ISEE SETR Manager
Quick Start Guide for Users

Revision: **1.5**
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Account Setup & Permissions

https://esgfusion.nswc.navy.mil/setrmgr/

Setup your account properties and profile image by clicking the account icon on the upper right, then click the Edit Profile link.

Customize profile image: mouse-over image and click Change

Setup memberships in any Programs, PMAs, or PEOs in which you play a role to ensure correct permissions. Use the Programs & Projects or the PMAs & PEOs menu, open the item you wish to join, then click the Request Membership button.

To remove your membership and permissions from a Program, PMA, or PEO, open the item and click the Leave button.

Managing Notifications

To control all notifications in the SETR Manager:

1. Click the notifications icon on the top right
2. At the bottom of the list, click Settings
3. Select the category of notifications you wish to edit
4. When editing Program, PMA, PEO, or Checklist notifications, select the appropriate value for "**Notification Settings For**"
5. Click the remove icon next to the specific notifications you wish to disable.
   NOTE: If you remove a notification from your account, only the owner of the item will be able to add it back.

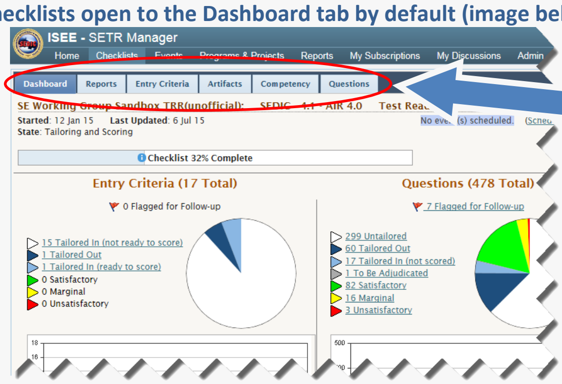
Opening and Navigating a Checklist

From the Home menu: Click Open link next to the checklist

From the Checklists menu:

1. Locate the checklist you wish to open using filters or search
2. Click the checklist in the table, then click Open this Checklist

Checklists open to the Dashboard tab by default (image below)



Dashboard tab – An overview of the state of the checklist

Reports tab – Viewed on screen or exported to XLS, DOC, or PDF

Entry Criteria tab –Entry Criteria details and question summary for the checklist, including tailor/scoring, question metrics, and discussion. Can be searched and exported to XLS.

Artifacts tab – Summary of all questions by Artifacts (or Products) for the checklist, including tailor/scoring, question metrics, and discussion. Can be searched and exported to XLS.

Competency tab – Summary of all questions by Competency for the checklist, including tailor/scoring, question metrics, and discussion. Can be searched and exported to XLS.

Questions tab – All Questions in the checklist, including current tailoring, scoring, & assignments, all question details/properties, and discussions. Can be searched and exported to XLS.

No permission to open a checklist? Request access to it by selecting the checklist and clicking the **Request to Join Checklist** button

Finding & Searching Questions: Open the checklist first, then…

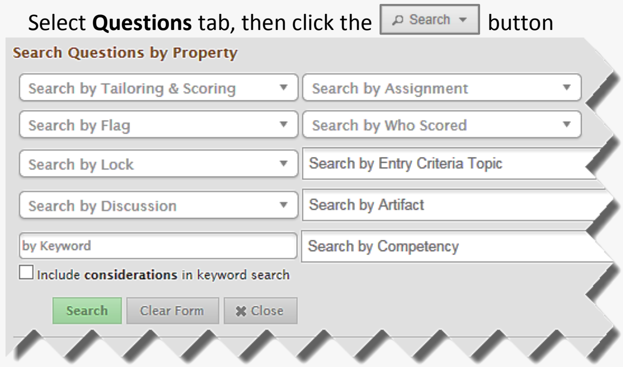
Find Questions Assigned to You: Select **Dashboard** tab, then **Checklist Sharing** tab, click Assigned To link next to your name
Also, from **Homepage** or **Checklists** menu, click # in **Assigned** column

Questions By Entry Criteria, Artifact, or Competency:

1. Select the **Entry Criteria**, **Artifact**, or **Competency** tab
2. Click the # in the **QTY Qs** column to view questions for item ***OR*** select the item(s) to view details, then click any link in the Question Summary to view the matching questions

From Dashboard Tab: Select any link next to the question pie chart ***OR*** select any question link in the **Activity Stream** tab ***OR*** select any Assigned To or Scored By link on the **Sharing** tab

Advanced Search (by Keyword, by Number, or Custom):
Select **Questions** tab, then click the Search button



Did you know? You can hide/show, drag/drop, resize, and sort columns in the checklist. Use CTRL-click to do a multi-column sort.

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Integrated Systems Engineering Environment (ISEE) SETR Manager

Sharing a Checklist

1. Open the checklist and view the **Dashboard**
2. Select the **Checklist Sharing** tab on the lower right to view the list of people the checklist is currently shared with
3. To share with someone else, click Add Someone
4. **Notifications are sent to the new participant and to the** checklist owner(s) when the checklist is shared

Note: The checklist owner(s) decide how/if participants can share the checklist. If you can share the checklist, anyone you share it with will be given the same role you have by default.

Selecting Multiple Checklist Items

1. Open the checklist and select the appropriate tab (Entry Criteria, Artifacts, Competency, or Questions)
2. Click an item in the list
3. Hold down the ***SHIFT*** key and select another item to select a range ***OR*** hold down the ***CTRL*** key and select more item(s) to add specific items to the selection ***OR*** type **CTRL-A** on your keyboard to select all the currently displayed items
4. The right side of the page will summarize the items selected

Tailoring & Scoring

1. Open the checklist, then find/search and select the question(s) you wish to tailor/score (see **Finding & Searching Questions** on the reverse side)
2. Click edit on the right side to open the tailor/score form
3. Provide your tailoring and/or scoring decision, justification, and comment
4. Click the save button. The save & next button will save your input & automatically advance to the next question in the list.
5. The cancel / close button will close the form without saving changes or will close the form when you are done.

Note: When the tailor/score form is open, the following keyboard shortcuts become operational:

"O" = Tailor Out	"1" = Score Satisfactory (Green)
"I" = Tailor In	"2" = Score Marginal (Yellow)
"U" = Untailored	"3" = Score Unsatisfactory (Red)
"F" = Flag/Un-flag Toggle	

Note: All questions must be tailored. Question scoring is optional by default, but is controlled by the checklist owner(s). Contributors can tailor and score the questions. Only the checklist owner(s) can tailor an Entry Criteria, Artifacts, or Competency all at once.

Note: Entry Criteria must be scored before the checklist can be completed. Owner(s) of the checklist can score an entry criteria only after the questions within them are tailored.

Add / Edit a SETR Event

1. Select the Event menu to open the events page
2. To schedule a new event, click Add Event on the toolbar
3. To edit an existing event, locate the event in the list (or filter/search for it)
4. Click the event to open the details
5. Select the Edit Event button

Note: Program, PMA, and PEO leadership are notified when new SETR events are scheduled. Also, the edit button will be disabled if you don't have permission to edit a selected event.

Discussions

1. Open the checklist and select the appropriate tab (Entry Criteria, Artifacts, Competency, or Questions)
2. Locate the item you wish to discuss and select it from the list
3. Click Start a Discussion or reply button on the lower right

You can **mention someone by name** by typing the **@** symbol in your discussion comment, then type at least one letter from their name. Click the matching name from the list displayed below the comment box. Notifications are sent to people when they are mentioned.

Exporting to Excel

List of Checklists or Events:

1. Filter or search on the **Checklists** or **Events** menu
2. Click the Download as XLS button

Checklist Reports:

1. Open the checklist and select the **Reports** tab
2. Locate the report and click the xls link below it

Checklist Data:

Note: Export to Excel may be disabled if the checklist owner chooses to restrict it. Export is disabled on Unofficial checklists.

1. Open the checklist and select the Entry Criteria, Artifact, Competency, or Questions tab
2. Optionally filter/search the items until you narrow the list down to the desired items
3. Click the Download as XLS button above the item list

Note: Exported Excel files are **not** designed nor meant to facilitate question tailoring and scoring. Official tailoring/scoring data should always be saved online in the SETR Manager.

Need Further Help?

Click ? Tour or ? on any page for step-by-step assistance/help

Submit suggestions, issues, & comments using Feedback

Frequently Asked Questions (FAQ): Click ? then click the FAQ link

Additional Training Resources: AIR 4.1 Systems Engineering website

https://nserc.nswc.navy.mil/navair/navairse/