar is a toolbar with icons for information, user, search, list, back, forward, and link. The main content area is divided into two tabs: 'Attributes' (selected) and 'Calculated Values'. Under the 'Attributes' tab, there is an 'Edit Attributes' button and a 'Show all' dropdown menu. Below this is a table with two columns: 'Name' and 'Value'. The table contains several rows of attributes, each with a checkmark in the first column. The attributes are: Appropriated Budget, New Requested Budget, Project Business Value, Project Dependencies, Project Lead, Project Team, Publish?, RAG Status, Sample Date (with the value 'NO DATE SET'), Sample List, Sample Numeric, Sample Text, and Total Spent to Date. At the bottom of the form are three buttons: 'Open' (blue), 'Duplicate' (green), and 'Delete' (red).

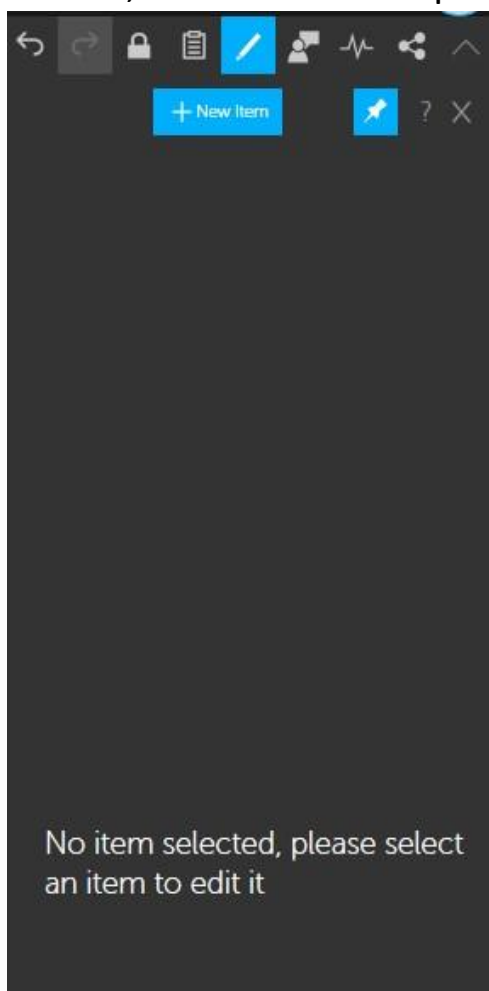
4. The new item will appear on your roadmap instantly

Editing Existing Items to your SharpCloud Roadmap

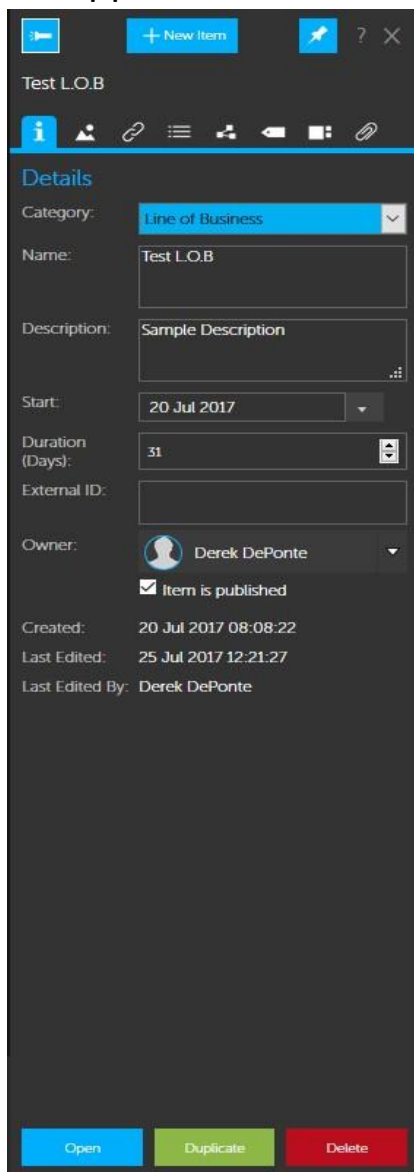
1. Click the **Edit Item Properties** icon at the top right of the page



2. If you already have an item selected it will pull up the item properties for that specific item, otherwise it will prompt you to select an item to edit



3. Click the item on your roadmap that you want to edit; the details for that item will appear



The screenshot shows a mobile application interface for editing an item. At the top, there is a header bar with a blue bar containing a home icon, a '+ New Item' button, and a share icon. Below the header, the title 'Test L.O.B' is displayed. A secondary toolbar contains icons for information, user profile, link, list, share, back, and refresh. The main content area is titled 'Details' and contains the following fields:

- Category: Line of Business (dropdown menu)
- Name: Test L.O.B (text input)
- Description: Sample Description (text input)
- Start: 20 Jul 2017 (date picker)
- Duration (Days): 31 (spinner)
- External ID: (text input)
- Owner: Derek DePonte (user selection dropdown)
- Item is published
- Created: 20 Jul 2017 08:08:22
- Last Edited: 25 Jul 2017 12:21:27
- Last Edited By: Derek DePonte

At the bottom of the form, there are three buttons: 'Open' (blue), 'Duplicate' (green), and 'Delete' (red).

4. There are various item properties you can edit by selecting from the icons at the top



5. Below are screenshots of the options within each of the additional tabs

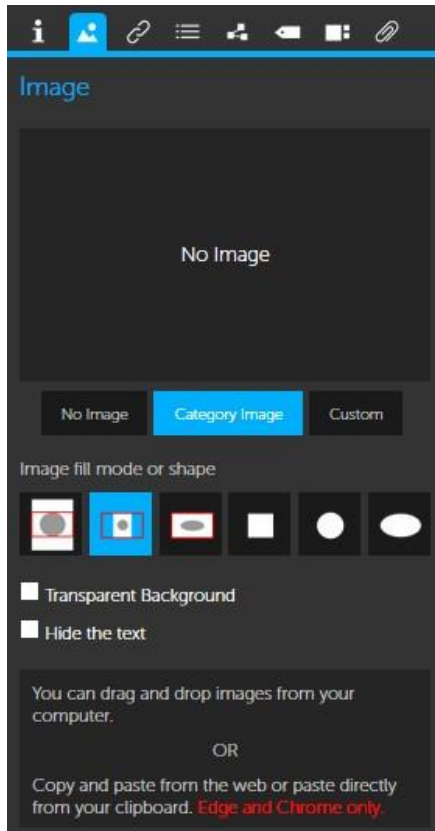


Figure 1: Insert Image Options

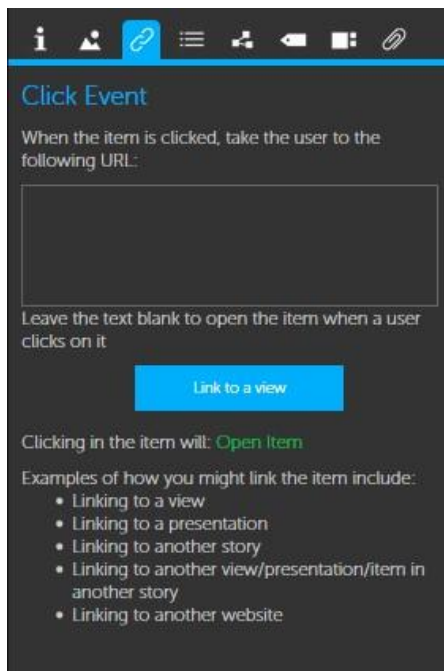


Figure 2: Click Event Options

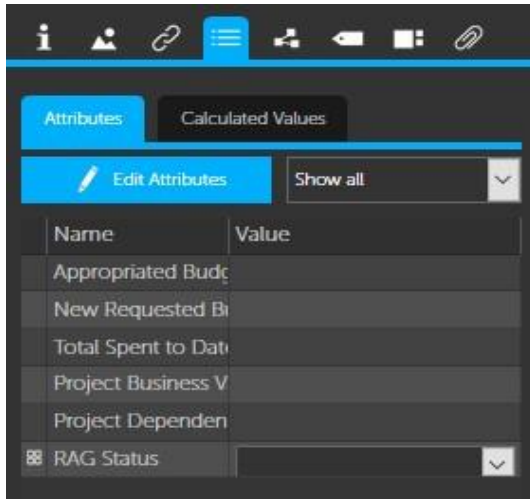


Figure 3: Additional Item Attribute Values

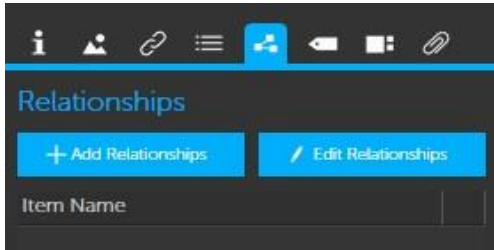


Figure 4: Add/Edit Item Relationships

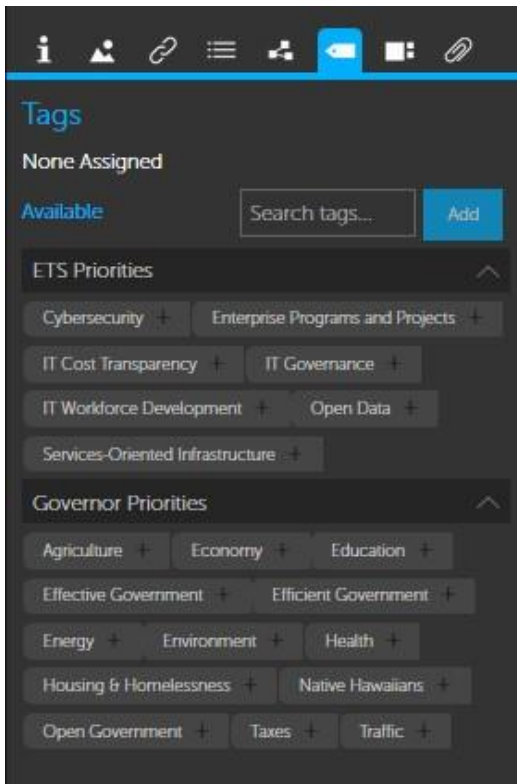


Figure 5: Add/Remove Item Tags

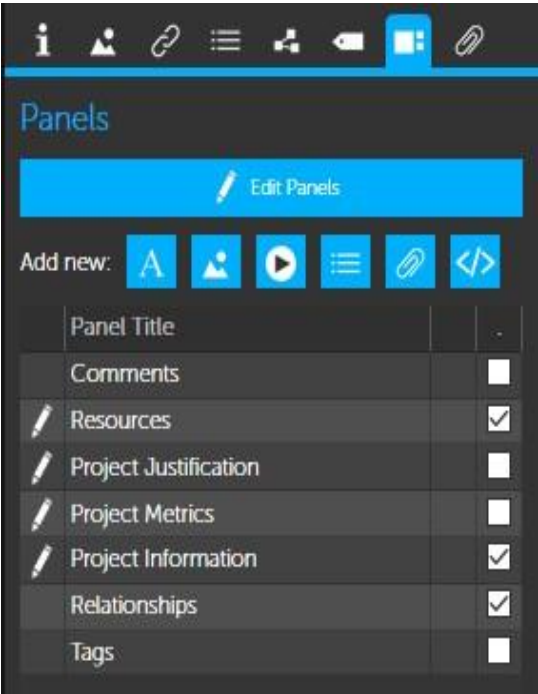


Figure 6: Item Panels

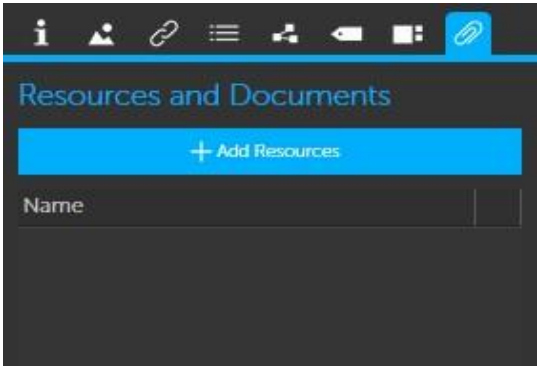
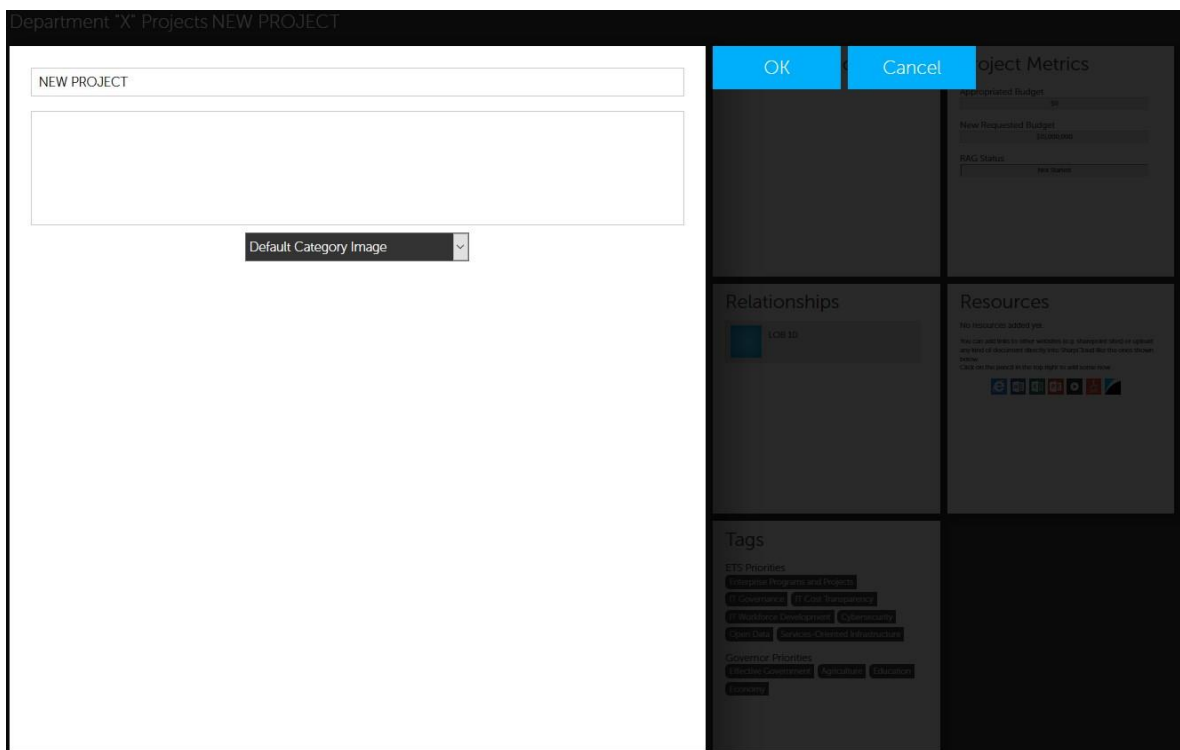
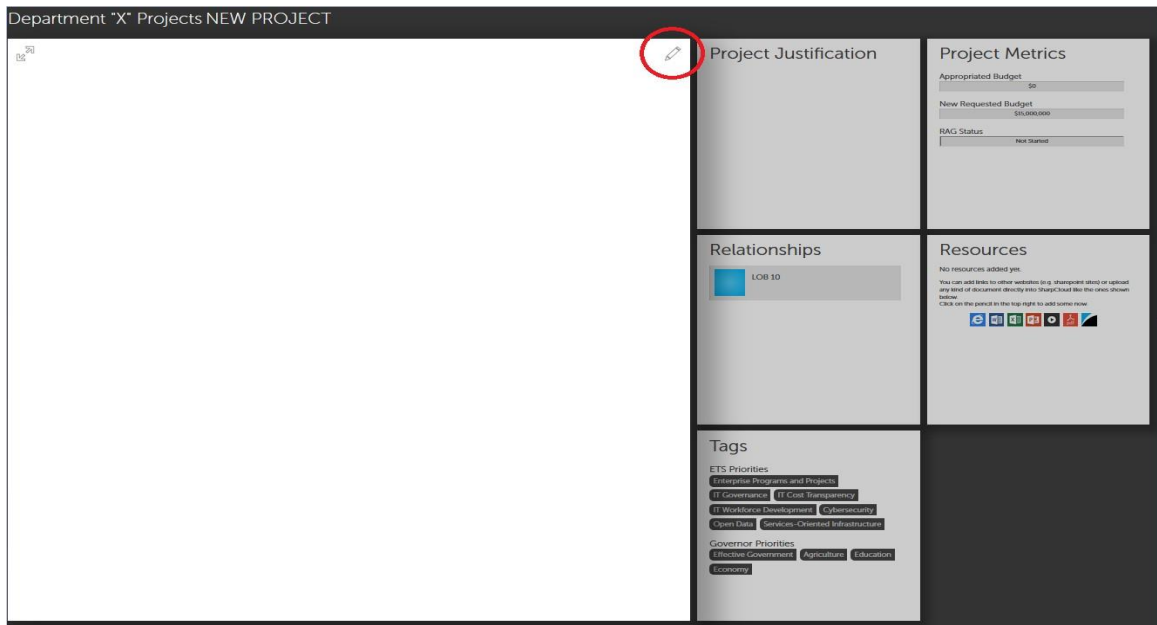


Figure 7: Add Resources/Documents to an Item

6. Another way to edit items is by drilling down into the item itself by clicking on it 3 times and clicking the edit icon in the top right of the currently selected panel



Department "X" Projects NEW PROJECT

Project Metrics

Appropriated Budget ✖

0

Total Spent to Date

There is currently no value for this attribute. [Add value](#)

New Requested Budget ✖

15000000

RAG Status ✖

Not Started

Project Dependencies/Assumptions/Risks

There is currently no value for this attribute. [Add value](#)

Project Business Value

There is currently no value for this attribute. [Add value](#)

[Choose attributes to show](#)

[OK](#) [Cancel](#) Project Justification

Relationships

100 ED

Resources

No resources added yet

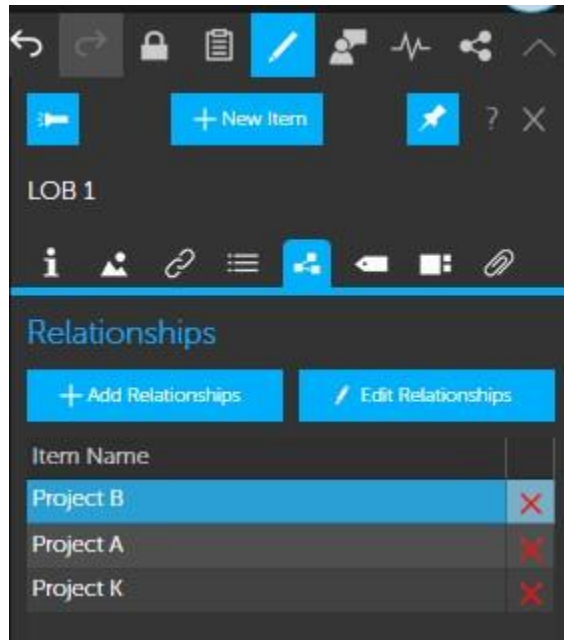
Tags

ETS Priorities

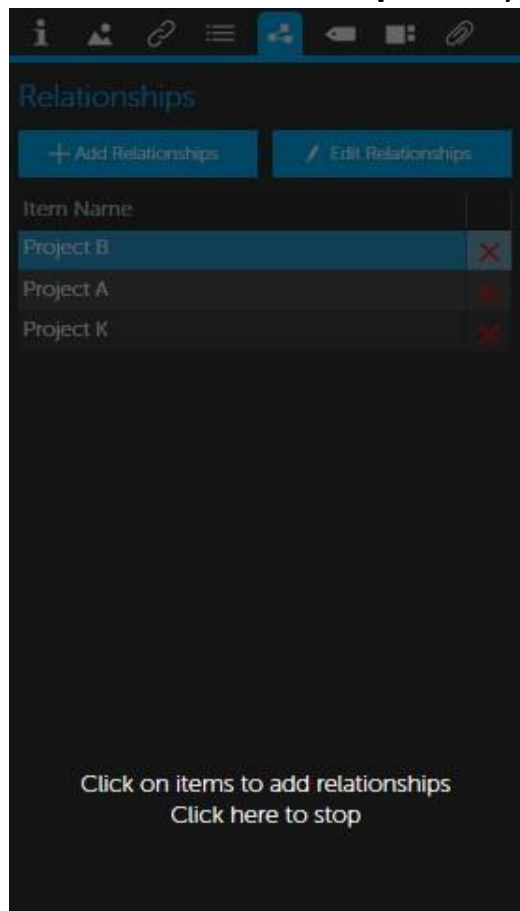
Governor Priorities

Creating Relationships with other items in your roadmap

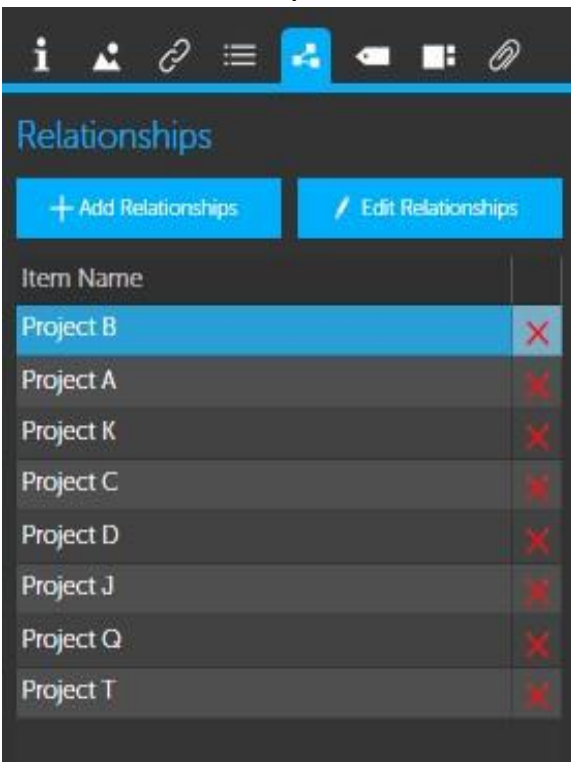
1. Select the item, open the **Edit item properties** pane, and select the Relationships tab:



2. Click **Add Relationships** and you will see the following:

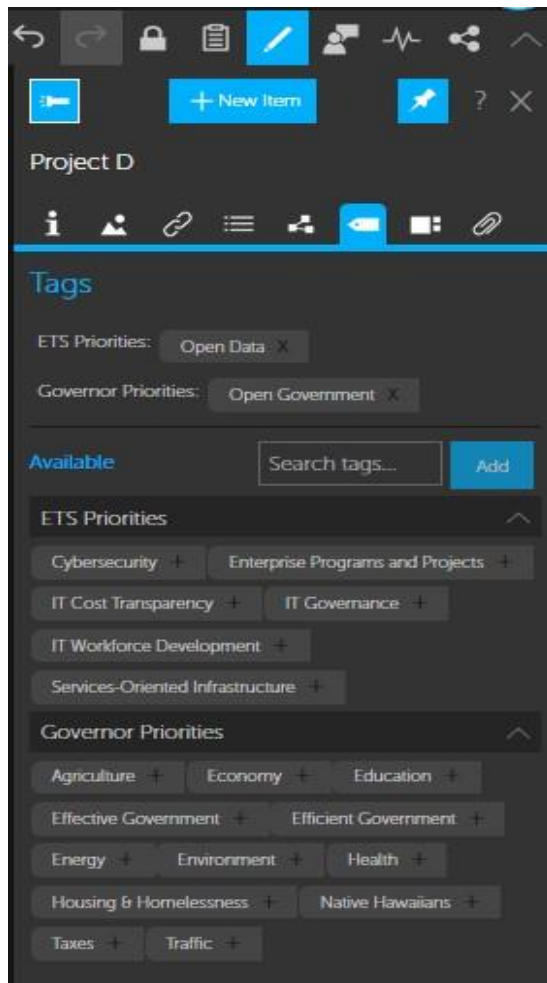


3. Click on all items in your story that you want to create a relationship between
4. Once you are finished adding relationships, click anywhere in the edit item panel to stop
5. You will see the updated list of relationships

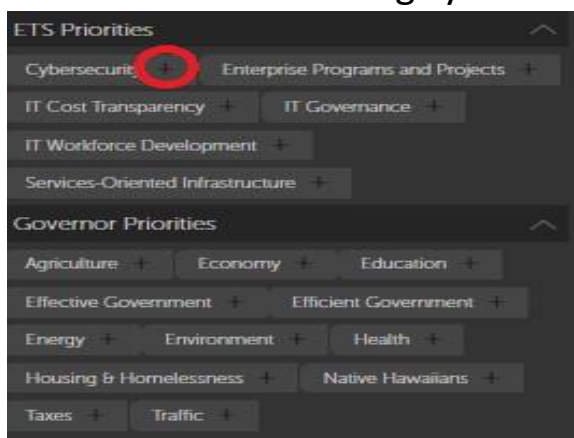


Tagging Items that relate to an ETS or Governor Priority

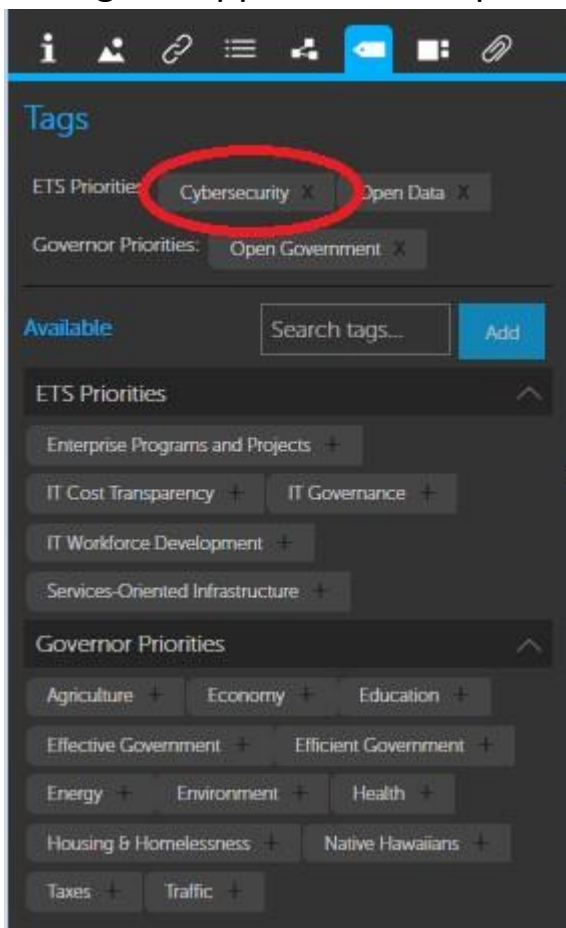
1. Select the item, open the **Edit item properties** pane, and select the Tags tab:



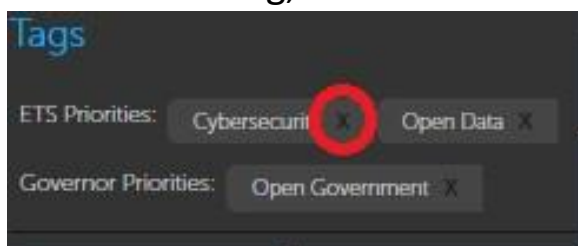
2. Click the “+” next to tags you wish to add to the item



- The tag will appear at the top after you add it



- To Remove a Tag, click the "X" next to it



SharpCloud Help

- [Official SharpCloud Documentation](#)
- ETS SharpCloud Specialist: kaimana.n.bingham@hawaii.gov
808-586-0708

Defining Financial Metrics

- **Appropriated Budget:** Existing budget you can submit spend requests against. These are funds approved in the executive budget summary.
- **Federal Funds:** Funds provided by the federal government to a specific department project
- **Special Funds:** Funds created for a special purpose and restricted for specific use.
- **General Funds:** Used to account for resources not specifically set aside for special purposes.
- **Total Spent to Date:** Any funds spent on this date including any non-budgeted funds that have been used for this project.
 - FY Total Spent to Date:** The funds spent per the current Fiscal Year
- **New Requested Budget:** New biennium requests or funds pending appropriation and new supplemental requests

The screenshot displays the SharpCloud interface for a project named "Projects Project E". The main section is titled "Financial Metrics" and contains five data points, all showing a value of 0:

- Appropriated Budget: 0
- New Requested Budget: 0
- Total Spent to Date: 0
- Federal Funds: 0
- General Funds: 0

The interface also features several other panels on the right side:

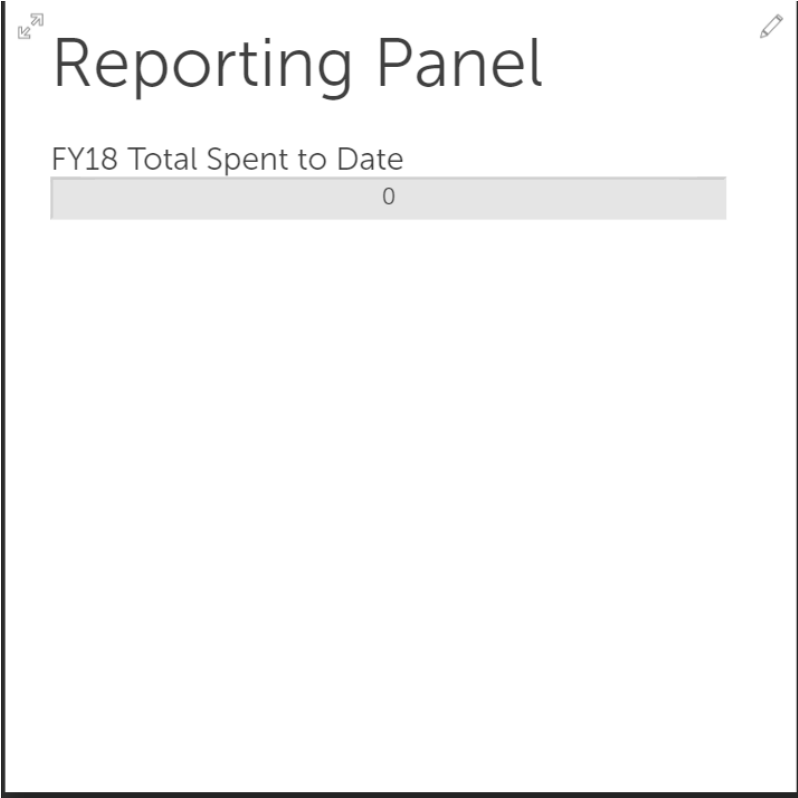
- Project Team:** A panel for managing project team members.
- Relationships:** A panel for managing relationships between projects.
- Renewal Breakout:** A panel showing the duration in days for renewal breakout.
- Resources:** A panel for managing resources, currently showing "No resources added yet." and a list of social media icons.
- Tags:** A panel for managing tags.

The top of the interface shows the user's name "Erin Nakama" and the document title "departmentBase (copy: 24/04/18 13:15:43) (admin)".

The Reporting Panel

These three attributes will be converted from Sharepoint into Sharpcloud under the "Reporting Panel":

FY Total Spent to Date = Actual Amount Spent



Project Metrics

RAG Status: Red, Amber, Green, Canceled, and On Hold status bars.

Date Created: An automatic that generates when the project items are created.

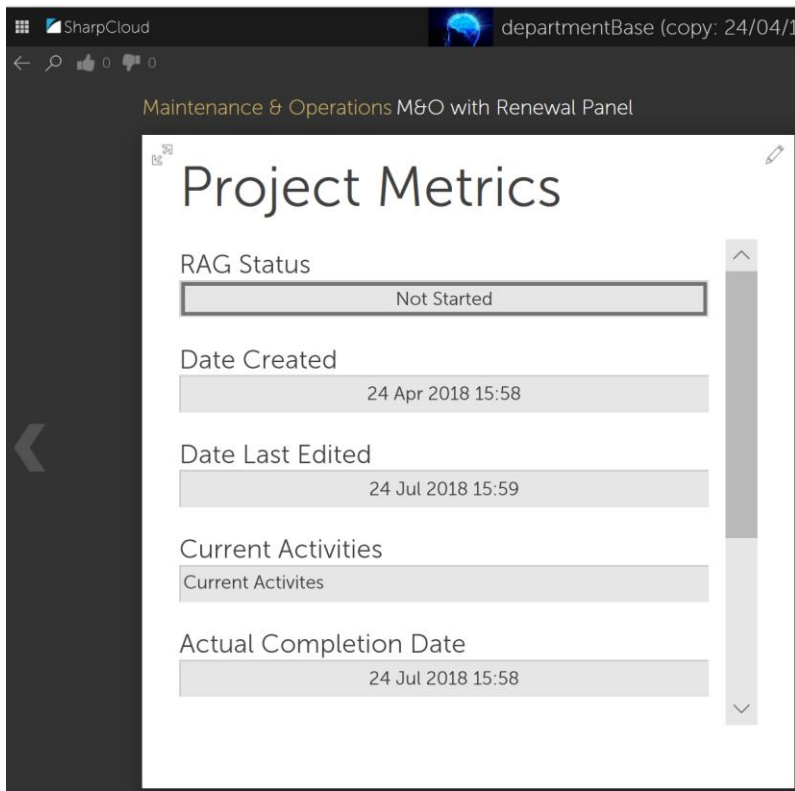
Date Last Edited: An automatic field that generates when the project item is edited.

Current Activities: milestones for projects

Project Start Date: “Notice to Proceed” date, i.e., the actual start date of a project as defined by the contract.

Actual Completion Date: The date the project is complete

Percent Complete:



The screenshot displays a mobile application interface for 'SharpCloud' with the title 'departmentBase (copy: 24/04/1)'. The main content area is titled 'Maintenance & Operations M&O with Renewal Panel' and 'Project Metrics'. The metrics are as follows:

Field	Value
RAG Status	Not Started
Date Created	24 Apr 2018 15:58
Date Last Edited	24 Jul 2018 15:59
Current Activities	Current Activites
Actual Completion Date	24 Jul 2018 15:58

Renewel Breakout

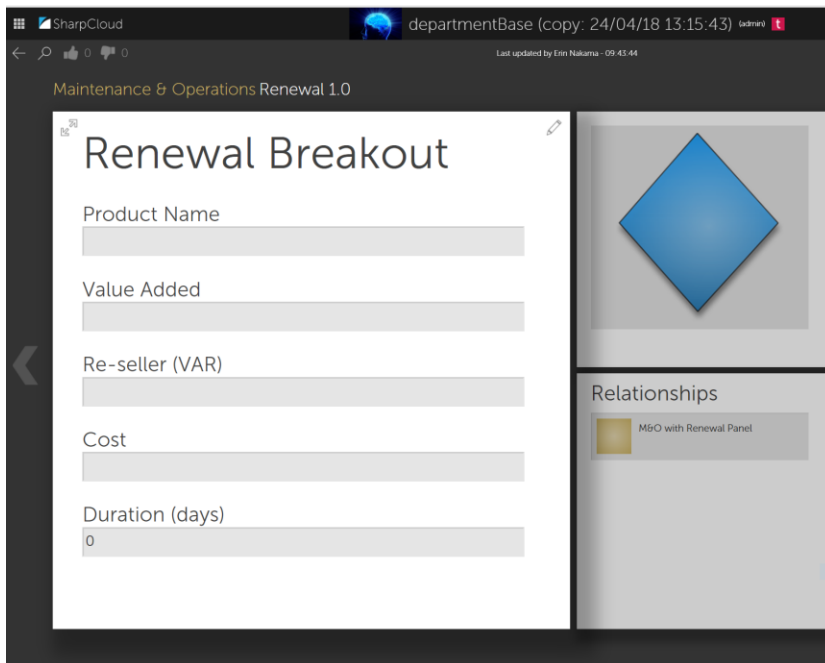
“Renewal Breakout” panel with comment features:

Product Name -

Re-seller (VAR)-

Cost- Cost per fiscal year

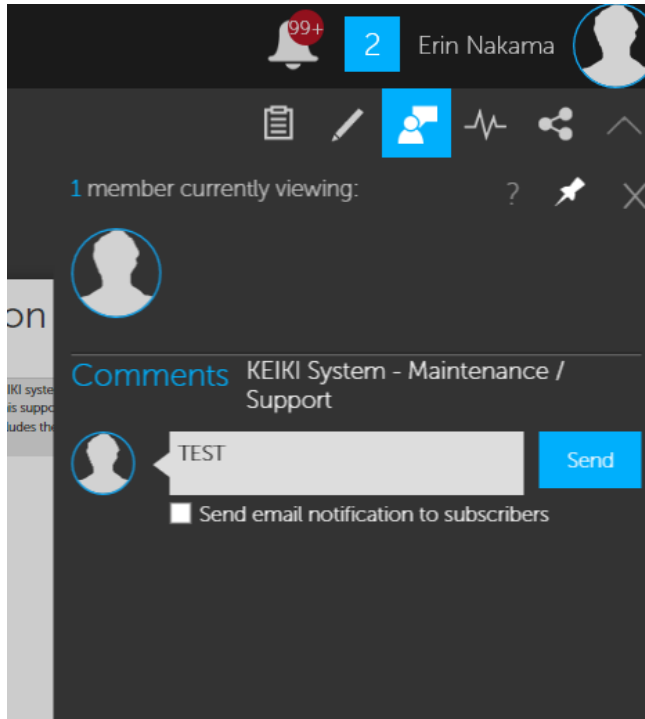
Duration- Duration of the contract



The screenshot shows a software interface for 'Renewal Breakout'. The top bar includes 'SharpCloud' and 'departmentBase (copy: 24/04/18 13:15:43)'. Below the title 'Renewal Breakout', there are five input fields: 'Product Name', 'Value Added', 'Re-seller (VAR)', 'Cost', and 'Duration (days)'. The 'Duration (days)' field contains the value '0'. To the right, there is a 'Relationships' section with a blue diamond icon and a card labeled 'MRO with Renewal Panel'.

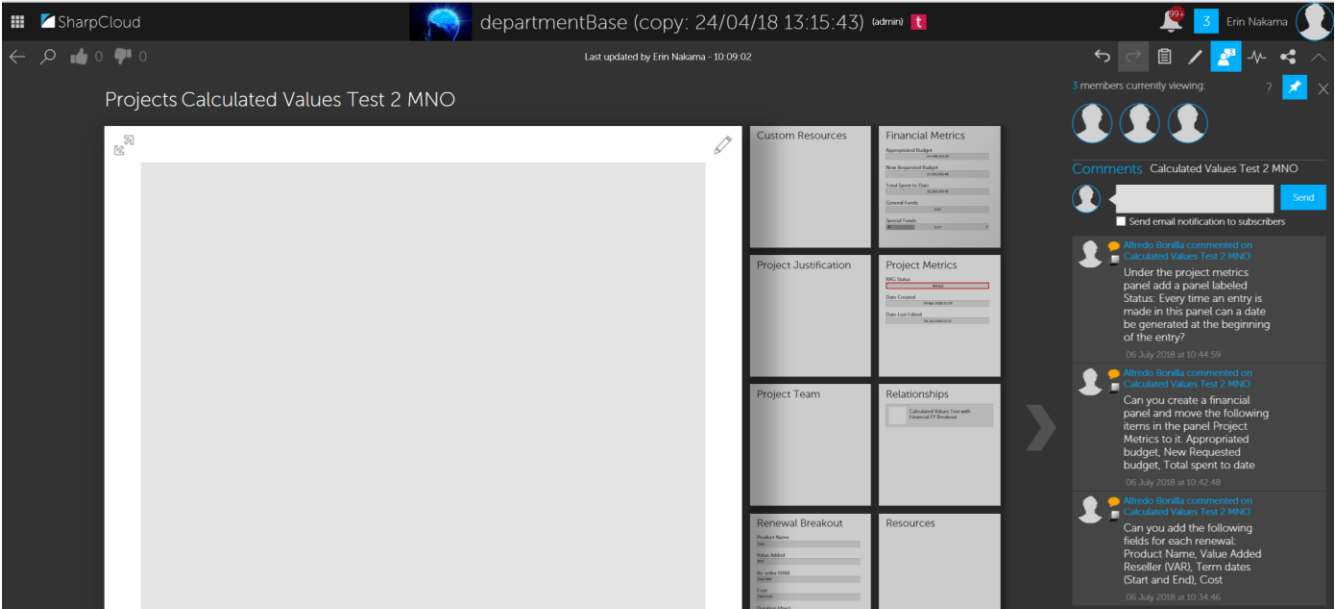
Adding comments to a project/panel

1. Select the project or panel that you would like to add commentary on.
2. Click on the “comment feed” icon.
3. Place in your content and hit the “send” icon. There is also the option to check off the box to send an email notification to all subscribers.



Viewing comments for a specific project/panel

To view comments that were made for a specific project or panel, you will need to have the item fully opened (double-clicked) to see.



Comments Story

When the item is not fully opened (double-clicked), in the comment bar you will see the "Comments Story" that shows all comments that were made for various projects/panels.

