

Software Engineering Process Group

User Manual

Version 1.4

Table of Contents

1. INTRODUCTION	5
2. USER ROLES AND PRIVILEGES	5
3. LOGIN DETAILS.....	6
3.1. LOGIN.....	6
3.2. LOGOUT	6
3.3. SHORTCUT TO SELECT PROJECT	6
4. MODULES.....	7
5. CUSTOMER.....	7
5.1. SEARCH FOR A CUSTOMER.....	7
5.2. ADD CUSTOMER DETAILS.....	8
5.3. EDIT CUSTOMER DETAILS	10
5.4. DELETE CUSTOMER DETAILS	11
6. PROJECTS	13
6.1. ADD NEW PROJECT	13
6.2. EDIT PROJECT DETAILS	25
6.3. DELETE PROJECT DETAILS.....	34
6.3.1. Delete Skill Name Details.....	39
6.3.2. Delete Reusable Component Details	40
6.3.3. Delete Key Feature Details.....	41
6.3.4. Delete Customer Comments	42
6.3.5. Export in Excel Format.....	42
6.4. PROJECTS-INACTIVE.....	44
7. ESTIMATION.....	45
7.1. ADD NEW ESTIMATE.....	45
7.2. VIEW ESTIMATE DETAILS.....	46
8. SE PROCESS GROUP.....	46
8.1. ISSUE TRACKER - SEARCH FOR ISSUES.....	47
8.1.1. Add Issue.....	48
8.1.2. Edit Issue.....	50
8.1.3. Add, Edit and Delete Corrective Action	51
8.1.4. Delete Issue.....	54
8.1.5. Export Issue.....	54
8.2. RISK TRACKER – SEARCH FOR RISKS	55
8.2.1. Add Risk.....	56

8.2.2. Edit Risk	58
8.2.3. Add Mitigation Plan	61
8.2.4. Edit Mitigation Plan	63
8.2.5. Add Contingency Plan	64
8.2.6 Edit Contingency Plan	65
8.2.7. Delete Mit/Conti Plan	66
8.2.8. Delete Risk	66
8.2.9. Export Risk	67
9. APPROVE LESSON LEARNT/RISK	67
9.1. SEARCH ISSUE	67
9.1.1. Approve Corrective Action	68
9.2. SEARCH RISK	69
9.2.1. Approve Mit/Conti Plan	69
10. VIEW LESSON LEARNT/RISK.....	70
10.1. SEARCH ISSUE	70
10.1.1. View Corrective Action	70
10.2. SEARCH RISK	71
10.2.1. View Risk Taxonomy	71
11. CAUSAL ANALYSIS.....	72
11.1. SEARCH PROJECT	73
11.2. ADD ITERATION	74
11.3. EDIT ITERATION DETAILS	75
11.4. DELETE DEFECT	78
11.5. ADD / EDIT CAUSAL ANALYSIS	78
11.6. ADD PREVENTIVE ACTION	79
11.7. EDIT PREVENTIVE ACTION	81
11.8. DELETE PREVENTIVE ACTION	82
12. TASK TRACKER	82
12.1. SEARCH FOR TASKS	83
12.2. ADD TASKS	84
12.3. EDIT TASKS	86
12.4. RELATE TO OLD TASK	90
12.5. DELETE TASK	91
12.6. IMPORT TASKS	92
12.7. GENERATE REPORT	93
13. CR TRACKER	93
13.1. SEARCH FOR CHANGE REQUEST	93

13.2. ADD CHANGE REQUEST	95
13.3. EDIT CHANGE REQUEST.....	97
13.4. ADD ACTIVITY.....	99
13.5. EDIT OR DELETE ACTIVITY.....	101
14. BUG TRACKER	103
14.1. SEARCH FOR BUG	103
14.2. ADD BUG.....	104
14.3. UPLOAD DOCUMENT.....	105
14.4. ASSIGN BUG	106
14.5. EXPORT BUGS.....	107
14.6. EDIT BUG DETAILS.....	108
14.7. CLOSE BUGS	111
14.8. RE-ASSIGN TESTER.....	111
14.9. IMPORT BUGS	112
15. TIMESHEET	112
15.1. ENTER TIMESHEET DETAILS	112
<i>15.1.1. Enter Task Plans and Open Issues.....</i>	<i>115</i>
15.2. VALIDATION	115
<i>15.2.1. Validate Timesheet</i>	<i>115</i>
16. INDEX	118

1. Introduction

The **Software Engineering Process Group** (SEPG) is a user-friendly application that enables SPAN employees to access, add, update, and maintain the details of a project. This application allows the employees to track details of a project, for example, time spent working on a project, status of the project, teams working on the project, etc. It provides the status of the project until completion.

2. User Roles and Privileges

Designation (JSE, SE, SSE, etc.) is the level at which an employee is placed in a company's hierarchy. Role (Module Lead, Project Lead, Project Manager, etc.) is the part or job performed by an employee, immaterial of the designation. Access and privileges are less restricted as you go higher up the roles. The table below provides the details about the specific designations that have access and privileges to specific modules.

SN.	Module Name	JSE, SE, SSE	TL, PL	PM & Above	GM & Above
1.	Customers			√	√
2.	Audit List		√	√	√
3.	Projects	√	√	√	√
4.	SE Process Group		√	√	√
5.	Approve Lesson Learnt/Risk				√
6.	View Lesson Learnt/Risk			√	√
7.	Causal Analysis		√	√	√
8.	Task Tracker	√	√	√	√
9.	CR Tracker	√	√	√	√
10.	Test Case Management	√	√	√	√
11.	Bug Tracker	√	√	√	√
12.	Time Sheet	√	√	√	√
13.	Reports		√	√	√

Designations

- **JSE** - Junior Software Engineer
- **SE** - Software Engineer
- **SSE** - Senior Software Engineer
- **TL** - Team Leader
- **PL** - Project Leader
- **PM** - Project Manager
- **GM** - Group Manager

3. Login Details

The SEPG application requires the user to enter the intranet login credentials assigned to them, depending upon their roles and privileges. Once users enter the specific username and password, they can access the application.

3.1. Login

To log into the SEPG application,

The procedure to log into the application may vary for the employees of Bangalore and Chandigarh.

SPAN Bangalore employees must log into their intranet using their login credentials, select SEPG from the drop-down from the top right corner of the Intranet Home Page, and then click **Go**.

SPAN Chandigarh employees must click the URL mentioned below, enter the appropriate Windows User Name and Password, select **SEPG** from the drop-down of the **Application** field, and then click **Login**.

- SPAN Bangalore employees must use (URL: <http://intranet.spanservices.com>).
- SPAN Chandigarh employees must use (URL: <http://chd-hrms.spanservices.com>).

3.2. Logout

To log out of the SEPG application, click **Logout**  link displayed at the top-right corner of all the screens.

3.3. Shortcut to Select Project

A faster method to select and retain a project, immaterial of the screen you are in, is to select the project from the drop-down shown on the top-right side of all the screens and click the **Save** icon, as shown below. Once **Save** is clicked, the current screen is loaded with

the selected project details. 

4. Modules

The SEPG application contains the following modules that are shown in the left menu.

<input type="checkbox"/> Customers
<input type="checkbox"/> Audit List
<input type="checkbox"/> Projects
<input type="checkbox"/> SE Process Group
<input type="checkbox"/> Approve Lesson Learnt/Risk
<input type="checkbox"/> View Lesson Learnt/Risk
<input type="checkbox"/> Causal Analysis
<input type="checkbox"/> Task Tracker
<input type="checkbox"/> CR Tracker
<input type="checkbox"/> Test Case Management
<input type="checkbox"/> Bug Tracker
<input type="checkbox"/> Time Sheet
<input type="checkbox"/> Reports

Each module is sub-divided to provide detailed reports. To view each sub-division, click the ☐ icon to expand the modules.

5. Customer

The **Customer** module allows you to manage and maintain customer details. You can add, edit or delete the details of customers. Details such as name and address of the contact person, designation of the contact, related telephone numbers and email ID of the contact are maintained in this module.

5.1. Search for a Customer

To search for a specific customer details, follow these steps.

1. In the left menu, click **Customers** (by default, **Customer-Individual** is selected).
2. In the **Search** section, enter the **Customer Name** and select a name from the drop-down for the **Span Marketing Person** field.
3. Click **Search**.
4. The grid below the **Search** section shows the list of customers, address of the customer and the name of the SPAN marketing person.

Search
 Customer Name : Span Marketing Person : Select

Name	Address	Span Marketing Person
<input type="checkbox"/> Magnet Marelli	#152, Giancarlo Ln., Isla de Roma, Rome, Italy	Jeremy Brown
<input type="checkbox"/> Amsoil Chaparal Corporation	#6464, Suite-04, Palm Beach Blvd., Palm Beach, Miami, FL	
<input type="checkbox"/> Acerbis Pro Inc.	#1757 E, Chestnut Ave., Donnington Park, Surrey, England	Jeremy Brown
<input type="checkbox"/> Renthal BudLight KTM	Chateau de Laux, Bordeaux, Rivera Plantaganet, France	

5.2. Add Customer Details

To add a new customer details, follow these steps.

1. In the left menu, click **Customers** (by default, **Customer-Individual** is selected).
2. Click **Add Customer**.

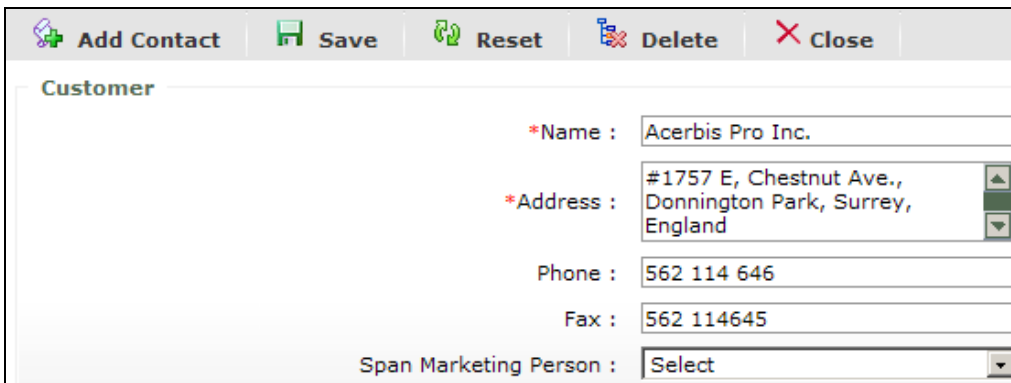
Search
 Customer Name : Span Marketing Person : Select

Name	Address	Span Marketing Person
<input type="checkbox"/> Magnet Marelli	#152, Giancarlo Ln., Isla de Roma, Rome, Italy	Jeremy Brown
<input type="checkbox"/> Amsoil Chaparal Corporation	#6464, Suite-04, Palm Beach Blvd., Palm Beach, Miami, FL	
<input type="checkbox"/> Acerbis Pro Inc.	#1757 E, Chestnut Ave., Donnington Park, Surrey, England	Jeremy Brown
<input type="checkbox"/> Renthal BudLight KTM	Chateau de Laux, Bordeaux, Rivera Plantaganet, France	

3. In the following screen, enter values in the fields mentioned below.

Customer
 *Name :
 *Address :
 Phone :
 Fax :
 Span Marketing Person : Select

- **Name** – Enter the name of the customer
 - **Address** – Enter the address of the customer
 - **Phone** – Enter the telephone number of the customer
 - **Fax** – Enter the fax number of the customer
 - **Span Marketing Person** – Enter the name of the SPAN marketing person
4. To save the details, click **Save**.
 5. Once you click **Save**, you can see the **Add Contact** and **Delete** buttons.



Customer

*Name : Acerbis Pro Inc.

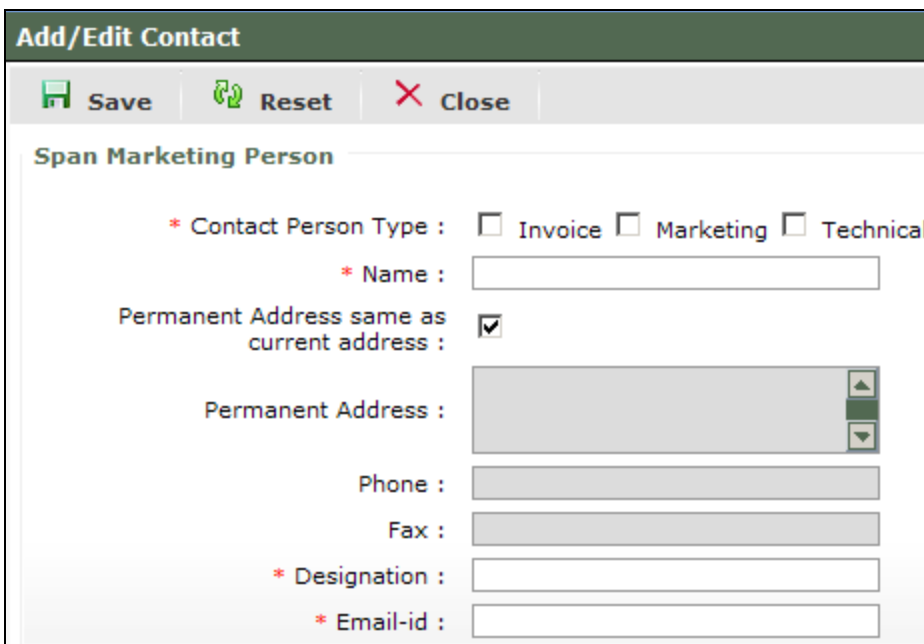
*Address : #1757 E, Chestnut Ave.,
Donnington Park, Surrey,
England

Phone : 562 114 646

Fax : 562 114645

Span Marketing Person : Select

6. Click **Add Contact**.



Add/Edit Contact

Save Reset Close

Span Marketing Person

* Contact Person Type : ☐ Invoice ☐ Marketing ☐ Technical

* Name :

Permanent Address same as current address : ☒

Permanent Address :

Phone :

Fax :

* Designation :

* Email-id :

7. In the **Add/Edit Contact** pop-up, for the **Contact Person Type** field, select the checkbox for an option.
8. For the **Name** field, enter the name of the contact person.
9. If the permanent address of the contact person is the same as the current address, select the checkbox for the **Permanent Address same as current address** field.
10. If the permanent address is different from the current address (do not select the checkbox), in the **Permanent Address** field, enter the permanent address of the contact person.
11. For the **Phone** field, enter the telephone number of the contact person.
12. For the **Fax** field, enter the fax number of the contact person.
13. For the **Designation** field, enter the designation of the contact person.
14. For the **Email-id** field, enter the email ID of the contact person.
15. To save the details, click **Save**.
16. To reset the values, click **Reset**.

17. To close the pop-up, click **Close**.
18. The saved details of the contact person are shown in the grid of the **Customer** screen.

<input type="checkbox"/> Name	Designation	Email-id
<input type="checkbox"/> Travis Pastrana	Marketing Lead	travis@acerbis.com

5.3. Edit Customer Details

To edit the details of a customer, follow these steps.

1. In the left menu, click **Customers**.
2. By default, **Customer-Individual** is selected.
3. The list of all customers is shown in the grid below the **Search** section.

Search
 Customer Name : Span Marketing Person :

<input type="checkbox"/> Name	Address	Span Marketing Person
<input type="checkbox"/> Maquet Marenelli	#152, Giancarlo Ln., Isla de Roma, Rome, Italy	Jeremy Brown
<input type="checkbox"/> Amsoil Chaparral Corporation	#6464, Suite-04, Palm Beach Blvd., Palm Beach, Miami, FL	Jeremy Brown
<input type="checkbox"/> Acerbis Pro Inc.	#1757 E, Chestnut Ave., Donnington Park, Surrey, England	Jeremy Brown
<input type="checkbox"/> Renthal BudLight KTM	Chateau de Laux, Bordeaux, Rivera Plantaganet, France	

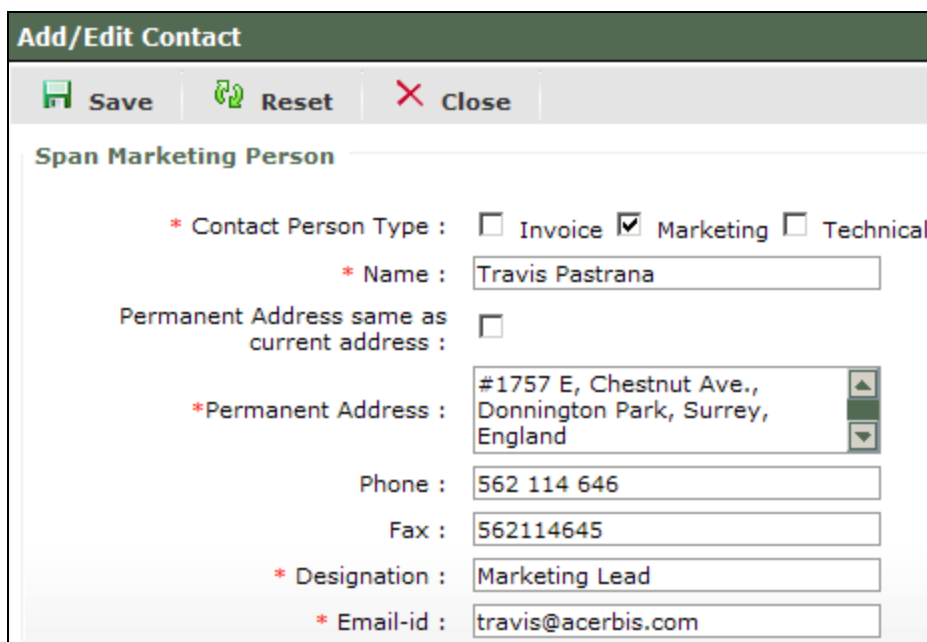
4. To search for a specific customer, in the **Search** section, enter the **Customer Name** and select the **Span Marketing Person**.
5. Click **Search**.
6. From the grid below the **Search** section, under **Name** column, click the customer name link.

Customer
 *Name :
 *Address :
 Phone :
 Fax :
 Span Marketing Person :

<input type="checkbox"/> Name	Designation	Email-id
<input type="checkbox"/> Tyler Evans	Chief Invoice Head	evans@chapparral_amsoil.com

7. In the **Customer** screen, edit the fields mentioned below.
 - **Name** – Edit the name of the customer
 - **Address** – Edit the address of the customer
 - **Phone** – Edit the telephone number of the customer
 - **Fax** – Edit the fax number of the customer

- **Span Marketing Person** - Edit the name of the SPAN marketing person
8. To save the changes, click **Save**.
 9. To edit the details of the contact person, from the grid in the **Customer** screen, under **Name** column, click the name of the contact person.
 10. In the **Add/Edit Contact** pop-up, edit the fields mentioned below.
 - **Contact Person Type** – Edit the checkbox for this field
 - **Name** – Edit the name of the contact person
 - **Permanent Address same as current address** – If the permanent address of the contact is same as the current address, select the checkbox for this field (if you select this checkbox, the **Permanent Address**, **Phone** and **Fax** fields are disabled).
 - **Permanent Address** – Edit the permanent address
 - **Phone** – Edit the telephone number of the contact
 - **Fax** – Edit the fax number of the contact person
 - **Designation** – Edit the designation of the contact
 - **Email-id** – Edit the email ID of the contact



11. To save the changes, click **Save**.
12. To reset the values, click **Reset**.
13. To close the pop-up, click **Close**.

5.4. Delete Customer Details

To delete a customer details, follow these steps.

1. In the left menu, click **Customers**.
2. By default, **Customer-Individual** is selected.

3. In the grid below the **Search** section, under **Name** column, click the name link for the record you want to delete.
4. In the **Customer** screen, from the grid below, select the corresponding checkbox for the record you want to delete.

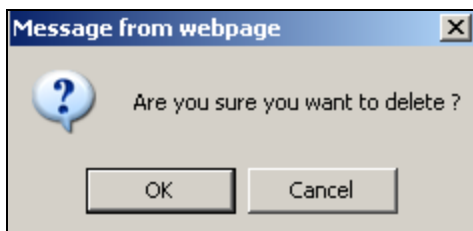
<input type="checkbox"/> Name	Designation	Email-id
<input type="checkbox"/> Travis Pastrana	Marketing Lead	travis@acerbis.com

5. Click **Delete**.
6. In the confirmation pop-up, click **OK**.
7. To close the screen, click **Close**.
8. From the grid below the **Search** section, select the corresponding checkbox for the record you want to delete.

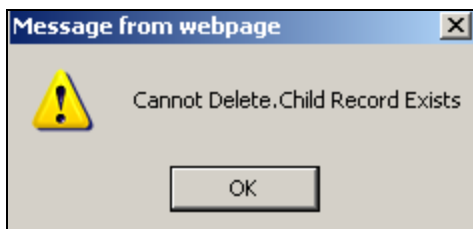
Search
 Customer Name : Span Marketing Person :

<input type="checkbox"/> Name	Address	Span Marketing Person
<input checked="" type="checkbox"/> Johnson	#54546, East London, England	
<input checked="" type="checkbox"/> Magnet Marenelli	#152, Giancarlo Ln., Isla de Roma, Rome, Italy	Jeremy Brown
<input type="checkbox"/> Amsoil Chaparral Corporation	#6464, Suite-04, Palm Beach Blvd., Palm Beach, Miami, FL	Nick Wey
<input type="checkbox"/> Acerbis Pro Inc.	#1757 E, Chestnut Ave., Donnington Park, Surrey, England	Jeremy Brown
<input type="checkbox"/> Renthall BudLight KTM	Chateau de Laux, Bordeaux, Rivera Plantaganet, France	Nick Wey

9. Click **Delete**.



10. In the confirmation pop-up, click **OK**.
11. If a child record exists, you can see the warning pop-up shown below.



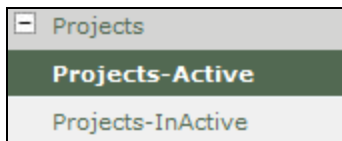
Note: Before you delete a customer record, ensure that the contact person's details related to the customer are deleted first. If the details of the contact person related to the customer continue to exist, then the application shows a warning pop-up (see above) indicating a child record existing within the customer's details.

6. Projects

The **Project** module allows you to view, add, edit and delete the details related to a specific project such as phase, start date, estimated end date, effort, etc. You can view projects that are active and inactive in the **Projects-Active** and **Projects-InActive** sub-modules respectively. Project that are in **Completed** or **Scrapped** statuses are said to be inactive. You can also copy a particular phase in a project to create a new phase.

To search for a specific project, follow these steps.

- From the left menu, click **Projects**.



- By default, **Projects-Active** sub-module is shown.



- In the **Search** section, enter values in the fields mentioned below.
 - Project Code** – Enter the project code
 - Project Name** – Enter the project name
 - Project Start Date** – Select the project start date using the calendar control
 - Project End Date** – Select the project end date using the calendar control
 - Platform** – Select the platform on which the project is based from the drop-down
 - Status** – Select the status of the project from the drop-down
 - Skills/Technologies** – Enter the skills or technologies involved in the project
- Click **Search**.
- The specific projects are shown in the grid below the **Search** section based of the search criteria.

Add New Project		Delete	
<input type="checkbox"/>	Project Code	Project Name	Customer Name
<input type="checkbox"/>	RS1685HLM	Database Solutions	Renthal BudLight KTM
<input type="checkbox"/>	FG4674YJE	Old School DB	Acerbis Pro Inc.
<input type="checkbox"/>	PRJTEA0001	ACC Torpedo	Amsoil Chaparal Corporation

6.1. Add New Project

To add a new project, follow the steps mentioned below.

- From the left menu, click **Projects**.

☐ Projects

Projects-Active

Projects-InActive

- By default, **Projects-Active** sub-module is shown.
- From below the **Search** section, click **Add New Project**.

<div> Add New Project Delete </div>		
<input type="checkbox"/>	Project Code	Project Name
<input type="checkbox"/>	RS1685HLM	Database Solutions
<input type="checkbox"/>	FG4674YJE	Old School DB
<input type="checkbox"/>	PRJTEA0001	ACC Torpedo
		Customer Name
		Renthal BudLight KTM
		Acerbis Pro Inc.
		Amsoil Chaparral Corporation

- By default, **Information** (tab) screen is shown first.
- Enter the details in the various fields mentioned below.

Save
 Reset
 Close

Information

Resource

Phase

CustomerInfo

Skills/Technologies

Reusable Component


KeyFeature

Customer Comments




*Project Code : YK976ERB
 * Process Model : Maintenance Support
 *Billing Type : Time & Material
 * Project Manager : Ricky Carmichael
 * Project Start Date : 09/01/2009 (mm/dd/yyyy)
 * Project Esti. End Date : 12/31/2013 (mm/dd/yyyy)
 Project Act. End Date : (mm/dd/yyyy)
 Architecture : N-Tier
 Methodology : OTHERS
 Life Cycle : Select
 * Project Status : In Progress
 * Delivery Model : off-shore
 Project Unit : Select
 Project Description : This is the project repository for the Internal Projects of SPAN - the backbone of SPAN!
 We support all the members of SPAN in providing them automation of processes and in enabling a comfortable work space.
 Relationship To Other Projects :
 Customer Imposed Constraints and Limitations :

*Project Name : Amsoil Chapparral
 * Platform : OTHERS
 Project Leader : Ricky Carmichael
 Quality Manager : Ricky Carmichael
 * Domain : Other
 *Complexity : High
 * Customer Name : Internal Customer
 Size : Select
 * Director : Jamie Jhonson
 * Division Unit : ASG

- **Project Code** – Enter the project code
- **Project Name** – Enter the project name
- **Process Model** – Select the process model from the drop-down
- **Platform** – Select the platform from the drop-down
- **Billing Type** – Select the billing type from the drop-down
- **Project Leader** – Select the project leader from the drop-down
- **Project Manager** - Select the project manager from the drop-down
- **Project Start Date** – Enter the project start date using the calendar control
- **Quality Manager** - Select the quality manager from the drop-down

- **Project Esti. End Date** - Select the project estimated end date using the calendar control
 - **Domain** - Select the domain from the drop-down
 - **Project Act. End Date** - Select the project actual end date using the calendar control (entered only at the closure of the project and not while creating the project)
 - **Complexity** - Select the complexity from the drop-down
 - **Architecture** - Select the architecture from the drop-down
 - **Customer Name** - Select the customer name from the drop-down
 - **Methodology** - Select the methodology from the drop-down
 - **Size** - Select the size from the drop-down
 - **Life Cycle** - Select the life cycle from the drop-down
 - **Project Status** - Select the project status from the drop-down
 - **GM** - Select the group manager from the drop-down
 - **Delivery Model** - Select the delivery model from the drop-down
 - **Division Unit** - Select the division unit from the drop-down
 - **Project Unit** - Select the project unit from the drop-down
 - **Project Description** - Enter the project description
 - **Relationship To Other Projects**: Enter the relationship of the selected project to other projects
 - **Customer Imposed Constraints and Limitations**: Enter the customer imposed constraints and limitations
6. To add the details of the customer, right next to the **Customer Name** field, click the  icon.
7. In the **Customer** pop-up, enter values in the fields mentioned below.

Customer

 Save
 Reset
 Close

* Customer Name :

* Customer Address :

Phone :

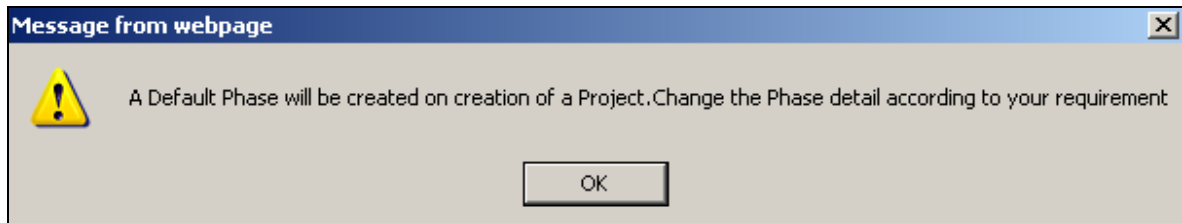
Fax :

Span Marketing Person :

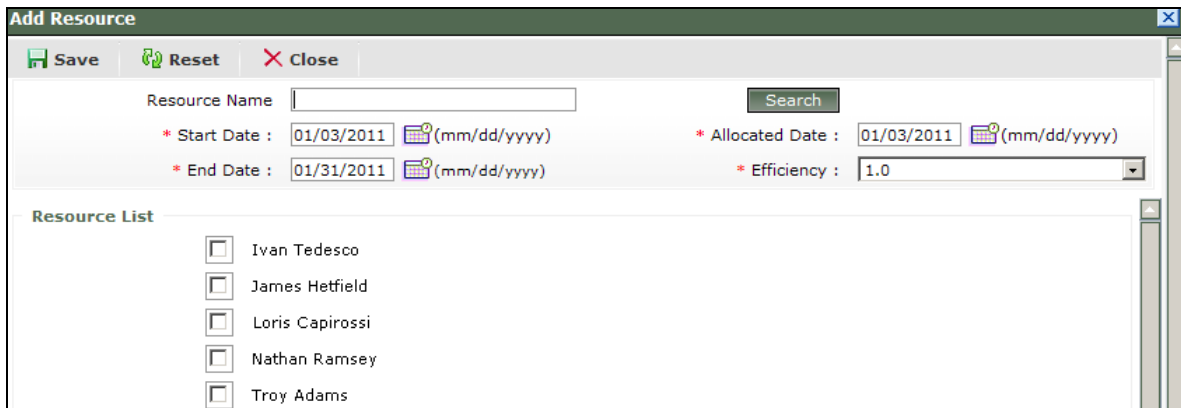
Select

- **Customer Name** - Enter the customer name
- **Customer Address** - Enter the customer address
- **Phone** - Enter the customer's telephone number
- **Fax** - Enter the customer's fax number





- **Span Marketing Person** – Select the SPAN marketing person from the drop-down
8. To save the details, in the **Customer** pop-up, click **Save** (you can add the customer's details in the **Customer** module also).
 9. In the **Information** screen, click **Save**.
 10. Once you click **Save**, you can see the pop-up shown below.



11. In the pop-up, click **OK**.
12. To add resources to the created project, click **Resource** tab.
13. Click **Add Resource**.


 A screenshot of the 'Add Resource' pop-up window. At the top, there are three buttons: 'Save' (with a green floppy disk icon), 'Reset' (with a green circular arrow icon), and 'Close' (with a red X icon). Below these is a 'Resource Name' text field and a 'Search' button. The form contains several fields with red asterisks indicating required fields: '* Start Date' (01/03/2011), '* End Date' (01/31/2011), '* Allocated Date' (01/03/2011), and '* Efficiency' (1.0). Each date field has a calendar icon and a '(mm/dd/yyyy)' format hint. Below the form fields is a section titled 'Resource List' containing a list of names with checkboxes: Ivan Tedesco, James Hetfield, Loris Capirossi, Nathan Ramsey, and Troy Adams.

14. In the **Add Resource** pop-up, click **Search**.
15. The **Resource List** section shows the names of all the employees.
16. Select the corresponding checkbox for the resource you want to add (you can add multiple resources simultaneously).
17. The **Start Date** and **Allocated Date** fields, by default, show the project start date and the **End Date** field shows the project end date.
18. For the **Efficiency** field, select the efficiency level from the drop-down.
19. To save the details, click **Save**.
20. The newly added resources are shown in the grid below the **Project Details** section.
21. To add the resource details, from the grid, under **Resource Name** column, click the resource name link for the resource, whose details you want to add.

 Add Resource
  Delete
  Export
  Close

Information **Resource** Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : GUI007GD Project Name : THOR MX




Resource

<input type="checkbox"/>	Resource Name	Start Date
<input type="checkbox"/>	Ivan Tedesco	01/03/2011
<input type="checkbox"/>	Nathan Ramsey	01/03/2011
<input type="checkbox"/>	Loris Capirossi	01/03/2011
<input type="checkbox"/>	Troy Adams	01/03/2011

22. In the **Edit Resource** pop-up, for the **Mail** field, select an option from the drop-down.
23. For the **Project Responsibilities** field, enter the responsibilities of the resource.
24. For the **Customer Liasion Responsibilities** field, enter the customer liasion responsibilities.
25. For the **Quality Control Responsibilities** field, enter the quality control responsibilities.

Note: All other fields already show the details, which you can edit, if necessary. The **Resource Name** and **Designation** fields cannot be edited.

Edit Resource

 Save
  Reset
  Close




Resource Detail

Details

* Resource Name : Kishan G
 * Start Date : 08/30/2011 (mm/dd/yyyy)
 * End Date : 08/30/2012 (mm/dd/yyyy)
 Designation : Team Leader

* Mail : Select
 * Allocated Date : 08/30/2011 (mm/dd/yyyy)
 * Efficiency : 1.0
 * Project Responsibilities :
 * Customer Liaison Responsibilities :
 * Quality Control Responsibilities :

26. To save the details, click **Save**.
27. To add phase details for the project, click the **Phase** tab.
28. In the **Phase** tab, below **Project Details** section, the grid shows the **DefaultPhase** containing three modules, automatically created.

 Add New Phase
  Delete
  Close

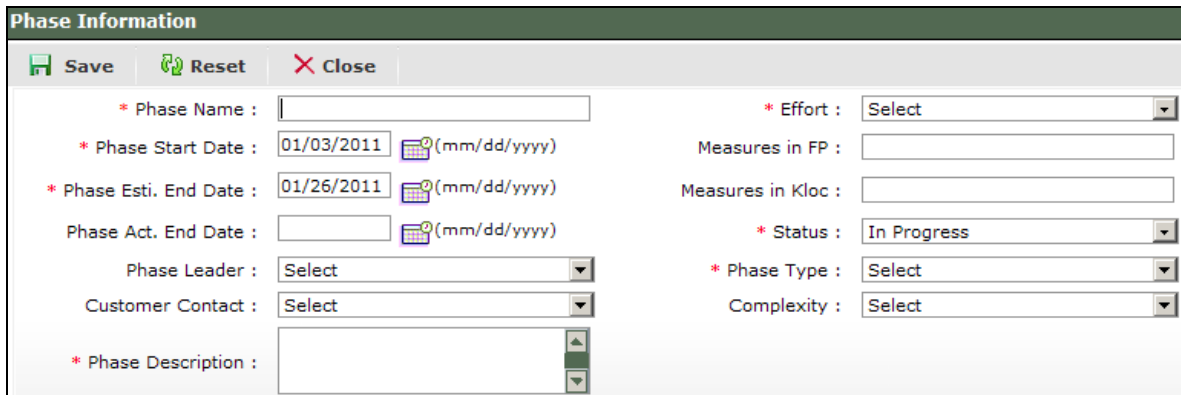
Information Resource **Phase** CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : GF6666JF15 Project Name : Azonic Activators

<input type="checkbox"/>	Phase Name	Start Date	Esti. End Date	Status
<input type="checkbox"/>	DefaultPhase	01/03/2011	01/26/2011	In Progress

29. To add a new phase, click **Add New Phase** (you may also rename the system created default phase).
30. In the **Phase Information** pop-up, enter values in the fields mentioned below.



Phase Information

Save Reset Close

* Phase Name :

* Phase Start Date : 01/03/2011 (mm/dd/yyyy)

* Phase Esti. End Date : 01/26/2011 (mm/dd/yyyy)

Phase Act. End Date : (mm/dd/yyyy)

Phase Leader : Select

Customer Contact : Select

* Phase Description :

* Effort : Select

Measures in FP :

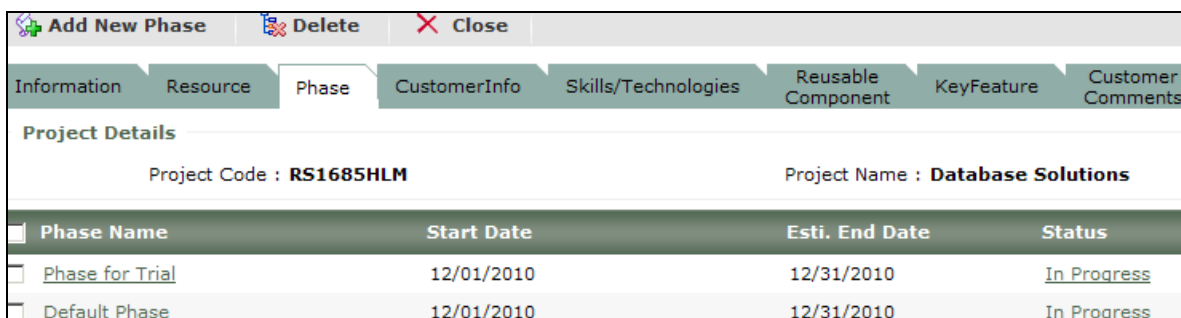
Measures in Kloc :

* Status : In Progress

* Phase Type : Select

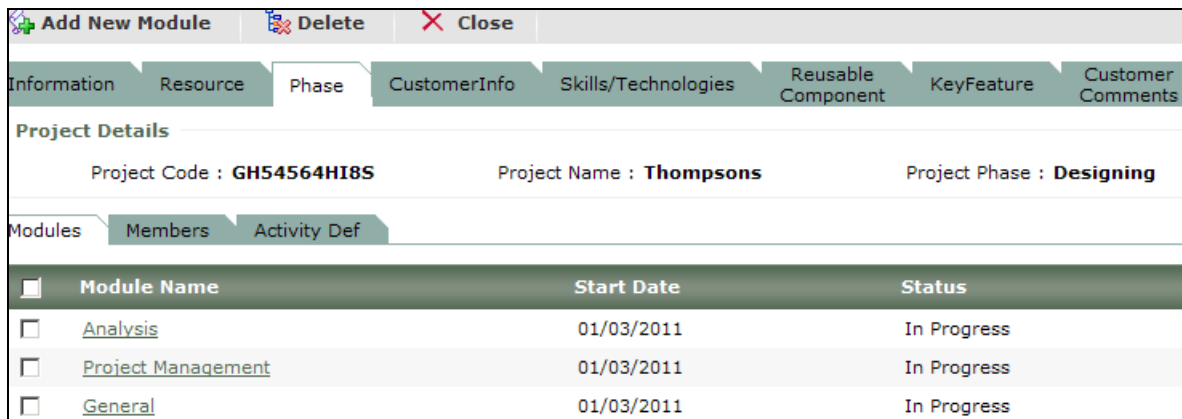
Complexity : Select

- **Phase Name** – Enter the phase name
 - **Effort** – Select the effort from the drop-down
 - **Phase Start Date** – By default, the project start date is shown
 - **Measures in FP** – Enter the measures taken in functional points
 - **Phase Esti. End Date** – By default, the project estimated end date is shown
 - **Measures in Kloc** – Enter the measures taken in Kloc
 - **Phase Act. End Date** – Select the phase actual end date using the calendar control (this information is entered only at the closure of the phase and not while creating the phase)
 - **Status** – Select the status from the drop-down
 - **Phase Leader** – Select the project leader from the drop-down
 - **Phase Type** – Select the phase type from the drop-down
 - **Customer Contact** – Select the customer contact person from the drop-down
 - **Complexity** – Select the complexity from the drop-down
 - **Phase Description** – Enter the phase description
31. To save the details, in the **Phase Information** pop-up, click **Save**.
 32. To close the pop-up, click **Close**.
 33. The newly added phase details are shown in the grid below the **Project Details** section, as shown below.



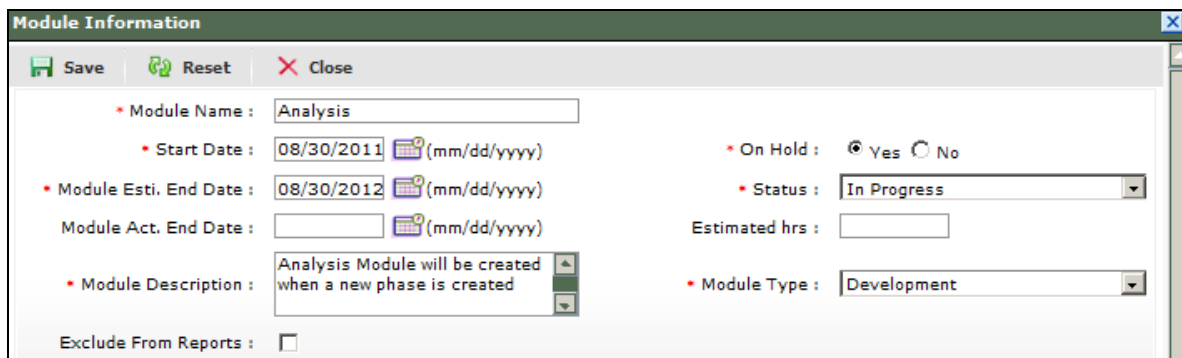
Project Details			
Project Code : RS1685HLM		Project Name : Database Solutions	
Phase Name	Start Date	Esti. End Date	Status
Phase for Trial	12/01/2010	12/31/2010	In Progress
Default Phase	12/01/2010	12/31/2010	In Progress

34. To add a module (besides the three system created modules), from the **Status** column, click the corresponding **In Progress** status link for the phase.
35. In the following screen, click **Add New Module**.



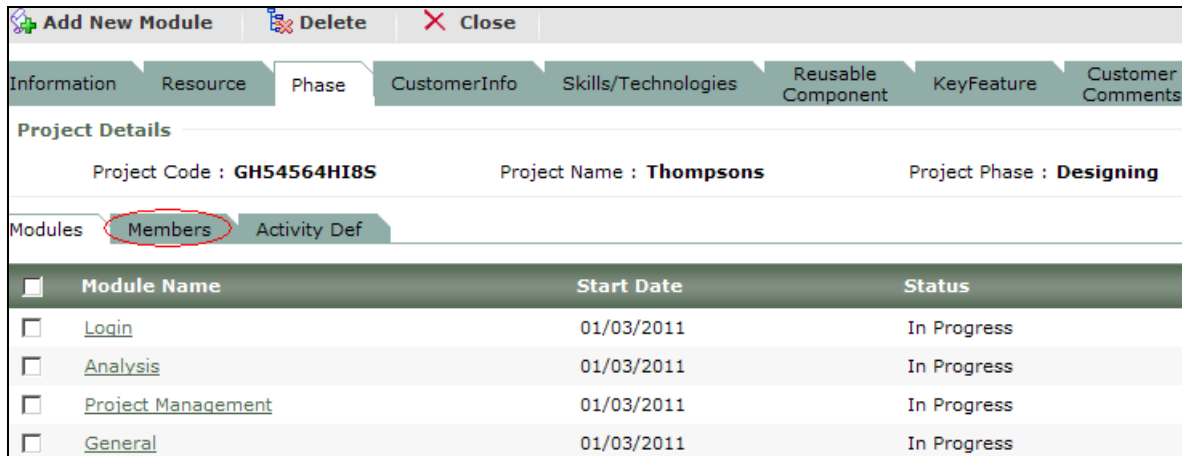
Module Name	Start Date	Status
Analysis	01/03/2011	In Progress
Project Management	01/03/2011	In Progress
General	01/03/2011	In Progress

36. In the **Module Information** pop-up, enter values in the fields mentioned below.



- **Module Name** – Enter the module name
 - **Start Date** – By default, the project start date is shown
 - **On Hold** – Select the radio button (by default, **No** is selected)
 - **Module Esti. End Date** – By default, the project estimated end date is shown
 - **Status** – Select the status from the drop-down (by default, **In Progress** is selected)
 - **Module Act. End Date** – Select the actual module end date using the calendar control (this information is entered only at the closure of the module and not while creating the module)
 - **Estimated hrs** – Enter the estimated hours of work
 - **Module Description** – Enter the module description
 - **Module Type** – Select the module type from the drop-down
 - **Exclude From Reports** – To exclude the module from reports, select the checkbox
37. To save the details, click **Save**.
38. The newly created module is included in the grid along with the three system created modules.

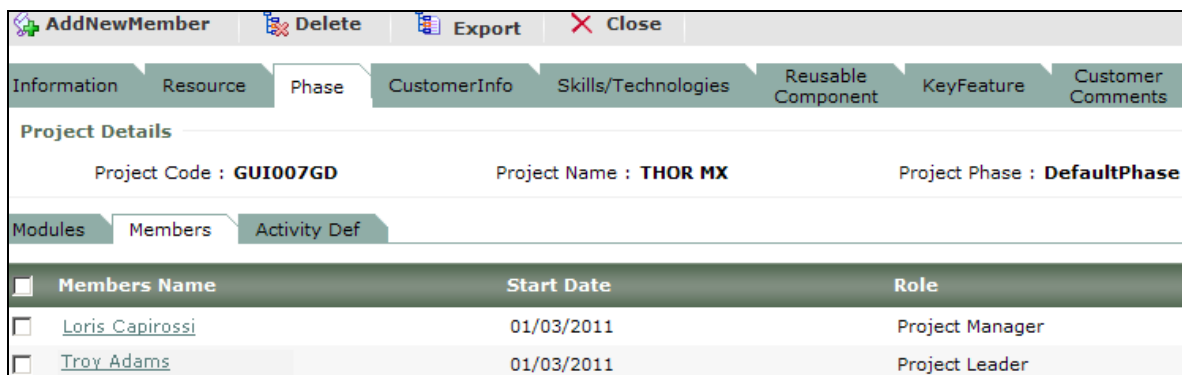
39. To add a member to the created module, from below the **Project Details** section, click **Members** tab.



The screenshot shows the 'Project Details' section with the 'Members' tab selected. The project code is GH54564HI8S, the project name is Thompsons, and the project phase is Designing. Below the tabs, there is a table of modules.

Module Name	Start Date	Status
<input type="checkbox"/> Login	01/03/2011	In Progress
<input type="checkbox"/> Analysis	01/03/2011	In Progress
<input type="checkbox"/> Project Management	01/03/2011	In Progress
<input type="checkbox"/> General	01/03/2011	In Progress

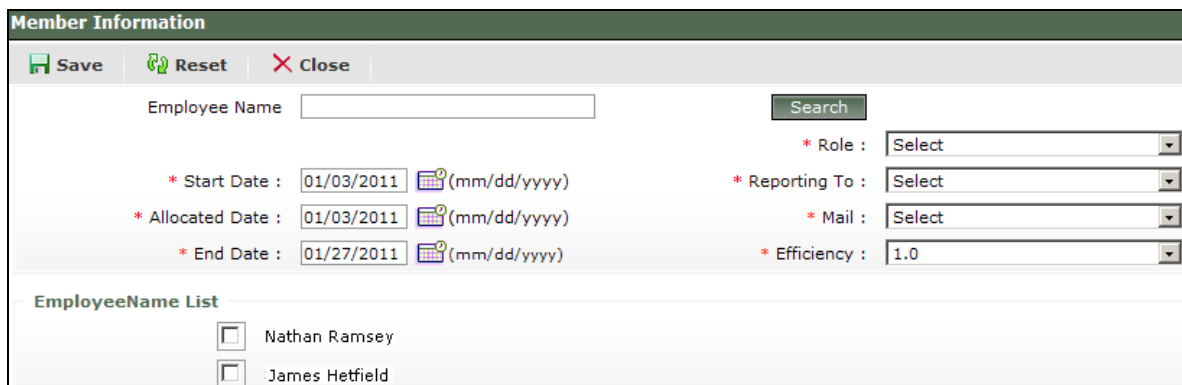
40. In the **Members** tab, click **AddNewMember**.



The screenshot shows the 'AddNewMember' pop-up window. The project code is GUI007GD, the project name is THOR MX, and the project phase is DefaultPhase. Below the tabs, there is a table of members.

Members Name	Start Date	Role
<input type="checkbox"/> Loris Capirossi	01/03/2011	Project Manager
<input type="checkbox"/> Troy Adams	01/03/2011	Project Leader

41. In the **Member Information** pop-up, click **Search** to view the list of available employees (the list of employee names shown here is completely based on the resources that you add in the **Resource** tab).



The screenshot shows the 'Member Information' pop-up window. It has fields for Employee Name, Start Date, Allocated Date, End Date, Role, Reporting To, Mail, and Efficiency. Below these fields is a list of employees with checkboxes.

Employee Name: Search

* Start Date: 01/03/2011 (mm/dd/yyyy) * Role: Select

* Allocated Date: 01/03/2011 (mm/dd/yyyy) * Reporting To: Select

* End Date: 01/27/2011 (mm/dd/yyyy) * Mail: Select

* Efficiency: 1.0

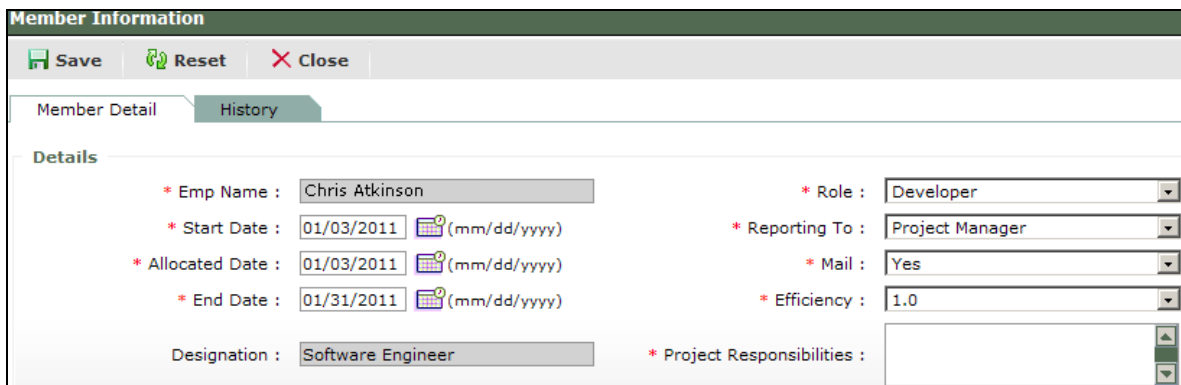
EmployeeName List

☐ Nathan Ramsey

☐ James Hetfield

42. From the **EmployeeName List**, select the corresponding checkbox for the employees whom you want to add as members.
43. Enter values in the fields mentioned below.

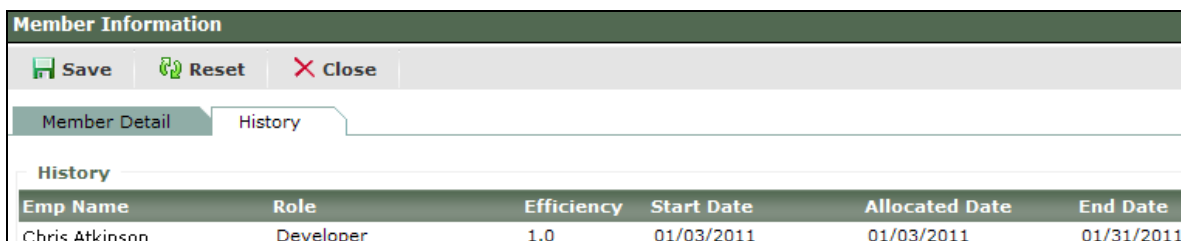
- **Employee Name** – Enter the name of the employee or to add multiple employees, click **Search** to view the list of available employees and select the corresponding checkbox for the employee you want to add as a member
 - **Role** – Select the role from the drop-down
 - **Start Date** – By default, the project start date is shown
 - **Reporting To** – Select an option from the drop-down (the list of designations shown in the drop-down is based on the option you select for the **Role** field)
 - **Allocated Date** – By default, the project start date is shown
 - **Mail** – Select an option from the drop-down (if you select **Yes**, emails will be sent to the member and if you select **No**, then no emails will be sent to the member)
 - **End Date** – By default, the project end date is shown
 - **Efficiency** – Select the efficiency level from the drop-down
44. To save the details, click **Save**.
45. The names of the newly added members are shown in the grid.
46. To add the project responsibilities for a member, from the **Members Name** column of the grid, click the member name link.
47. In the **Member Information** pop-up, under **Member Detail** tab, for the **Project Responsibilities** field, enter the project responsibilities of the member.



The screenshot shows the 'Member Information' pop-up window with the 'Member Detail' tab selected. The window has a title bar with 'Save', 'Reset', and 'Close' buttons. Below the title bar, there are two tabs: 'Member Detail' and 'History'. The 'Member Detail' tab is active, showing a form with the following fields:

- * Emp Name : Chris Atkinson
- * Start Date : 01/03/2011 (mm/dd/yyyy)
- * Allocated Date : 01/03/2011 (mm/dd/yyyy)
- * End Date : 01/31/2011 (mm/dd/yyyy)
- Designation : Software Engineer
- * Role : Developer
- * Reporting To : Project Manager
- * Mail : Yes
- * Efficiency : 1.0
- * Project Responsibilities : (empty text area)

48. To view the history of the member's project details, click the **History** tab.



The screenshot shows the 'Member Information' pop-up window with the 'History' tab selected. The window has a title bar with 'Save', 'Reset', and 'Close' buttons. Below the title bar, there are two tabs: 'Member Detail' and 'History'. The 'History' tab is active, showing a table with the following data:

Emp Name	Role	Efficiency	Start Date	Allocated Date	End Date
Chris Atkinson	Developer	1.0	01/03/2011	01/03/2011	01/31/2011

49. To save the project responsibilities of the member, click **Save**.
50. To add the activity definition for the project, click the **Activity Def** tab.

AddActivity	Save	Reset	Delete	Compute Actual From TimeSheet	Close
<div> Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments </div>					
Project Details <div> Project Code : GUI007GD Project Name : THOR MX Project Phase : DefaultPhase </div>					
<div> Modules Members Activity Def </div>					
ActivityDetails	SubActivity Detail	Estimated Effort	Total Actual Effort	Default	<input type="checkbox"/>
Total Effort :		0 ManHrs	0 ManHrs		
Total Effort for other unplanned activities :					







51. Click **AddActivity**.
52. Once you click **AddActivity**, you can see that a new row is inserted in the grid (see image below).
53. Under the **ActivityDetails** column of the grid, select an activity from the drop-down.
54. Under the **SubActivity Detail** column of the grid, select a sub-activity from the drop-down (the options shown in this drop-down depends on the activity that you select).
55. Under the **Estimated Effort** column, enter the estimated effort for the activity.

AddActivity	Save	Reset	Delete	Compute Actual From TimeSheet	Close
<div> Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments </div>					
Project Details <div> Project Code : GUI007GD Project Name : THOR MX Project Phase : DefaultPhase </div>					
<div> Modules Members Activity Def </div>					
ActivityDetails	SubActivity Detail	Estimated Effort	Total Actual Effort	Default	<input type="checkbox"/>
Select	Select	0.0	0.0	<input type="checkbox"/>	<input type="checkbox"/>
Total Effort :		0 ManHrs	0 ManHrs		
Total Effort for other unplanned activities :					

56. Once you enter the **Estimated Effort**, the **Total Effort** box in the same column shows the total time (effort) spent on all the activities in terms of man-hours.

AddActivity	Save	Reset	Delete	Compute Actual From TimeSheet	Close
<div> Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments </div>					
Project Details <div> Project Code : PL256GUI Project Name : Airoh Project Phase : 2010 - Q1 </div>					
<div> Modules Members Activity Def </div>					
ActivityDetails	SubActivity Detail	Estimated Effort	Total Actual Effort	Default	<input type="checkbox"/>
Coding	Debugging	8.0	0.0	<input type="checkbox"/>	<input type="checkbox"/>
Documentation	Help File Preparation	10.0	0.0	<input type="checkbox"/>	<input type="checkbox"/>
Total Effort :		0 ManHrs	0 ManHrs		
Total Effort for other unplanned activities :					

57. To calculate the **Total Actual Effort** (actual effort for the activity as entered by the resource in **Time Sheet** module), click **Compute Actual From TimeSheet**.

 AddActivity
  Save
  Reset
  Delete
  Compute Actual From TimeSheet
  Close

Information Resource **Phase** CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : **PL256GUI** Project Name : **Airoh** Project Phase : **2010 - Q1**


Modules **Members** Activity Def

ActivityDetails	SubActivity Detail	Estimated Effort	Total Actual Effort	Default	
Coding	Debugging	8.0	1	<input type="checkbox"/>	<input type="checkbox"/>
Documentation	Help File Preparation	10.0	5	<input type="checkbox"/>	<input type="checkbox"/>
Total Effort :		18 ManHrs	6 ManHrs		
Total Effort for other unplanned activities :		17 ManHrs			

58. The **Total Actual Effort** column shows the total actual effort for each activity as well as the total actual effort for all the activities put together.

59. The **Total Effort for other unplanned activities** box shows the effort (time spent) for unplanned activities.

60. To view the details of the customer of the project, click **CustomerInfo** tab.

 Close

Information Resource Phase **CustomerInfo** Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : **RS1685HLM** Project Name : **Database Solutions**



Customer Detail

Name : Renthall BudLight KTM
 Address : Chateau de Laux, Bordeaux, Rivera Plantaganet, France
 Phone : 5464646145
 Fax : 5464646145
 Span Marketing Person : Nick Wey

Name	Email-id
Ralfe Lazarus	lazarusr@renthalbud.com

61. The **Customer Detail** section shows the details related to the customer and the grid below the **Customer Detail** section shows the name and email address of the customer contact person.



62. To add the skills and technologies related to the project, click the **Skills/Technologies** tab.

 Add Skill
  Close

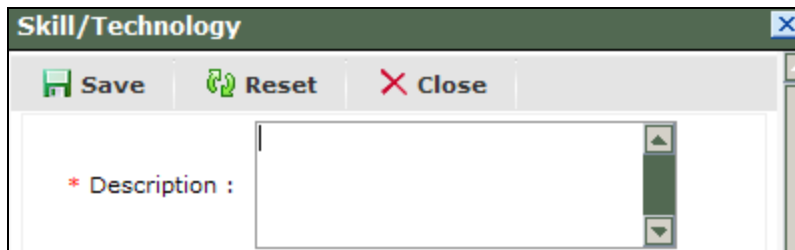
Information Resource Phase CustomerInfo **Skills/Technologies** Reusable Component KeyFeature Customer Comments

Project Details

Project Code : **RS1685HLM** Project Name : **Database Solutions**

Skill Name	Delete
SQL with reporting	
Java technology with Struts 1.1 and hibernate configuration.	

63. Click **Add Skill**.



Skill/Technology

Save Reset Close

* Description :

64. In the **Skill/Technology** pop-up, for the **Description** field, enter the skills and technologies involved.
65. To save the details, click **Save**.
66. To add reusable components to the project, click the **Reusable Component** tab.



ADD ReusableComponent Close

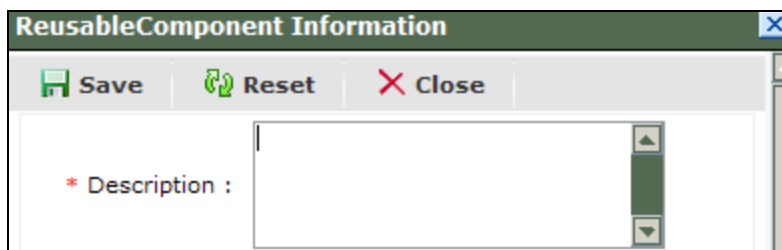
Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : **RS1685HLM** Project Name : **Database Solutions**

Reusable Name	Delete
Component for expand and collapse.	
Created a reusable component for the grid and Pagination.	

67. Click **ADD ReusableComponent**.

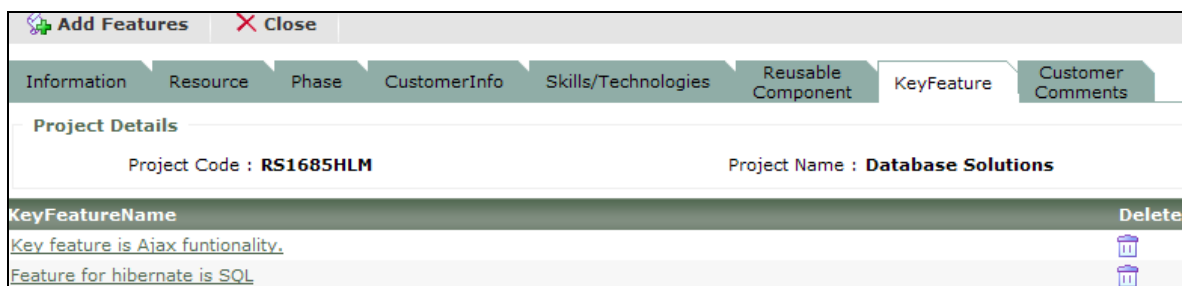


ReusableComponent Information

Save Reset Close

* Description :

68. In the **ReusableComponent Information** pop-up, for the **Description** field, enter the reusable components.
69. To save the details, click **Save**.
70. To add the key features of the project, click the **KeyFeature** tab.





Add Features Close

Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : **RS1685HLM** Project Name : **Database Solutions**

KeyFeatureName	Delete
Key feature is Ajax funtionality.	
Feature for hibernate is SQL	

71. Click **Add Features**.



Add Edit Key-Feature

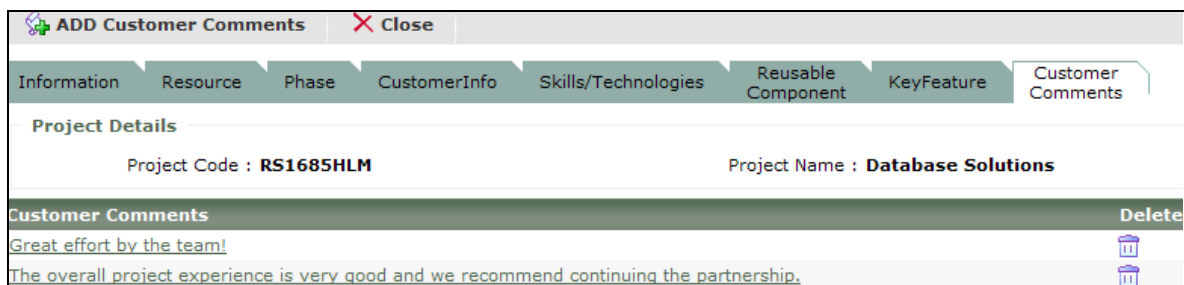
Save Reset Close

* Description :

72. In the **Add Edit Key-Feature** pop-up, for the **Description** field, enter the key features.

73. To save the details, click **Save**.

74. To add customer comments, click the **Customer Comments** tab.



ADD Customer Comments Close

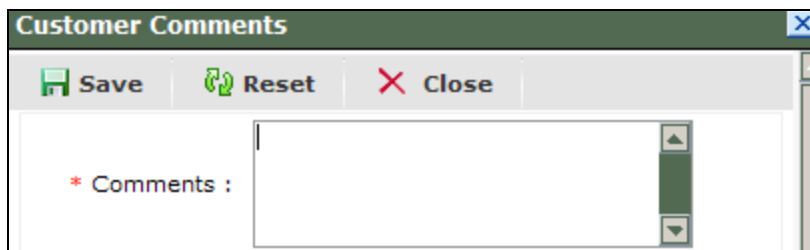
Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : RS1685HLM Project Name : Database Solutions

Customer Comments	Delete
Great effort by the team!	
The overall project experience is very good and we recommend continuing the partnership.	

75. Click **ADD Customer Comments**.



Customer Comments

Save Reset Close

* Comments :

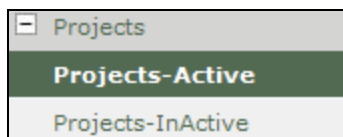
76. In the **Customer Comments** pop-up, for the **Comments** field, enter the comments given by the customer.

77. To save the details, click **Save**.

6.2. Edit Project Details

To edit a project details, follow these steps.

1. From the left menu, click **Projects**.



Projects

Projects-Active

Projects-InActive

2. By default, **Projects-Active** sub-module is shown.

3. In the **Search** section, enter the search criteria to find a specific project, or to view the list of all the projects, without entering the search criteria, click **Search**.

Search

Project Code : Project Name :

Project Start Date : (mm/dd/yyyy) Project End Date : (mm/dd/yyyy)

Platform : Status :

Skills/Technologies :

Project Code	Project Name	Customer Name
GUI007GD	THOR MX	Lola
HJU5654GH	Silkolene	Richie
GH54564HI8S	Thompsons	Jamie
GF6666JF15	Azonic Activators	Internal Tools
RS1685HLM	Database Solutions	Renthal BudLight KTM
FG4674YJE	Old School DB	Acerbis Pro Inc.
PRJTEA0001	ACC Torpedo	Amsoil Chaparral Corporation

- The grid shows the list of projects that meet the search criteria.
- In the grid, from the **Project Code** column, click the specific project code link that you want to edit.
- In the following **Information** (tab) screen, edit the fields mentioned below.

Information **Resource** **Phase** **CustomerInfo** **Skills/Technologies** **Reusable Component** **KeyFeature** **Customer Comments**

*Project Code : YK976ERB

*Project Name : Amsoil Chapparral

*Process Model : Maintenance Support

*Platform : OTHERS

*Billing Type : Time & Material

Project Leader : Ricky Carmichael

*Project Manager : Ricky Carmichael

Quality Manager : Ricky Carmichael

*Project Start Date : 09/01/2009 (mm/dd/yyyy)

*Project Esti. End Date : 12/31/2013 (mm/dd/yyyy)

*Domain : Other

Project Act. End Date : (mm/dd/yyyy)

*Complexity : High

Architecture : N-Tier

*Customer Name : Internal Customer

Methodology : OTHERS

Size : Select

Life Cycle : Select

*Project Status : In Progress

*Director : Jamie Jhonson

*Delivery Model : off-shore

*Division Unit : ASG

Project Unit : Select

Project Description : This is the project repository for the Internal Projects of SPAN - the backbone of SPAN!

We support all the members of SPAN in providing them automation of processes and in enabling a comfortable work space.

Relationship To Other Projects :

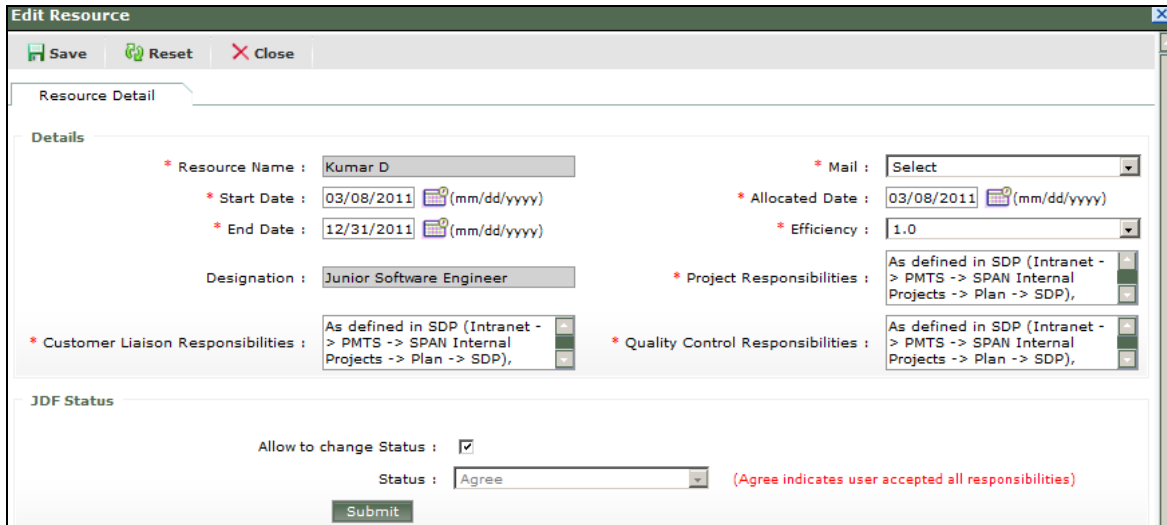
Customer Imposed Constraints and Limitations :

- **Project Code** – Edit the project code
- **Project Name** – Edit the project name
- **Process Model** – Select the process model from the drop-down
- **Platform** – Select the platform from the drop-down
- **Billing Type** – Select the billing type from the drop-down
- **Project Leader** – Select the project leader from the drop-down
- **Project Manager** – Select the project manager from the drop-down
- **Project Start Date** – Edit the project start date using the calendar control

- **Quality Manager** - Select the quality manager from the drop-down
 - **Project Esti. End Date** - Edit the project estimated end date using the calendar control
 - **Domain** - Select the domain from the drop-down
 - **Project Act. End Date** - Edit the project actual end date using the calendar control
 - **Complexity** - Select the complexity from the drop-down
 - **Architecture** - Select the architecture from the drop-down
 - **Customer Name** - Select the customer name from the drop-down
 - **Methodology** - Select the methodology from the drop-down
 - **Size** - Select the size from the drop-down
 - **Life Cycle** - Select the life cycle from the drop-down
 - **Project Status** - Select the project status from the drop-down
 - **GM** - Select the group manager from the drop-down
 - **Delivery Model** - Select the delivery model from the drop-down
 - **Division Unit** - Select the division unit from the drop-down
 - **Project Unit** - Select the project unit from the drop-down
 - **Project Description** - Edit the project description
 - **Relationship To Other Projects**: Edit the relationship of the selected project to other projects
 - **Customer Imposed Constraints and Limitations**: Edit the customer imposed constraints and limitations
7. To reset the values, before you click **Save**, click **Reset**.
 8. To save the details, click **Save**.
 9. To edit the resource details, click the **Resource** tab.
 10. From below the **Project Details** section, under the **Resource Name** column of the grid, click the resource name link for the resource, whose details you want to edit.

Add Resource		Delete		Export		Close	
Information	Resource	Phase	CustomerInfo	Skills/Technologies	Reusable Component	KeyFeature	Customer Comments
Project Details							
Project Code : GUI007GD				Project Name : THOR MX			
Resource							
<input type="checkbox"/>	Resource Name	Start Date					
<input type="checkbox"/>	Ivan Tedesco	01/03/2011					
<input type="checkbox"/>	Nathan Ramsey	01/03/2011					
<input type="checkbox"/>	Loris Capirossi	01/03/2011					
<input type="checkbox"/>	Troy Adams	01/03/2011					

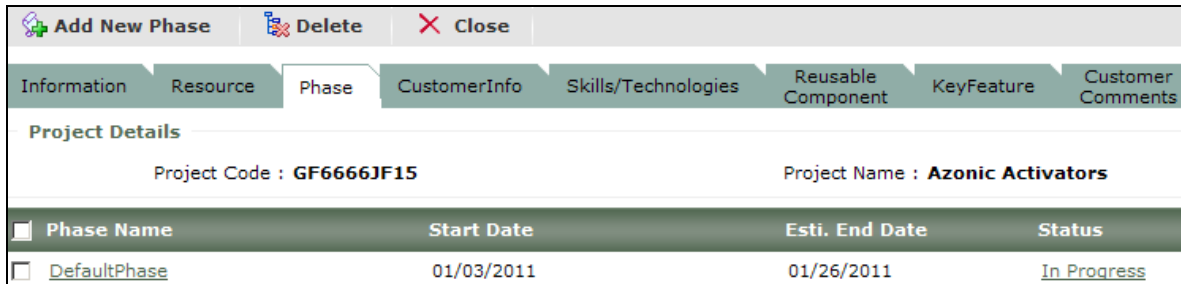
11. In the **Edit Resource** pop-up, edit the fields mentioned below.



- **Resource Name** – This field is shown in non-edit mode
 - **Mail** – Select an option from the drop-down (if you select **Yes** from the drop-down, the information changed is emailed to the resource)
 - **Start Date** – Edit the start date using the calendar control
 - **Allocated Date** – Edit the allocated date using the calendar control
 - **End Date** – Edit the end date using the calendar control
 - **Efficiency** – Edit the efficiency level
 - **Designation** – This field is shown in non-edit mode
 - **Project Responsibilities** – Edit the project responsibilities of the resource
 - **Customer Liasion Responsibilities** – Edit the customer liasion responsibilities
 - **Quality Control Responsibilities** – Edit the quality control responsibilities
12. To reset the values, before you click **Save**, click **Reset**.
 13. To save the details, click **Save**.
 14. In the **JDF Status** section, to change the status, select the checkbox for the **Allow to change Status**.

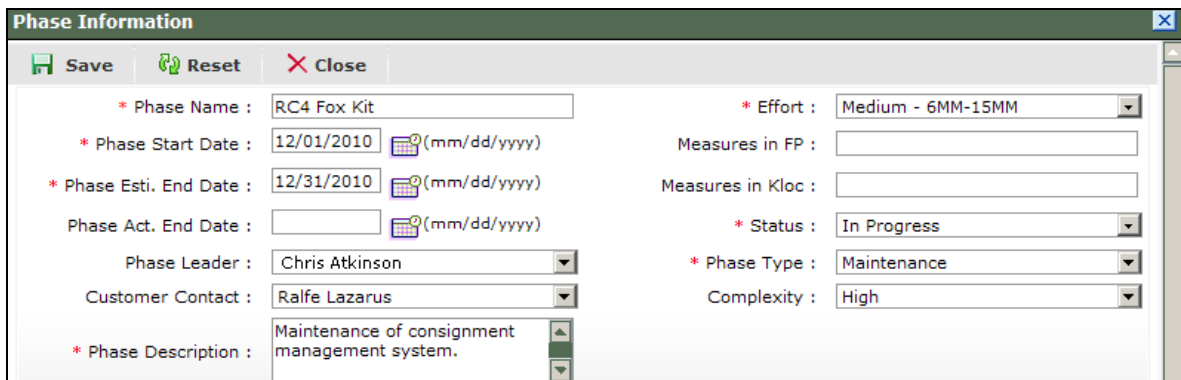
Note: Only the project GM, PM and PL can edit the **Allow to change Status** checkbox. If the **Allow to change Status** checkbox is not selected, the employee cannot edit the **Status** field. If the employee selects the **Disagree** option from the drop-down, the employee must enter the reason for disagreeing in the **Comments** field. Once the employee click **Submit**, the JDF status is freezed and an email is sent to the PM and PL.

15. Click **Submit**.
16. To edit the phase details, click the **Phase** tab.



Phase Name	Start Date	Esti. End Date	Status
DefaultPhase	01/03/2011	01/26/2011	In Progress

17. The grid below the **Project Details** section shows the **Phase Name**, **Start Date**, **Esti. End Date** and **Status** of the phase.
18. To edit the phase details, click the phase name link in the **Phase Name** column.
19. In the **Phase Information** pop-up, edit the fields mentioned below.



- **Phase Name** – Edit the phase name
 - **Effort** – Select the effort from the drop-down
 - **Phase Start Date** – Edit the project start date using the calendar control
 - **Measures in FP** – Edit the measures taken in functional points
 - **Phase Esti. End Date** – Edit the project estimated end date using the calendar control
 - **Measures in Kloc** – Edit the measures taken in Kloc
 - **Phase Act. End Date** – Edit the phase actual end date using the calendar control
 - **Status** – Select the status from the drop-down
 - **Phase Leader** – Select the project leader from the drop-down
 - **Phase Type** – Select the phase type from the drop-down
 - **Customer Contact** – Select the customer contact person from the drop-down
 - **Complexity** – Select the complexity from the drop-down
 - **Phase Description** – Edit the phase description
20. To reset the values, before you click **Save**, click **Reset**.
 21. To save the details, click **Save**.
 22. To edit the module details, member details and activity details, click the status link in the **Status** column.

Information Resource **Phase** CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : **GF6666JF15** Project Name : **Azonic Activators**

<input type="checkbox"/> Phase Name	Start Date	Esti. End Date	Status
<input type="checkbox"/> DefaultPhase	01/03/2011	01/26/2011	In Progress

23. By default, **Module** tab is selected and the grid below the **Project Details** section shows the module names, start dates and the status of the modules in the phase.

Information Resource **Phase** CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : **GH54564HI8S** Project Name : **Thompsons** Project Phase : **Designing**

Modules **Members** Activity Def

<input type="checkbox"/> Module Name	Start Date	Status
<input type="checkbox"/> Analysis	01/03/2011	In Progress
<input type="checkbox"/> Project Management	01/03/2011	In Progress
<input type="checkbox"/> General	01/03/2011	In Progress

24. To edit module details, from the grid, click the specific module name link in the **Module Name** column.
25. In the **Module Information** pop-up, edit the fields mentioned below.

Module Information

* Module Name :

* Start Date : (mm/dd/yyyy)
 * On Hold : ☐ Yes ☒ No

* Module Esti. End Date : (mm/dd/yyyy)
 * Status :

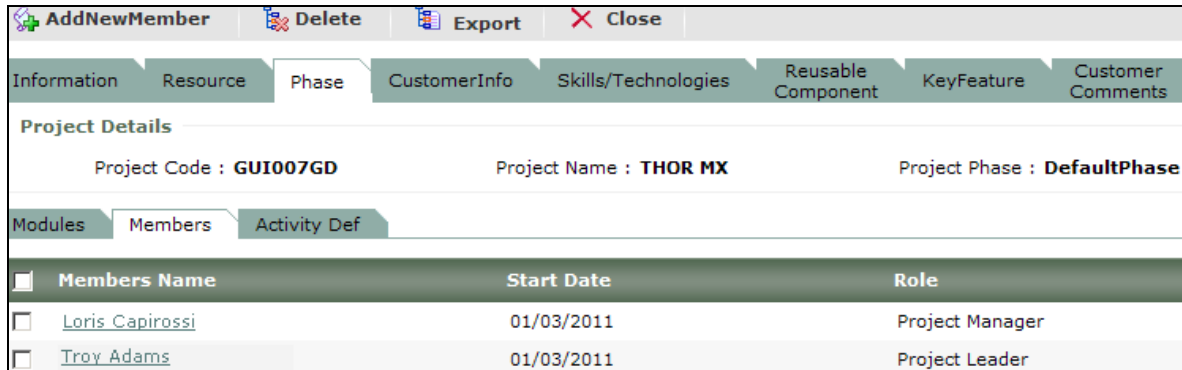
Module Act. End Date : (mm/dd/yyyy)
 Estimated hrs :

* Module Description :
* Module Type :

Exclude From Reports : ☒

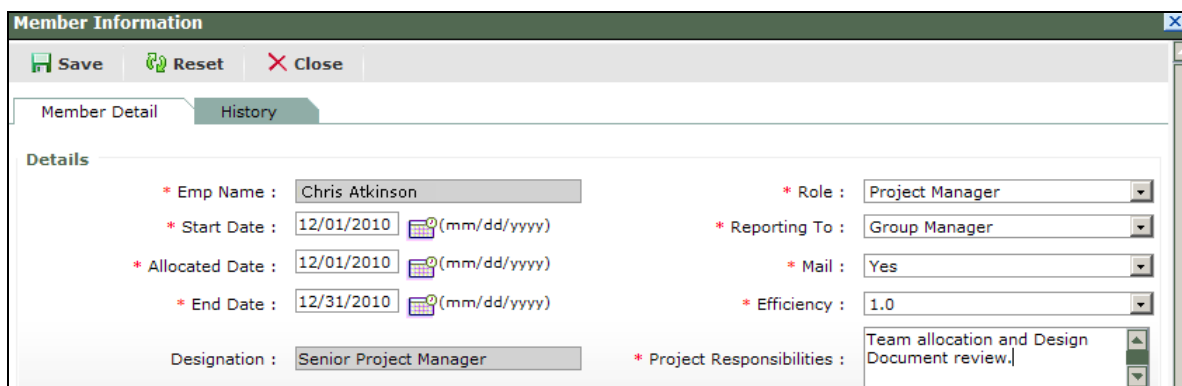
- **Module Name** – Edit the module name
- **Start Date** – Edit the project start date using the calendar control
- **On Hold** – Select the radio button (by default, **No** is selected)
- **Module Esti. End Date** – Edit the project estimated end date using the calendar control
- **Status** – Select the status from the drop-down (by default, **In Progress** is selected)
- **Module Act. End Date** – Edit the actual module end date using the calendar control

- **Estimated hrs** – Edit the estimated hours of work
 - **Module Description** – Edit the module description
 - **Module Type** – Select the module type from the drop-down
 - **Exclude From Reports** – To exclude the module from reports, select the checkbox
26. To reset the values, before you click **Save**, click **Reset**.
27. To save the details, click **Save**.
28. To edit member details, click the **Members** tab below the **Project Details** section.



Members Name	Start Date	Role
Loris Capirossi	01/03/2011	Project Manager
Troy Adams	01/03/2011	Project Leader

29. From the grid, click the specific members name link in the **Members Name** column.
30. In the **Member Information** pop-up, edit the fields mentioned below.

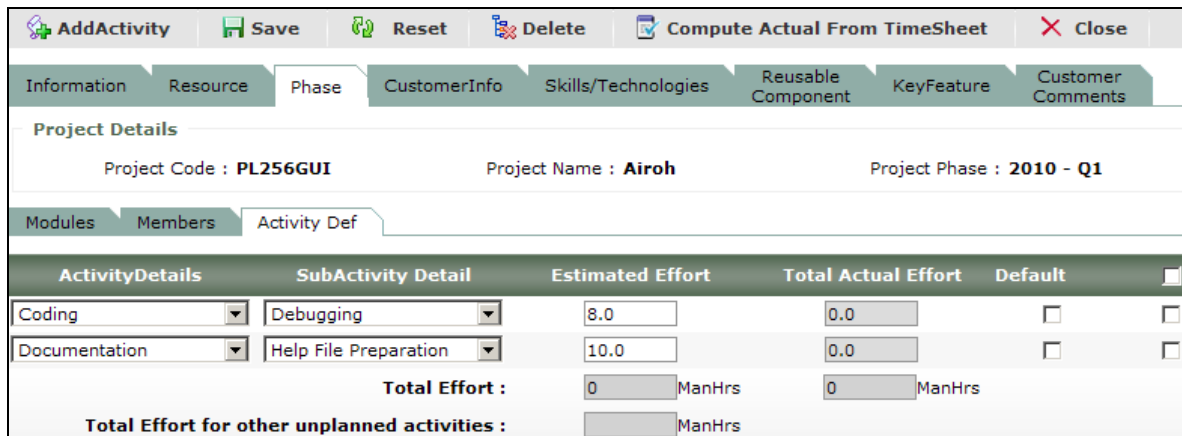


Details	
* Emp Name :	Chris Atkinson
* Start Date :	12/01/2010 (mm/dd/yyyy)
* Allocated Date :	12/01/2010 (mm/dd/yyyy)
* End Date :	12/31/2010 (mm/dd/yyyy)
* Role :	Project Manager
* Reporting To :	Group Manager
* Mail :	Yes
* Efficiency :	1.0
Designation :	Senior Project Manager
* Project Responsibilities :	Team allocation and Design Document review.

- **Emp Name** – This field is shown in non-edit mode
 - **Role** – Select the role from the drop-down
 - **Start Date** – Edit the start date using the calendar control
 - **Reporting To** – Select an option from the drop-down
 - **Allocated Date** – Edit the allocated date using the calendar control
 - **Mail** – Select an option from the drop-down
 - **End Date** – Edit the end date using the calendar control
 - **Efficiency** – Select an option from the drop-down
 - **Designation** – This field is shown in non-edit mode
 - **Project Responsibilities** – Edit the project responsibilities
31. To reset the values, before you click **Save**, click **Reset**.
32. To save the details, click **Save**.

Note: History details of the member can only be viewed in the **History** tab, but cannot be edited.

33. To edit activity details, click the **Activity Def** tab below the **Project Details** section.



ActivityDetails	SubActivity Detail	Estimated Effort	Total Actual Effort	Default
Coding	Debugging	8.0	0.0	<input type="checkbox"/>
Documentation	Help File Preparation	10.0	0.0	<input type="checkbox"/>
Total Effort :		0 ManHrs	0 ManHrs	
Total Effort for other unplanned activities :				

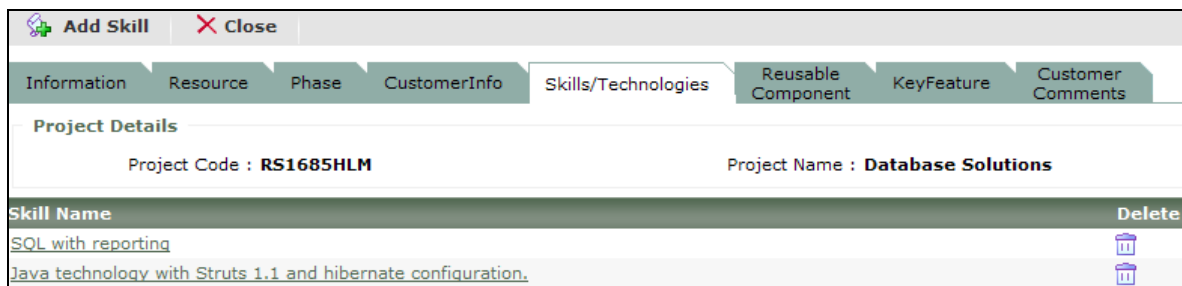
34. To edit the **ActivityDetails** and **SubActivity Detail** column, select an option from the drop-down, and edit the **Estimated Effort**.



Note: The **Total Actual Effort** column, the **Total Effort** and **Total Effort for other unplanned activities** boxes cannot be edited – these boxes auto-populate with values when you click the **Compute Actual From TimeSheet** button from the top of the screen.

35. To reset the values, before you click **Save**, click **Reset**.
 36. To save the details, click **Save**.




Note: The details in the **CustomerInfo** tab cannot be edited, but only be viewed.

37. To edit skill and technology details, click the **Skills/Technologies** tab below the **Project Details** section.



Skill Name	Delete
SQL with reporting	
Java technology with Struts 1.1 and hibernate configuration.	


38. From the grid below the **Project Details** section, under **Skill Name** column, click the skill name link that you want to edit.
 39. In the **Skill/Technology** pop-up, edit the **Description** field.

Skill/Technology	
 Save  Reset  Close	
* Description :	SQL with reporting

40. To reset the values, before you click **Save**, click **Reset**.




41. To save the details, click **Save**.

42. To edit the reusable component details, click the **Reusable Component** tab.

ADD ReusableComponent 	
Information	Resource
Phase	CustomerInfo
Skills/Technologies	Reusable Component
KeyFeature	Customer Comments
Project Details Project Code : RS1685HLM Project Name : Database Solutions	
Reusable Name	Delete
Component for expand and collapse.	
Created a reusable component for the grid and Pagination.	

43. From the grid below the **Project Details** section, under **Reusable Name** column, click the reusable name link you want to edit.




44. In the **ReusableComponent Information** pop-up, edit the **Description** field.

ReusableComponent Information	
 Save  Reset  Close	
* Description :	Component for expand and collapse.

45. To reset the values, before you click **Save**, click **Reset**.


46. To save the details, click **Save**.

47. To edit the key features, click the **KeyFeature** tab.

Add Features 	
Information	Resource
Phase	CustomerInfo
Skills/Technologies	Reusable Component
KeyFeature	Customer Comments
Project Details Project Code : RS1685HLM Project Name : Database Solutions	
KeyFeatureName	Delete
Key feature is Ajax funtionality.	
Feature for hibernate is SQL	

48. From the grid below the **Project Details** section, under **KeyFeatureName** column, click the key feature name link you want to edit.

49. In the **Add Edit Key-Feature** pop-up, edit the **Description** field.

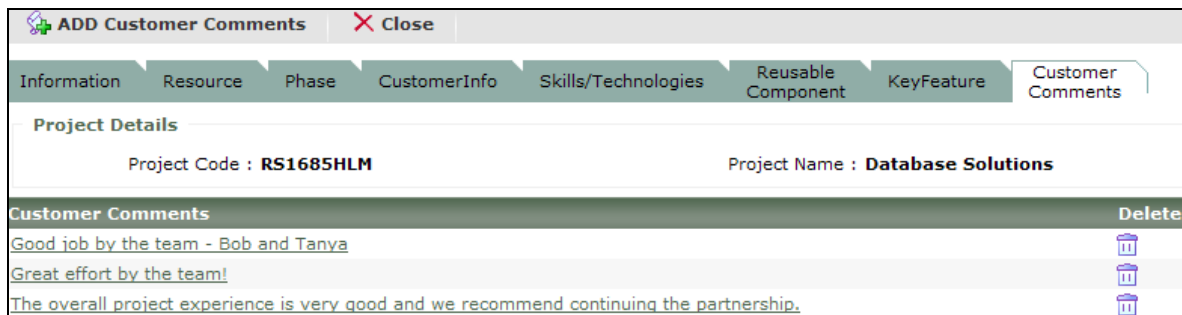


Add Edit Key-Feature

Save Reset Close

* Description : Key feature is Ajax funtionalty.

50. To reset the values, before you click **Save**, click **Reset**.
51. To save the details, click **Save**.
52. To edit the customer comments, click the **Customer Comments** tab.






ADD Customer Comments Close

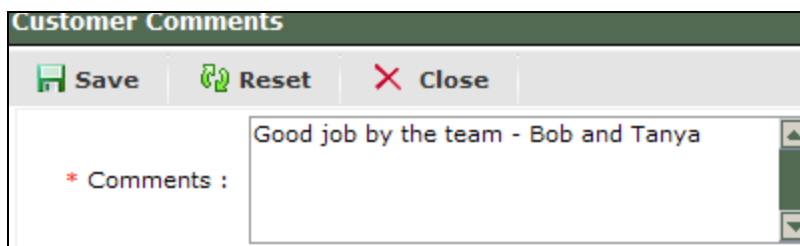
Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : RS1685HLM Project Name : Database Solutions

Customer Comments	Delete
Good job by the team - Bob and Tanya	
Great effort by the team!	
The overall project experience is very good and we recommend continuing the partnership.	

53. From the grid below the **Project Details** section, under **Customer Comments** column, click the comment link you want to edit.
54. In the **Customer Comments** pop-up, edit the **Comments** field.



Customer Comments

Save Reset Close

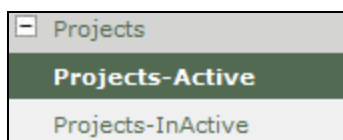
* Comments : Good job by the team - Bob and Tanya

55. To reset the values, before you click **Save**, click **Reset**.
56. To save the details, click **Save**.

6.3. Delete Project Details

To delete a project details, follow these steps.

1. From the left menu, click **Projects**.



Projects

Projects-Active

Projects-InActive

2. By default, **Projects-Active** sub-module is shown.
3. In the **Search** section, enter the search criteria to find a specific project, or to view the list of all the projects, without entering the search criteria, click **Search**.
4. The grid shows the list of projects that meet the search criteria.

Search

Project Code :

Project Name :

Project Start Date : (mm/dd/yyyy)

Project End Date : (mm/dd/yyyy)

Platform :

Status :

Skills/Technologies :

Search

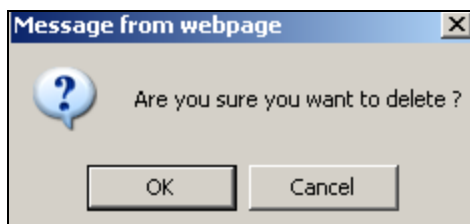
Reset

Add New Project

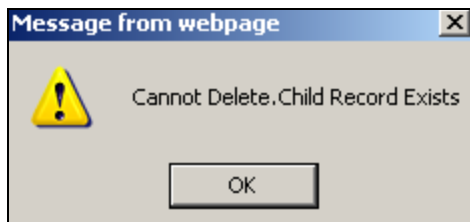
Delete

<input type="checkbox"/>	Project Code	Project Name	Customer Name
<input type="checkbox"/>	GUI007GD	THOR MX	Lola
<input type="checkbox"/>	HJU5654GH	Silkolene	Richie
<input type="checkbox"/>	GH54564HI8S	Thompsons	Jamie
<input type="checkbox"/>	GF6666JF15	Azonic Activators	Internal Tools
<input type="checkbox"/>	RS1685HLM	Database Solutions	Renthal BudLight KTM
<input type="checkbox"/>	FG4674YJE	Old School DB	Acerbis Pro Inc.
<input type="checkbox"/>	PRJTEA0001	ACC Torpedo	Amsoil Chaparal Corporation

- In the grid, select the corresponding checkbox for the project you want to delete.
- Click **Delete**.
- In the confirmation pop-up, click **OK**.



- If child records exist, you can see the warning pop-up shown below.



- Click **OK**.
- From the list of projects in the grid below the **Search** section, click the specific project code link.
- In the following screen (**Information** tab), click the **Phase** tab.

Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

*Project Code :
 *Project Name :

* Process Model :
 * Platform :

*Billing Type :
 Project Leader :

* Project Manager :
 Quality Manager :

* Project Start Date : (mm/dd/yyyy)
 * Domain :

* Project Esti. End Date : (mm/dd/yyyy)
 *Complexity :

Project Act. End Date : (mm/dd/yyyy)
 * Customer Name :

Architecture :
 Size :

Methodology :

Life Cycle :

* Project Status :
 * GM :

* Delivery Model :
 * Division Unit :

Project Unit :

Project Description :

12. In the **Phase** tab, from the grid below the **Project Details** section, click the specific status link under the **Status** column for the phase you want to delete.

Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

Project Code : **GF6666JF15**
 Project Name : **Azonic Activators**

Phase Name	Start Date	Esti. End Date	Status
DefaultPhase	01/03/2011	01/26/2011	In Progress

13. In the following screen (by default **Modules** tab is shown), select the checkboxes for all the modules.

Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments

Project Details

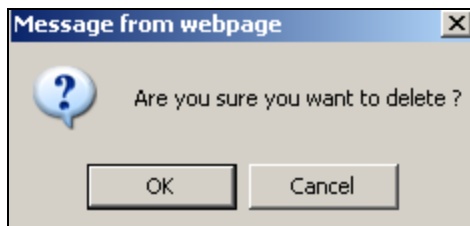
Project Code : **GH54564HI8S**
 Project Name : **Thompsons**
 Project Phase : **Designing**

Modules Members Activity Def

<input checked="" type="checkbox"/>	Module Name	Start Date	Status
<input checked="" type="checkbox"/>	Login	01/03/2011	In Progress
<input checked="" type="checkbox"/>	Analysis	01/03/2011	In Progress
<input checked="" type="checkbox"/>	Project Management	01/03/2011	In Progress
<input checked="" type="checkbox"/>	General	01/03/2011	In Progress

14. Click **Delete**.

15. In the confirmation pop-up, click **OK**.



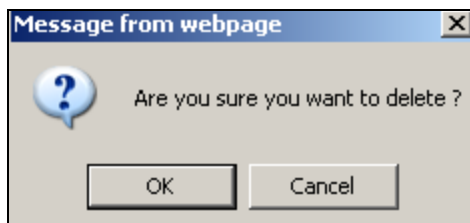
16. Click the **Members** tab.

17. In the grid, select the corresponding checkboxes for all the members.

AddNewMember Delete Export Close		
Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments		
Project Details		
Project Code : RS1685HLM	Project Name : Database Solutions	Project Phase : Improvisation
Modules Members Activity Def		
<input checked="" type="checkbox"/> Members Name	Start Date	Role
<input checked="" type="checkbox"/> James Hetfield	12/01/2010	Project Manager
<input checked="" type="checkbox"/> Troy Adams	12/01/2010	Project Leader

18. Click **Delete**.

19. In the confirmation pop-up, click **OK**.



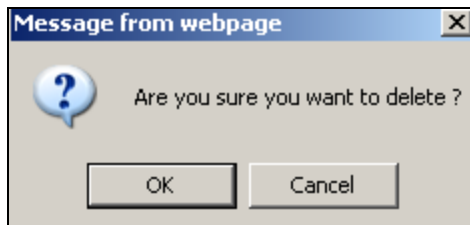
20. Click the **Activity Def** tab.

AddActivity Save Reset Delete Compute Actual From TimeSheet Close					
Information Resource Phase CustomerInfo Skills/Technologies Reusable Component KeyFeature Customer Comments					
Project Details					
Project Code : PL256GUI		Project Name : Airoh		Project Phase : 2010 - Q1	
Modules Members Activity Def					
ActivityDetails	SubActivity Detail	Estimated Effort	Total Actual Effort	Default	
Coding	Debugging	8.0	0.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Documentation	Help File Preparation	10.0	0.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Total Effort :		18	ManHrs	0	ManHrs
Total Effort for other unplanned activities :			ManHrs		

21. In the grid, select the corresponding checkboxes for all the activities.

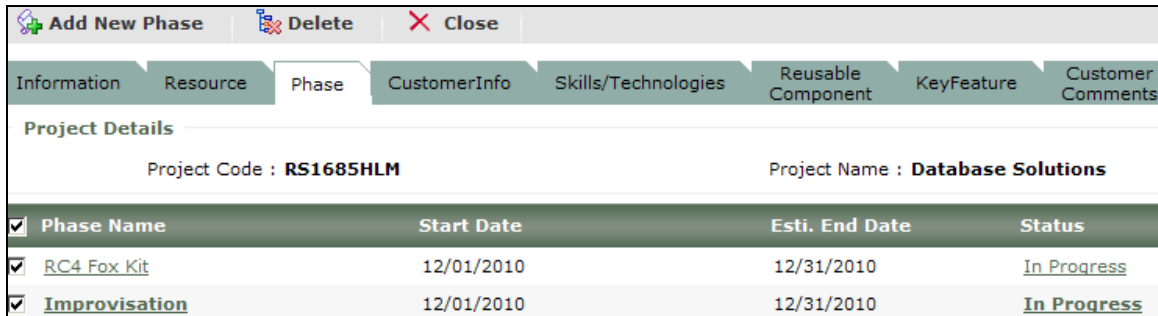
22. Click **Delete**.

23. In the confirmation pop-up, click **OK**.



24. To close the screen, click **Close**.

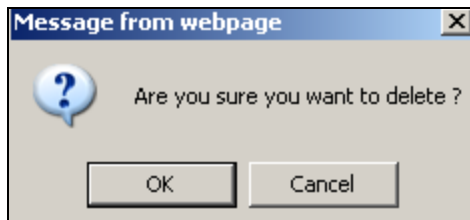
25. In the following screen (**Phase** tab), select the corresponding checkboxes for all the phases.



Phase Name	Start Date	Esti. End Date	Status
<input checked="" type="checkbox"/> RC4 Fox Kit	12/01/2010	12/31/2010	In Progress
<input checked="" type="checkbox"/> Improvisation	12/01/2010	12/31/2010	In Progress


26. Click **Delete**.

27. In the confirmation pop-up, click **OK**.



28. Click the **Resource** tab.

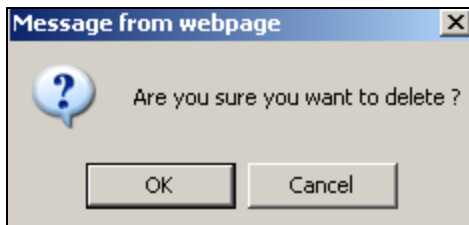
29. In the grid, select the corresponding checkboxes for all the resources.



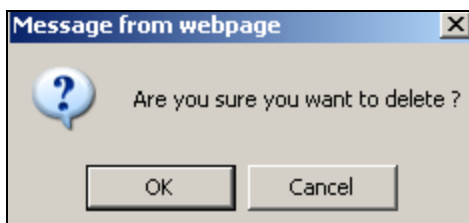
Resource Name	Start Date
<input checked="" type="checkbox"/> James Hetfield	01/03/2011
<input checked="" type="checkbox"/> Troy Adams	01/03/2011
<input checked="" type="checkbox"/> Loris Capirossi	01/03/2011
<input checked="" type="checkbox"/> Nathan Ramsey	01/03/2011

30. Click **Delete**.

31. In the confirmation pop-up, click **OK**.



32. To close the screen (**Resource** tab), click **Close**.
33. In the following screen (**Information** tab), click **Close**.
34. From the grid below the **Search** section, select the corresponding checkbox for the project you want to delete.
35. Click **Delete**.
36. In the confirmation pop-up, click **OK**.

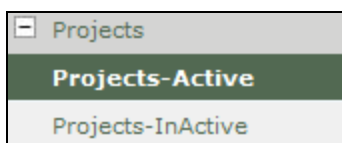


Note: If a project status must be changed to **Completed** or **Scrapped**, then the status of its corresponding child records, i.e., phases, modules, tasks, bugs must also be changed to **Completed** or **Scrapped**.

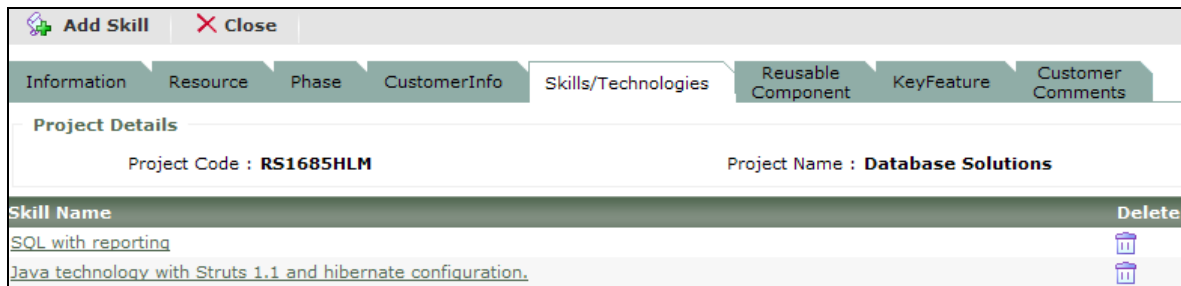
6.3.1. Delete Skill Name Details



To delete skill and technology details, follow these steps.


1. From the left menu, click **Projects**.

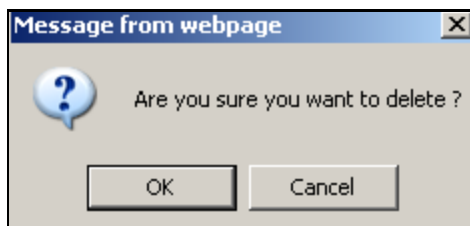


2. By default, **Projects-Active** sub-module is shown.
3. In the **Search** section, enter the search criteria to find a specific project, or to view the list of all the projects, without entering the search criteria, click **Search**.
4. The grid shows the list of projects that meet the search criteria.
5. From the grid below the **Search** section, click the specific project code link for the project.
6. In the following screen (**Information** tab), click the **Skills/Technologies** tab.



Skill Name	Delete
SQL with reporting	
Java technology with Struts 1.1 and hibernate configuration.	

- In the grid below the **Project Details** section, click the delete icon  corresponding to the skill / technology you want to delete.

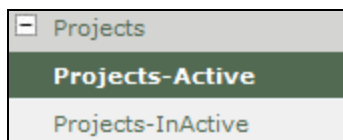


- In the confirmation pop-up, click **OK**.

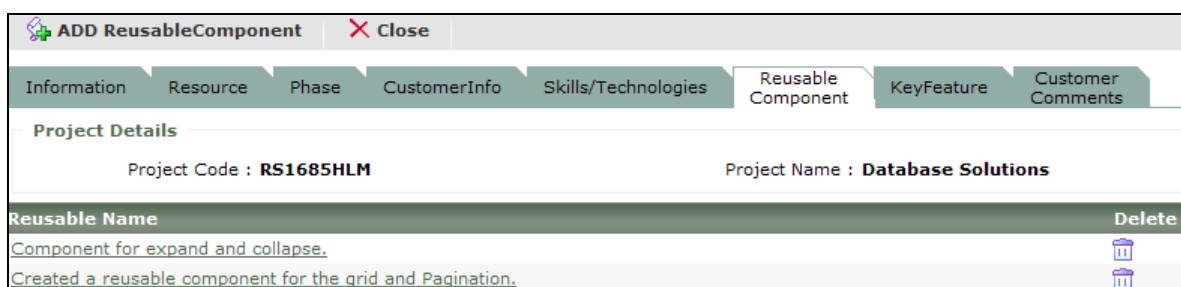
6.3.2. Delete Reusable Component Details



To delete reusable component details, follow these steps.


- From the left menu, click **Projects**.

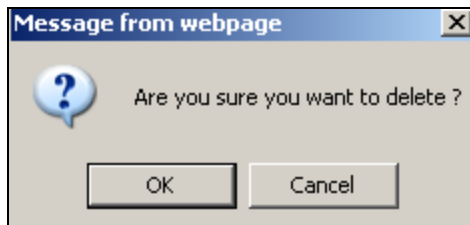


- By default, **Projects-Active** sub-module is shown.
- In the **Search** section, enter the search criteria to find a specific project, or to view the list of all the projects, without entering the search criteria, click **Search**.
- The grid shows the list of projects that meet the search criteria.
- From the grid below the **Search** section, click the specific project code link for the project.
- In the following screen (**Information** tab), click the **Reusable Component** tab.



Reusable Name	Delete
Component for expand and collapse.	
Created a reusable component for the grid and Pagination.	

- In the grid below the **Project Details** section, click the delete icon  corresponding to the reusable name you want to delete.

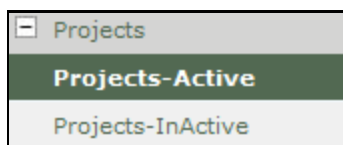


8. In the confirmation pop-up, click **OK**.

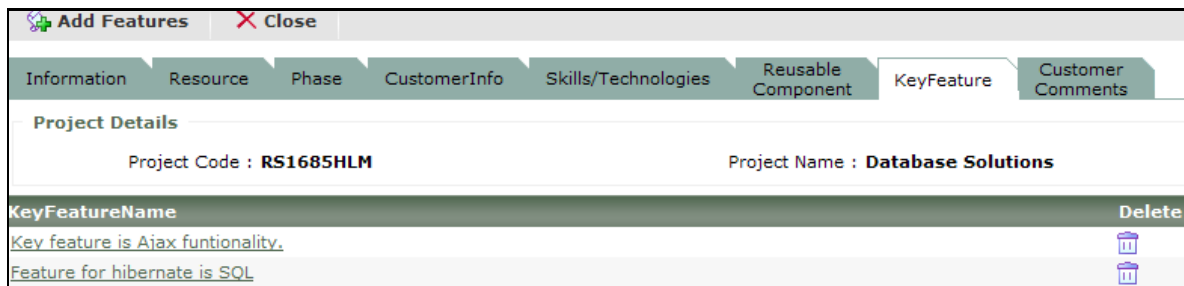
6.3.3. Delete Key Feature Details


To delete key feature details, follow these steps.

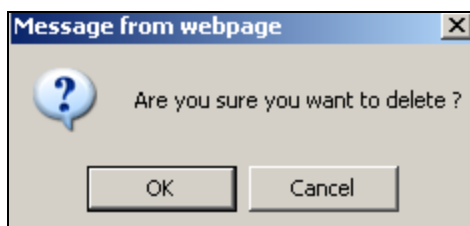
1. From the left menu, click **Projects**.



2. By default, **Projects-Active** sub-module is shown.
3. In the **Search** section, enter the search criteria to find a specific project, or to view the list of all the projects, without entering the search criteria, click **Search**.
4. The grid shows the list of projects that meet the search criteria.
5. From the grid below the **Search** section, click the specific project code link for the project.
6. In the following screen (**Information** tab), click the **KeyFeature** tab.



7. In the grid below the **Project Details** section, click the delete icon  corresponding to the key feature you want to delete.

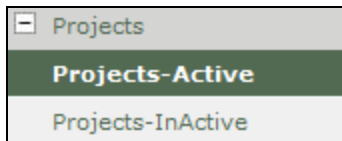


8. In the confirmation pop-up, click **OK**.

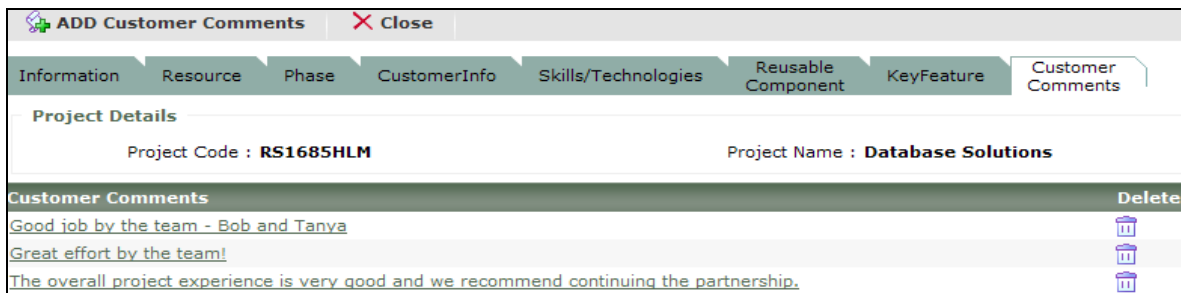
6.3.4. Delete Customer Comments


To delete customer comments, follow these steps.

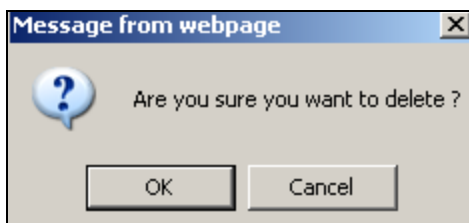
1. From the left menu, click **Projects**.



2. By default, **Projects-Active** sub-module is shown.
3. In the **Search** section, enter the search criteria to find a specific project, or to view the list of all the projects, without entering the search criteria, click **Search**.
4. The grid shows the list of projects that meet the search criteria.
5. From the grid below the **Search** section, click the specific project code link for the project.
6. In the following screen (**Information** tab), click the **Customer Comments** tab.



7. In the grid below the **Project Details** section, click the delete icon  corresponding to the customer comment you want to delete.



8. In the confirmation pop-up, click **OK**.

Note: Before deleting a project, the issue records and risk records related to the project must be deleted first.

6.3.5. Export in Excel Format

You can view the details related to the project and the phase, and the employee's role in the phase or project in Excel format. While the **Export** option in the **Resource** tab provides the details of the employees added at the project level, the **Export** option in the **Members** tab (located within the **Phase** tab) provides the details of the employees added at the phase level.

To export a file from the **Resource** tab, follow these steps.

1. From the grid showing the list of projects below the **Search** section, click a specific project code link.

Search

Project Code : Project Name :

Project Start Date : (mm/dd/yyyy) Project End Date : (mm/dd/yyyy)

Platform : Status :

Skills/Technologies :

Project Code	Project Name	Customer Name
GUI007GD	THOR MX	Lola
HJU5654GH	Silkolene	Richie
GH54564HI8S	Thompsons	Jamie
GF6666JF15	Azonic Activators	Internal Tools
RS1685HLM	Database Solutions	Renthal BudLight KTM
FG4674YJE	Old School DB	Acerbis Pro Inc.
PRJTEA0001	ACC Torpedo	Amsoil Chaparal Corporation

2. In the following screen (**Information** tab), click the **Resource** tab.

Information **Resource** **Phase** **CustomerInfo** **Skills/Technologies** **Reusable Component** **KeyFeature** **Customer Comments**

Project Details

Project Code : **GUI007GD** Project Name : **THOR MX**


Resource


Resource Name	Start Date
James Hetfield	01/03/2011
Troy Adams	01/03/2011
Loris Capirossi	01/03/2011
Nathan Ramsey	01/03/2011

3. Click **Export**.
4. In the **File Download** pop-up, click **Save**.

File Download

Do you want to open or save this file?



 Name: ...ETASK_PRJTEA0001_ACC Torpedo_ashwini_k.xls
Type: Microsoft Excel Worksheet, 5.00KB
From: **sdw1097**

 While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

5. In the **Save As** pop-up, select a location to save the file and click **Save**.

To export a file from the **Members** tab, follow these steps.

1. From the grid showing the list of projects below the **Search** section, click a specific project code link.

 Add New Project		 Delete	
<input type="checkbox"/>	Project Code	Project Name	Customer Name
<input type="checkbox"/>	RS1685HLM	Database Solutions	Renthal BudLight KTM
<input type="checkbox"/>	FG4674YJE	Old School DB	Acerbis Pro Inc.
<input type="checkbox"/>	PRJTEA0001	ACC Torpedo	Amsoil Chaparal Corporation

2. In the following screen (**Information** tab), click the **Phase** tab.

Information	Resource	Phase	CustomerInfo
Skills/Technologies			
Reusable Component			
KeyFeature			
Customer Comments			
Project Details			
Project Code : RS1685HLM		Project Name : Database Solutions	
Project Phase : Improvisation			
Modules	Members	Activity Def	
<input checked="" type="checkbox"/> Members Name	Start Date	Role	
<input checked="" type="checkbox"/> James Hetfield	12/01/2010	Project Manager	
<input checked="" type="checkbox"/> Troy Adams	12/01/2010	Project Leader	

3. Click **Export**.
4. In the **File Download** pop-up, click **Save**.
5. In the **Save As** pop-up, select a location to save the file and click **Save**.

6.4. Projects-Inactive

Projects that are in **Completed** or **Scrapped** status are shown in this sub-module.

To search for inactive projects, follow these steps.

1. From the left menu, click **Projects** (by default, **Projects-Active** is shown).
2. Click **Projects-InActive**.

	Projects
	Projects-Active
	Projects-InActive

3. In the **Search** section, enter the search criteria to find a specific project, or to view the list of all the projects, without entering the search criteria, click **Search**.

Search			
Project Code :	<input type="text"/>	Project Name :	<input type="text"/>
Project Start Date :	<input type="text"/> (mm/dd/yyyy)	Project End Date :	<input type="text"/> (mm/dd/yyyy)
Platform :	<input type="text"/>	Status :	<input type="text"/>
Skills/Technologies :	<input type="text"/>		


4. The grid below the **Search** section shows the list of all inactive projects.

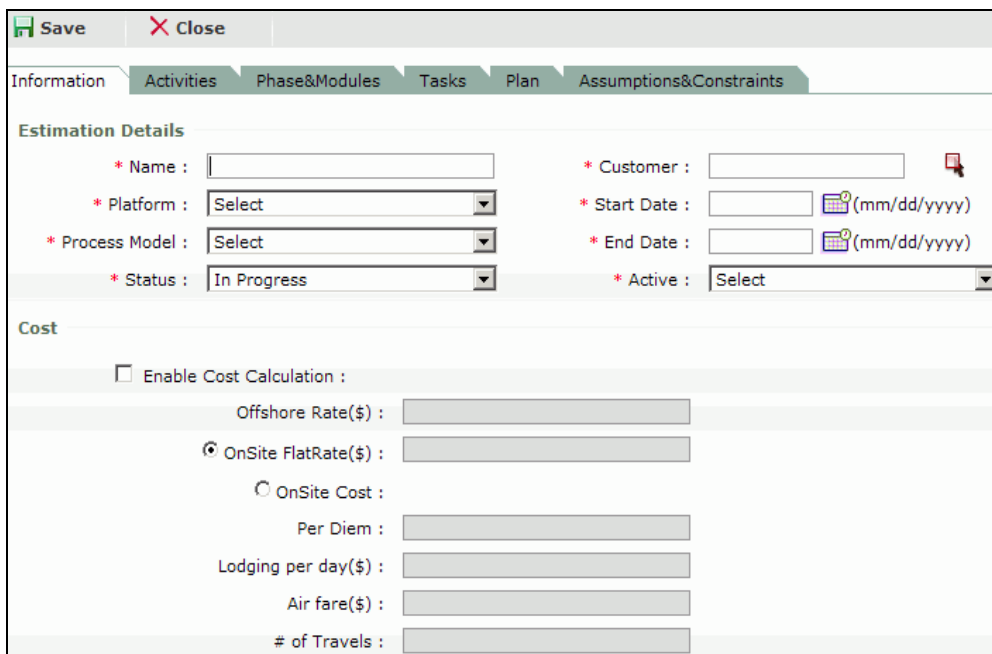
7. Estimation

Estimation section enables you to prepare an initial estimate for the project before the actual work starts. This estimation is a reference to prepare the actual estimation and the project plan.

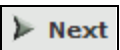
7.1. Add New Estimate

To add a new estimate, follow these steps:

1. In the left menu, click **Estimation**.
2. Click the  **Add New Estimate** icon to view the **Estimation Details** screen.



3. Enter the values in the following fields:
 - **Name** – Enter the name of the estimate.
 - **Platform** – Select the platform in which the project is developed.
 - **Process Model** – Select the process model.
 - **Status** – Select the status of the project.
 - **Customer** – Enter the name of the customer.
 - **Start Date** – Use the calendar control to select the date when the project is expected to start.
 - **End Date** – Use the calendar control to select the date when the project is expected to be completed.
 - **Active** – Select if the process is active or not.

- **Enable Cost Calculation** – To enable the cost calculation, select this checkbox.
 - **Offshore Rate** – Enter the offshore rate in dollars.
 - **Onsite Flat Rate** – By default, this option is selected. Enter the flat rate if you know the value.
 - **Onsite Cost** - If not, to calculate the onsite cost, select the **Onsite Cost** option to make the following fields active. Enter the appropriate cost in each field.
 - Per Diem
 - Lodging Per Day
 - Air Fare
 - # of Travels
 - **Estimation Method** – To select one of the following estimation methods, select the specific checkbox.
 - Historical Data
 - Functional Points
4. Click **Save**.
 5. Next, click the **Activities** tab, enter the details, and save the details. You can also click the  icon to navigate to the tabs.
 6. Similarly, enter the details in the **Phase & Modules, Tasks, Plan, Assumptions & Constraints tabs**, and save the details.

7.2. View Estimate Details

To view the estimate details, follow these steps:

1. In the left menu, click **Estimation**.
2. You can view a list of estimation names.
3. To search for a specific estimation, in the **Search** section, enter the estimation name, customer name, and select the status.
4. Click **Search** to view the record.

OR

5. In the **Estimate Name** column, click the required name to view the details.

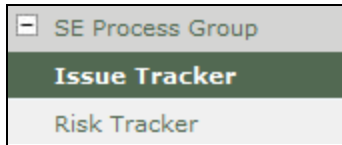
8. SE Process Group

The **Software Engineering Process Group** (SEPG) enables employees to track various issues and risks related to projects. While the Issue Tracker sub-module tracks issues, the Risk Tracker sub-module tracks risks in the project. Team leaders or anyone above them can access this module.

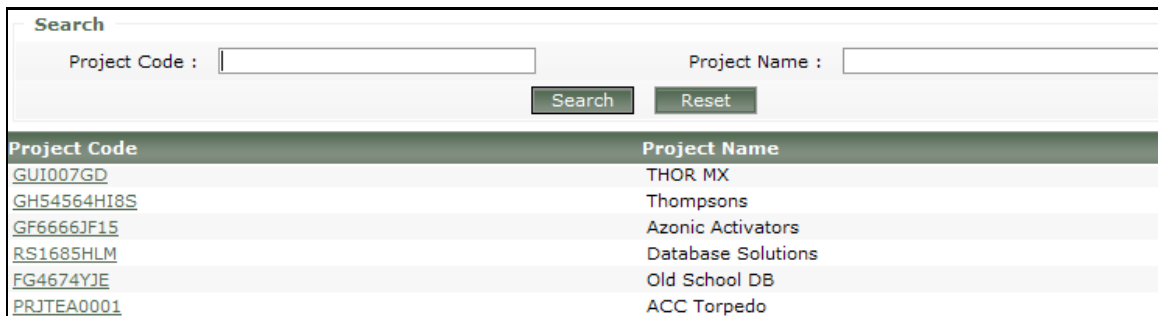
8.1. Issue Tracker - Search for Issues

To search for a specific issue, follow these steps.

- From the left menu of the application, click **SE Process Group** (by default, **Issue Tracker** sub-module is selected).



- In the **Search** section, enter the **Project Code** and **Project Name**.



Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions
FG4674YJE	Old School DB
PRJTEA0001	ACC Torpedo

- Click **Search**.
- The grid below the **Search** section shows the projects that meet the search criteria.
- Under **Project Code** column of the grid, click a specific project code.
- In the following screen, in the **Search** section, enter values in the fields mentioned below.



Project Code : **J109030** Project Name : **THOR MX**

IssueName :

Type :

Category :

RaisedBy :

Issue Phase :

Detected During :

Status :

- **IssueName** – Enter the issue name
 - **Type** - Select the type from the drop-down
 - **Category** – Select the category from the drop-down
 - **RaisedBy** - Select the name of the person from the drop-down
 - **Issue Phase** - Select the issue phase from the drop-down
 - **Detected During** - Select an option from the drop-down
 - **Status** – Select the status from the drop-down
- Click **Search**.
 - The grid below the **Search** section shows the list of issues that match the search criteria.

Search

Project Code : **J109030** Project Name : **THOR MX**

IssueName :

Type :

Category :

RaisedBy :

Issue Phase :

Detected During :

Status :

AddNewIssue **Delete** **Export** **Close**

IssueName	Type	Raised On	RaisedBy	Follow Up Date	Closed On	Status
<input type="checkbox"/> DP and CSA Meeting need to scheduled	Internal	04/28/2010	Nathan Ramsey	05/15/2010	09/07/2010	Closed
<input type="checkbox"/> Defect Aalysis needs to happen	Internal	04/19/2010	Nathan Ramsey	05/19/2010	09/07/2010	Closed
<input type="checkbox"/> Segregate SEPG bugs as Simple/Medium/Complex	Internal	04/12/2010	Nathan Ramsey	05/12/2010		Open

8.1.1. Add Issue

To add a new issue, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Search

Project Code :

Project Name :

Project Code	Project Name
EC0011	VLSI-Xilinx
GUI007GD	THOR MX
GH54564HI8S	Thompsons

2. In the following screen, from below the **Search** section, click **AddNewIssue**.

Search

Project Code : **J109030** Project Name : **THOR MX**

IssueName :

Type :

Category :

RaisedBy :

Issue Phase :

Detected During :

Status :

AddNewIssue **Delete** **Export** **Close**

IssueName	Type	Raised On	RaisedBy	Follow Up Date	Closed On	Status
<input type="checkbox"/> DP and CSA Meeting need to scheduled	Internal	04/28/2010	Nathan Ramsey	05/15/2010	09/07/2010	Closed
<input type="checkbox"/> Defect Aalysis needs to happen	Internal	04/19/2010	Nathan Ramsey	05/19/2010	09/07/2010	Closed
<input type="checkbox"/> Segregate SEPG bugs as Simple/Medium/Complex	Internal	04/12/2010	Nathan Ramsey	05/12/2010		Open

3. In the **Issue tracker Detail** screen, enter values in the fields mentioned below.

Save
Reset
Close

Issue tracker Detail

Status : **Open**

Part Of LessonLearnt : ☐

* IssueName :

* Issue Phase :

* Detected During :

* Impact/Consequence :

* Raised On : (mm/dd/yyyy)

* To Be Closed By : (mm/dd/yyyy)

* Problem/Issue Description :

* Root Cause :

* Type :

* Category :

Context :

* RaisedBy :

* Follow Up Date : (mm/dd/yyyy)

- **Status** - By default, the status is shown in non-edit mode as **Open**
 - **Part of LessonLearnt** - If a corrective action is approved, this checkbox is selected.
 - **IssueName** - Enter the name of the issue
 - **Type** - Select the type of issue from the drop-down
 - **Issue Phase** - Select the issue phase from drop-down
 - **Category** - Select the category to which the issue belongs from the drop-down
 - **Detected During** - Select the detected during from drop-down
 - **Context** - Enter the context during which the issue occurred
 - **Impact/Consequence** - Select the impact / consequence from the drop-down
 - **RaisedBy** - Select the name of the employee from the drop-down
 - **Raised On** - Select the date when this issue was raised using the calendar control (selected date must be within the range of the project start and end dates)
 - **Follow Up Date** - Select the follow-up date using the calendar control (selected date must be within the range of the **Raised On** and **To Be Closed By** dates)
 - **To Be Closed By** - Select the date by when this issue must be resolved and closed using the calendar control (selected date must be within the range of the project start and end dates)
 - **Problem/Issue Description** - Enter a brief description of the problem / issue
 - **Root Cause** - Enter a brief description of the root cause of the issue
- To save the details, click **Save**.
 - The newly added issue is shown in the grid.

8.1.2. Edit Issue

To edit an issue, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.
2. In the following screen, from the grid below the **Search** section, click the issue name link under **IssueName** column.
3. In the **Issue tracker Detail** screen, edit the fields mentioned below.

Issue tracker Detail
History

Issue tracker Detail

Status : **Open**
Part Of LessonLearnt : ☐

* IssueName : Release Deployment Issue
* Issue Phase : Select
* Detected During : Select
* Impact/Consequence : Schedule
* Raised On : 10/22/2009 (mm/dd/yyyy)
* To Be Closed By : 11/16/2009 (mm/dd/yyyy)
* Problem/Issue Description :
One folder was completely deleted while deploying a new build for the application which resulted in the online test application not working when the test was rolled out to all.
The release procedure is not documented and there are no checklists defined to make sure that there are no flaws in the process.
* Root Cause :

* Type : Internal
* Category : Issue
Context :
* RaisedBy : Nathan Ramsey
* Follow Up Date : 10/30/2009 (mm/dd/yyyy)

Issue Corrective Action List

Corrective Action	Responsibility	Due Date	Effectiveness of Corrective Action	Status
Create documentation of the release process and deployment and create a checklist of required which needs to be used by anyone who is deploying an application on the	Chad Reed	11/16/2009		Closed

- **Status** - By default, the status is shown in non-edit mode as **Open**
- **Part of LessonLearnt** - If a corrective action is approved, this checkbox is selected.
- **IssueName** – Edit the name of the issue
- **Type** - Select the type of issue from the drop-down
- **Issue Phase** – Select the issue phase from the drop-down
- **Category** - Select the category to which the issue belongs from the drop-down
- **Detected During** – Select the activity from the drop-down
- **Context** – Edit the context during which the issue occurred
- **Impact/Consequence** - Select the impact / consequence from the drop-down
- **RaisedBy** - Select the name of the employee from the drop-down
- **Raised On** – Select the date when this issue was raised using the calendar control (selected date must be within the range of the project start and end dates)
- **Follow Up Date** - Select the follow-up date using the calendar control (selected date must be within the range of the **Raised On** and **To Be Closed By** dates)

Issue Corrective Action

Save Reset Close

Issue Detail

IssueName : Scroll

* **Status :** Open

* **Corrective Action :**

* **Responsibility :** Select

* **Due Date :** (mm/dd/yyyy)

Effectiveness of Corrective Action :

Verified Date :

Verified By :

- **IssueName** – This field shows the issue name in non-edit mode
 - **Status** – This field shows the status of the issue in non-edit mode
 - **Corrective Action** – Enter the corrective action taken
 - **Responsibility** – Select the person responsible for the corrective action from the drop-down
 - **Due Date** – Select the due date using the calendar control (selected date must be within the range of the **Raised On** and **To Be Closed By** dates)
 - **Effectiveness of Corrective Action** – Enter the effectiveness of the corrective action
 - **Verified Date** – If the issue is verified by the project manager, the date it was verified is shown in non-edit mode
 - **Verified By** – If the issue is verified by the project manager, the name of the manager is shown in non-edit mode
3. To reset values, before you click **Save**, click **Reset**.
 4. To save the details, click **Save**.

To edit a corrective action, follow these steps.

1. From the **Issue tracker Detail** screen, scroll down to view the **Issue Corrective Action List** grid.

Issue Corrective Action List					
<input type="checkbox"/>	Corrective Action	Responsibility	Due Date	Effectiveness of Corrective Action	Status
<input checked="" type="checkbox"/>	Issue 1	Nick Wey	01/27/2011	Effective	Open
<input type="checkbox"/>	Issue-5	Jeremy Brown	01/25/2011	Moderate	Open

2. From the grid, under the **Corrective Action** column, click the corrective action link you want to edit.
3. In the **Issue Corrective Action** pop-up, edit values in the fields mentioned below.

Save

Reset

Close

Issue Detail

IssueName :

Scroll

* Status :

Open

* Corrective Action :

Issue 1

* Responsibility :

Nick Wey

* Due Date :

01/27/2011

(mm/dd/yyyy)

Effectiveness of Corrective Action :

Effective

Verified Date :

1/7/2011

Verified By :

Chris Atkinson

- **IssueName** – This field shows the issue name in non-edit mode
 - **Status** – Select the status from the drop-down
 - **Corrective Action** – Edit the corrective action taken
 - **Responsibility** – Select the person responsible for the corrective action from the drop-down
 - **Due Date** – Select the due date using the calendar control (selected date must be within the range of the **Raised On** and **To Be Closed By** dates)
 - **Effectiveness of Corrective Action** – Edit the effectiveness of the corrective action
 - **Verified Date** – If the issue is verified by the project manager, the date it was verified is shown in non-edit mode
 - **Verified By** – If the issue is verified by the project manager, the name of the manager is shown in non-edit mode
- To reset values, before you click **Save**, click **Reset**.
 - To save the changes, click **Save**.

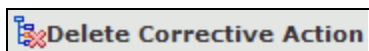
To delete a corrective action, follow these steps.

- In the **Issue tracker Detail** screen, scroll down to view the **Issue Corrective Action List** grid.

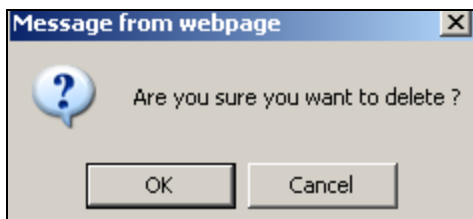
Issue Corrective Action List				
<input type="checkbox"/>	Corrective Action	Responsibility	Due Date	Effectiveness of Corrective Action
<input checked="" type="checkbox"/>	Issue 1	Nick Wey	01/27/2011	Effective
<input type="checkbox"/>	Issue-5	Jeremy Brown	01/25/2011	Moderate

- In the grid, select the corresponding checkbox for the corrective action you want to delete.

3. Click **Delete Corrective Action**.



4. In the confirmation pop-up, click **OK**.



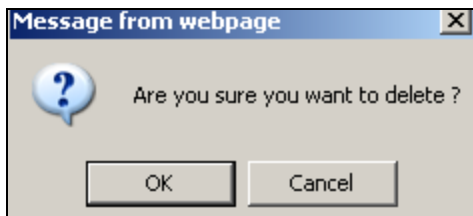
8.1.4. Delete Issue

You can delete an issue only if no depending child record (corrective action) exists. To delete an issue, follow the steps mentioned below.

1. From the grid below the **Search** section, select the corresponding checkbox for the issue you want to delete.
2. Click **Delete**.



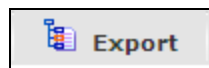
3. In the confirmation pop-up, click **OK**.



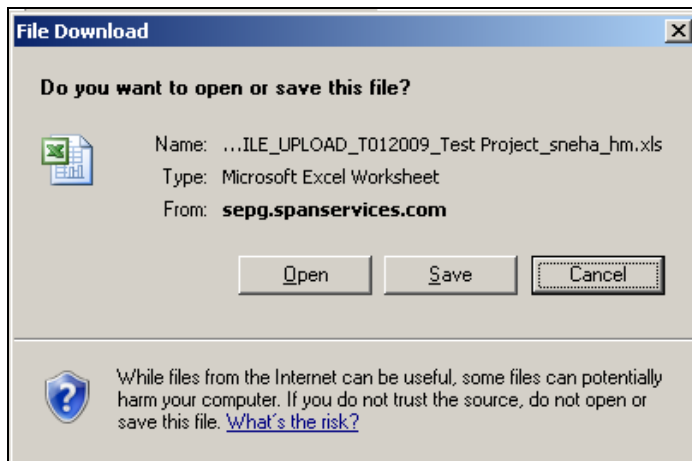
8.1.5. Export Issue

Issue details can be exported to Excel using the export function. To export issue details,

1. From below the **Search** section, click **Export**.



2. In the **File Download** pop-up, click **Save**.



3. In the **Save As** pop-up, select a location and click **Save**.

8.2. Risk Tracker – Search for Risks

To search for a specific risk, follow these steps.

1. From the left menu of the application, click **SE Process Group**.
2. Click **Risk Tracker** sub-module.



3. In the **Search** section, enter the **Project Code** and **Project Name**.
4. Click **Search**.

Search	
Project Code : <input type="text"/>	Project Name : <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/>	
Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS164HLM	Database Solutions
FG4674YJE	Old School DB
PRJTEA0001	ACC Torpedo

5. The grid below the **Search** section shows the projects that meet the search criteria.
6. Under **Project Code** column of the grid, click a specific project code link.
7. In the following screen, in the **Risk Search** section, enter values in the fields mentioned below.

Risk Search	
Risk Name : <input type="text"/>	Source : <input type="text" value="Select"/>
Initial Risk : <input type="text" value="Select"/>	RaisedBy : <input type="text" value="Select"/>
Life cycle Phase : <input type="text" value="Select"/>	Detected During : <input type="text" value="Select"/>
Status : <input type="text" value="Select"/>	
<input type="button" value="Search"/> <input type="button" value="Reset"/>	

- **Risk Name** – Enter the risk name

- **Source** – Select the source from the drop-down
 - **Initial Risk** – Select the initial risk from the drop-down
 - **RaisedBy** – Select the name of the person from the drop-down
 - **Life cycle Phase** – Select the life cycle phase from the drop-down
 - **Detected During** – Select an option from the drop-down
 - **Status** – Select the status from the drop-down
8. Click **Search**.
 9. The grid below the **Search** section shows the list of risks that match the search criteria.

Risk Search

Risk Name : Source :

Initial Risk : RaisedBy :

Life cycle Phase : Detected During :

Status :

	Risk Name	Platform	Raised On	RaisedBy	Closed On	Status
<input type="checkbox"/>	risk on 27th	OTHERS	01/24/2012	Chad Reed		Risk Occurred
<input type="checkbox"/>	Report Server to be released	OTHERS	04/18/2011	Nathan Ramsey	07/27/2011	Closed

8.2.1. Add Risk

To add a new risk, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column

Search

Project Code : Project Name :

Project Code	Project Name
EC0011	VLSI-Xilinx
GUI007GD	THOR MX
GH54564HI8S	Thompsons

2. In the following screen, from below the **Search** section, click **Add Risk**.

Risk Search

Risk Name : Source :





Initial Risk : RaisedBy :

Life cycle Phase : Detected During :

Status :

	Risk Name	Platform	Raised On	RaisedBy	Closed On	Status
<input type="checkbox"/>	risk on 27th	OTHERS	01/24/2012	Chad Reed		Risk Occurred
<input type="checkbox"/>	Report Server to be released	OTHERS	04/18/2011	Nathan Ramsey	07/27/2011	Closed

3. In the **RiskTracker Detail** screen, enter values in the fields mentioned below.

RiskTracker Detail	
Project Code : J109030	Project Name : Internal Tools
RiskTracker Detail	
Status : Open	Part Of Risk Taxonomy : <input type="checkbox"/>
* Risk Name : <input type="text"/>	* Source : <input type="text" value="Select"/>
* Life cycle Phase : <input type="text" value="Select"/>	Category : <input type="text" value="Select"/>
* Detected During : <input type="text" value="Select"/>	* Impact/Consequence : <input type="text" value="Select"/>
* Severity : <input type="text" value="Select"/>	* Probability : <input type="text" value="Select"/>
Initial Risk : <input type="text"/>	Risk Exposure : <input type="text"/>
* RaisedBy : <input type="text" value="Select"/>	* Raised On : <input type="text" value=""/>  (mm/dd/yyyy)
* Follow Up Date : <input type="text" value=""/>  (mm/dd/yyyy)	Risk Anticipated Date : <input type="text" value=""/>  (mm/dd/yyyy)
* To Be Closed By : <input type="text" value=""/>  (mm/dd/yyyy)	
* Description : <input type="text"/>	
* Risk Strategy : <input type="text"/>	

- **Status** – This field is by default shown as **Open** in non-edit mode
- **Part Of Risk Taxonomy** – If a corrective action is approved, this checkbox is selected
- **Risk Name** – Enter the name of the risk
- **Source** – Select the source of risk from the drop-down
- **Life cycle Phase** – Select the life cycle phase from the drop-down
- **Category** – Select the category from the drop-down
- **Detected During** – Select the activity name from the drop-down
- **Impact/Consequence** – Select the impact / consequence from the drop-down
- **Severity** – Select the severity of the risk from the drop-down
- **Probability** – Select the probability of the risk occurrence from the drop-down
- **Initial Risk** – Based on the value in the **Severity** and **Probability** fields, the initial risk value is shown in non-edit mode

Initial Risk and **Risk Exposure** values are based on the following conditions:

Depending on the **Severity** and **Probability**, the **Initial Risk** and **Risk Exposure** values are shown.

VALUES	INITIAL RISK	RISK EXPOSURE
1 - 3	Low	Product of Severity and Probability values
4 - 8	Medium	Product of Severity and Probability values
9 and more than 9	High	Product of Severity and Probability values

- If the initial risk is **High**, then the **Severity** and **Probability** fields will become non-editable.
- If the follow-up date is less than the current date, then the severity and

probability will be upgraded to the next level. In addition, the **Initial Risk** and **Risk Exposure** will be upgraded to the next level.

- **Risk Exposure** - Based on the value in the **Severity** and **Probability** fields, the risk exposure value is shown in non-edit mode
 - **RaisedBy** - Select the name of the employee from the drop-down
 - **Raised On** - Select the date when this issue was raised using the calendar control (selected date must be within the range of the project start and end dates)
 - **Follow Up Date** - Select the follow-up date using the calendar control. Select the date up to which the risk must be followed. If the follow-up date crosses the current date, the assigned person will get reminder emails every day reminding to take the required action. (Selected date must be within the range of the **Raised On** and **To Be Closed By** dates).
 - **Risk Anticipated date** - Select the risk anticipated date using the calendar control
 - **To Be Closed By** - Select the date by when this issue must be resolved and closed using the calendar control (selected date must be within the range of the project start and end dates)
 - **Description** - Enter the description of the risk
 - **Risk Strategy** - Enter the risk strategy
4. To save the details, click **Save**.
 5. The newly added issue is shown in the grid.

8.2.2. Edit Risk

To edit a risk, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Search	
Project Code : <input type="text"/>	Project Name : <input type="text"/>
<input type="button" value="Search"/>	<input type="button" value="Reset"/>
Project Code	Project Name
EC0011	VLSI-Xilinx
GUI007GD	THOR MX
GH54564HI8S	Thompsons

2. In the following screen, from the grid below the **Search** section, click the risk name link under **Risk Name** column.

Risk Search

Risk Name : Source :
 Initial Risk : RaisedBy :
 Life cycle Phase : Detected During :
 Status :

	Risk Name	Platform	Raised On	RaisedBy	Closed On	Status
<input type="checkbox"/>	risk on 27th	OTHERS	01/24/2012	Chad Reed		Risk Occurred
<input type="checkbox"/>	Report Server to be released	OTHERS	04/18/2011	Nathan Ramsey	07/27/2011	Closed

3. In the **RiskTracker Detail** screen, edit the fields mentioned below.

RiskTracker Detail

Project Code : **J109030** Project Name : **Internal Tools**

RiskTracker Detail

Status : Part Of Risk Taxonomy : ☒
 * Risk Name : *Source :
 * Life cycle Phase : Category :
 * Detected During : * Impact/Consequence :
 * Severity : * Probability :
 Initial Risk : Risk Exposure :
 * Raised By : * Raised On Date : (mm/dd/yyyy)
 * Follow Up Date : (mm/dd/yyyy) Risk Anticipated Date : (mm/dd/yyyy)
 * To Be Closed By Date : (mm/dd/yyyy) * Risk Strategy :
 * Description :

☒ Mitigation
 ☐ Contingency

Mit/Conti Plan

	Mitigation Plan	Responsibility	Due Date	Effectiveness of Mitigation Plan	Risk Threshold	Status
<input type="checkbox"/>	Upload Failure	Ricky Carmichael	08/21/2012	Very effective	Low	Open

- **Status** – Select the status from the drop-down (if you select the option **Risk Occurred**, the risk is considered as an issue, and is also displayed in the **Issue Tracker** sub-module. The **Issue Name** is the same as that of the **Risk Name**. Similarly, if you select the option **Closed** to close the risk, you must first ensure that all the mitigations are in **Closed** status and all the contingencies are in **Applied** status.)
- **Part Of Risk Taxonomy** – If a corrective action is approved, this checkbox is selected
- **Risk Name** – Edit the name of the risk
- **Source** – Select the source from the drop-down
- **Life cycle Phase** – Select the life cycle phase from the drop-down
- **Category** – Select the category from the drop-down
- **Detected During** – Select the activity name from the drop-down
- **Impact/Consequence** – Select the impact / consequence from the drop-down

- **Severity** – Select the severity of the risk from the drop-down
 - **Probability** – Select the probability of the risk occurrence from the drop-down
 - **Initial Risk** – Based on the value in the **Severity** and **Probability** fields, the initial risk value is shown in non-edit mode
 - **Risk Exposure** - Based on the value in the **Severity** and **Probability** fields, the risk exposure value is shown in non-edit mode
 - **RaisedBy** – Select the name of the employee from the drop-down
 - **Raised On** – Select the date when this issue was raised using the calendar control (selected date must be within the range of the project start and end dates)
 - **Follow Up Date** – Select the follow-up date using the calendar control. Select the date up to which the risk must be followed. If the follow-up date crosses the current date, the assigned person will get reminder emails every day reminding to take the required action. (Selected date must be within the range of the **Raised On** and **To Be Closed By** dates).
 - **Risk Anticipated date** - Select the risk anticipated date using the calendar control
 - **To Be Closed By** – Select the date by when this issue must be resolved and closed using the calendar control (selected date must be within the range of the project start and end dates)
 - **Description** – Edit the description of the risk
 - **Risk Strategy** – Edit the risk strategy
4. To view the mitigation added to the risk, select the radio button for **Mitigation**; to view the contingency added to the risk, select the radio button for **Contingency**.
 5. To reset the values, before you click **Save**, click **Reset**.
 6. To save the details, click **Save**.
 7. To view the history of the risk and the mitigation, click the **History** tab.

Close

History Details

Risk Name : Resource is not getting task on regular basis from Customer
Source : Customers

RiskTracker Detail
History
Comments

Risk History Detail
Mitigation History

Risk History Detail

Status	Severity	Probability	Initial Risk	Risk Exposure	Updated By
Open	Critical - 3	Possible - 2	Medium	6	Chad Reed

Close

History Details

Risk Name : **Resource is not getting task on regular basis from Customer**
Source : **Customers**

RiskTracker Detail
History
Comments

Risk History Detail
Mitigation History

Mitigation History

Description	Status	Updated By
Send the reminder along with the daily status report : BaseLine Responsibility :Chad Reed	Open	Chad Reed
Send the reminder along with the daily status report : BaseLine Probability :Medium - 2	Open	Chad Reed
Send the reminder along with the daily status report : BaseLine Severity :Low - 1	Open	Chad Reed

8. To view the comments entered by the user on the change of the risk follow-up date and risk anticipated date, click **Comments**.

Close

Risk Comment Detail

Risk Name : **Resource is not getting task on regular basis from Customer**
Source : **Customers**

RiskTracker Detail
History
Comments

Comments Details for the Risk: Resource is not getting task on regular basis from Customer

Status	Modified By	Modified Date	Comments
FollowUp Date	chad_reed	06/24/2011	BaseLine FollowUp Date : 07/11/2011
Anticipated Date	chad_reed	06/24/2011	BaseLine Anticipated Date :

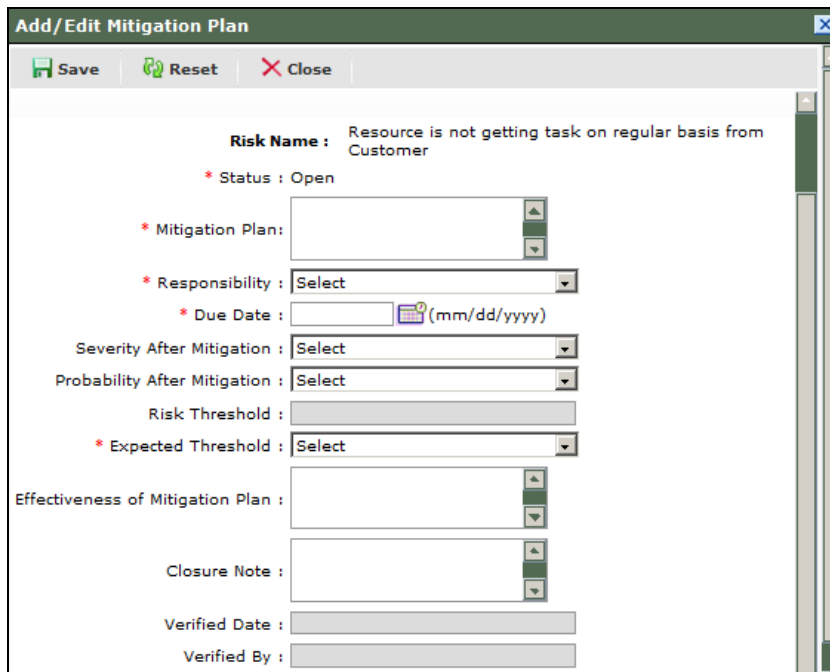
9. To close the screen, click **Close**.

8.2.3. Add Mitigation Plan

Mitigation plan is the action that must be implemented to avoid risks in the future. You can periodically review and check the effectiveness of these plans.

To add a new mitigation plan, follow these steps:

1. From the grid below the **Risk Search** section, click a **Risk Name** link.
2. In the **RiskTracker Detail** screen, click **Add Mitigation Plan**.
3. In the **Add/Edit Mitigation Plan** window, enter the values in the fields mentioned below.



- **Risk Name** – This field shows the risk name in non-edit mode
- **Status** – This field shows the status of the mitigation in non-edit mode
- **Mitigation Plan** – Enter the details of the mitigation plan.
- **Responsibility** – Select the person responsible for this plan from the drop-down
- **Due Date** – Select the date when the Mitigation Plan is due from the calendar control (selected date must be within the range of the **Raised On** and **To Be Closed By** dates)
- **Severity After Mitigation** – Select the value from the drop-down list
- **Probability After Mitigation** – Select a value from the drop-down list
- **Risk Threshold** – Based on the values in the previous two fields, the risk threshold value is shown in non-edit mode

Note: If the **Risk Threshold** is **High**, then, you must add another Mitigation plan to reduce the threshold value. Threshold values:

1 – 2: **Low**

3 – 4: **Medium**

6 and more than 6: **High**

If the **Risk Threshold** value is **High**, then the system shows an alert asking you to add a Mitigation plan.

- **Expected Threshold** – Select the expected threshold from the drop-down

Note: The value selected for the **Expected Threshold** must be less than or equal to the **Risk Exposure**.

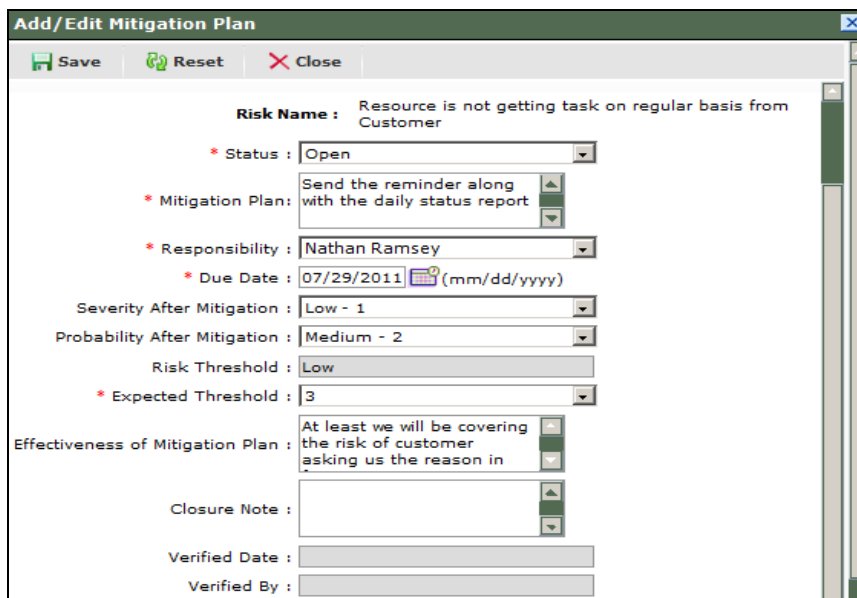
- **Effectiveness of Mitigation Plan** – Explain the effectiveness of the plan

- **Closure Note** – Enter the closure note
 - **Verified Date** – This field shows the date when this plan was verified, in non-edit mode. This date is picked up from the **RiskTracker Details** screen once the plan is verified.
 - **Verified By** – This field shows the name of the person who verified this plan, in non-edit mode
4. Click **Save**.
 5. To clear the values, click **Reset**.

8.2.4. Edit Mitigation Plan

To edit a mitigation plan, follow the steps mentioned below.

1. From the grid below the **Risk Search** section, click a **Risk Name** link.
2. In the **RiskTracker Detail** screen, from the **Miti/Conti Plan** grid, click the specific mitigation link you want to edit.
3. In the **Add/Edit Mitigation Plan** pop-up, edit the fields mentioned below.



- **Risk Name** – This field shows the risk name in non-edit mode
- **Status** – Select the status from the drop-down (if you select the option **Closed**, **Severity After Mitigation**, **Probability After Mitigation**, **Effectiveness of Mitigation Plan** and **Closure Note** fields become mandatory)
- **Mitigation Plan** – Edit the details of the mitigation plan.
- **Responsibility** – Select the person responsible for this plan from the drop-down
- **Due Date** – Select the date when the Mitigation Plan is due from the calendar control (selected date must be within the range of the **Raised On** and **To Be Closed By** dates)

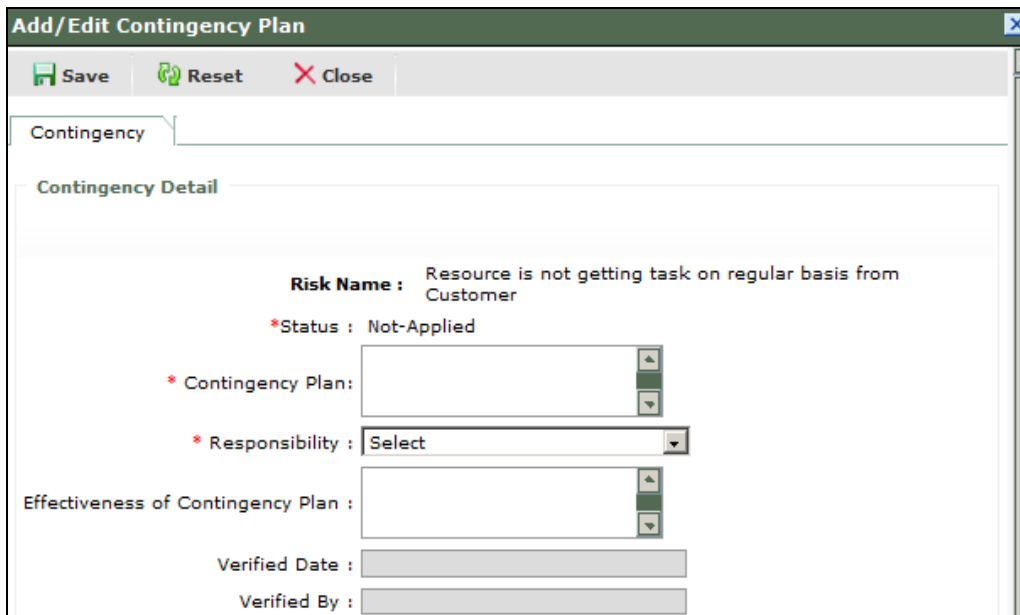
- **Severity After Mitigation** - Select the value from the drop-down list
 - **Probability After Mitigation** - Select a value from the drop-down list
 - **Risk Threshold** - Based on the values in the previous two fields, the risk threshold value is shown in non-edit mode
 - **Expected Threshold** - Select the expected threshold from the drop-down
 - **Effectiveness of Mitigation Plan** - Explain the effectiveness of the plan
 - **Closure Note** - Edit the closure note
 - **Verified Date** - This field shows the date when this plan was verified, in non-edit mode. This date is picked up from the **RiskTracker Details** screen once the plan is verified.
 - **Verified By** - This field shows the name of the person who verified this plan, in non-edit mode
4. Click **Save**.
 5. To clear the values, click **Reset**.

8.2.5. Add Contingency Plan

Contingency plan is the action that must be implemented if the mitigation plan fails.

To add a new contingency plan, follow these steps:

1. From the grid below the **Risk Search** section, click a **Risk Name** link.
2. In the **RiskTracker Detail** screen, click **Add Contingency Plan**.
3. In the **Add/Edit Contingency Plan** window, enter the values in the fields mentioned below.



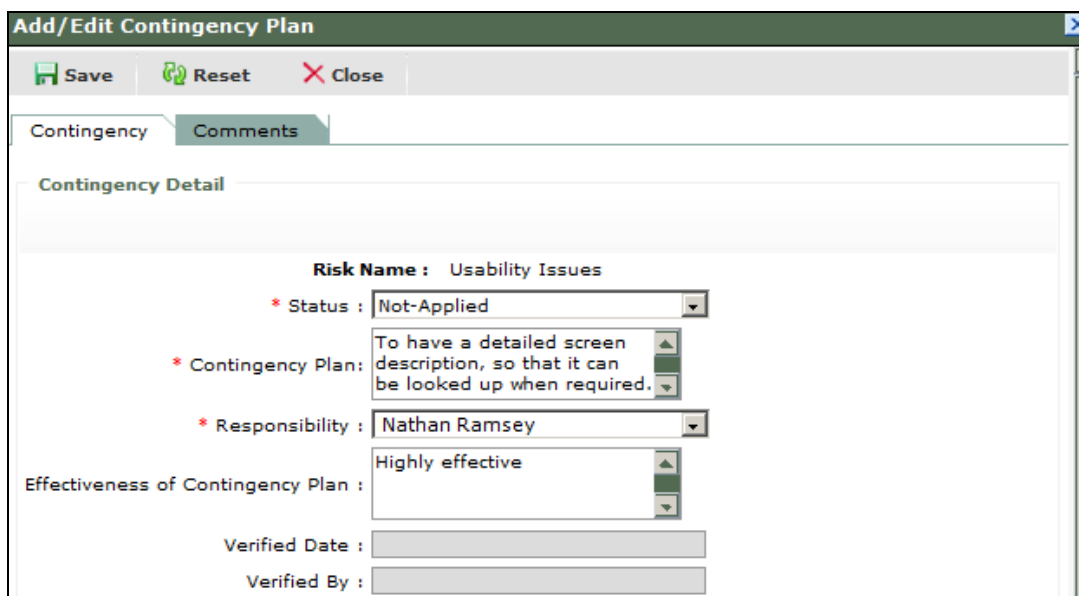
- **Risk Name** - This field shows the risk name in non-edit mode
- **Status** - This field shows the status in non-edit mode

- **Contingency Plan** – Enter the contingency plan details
 - **Responsibility** – Select the name of the person responsible from the drop-down
 - **Effectiveness of Contingency Plan** – Enter the effectiveness of the contingency plan
 - **Verified Date** – This field shows the date when this plan was verified, in non-edit mode. This date is picked up from the **RiskTracker Details** screen once the plan is verified.
 - **Verified By** – This field shows the name of the person who verified this plan, in non-edit mode
4. Click **Save**.
 5. To clear the values, click **Reset**.

8.2.6 Edit Contingency Plan

To edit a contingency plan, follow the steps mentioned below.

1. From the grid below the **Risk Search** section, click a **Risk Name** link.
2. In the **RiskTracker Detail** screen, from the **Miti/Conti Plan** grid, click the specific mitigation link you want to edit.
3. In the **Add/Edit Contingency Plan** pop-up, edit the fields mentioned below.



- **Risk Name** – This field shows the risk name in non-edit mode
- **Status** – Select the status from the drop-down (if you select the option **Applied**, the status of the mitigation related to the risk automatically changes to **Failure**)
- **Contingency Plan** – Edit the contingency plan details
- **Responsibility** – Select the name of the person responsible from the drop-down

- **Effectiveness of Contingency Plan** – Edit the effectiveness of the contingency plan
 - **Verified Date** – This field shows the date when this plan was verified, in non-edit mode. This date is picked up from the **RiskTracker Details** screen once the plan is verified.
 - **Verified By** – This field shows the name of the person who verified this plan, in non-edit mode
4. Click **Save**.
 5. To clear the values, click **Reset**.
 6. To view the comments entered by the user on the change of contingency status, click **Comments** tab.



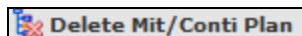
Status	Modified By	Modified Date	Comments
Not-Applied	Nathan Ramsey	02/10/2012	Initial Status

Total Record(s) : 1

Page 1 of 1

8.2.7. Delete Mit/Conti Plan

1. To delete a mitigation plan or a contingency plan, in the **RiskTracker Details** screen, select the radio button for **Mitigation** or **Contingency**.
2. In the **Mit/Conti Plan** grid, select the corresponding checkbox for the record you want to delete.
3. Click **Delete Mit/Conti Plan**.



4. In the confirmation pop-up, click **OK**.

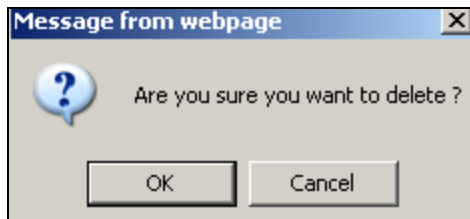
8.2.8. Delete Risk

You can delete a risk only if no depending child record (mitigation / contingency) exists. To delete a risk, follow the steps mentioned below.

1. In the grid below the **Risk Search** section, select the corresponding risk to be deleted.
2. From below the **Risk Search** section, click **Delete**.



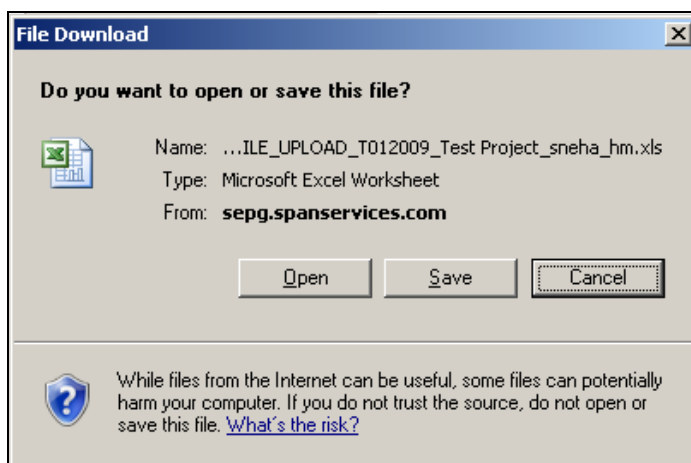
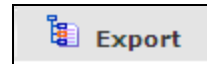
3. In the confirmation pop-up, click **OK**.



8.2.9. Export Risk

Risk details can be exported to Excel using the export function. To export risk details,

1. From below the **Search** section, click **Export**.
2. In the **File Download** pop-up, click **Save**.



3. In the **Save As** pop-up, select a location and click **Save**.

9. Approve Lesson Learnt/Risk

Only Group Managers (GM) and those above the GM can access the **Approve Lesson Learnt/Risk** module. If the GM or anyone above the GM agrees that the team has handled the issue/risk with the right corrective action/mitigation plan, they can approve the issue.

This module contains two sub-modules: **Approve Lesson Learnt** and **Approve Risk Taxonomy**.

9.1. Search Issue

To search for a specific issue, follow the steps mentioned below.

1. Expand the **Approve Lesson Learnt/Risk** menu.
2. Click **Approve Lesson Learnt** option.
3. In the **Search Issues** section, enter values in the fields mentioned below.

Search Issues

Project Code :

Project Name :

Issue Name :

Domain : Select

Issue Phase : Select

Platform : Select

- **Project Code** – Enter the project code
 - **Project Name** – Enter the project name
 - **Issue Name** – Enter the issue name
 - **Domain** – Select the domain from the drop-down
 - **Issue Phase** - Select issue phase from the drop-down
 - **Platform** – Select the platform from the drop-down
- Click **Search**.
 - The grid below the **Search Issues** section shows the records that match the criteria.

9.1.1. Approve Corrective Action

To approve a specific corrective action, follow the steps mentioned below.

- Click the specific **Issue Name** link.

Issue Name ^	Project Code	Project Description	Issue Phase
test 1	JV01104	desc '	Requirements Phase
CMMI Training	SQA	Created a new project called Software Quality Assurance to enable time sheet entry & metrics for SQA personnel	Requirements Phase
Freezing of data	SQA	Created a new project called Software Quality Assurance to enable time sheet entry & metrics for SQA personnel	Requirements Phase
Tools Ownership	SQA	Created a new project called Software Quality Assurance to enable time sheet entry & metrics for SQA personnel	Requirements Phase

- You can see the **Approve Corrective Action** window.

Approve Corrective Action

Corrective Action	Verify	Approve
1. We will ensure that only those skills related to the project will be considered while preparing the skill matrix.	<input type="checkbox"/>	<input type="checkbox"/>
2. For any task which needs more time due to valid reasons, the estimation of such tasks will be increased by giving valid reasons.	<input type="checkbox"/>	<input type="checkbox"/>

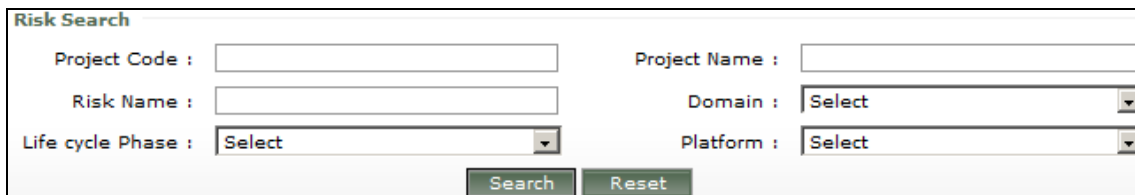
- To approve or verify the action taken, select the checkbox for **Verify** and **Approve** columns respectively.
- Click **Save**.

Note: Only the GM or anyone above the GM can verify and approve the corrective action taken. When the action is either approved or verified, the plan is considered a part of risk taxonomy.

9.2. Search Risk

To search for a specific risk, follow the steps mentioned below.

1. Expand the **Approve Lesson Learnt/Risk** menu.
2. Click **Approve Risk Taxonomy** option.
3. In the **Risk Search** section, enter values in the fields mentioned below.

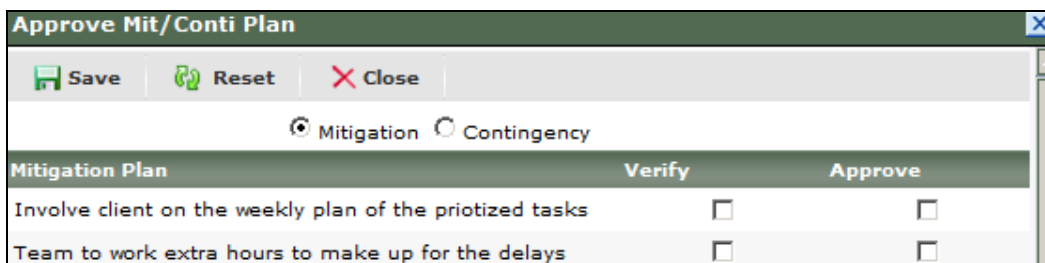


- **Project Code** – Enter the project code
 - **Project Name** – Enter the project name
 - **Risk Name** – Enter the risk name
 - **Domain** – Select the domain from the drop-down
 - **Life cycle Phase** - Select the life cycle phase from the drop-down
 - **Platform** – Select the platform from the drop-down
4. Click **Search**.
 5. The grid below the **Search Issues** section shows the records that match the criteria.

9.2.1. Approve Mit/Conti Plan

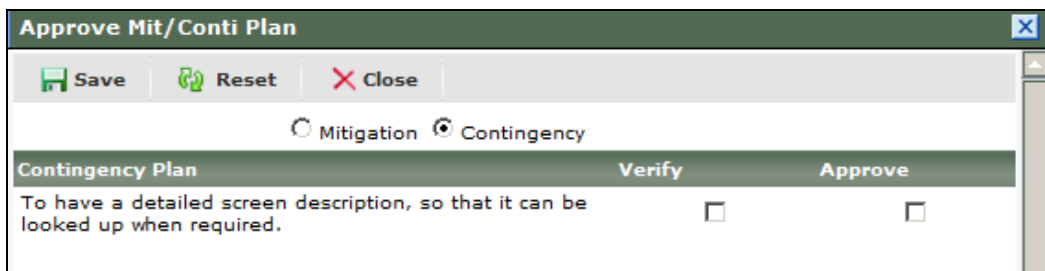
To approve a specific mit/conti plan, follow the steps mentioned below.

1. Click the specific **Risk Name** link.
2. You can see the **Approve Mit/Conti Plan** window.
3. To approve or verify the mitigation plan, select the radio button for **Mitigation**.



Mitigation Plan	Verify	Approve
Involve client on the weekly plan of the prioritized tasks	<input type="checkbox"/>	<input type="checkbox"/>
Team to work extra hours to make up for the delays	<input type="checkbox"/>	<input type="checkbox"/>

4. To approve or verify the contingency plan, select the radio button for **Contingency**.



Contingency Plan	Verify	Approve
To have a detailed screen description, so that it can be looked up when required.	<input type="checkbox"/>	<input type="checkbox"/>

5. Select the checkbox for **Verify** and **Approve** columns respectively.

6. Click **Save**.

Note: Only the GM or anyone above the GM can verify and approve the corrective action taken. When the action is either approved or verified, the plan is considered a part of risk taxonomy.

10. View Lesson Learnt/Risk

Lesson Learnt / Risk details allow you to view the procedure or strategy that was implemented to resolve an issue. If a similar issue occurs in the project, you can use the available solutions. Only Project Managers (PM) and above can access this module. Only approved issues or risks are shown in this screen.

10.1. Search Issue

To search for a specific issue, follow the steps mentioned below.

1. Expand the **View Lesson Learnt/Risk** menu.
2. Click **View Lesson Learnt** option.
3. In the **Search Issues** section, enter values in the fields mentioned below.

Search Issues

Project Code : <input style="width: 90%;" type="text"/>	Project Name : <input style="width: 90%;" type="text"/>
Issue Name : <input style="width: 90%;" type="text"/>	Domain : <select style="width: 90%; border: 1px solid black;" type="text" value="Select"></select>
Issue Phase : <select style="width: 90%; border: 1px solid black;" type="text" value="Select"></select>	Platform : <select style="width: 90%; border: 1px solid black;" type="text" value="Select"></select>

- **Project Code** – Enter the project code
 - **Project Name** – Enter the project name
 - **Issue Name** – Enter the issue name
 - **Domain** – Select the domain from the drop-down
 - **Issue Phase** - Select issue phase from the drop-down
 - **Platform** – Select the platform from the drop-down
4. Click **Search**.
 5. The grid below the **Search Issues** section shows the records that match the criteria.

10.1.1. View Corrective Action

To view a specific corrective action, follow the steps mentioned below.

1. In the left menu, click **View Lesson Learnt/Risk** to expand the menu.
2. Click **View Lesson Learnt** option.
3. In the grid below the Searchj Issue section, click the **Issue Name** link.
4. In the **View Corrective Action** pop-up, you can see the issue details.

View Corrective Action

Close

Issue Detail

IssueName : Deviation in planned and actuals

Deviation between Planned and Actuals needs to be monitored and analyzed

Description : to maintain the organization deviation benchmarks 1. Large turn around time in task execution 2. Deviation in Estimated vs. Actual

Corrective Action

Effectiveness of Corrective Action

2. Revisit the estimate if there is a scope change.

10.2. Search Risk

To search for a specific risk, follow the steps mentioned below.

- Expand the **Approve Lesson Learnt/Risk** menu.
- Click **Approve Risk Taxonomy** option.
- In the **Risk Search** section, enter values in the fields mentioned below.

Risk Search

Project Code :

Project Name :

Risk Name :

Domain :

Life cycle Phase :

Platform :

Search

Reset

- **Project Code** – Enter the project code
 - **Project Name** – Enter the project name
 - **Risk Name** – Enter the risk name
 - **Domain** – Select the domain from the drop-down
 - **Life cycle Phase** - Select the life cycle phase from the drop-down
 - **Platform** – Select the platform from the drop-down
- Click **Search**.
 - The grid below the **Search Issues** section shows the records that match the criteria.

10.2.1. View Risk Taxonomy

Risk taxonomy section enables you to record all the details of the identified risks at the organization and project level. This process applies to all types of projects currently executed in SPAN.

To view a specific risk, follow the steps mentioned below.

- In the **Risk Search** section, in the **Risk Name** column, click a specific risk name.

Project Code ^	Project Name	Risk Name	Phase	Platform	Detected During
T012008	Test Project	Software testing is the process used to assess the quality of computer software.	Software testing is the process used to assess the quality of computer software. Software testing is	ASP.Net	Software testing is the process used to assess the quality of computer software. Software testing is

- To view the mitigation plan, select the radio button for the **Mitigation**.

View Mit/Conti Plan

Close

☒ Mitigation
 ☐ Contingency

Risk Detail

Risk Name : Usability Issues

Description : There could be lot of changes on the Usability issues are anticipated and these would have a challenge on the architecture and limitations.

Mitigation

Effectiveness of Mitigation Plan

Will have checklist and keep on updating this checklist. Will follow the same for every release for every screen

- To view the contingency plan, select the radio button for the **Contingency**.

View Mit/Conti Plan

Close

☐ Mitigation
 ☒ Contingency

Risk Detail

Risk Name : Usability Issues

Description : There could be lot of changes on the Usability issues are anticipated and these would have a challenge on the architecture and limitations.

Contingency

Effectiveness of Contingency Plan

To have a detailed screen description, so that it can be looked up when required.

Highly effective

11. Causal Analysis

Causal Analysis is carried out in the project on the defect found during the project lifecycle to prevent re-occurrence of the defects, thereby ensuring stable project process and reduce re-work, which is a cost to the organization.

Defect Prevention is a key process area in CMMI Level 5, which keeps the project groups and the organization abreast of the problem and its resolutions. It improves the defect removal practices (Reviews and Testing) and enables to check the introduction of defect at different phases of the project lifecycle.

The process will help the project and the organization in unveiling the lessons and the best practices (success). It is a continuous process on any kind of project and not merely a method to prevent rework effort or the defect count.

The **Causal Analysis** module contains one sub-module called **Defect Prevention**. The **Defect Prevention** sub-module in SEPG enables the project groups to conduct the defect prevention activities on a periodic basis. The periodic reviews ensure the early detection of causes and prevent the recurrence of defects.

11.1. Search Project

To search for a specific project,

- From the left menu, click **Causal Analysis** (by default, the **Defect Prevention** sub-module is selected).



- In the **Search** section, enter the **Project Code** and **Project Name**.



- Click **Search**.
- The grid below the **Search** section shows the project code and project name.

Search	
Project Code : <input type="text"/>	Project Name : <input type="text"/>
<input type="button" value="Search"/>	<input type="button" value="Reset"/>
Project Code	Project Name
CR52424	CR Ticket Pro
TT10525	Trans Tigers
RR520125	Gems Spark

- Click the **Project Code** to view the iteration(s) of the selected project.

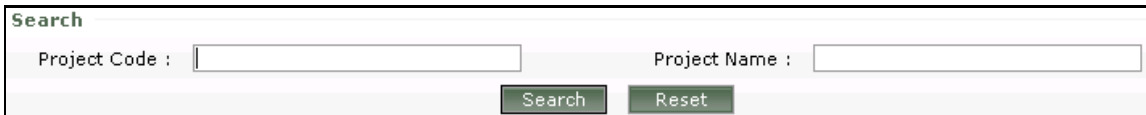
11.2. Add Iteration

To add a new iteration,

- From the left menu, expand the **Causal Analysis** module to view the **Defect Prevention** sub-module (by default, when you click **Causal Analysis**, the **Defect Prevention** sub-module is seen).



- In the **Search** section, enter the **Project Code** and **Project Name**.



- Click **Search**.
- The grid below the **Search** section shows the project code and project name.

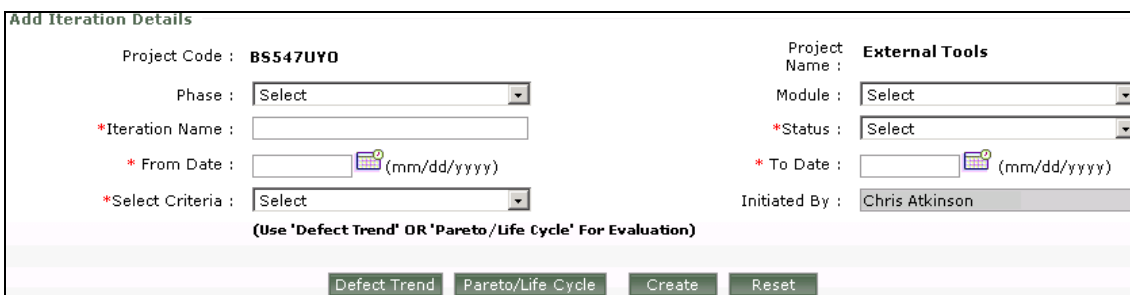
Search	
Project Code : <input type="text"/>	Project Name : <input type="text"/>
<input type="button" value="Search"/>	<input type="button" value="Reset"/>
Project Code	Project Name
CR52424	CR Ticket Pro
TT10525	Trans Tigers
RR520125	Gems Spark

- Click the **Project Code** to view the iteration(s) of the selected project.
- The **Search** section also allows you to filter the iterations displayed in the grid based on the **Iteration Name** and **Status**.



Iteration Name	From Date	To Date	Status
June-2013	06/01/2013	06/30/2013	Closed
June-HRMS-2013	06/01/2013	06/30/2013	Closed
June-CRM-2013	06/01/2013	06/30/2013	Closed

- Below the **Search** section, click **Add Iteration**.
- In the **Add Iteration Details** screen, enter values in the fields mentioned below.



- **Project Code** – This field automatically shows the project code
- **Project Name** – This field automatically shows the project name
- **Phase** – Select the phase name from the drop-down (if no phase is selected, then defects from all the phases are shown)
- **Module** – Select the module from the drop-down (if no module is selected, then defects from all the modules are shown)
- **Iteration Name** – Enter the iteration name
- **Status** – Select the status from the drop-down
- **From Date** – Select the from date using the calendar control
- **To Date** – Select the to date using the calendar control
- **Select Criteria** – Select the criteria from the drop-down (click the **Defect Trend** and **Pareto / Life Cycle** buttons to view the graphs, which helps in selecting the appropriate criteria)
- **Initiated By** – This field automatically shows the name of the logged-in user in non-edit mode

9. Click **Create**.

10. The defect details in the created iteration are shown in the grid, and **Include Defect(s)** and **Delete Defect(s)** buttons are shown.

Edit Iteration Details

Project Code : **BS547UY0**
Phase : **All**
Iteration Name :
From Date :
*Select Criteria :

Project Name : **External Tools**
Module : **All**
*Status :
To Date :
Initiated By :

(Use 'Defect Trend' OR 'Pareto/Life Cycle' For Evaluation)

	Defect Id	Date Reported	Origin	Defect Type	Severity	Status	Detected During	Assigned To	Phase	Module
<input type="checkbox"/>	101156	07/29/2013	GUI Design/Prototype	Data Handling	Medium	Verified	Test Case Design	Ohlins Mono	Makita	Production Support

Total Record(s) : 1

Page 1 of 1

Note: The **Phase** and **Module** fields show the project phase and project module respectively, for which defect RCA must be conducted and is important when RCA is done on Development Project defects.

11.3. Edit Iteration Details

To edit iteration details,

1. From the grid in the **Defect Prevention** sub-module, select the **Project Code**.

Search	
Project Code : <input type="text"/>	Project Name : <input type="text"/>
<input type="button" value="Search"/>	<input type="button" value="Reset"/>
Project Code	Project Name
CR52424	CR Ticket Pro
TT10525	Trans Tigers
RR520125	Gems Spark

2. From the grid of the following screen, select the **Iteration Name** link.

Search			
Project Code : BS547UYO	Project Name : External Tools		
Iteration Name : <input type="text"/>	Status : <input type="text" value="Select"/>		
<input type="button" value="Search"/>	<input type="button" value="Reset"/>		
<input type="button" value="Add Iteration"/>	<input type="button" value="Close"/>		
Iteration Name	From Date	To Date	Status
June-2013	06/01/2013	06/30/2013	Closed
June-HRMS-2013	06/01/2013	06/30/2013	Closed
June-CRM-2013	06/01/2013	06/30/2013	Closed

3. In the following **Edit Iteration Details** screen, edit the fields mentioned below.

Edit Iteration Details											
Project Code : BS547UYO						Project Name : External Tools					
Phase : All						Module : All					
Iteration Name : <input type="text" value="July'12"/>						*Status : <input type="text" value="Initiated"/>					
From Date : <input type="text" value="07/01/2013"/>						To Date : <input type="text" value="07/31/2013"/>					
*Select Criteria : <input type="text" value="All"/>						Initiated By : <input type="text" value="Chris Atkinson"/>					
(Use 'Defect-Trend' OR 'Pareto/Life Cycle' For Evaluation)											
<input type="button" value="Defect Trend"/>			<input type="button" value="Pareto/Life Cycle"/>			<input type="button" value="Save"/>			<input type="button" value="Reset"/>		
<input type="button" value="Include Defect(s)"/>	<input type="button" value="Delete Defect(s)"/>	<input type="button" value="Close"/>									
Defect Id	Date Reported	Origin	Defect Type	Severity	Status	Detected During	Assigned To	Phase	Module		
<input type="checkbox"/> 101156	07/29/2013	GUI Design/Prototype	Data Handling	Medium	Verified	Test Case Design	Ohlins Mono	Makita	Production Support		
Total Record(s) : 1											
Page 1 of 1											

- **Project Code** – This field automatically shows the project code in non-edit mode
- **Project Name** – This field automatically shows the project name in non-edit mode
- **Phase** – This field is shown in non-edit mode
- **Module** – This field is shown in non-edit mode
- **Iteration Name** – Iteration name is shown in non-edit mode
- **Status** – Edit the status from the drop-down

Note:

1. If you change the status to **Analyzed** and save the details, then the **Include Defect(s)** and **Delete Defect(s)** buttons are not shown and the **Select Criteria** field becomes non-editable.
2. If you change the status to **Reviewed** and save the details, then a confirmation pop-up asks if you want the observation in Issue Tracker. If you click OK, the **Reviewed By** field is added showing the name of the person who reviewed it and it will navigate to the [Issue tracker Detail](#) screen, where you can enter the details and

click **Save**. When you click **Save**, you are navigated back to the screen that shows the list of iterations. If you click **Cancel** in the confirmation pop-up, the **Reviewed By** field is added showing the name of the person who reviewed it. Also, once the status is changed to **Reviewed**, then you cannot edit the existing causal analysis and preventive action details.

3. If you change the status to **Closed** and save the details, you cannot edit the iteration details thereafter.

4. If you change the status to **Rejected** and save the details, then you cannot edit the existing causal analysis and preventive action details.

- **From Date** – The from date is shown in non-edit mode
 - **To Date** – The to date is shown in non-edit mode
 - **Select Criteria** – Edit the criteria from the drop-down (click the **Defect Trend** and **Pareto / Life Cycle** buttons to view the graphs, which helps in selecting the appropriate criteria)
 - **Initiated By** – This field automatically shows the name of the user who initiated the iteration
4. In the **Edit Iteration Details** screen, the defect details in the created iteration are shown in the grid, and **Include Defect(s)** and **Delete Defect(s)** buttons are shown.

Edit Iteration Details
 Project Code : **BS547UY0**
 Phase : **All**
 Iteration Name :
 From Date :
 *Select Criteria :
 (Use 'Defect Trend' OR 'Pareto/Life Cycle' For Evaluation)

Project Name : **External Tools**
 Module : **All**
 *Status :
 To Date :
 Initiated By :

<input type="checkbox"/>	Defect Id	Date Reported	Origin	Defect Type	Severity	Status	Detected During	Assigned To	Phase	Module
<input type="checkbox"/>	101156	07/29/2013	GUI Design/Prototype	Data Handling	Medium	Verified	Test Case Design	Ohlins Mono	Makita	Production Support

Total Record(s) : 1
Page 1 of 1

5. When you click **Include Defect(s)**, the **Include Defects For RCA** (Root Cause Analysis) pop-up shows the remaining defects that are not shown in the grid, but exist for the same date range.

Include Defect(s) For RCA

<input type="checkbox"/>	Defect Id	Date Reported	Origin	Defect Type	Severity	Status	Detected During	Assigned To	Phase	Module
<input type="checkbox"/>	101156	07/29/2013	GUI Design/Prototype	Data Handling	Medium	Verified	Test Case Design	Ohlins Mono	Makita	Production Support

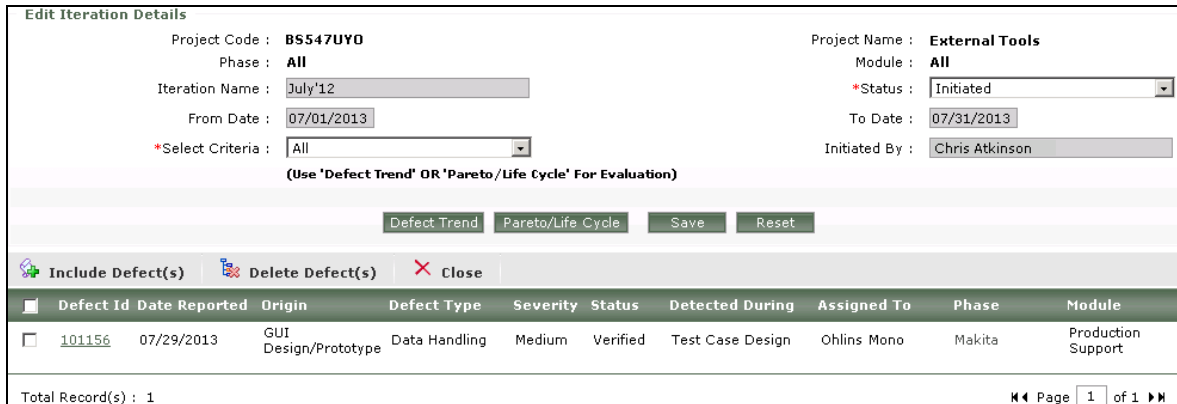
6. In the **Include Defects For RCA** pop-up, under **Defect Id**, select the corresponding checkbox for the defect to be selected and click **Include**.

- The selected defects are now shown in the grid under the **Edit Iteration Details** section.

11.4. Delete Defect

To delete a defect,

- In the **Edit Iteration Details** screen, from the grid, select the corresponding checkbox for the defect you want to delete.



Edit Iteration Details

Project Code : **BS547UY0** Project Name : **External Tools**
 Phase : **All** Module : **All**
 Iteration Name : **July'12** *Status : **Initiated**
 From Date : **07/01/2013** To Date : **07/31/2013**
 *Select Criteria : **All** Initiated By : **Chris Atkinson**
 (Use 'Defect Trend' OR 'Pareto/Life Cycle' For Evaluation)

Defect Trend **Pareto/Life Cycle** **Save** **Reset**

Include Defect(s) **Delete Defect(s)** **Close**

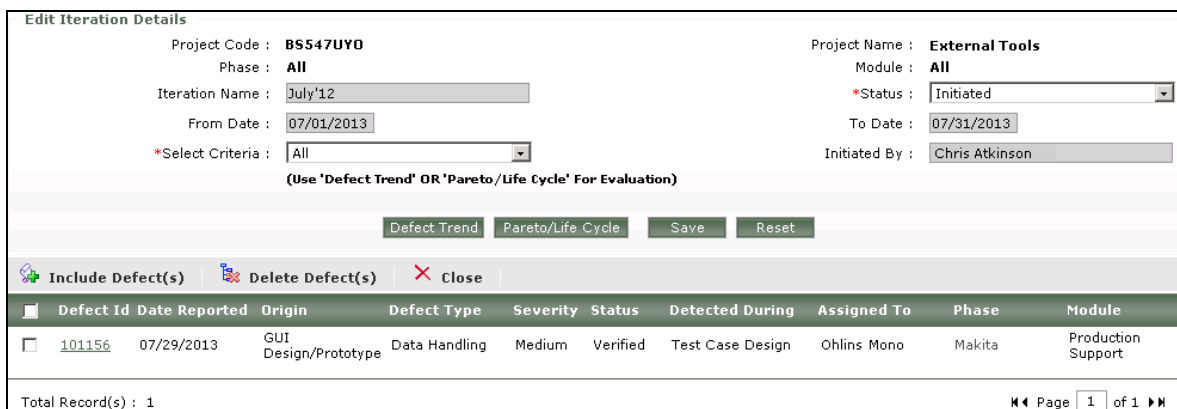
	Defect Id	Date Reported	Origin	Defect Type	Severity	Status	Detected During	Assigned To	Phase	Module
<input type="checkbox"/>	101156	07/29/2013	GUI Design/Prototype	Data Handling	Medium	Verified	Test Case Design	Ohlins Mono	Makita	Production Support

Total Record(s) : 1 Page 1 of 1

- Click **Delete Defect(s)**.
- In the confirmation pop-up, click **OK**.
- If a preventive action exists for the defect, you can see an alert message, which says that a child record exists and that must be first deleted before deleting the defect (refer section [11.8. Delete Preventive Action](#) in this document).

11.5. Add / Edit Causal Analysis

- To specify the causal analysis of a defect, from the **Defect Id** column of the grid, click the **Defect Id** link.



Edit Iteration Details

Project Code : **BS547UY0** Project Name : **External Tools**
 Phase : **All** Module : **All**
 Iteration Name : **July'12** *Status : **Initiated**
 From Date : **07/01/2013** To Date : **07/31/2013**
 *Select Criteria : **All** Initiated By : **Chris Atkinson**
 (Use 'Defect Trend' OR 'Pareto/Life Cycle' For Evaluation)

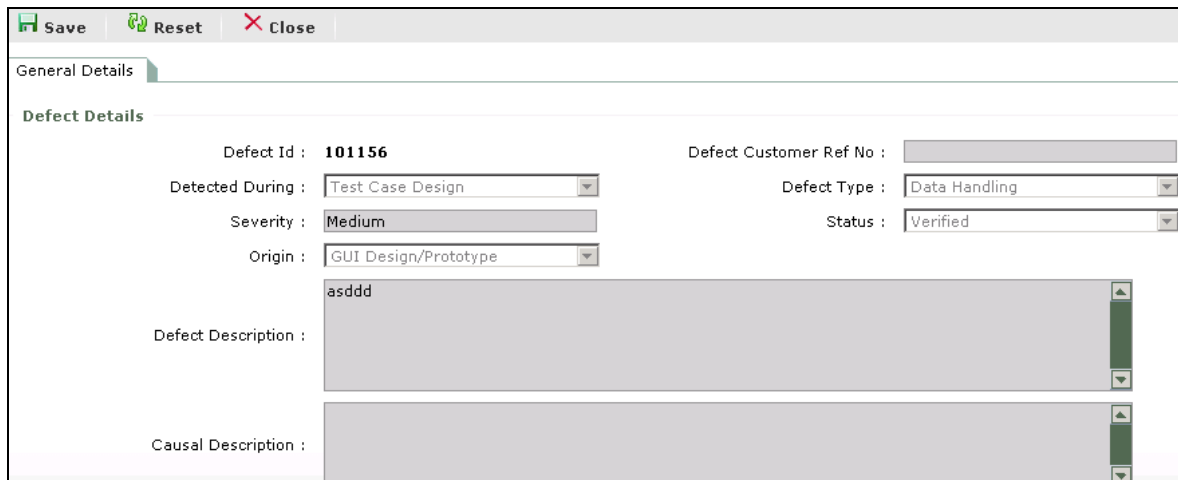
Defect Trend **Pareto/Life Cycle** **Save** **Reset**

Include Defect(s) **Delete Defect(s)** **Close**

	Defect Id	Date Reported	Origin	Defect Type	Severity	Status	Detected During	Assigned To	Phase	Module
<input type="checkbox"/>	101156	07/29/2013	GUI Design/Prototype	Data Handling	Medium	Verified	Test Case Design	Ohlins Mono	Makita	Production Support

Total Record(s) : 1 Page 1 of 1

- In the following **General Details** screen, the **Defect Details** section shows the details of the defect in non-edit mode (the defect details shown here is taken from the **Edit Bug Details** screen of the **Bug Tracker** module).



Save Reset Close

General Details

Defect Details

Defect Id : **101156** Defect Customer Ref No :

Detected During : Defect Type :

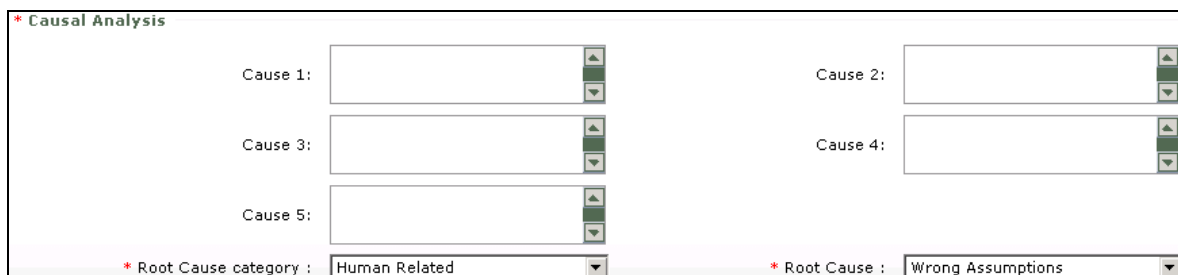
Severity : Status :

Origin :

Defect Description :

Causal Description :

3. In the **Causal Analysis** section, enter the cause(s) (5 Whys) of the defect (a defect must have at least one cause).



* Causal Analysis

Cause 1:

Cause 2:

Cause 3:

Cause 4:

Cause 5:

* Root Cause category : * Root Cause :

4. For the **Root Cause Category** and **Root Cause** fields, select options from the drop-down (the values shown in these two fields are taken from the **Edit Bug Details** screen of the **Bug Tracker** module).
5. Click **Save**.
6. Once you click **Save**, the cause(s) of the defect is saved and the **Add Preventive Action** button is shown.



Save Add Preventive Action Reset Close

11.6. Add Preventive Action

To add preventive action,

1. From the **General Details** section (refer second image under section 11.5. of this document), click **Add Preventive Action**.
2. In the **Add/Edit Preventive Action** pop-up, under **Preventive Action Details** section, enter values in the fields mentioned below.

Add/Edit Preventive Action

Save
 Reset
 Close

Preventive Action Details

Defect Id : 101156

* **Status :** **Identified**

* **Preventive Action :** Select [Custom](#)

* **Identified Date :** (mm/dd/yyyy)

* **Event Of Action :** Select

Effectiveness of Preventive Action

Total No. of Occurrence :

Verification Details of Preventive Action

Verified Date :

Verified By :

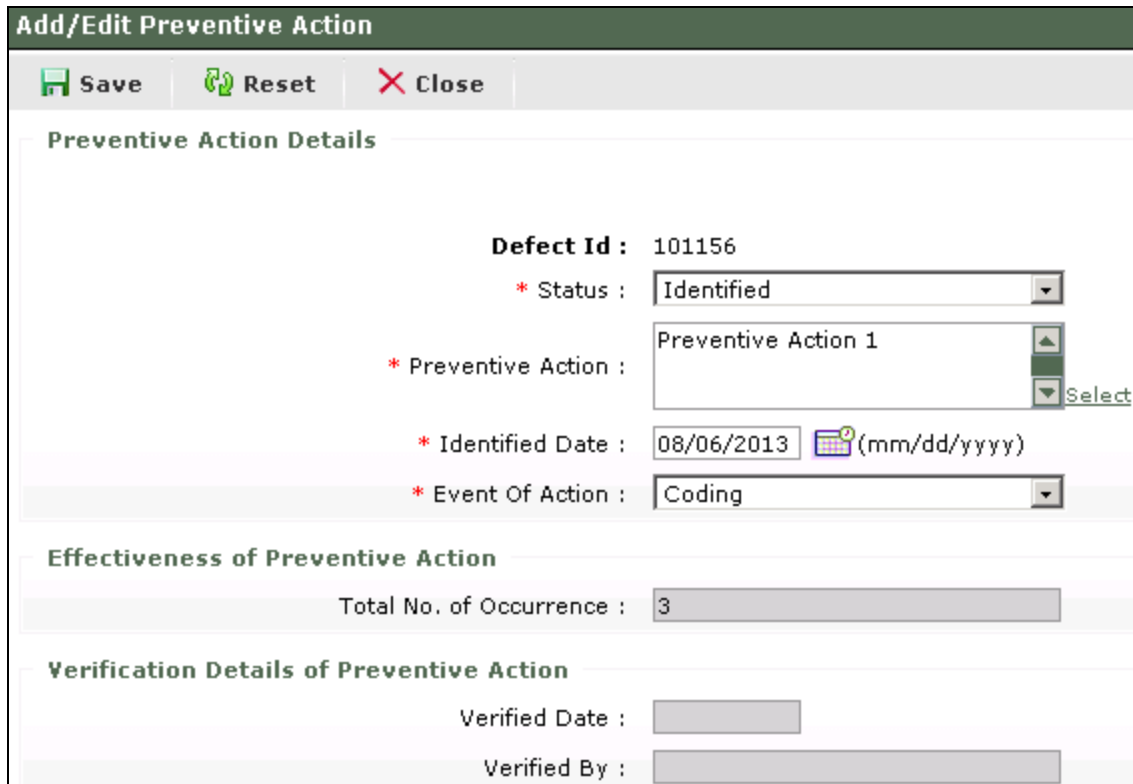
- **Defect Id** – This field automatically shows the defect ID
 - **Status** – When adding the preventive action for the first time, this field automatically shows the status as **Identified**; when editing an existing preventive action, this field is shown with a drop-down
 - **Preventive Action** – Select a preventive action from the drop-down (alternatively, to enter a new preventive action, click the **Custom** link and enter the preventive action; additionally, if a preventive action has occurred thrice or more than thrice, an alert message is shown – you may select another preventive action or ignore the message and continue)
 - **Identified Date** – Select the identified date using the calendar control
 - **Event of Action** – Select an event of action from the drop-down
3. In the **Effectiveness of Preventive Action** section, the **Total No. of Occurrence** field shows the value in non-edit mode, based on the selected preventive action.
 4. In the **Verification Details of Preventive Action** section, the **Verified Date** and **Verified By** fields show the values in non-edit mode, only if the status has been verified.
 5. Click **Save**.
 6. The saved preventive action details are shown in the **Defect Preventive Action Details** grid of the **General Details** screen.

Defect Preventive Action Details				
	Preventive Action	Event Of Action	Identified Date	Status
<input type="checkbox"/>	Preventive Action 1	Coding	08/06/2013	Identified
Total Record(s) : 1				
◀ Page 1 of 1 ▶				

11.7. Edit Preventive Action

To edit a preventive action details,

1. From the **Defect Preventive Action Details** grid of the **General Details** screen, click the **Preventive Action** link.



Add/Edit Preventive Action

Preventive Action Details

Defect Id : 101156

* Status : Identified

* Preventive Action : Preventive Action 1

* Identified Date : 08/06/2013 (mm/dd/yyyy)

* Event Of Action : Coding

Effectiveness of Preventive Action

Total No. of Occurrence : 3

Verification Details of Preventive Action

Verified Date :

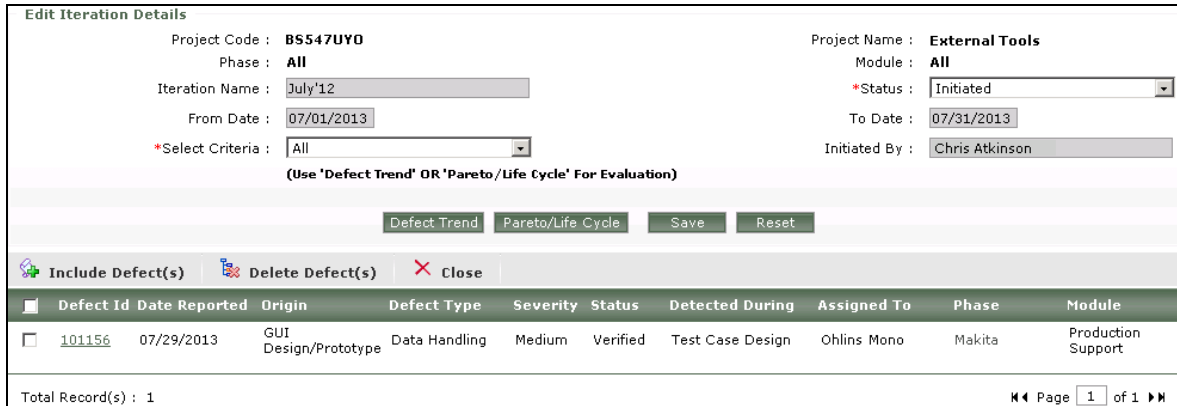
Verified By :

2. In the **Add/Edit Preventive Action** pop-up, edit the fields mentioned below.
 - **Defect Id** – This field automatically shows the defect ID in non-edit mode
 - **Status** – Select the status from the drop-down (if the status of the preventive action is changed to **Verified**, then in the **Add/Edit Preventive Action** pop-up, under **Verification Details of Preventive Action** section, the **Verified Date** and **Verified By** fields show the date the preventive action was verified and the person who verified it and you can only view the details, but cannot edit the details. Similarly, if the status of the preventive action is changed to **Rejected**, then you can only view the details, but cannot edit the details).
 - **Preventive Action** – Edit the preventive action
 - **Identified Date** – Edit the identified date using the calendar control
 - **Event of Action** – Edit the event of action
3. To save the changes, click **Save**.

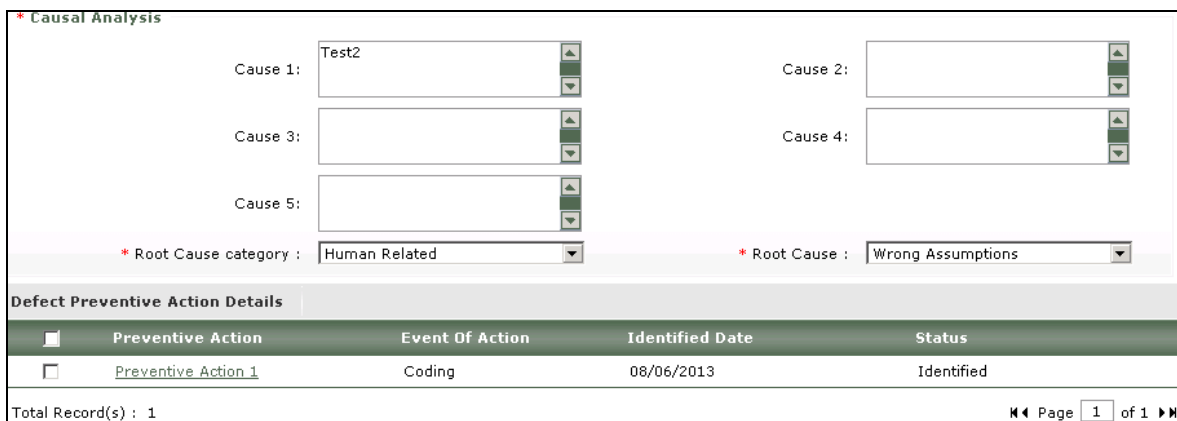
11.8. Delete Preventive Action

To delete a preventive action,

1. From the **Defect Id** column of the grid in the **Edit Iteration Details** screen, click the **Defect Id** link.



2. In the **Defect Preventive Action Details** grid of the **General Details** screen, select the corresponding checkbox for the preventive action you want to delete.



3. From the top of the screen, click **Delete Preventive Action**.



4. In the confirmation pop-up, click **OK**.

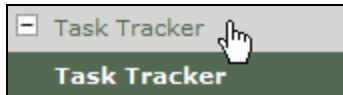
12. Task Tracker

The **Task Tracker** module allows you to keep track of the tasks related to various projects. When a new feature is included to an existing application of any project, then this new feature is called a 'task'. If the new feature is a replacement or modification of an existing feature in an application, then this new feature is called as a **Change Request** (CR). In the Task Tracker module, you can add a task, edit a task, import a task, delete a task, view the pictorial chart form of reports, view timesheet entry for a task, view history and comments.

12.1. Search for Tasks

To search for a specific task, follow these steps.



1. From the left menu, click **Task Tracker** (by default, **Task Tracker** sub-module is selected).



2. In the **Search** section, enter the **Project Code** and **Project Name**.
3. Click **Search**.
4. The grid below the **Search** section shows the projects that meet the search criteria.

Search	
Project Code : <input type="text"/>	Project Name : <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/>	
Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

5. Under **Project Code** column of the grid, click a specific project code.
6. In the following screen, in the **Search** section, enter values in the fields mentioned below.

Search	
Project Code : HY863H6	Project Name : Thompson and Thomphson
Phase : <input type="text" value="Select"/>	Module : <input type="text" value="Select"/>
Task Name : <input type="text"/>	Task No. : <input type="text"/>
Assigned To : <input type="text" value="Select"/>	Status : <input type="text" value="Select"/>
Priority : <input type="text" value="Select"/>	Date Type : <input type="text" value="Estimated Start Date"/>
From Date : <input type="text"/>  (mm/dd/yyyy)	To Date : <input type="text"/>  (mm/dd/yyyy)
<input type="button" value="Search"/> <input type="button" value="Reset"/>	

- **Phase** – Select the phase from the drop-down
 - **Module** – Select the module from the drop-down
 - **Task Name** – Enter the task name
 - **Task No.** – Enter the task number
 - **Assigned To** – Select the person to whom the task is assigned from the drop-down
 - **Status** – Select the status from the drop-down
 - **Priority** – Select the priority from the drop-down
 - **Date Type** – Select the date type from the drop-down (if you select an option, two additional fields – **From Date** and **To Date** – are shown, which help in narrowing down the search to a specified time frame)
7. Click **Search**.
 8. The grid below the **Search** section shows the list of issues that match the search criteria.

Project Code : **GH54564HI85**

Phase : Select

Task Name :

Assigned To : Select

Priority : Select

Project Name : **Thompsons**

Module : Select

Task No. :

Status : Select

Search

Reset

Add Task

Save

Delete

Import Task

Reports

Reset

Close

Task Name	Assigned To	Est. StartDate	Est. EndDate	Status	Cont Effort
Enhance	Stefan Everts	01/03/2011	01/27/2011	In-Progress	2.4

12.2. Add Tasks

To add a new task, follow these steps.

- From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Project Code :

Project Name :

Search

Reset

Project Code	Project Name
GUI007GD	THOR MX
GH54564HI85	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

- In the following screen, from below the **Search** section, click **Add Task**.

Project Code : **GH54564HI85**

Phase : Select

Task Name :

Assigned To : Select

Priority : Select

Project Name : **Thompsons**

Module : Select

Task No. :

Status : Select

Search

Reset

Add Task

Save

Delete

Import Task


Reports


Reset

Close

Task Name	Assigned To	Est. StartDate	Est. EndDate	Status	Cont Effort
Enhance	Stefan Everts	01/03/2011	01/27/2011	In-Progress	2.4

- In the **Details** tab that is shown by default, enter values in the fields mentioned below.
 - Phase** – Select a project phase from the drop-down.
 - Module** - Select a module from the drop-down (modules that have their status as **On-Hold**, **Scrapped** and **Completed** are not shown in the drop-down).

Note: If the module 'type' of selected module is not specified in **Project**, the **Message from webpage** pop-up alerts the user to select the module type. To select the module type, click the  icon next to the **Module** field, which opens the **Select Module Type** pop-up. In the **Select Module Type** pop-up, for the **Module**

field, select the module from the drop-down. For the **Module Type** field, select the module type from the drop-down. To save the changes, click **OK**, to reset the values, click **Reset** and to close the pop-up, click **Close**. If the selected module type is **Maintenance**, the application generates four activities (the four activities cannot be deleted and the activities are mentioned in the templates provided by Quality department), based on the **Customer Contracted Effort** entered by the user. Effort distribution can be seen in the **Effort Calculation Details** pop-up, when you click the  icon next to the **Effort Calculation Details** field.

- **Task Name** – Enter the task name.
- **Task No.** – The task number is auto-generated and is shown in non-edit mode.
- **Priority** – Select the priority from the drop-down.
- **Est. StartDate** – Enter the estimated start date using the calendar control.
- **Est. EndDate** – Enter the estimated end date using the calendar control.
- **Act. StartDate** – This field shows the auto generated date, based on the first timesheet entry, in non-edit mode.
- **Act. EndDate** – This field shows the auto generated date, based on the last timesheet entry, in non-edit mode.
- **Status** – Select the status from the drop-down.
- **Percentage Completed** – Enter the percentage of the task completed.
- **BaseLine/Label** – Enter the baseline / label, or simply click the **Select** link and select an option from the drop-down.
- **Version** – Enter the version, or simply click the **Select** link and select an option from the drop-down.
- **Assigned To** – Select the name of the employee from the drop-down.
- **Complexity** – The complexity is shown in non-edit mode based on the value you enter in the **Contracted Effort** field.
- **Impact Analysis Effort** – Enter the impact analysis effort.
- **Actual Effort** – This field shows the time you enter in the **Timesheet** module for the specific task.
- **Description** – Enter the description.
- **Add Activity** – To divide the task into multiple activities and enter the effort details for each activity, select this checkbox. Once you select this checkbox, you can see the **AddActivity** and **DeleteActivity** buttons on the top. If you don't want to divide the task into multiple activities, do not select the checkbox.
- **Contracted Effort** – Enter the complete contracted effort spent on the task.

- **Estimated Effort** – Based on the contracted effort and the efficiency of the person to whom the task is assigned, this field shows the total estimated effort.

Note: To exclude the efficiency of the person from the calculation, select the checkbox for the **Exclude Employee Efficiency** field. When you exclude the employee efficiency from the calculation, this field shows the same value as in the **Contracted Effort** field.

- To divide the task into multiple activities and enter the effort details for each activity, when you select the checkbox for the **Add Activity** field, you can see the **AddActivity** and **DeleteActivity** buttons on the top.



- Click **AddActivity**.

Add Activity : ☒

Note: Estimated Start Date will be considered as Received Date for maintenance projects.

Activity	Sub Activity	Contracted Effort	Assigned To	Estimated Effort	
Select		0.0	Select	0.0	<input type="checkbox"/>
Total Contracted Effort :			Total Estimated Effort :		
		Hrs			Hrs

- In the grid below, select an option for the **Activity**, **Sub Activity** and **Assigned To** fields from the drop-down.
- For the **Contracted Effort** field, enter the complete contracted effort spent on the activity.
- Based on the **Contracted Effort** and the efficiency of the person to whom the task is assigned, the **Estimated Effort** field shows the estimated effort.
- To reset the values, before you click **Save**, click **Reset**.
- To save the details, click **Save**.
- To close the screen, click **Close**.

12.3. Edit Tasks

To edit a task, follow these steps.

- From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Search

Project Code : Project Name :

Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

- In the following screen, from the grid below the **Search** section, click the task name link under **Task Name** column.

Project Code : **GH54564HI8S**

Phase : Select

Task Name :

Assigned To : Select

Priority : Select

Project Name : **Thompsons**

Module : Select

Task No. :

Status : Select

Search

Reset

Add Task

Save

Delete

Import Task

Reports

Reset

Close

Task Name	Assigned To	Est. StartDate	Est. EndDate	Status	Cont Effort
Enhance	Chris Atkinson	01/03/2011	01/27/2011	In-Progress	2.4

- In the following **Details** (tab) screen, edit the fields mentioned below.

Save

Reset

Close

Project Detail

Project Code : **JI09030**

Project Name : **Internal Tools**

Details

History

Time Sheet

Comments

* Phase : HRMS

* Task Name :

Relate To Old Tasks/CRs :

* Priority : Medium

* Est. StartDate : (mm/dd/yyyy)

Act. StartDate :

* Status : In-Progress

BaseLine/Label : Select

* Assigned To : Select

Impact Analysis Effort :

* Description :

Program Files/Impacted Items :

Requirement Specs :

Test Case Doc :

Add Activity : ☐

* Contracted Effort : (HH.MM)

* Estimated Effort : (HH.MM)

* Module : Production Support

Task No. :

Acceptance Testing : ☐

* Est. EndDate : (mm/dd/yyyy)

Act. EndDate :

Percentage Completed :


* Version : Select

Complexity :

Actual Effort :

Exclude Employee Efficiency : ☐

Note: Estimated Start Date will be considered as Received Date for

- **Phase** – This field is shown in non-edit mode
- **Module** – This field is shown in non-edit mode
- **Task Name** – Edit the task name
- **Relate To Old Tasks/CRs** – This field shows the related old tasks or CR in non-edit mode (click the  icon to open the **Old Tasks** pop-up to select the task; refer section [12.4. Relate to Old Task](#))
- **Task No.** – The task number is auto-generated and is shown in non-edit mode
- **Analysis Module's Task Est.Effort** – This field is shown in non-edit mode
- **Analysis Module's Task Actual Effort** – This field is shown in non-edit mode
- **Priority** – Edit the priority
- **Acceptance Testing** – If the task is given by a client, select this checkbox (notice that the **Relate To Old Tasks/CRs** field is shown as a mandatory field, once you select the checkbox)
- **Est. StartDate** – Edit the estimated start date using the calendar control
- **Est. EndDate** – Edit the estimated end date using the calendar control
- **Act. StartDate** – This field shows the auto generated date, based on the first timesheet entry, in non-edit mode
- **Act. EndDate** – This field shows the auto generated date, based on the last timesheet entry, in non-edit mode
- **Status** – Edit the status (if you select the option **Verified** from the drop-down, then after three days, the status automatically changes to **Completed**)
- **Percentage Completed** – Edit the percentage of the task completed
- **BaseLine/Label** – Edit the baseline / label
- **Version** – Edit the version
- **Assigned To** – Edit the name of the employee
- **Complexity** – The complexity is shown in non-edit mode based on the value you enter in the **Contracted Effort** field
- **Impact Analysis Effort** – Edit the impact analysis effort
- **Actual Effort** – This field shows the time you enter in the **Timesheet** module for the specific task in non-edit mode
- **Description** – Edit the description
- **Program Files/Impacted Items** – Edit the program files and impacted items
- **Requirement Specs** – Edit the requirement specifications
- **Technical Specs** – Edit the technical specifications
- **Test Case Doc** – Edit the test case doc details

- **Add Activity** – To divide the task into multiple activities and enter the effort details for each activity, select this checkbox. Once you select this checkbox, you can see the **AddActivity** and **DeleteActivity** buttons on the top. If you don't want to divide the task into multiple activities, do not select the checkbox.
 - **Contracted Effort** – Enter the complete contracted effort spent on the task.
 - **Exclude Employee Efficiency** – To exclude an employee's efficiency, select the checkbox
 - **Estimated Effort** – Based on the contracted effort and the efficiency of the person to whom the task is assigned, this field shows the total estimated effort.
4. To reset the values, before you click **Save**, click **Reset**.
 5. To save the details, click **Save**.
 6. To view the history of the changes in the task, click the **History** tab.

Close

Project Detail
Project Code : **J109030** Project Name : **Internal Tools**

Details History Time Sheet Comments

History Assigned

History

From Date	From Status	To Status	Updated Date	Updated By
	Initial	In-Progress	11/03/2011	chad_reed

7. The **History** grid shows the details of the task.
8. To view the history of the task assigned, in the **History** tab, click **Assigned**.

Close

Project Detail
Project Code : **J109030** Project Name : **Internal Tools**

Details History Time Sheet Comments

History Assigned

Assigned

Assigned To	Assigned Date	Status	Updated By
Nathan Ramsey	11/16/2011	In-Progress	Chad Reed

9. To view the timesheet details related to the task, click the **Time Sheet** tab.

Close

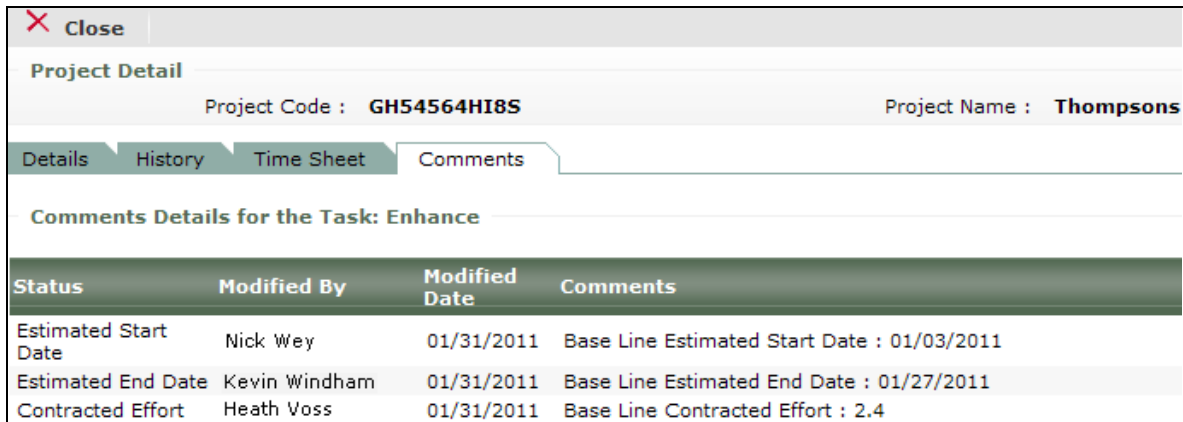
Project Detail
Project Code : **GH54564HI8S** Project Name : **Thompsons**

Details History Time Sheet Comments

TimeSheetEntryDetails for the Task: Enhance

TaskName	Date	Activity	SubActivity	Hours	TimeSheet By
Enhance	01/31/2011	Corrective and Preventive Activities	Data Collation for DP	1.0	Stefan Everts

10. The grid shows the details of the time spent on the task.
11. To view the comments related to the task, click the **Comments** tab.



Project Detail

Project Code : **GH54564HI8S** Project Name : **Thompsons**

Details History Time Sheet **Comments**

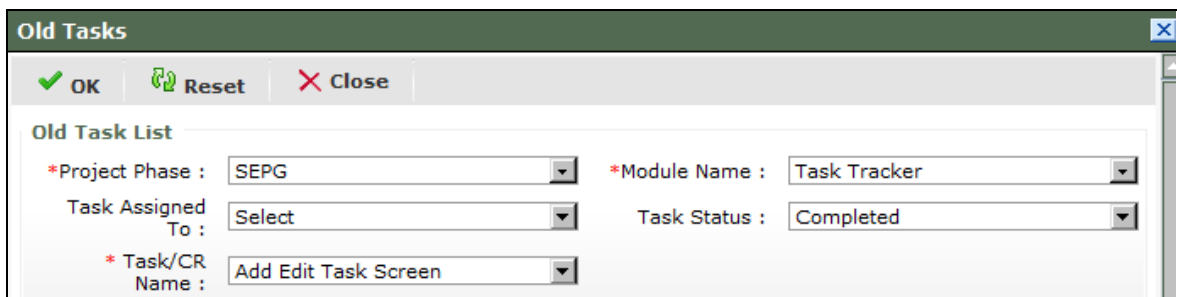
Comments Details for the Task: Enhance

Status	Modified By	Modified Date	Comments
Estimated Start Date	Nick Wey	01/31/2011	Base Line Estimated Start Date : 01/03/2011
Estimated End Date	Kevin Windham	01/31/2011	Base Line Estimated End Date : 01/27/2011
Contracted Effort	Heath Voss	01/31/2011	Base Line Contracted Effort : 2.4

12.4. Relate to Old Task

In case of new enhancements to old closed tasks, you can use this functionality to relate the current task with the old task / CR. To relate to the old task,

1. From the **Project Details** screen, next to **Relate To Old Tasks/CRs** field, click the

Old Tasks

OK Reset Close



Old Task List

*Project Phase : SEPG *Module Name : Task Tracker

Task Assigned To : Select Task Status : Completed

* Task/CR Name : Add Edit Task Screen

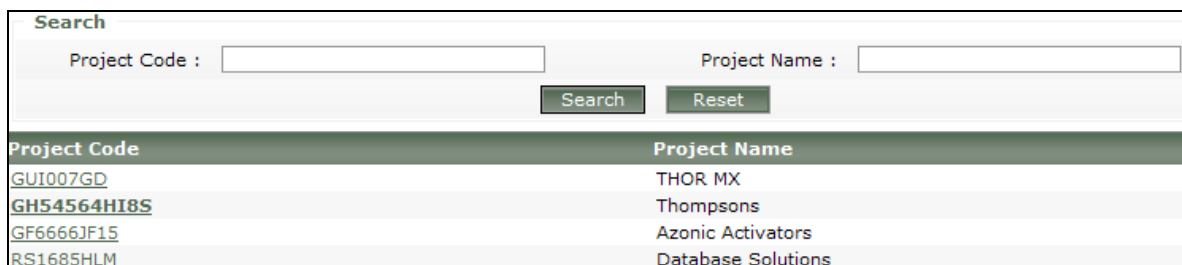
2. In the **Old Tasks** pop-up, select the options from the drop-down for the fields mentioned below.
 - **Project Phase** – Select the project phase from the drop-down
 - **Module name** - Select the module name from the drop-down (options shown in the drop-down are based on the selected project phase)
 - **Task Assigned To** – Select the resource name from the drop-down (options shown in the drop-down are based on the selected project phase)
 - **Task Status** - Select the task status from the drop-down
 - **Task/CR Name** - Select the task / CR name from the drop-down (options shown in the drop-down are based on the selected project phase)
3. To save the selection, click **OK**.
4. To reset values, click **Reset**.
5. To close the pop-up, click **Close**.

6. Once you relate the task, in the **Project Detail** screen, next to **Relate To Old Tasks/CRs** field, you can see the  icon and the **Detail** link.
7. To view the related task details, click the **Detail** link.
8. The **Related Task/CR Detail** pop-up shows the details of the related task.
9. To remove the related task / CR, click the  icon.
10. In the confirmation pop-up, click **OK**.

12.5. Delete Task

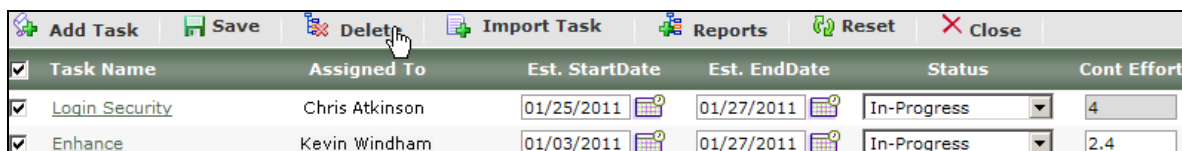
To delete a task, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



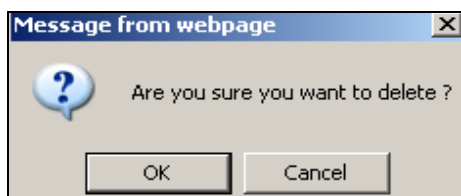
Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

2. In the following screen, from the grid below the **Search** section, select the corresponding checkbox for the task you want to delete.



<input checked="" type="checkbox"/>	Task Name	Assigned To	Est. StartDate	Est. EndDate	Status	Cont Effort
<input checked="" type="checkbox"/>	Login Security	Chris Atkinson	01/25/2011	01/27/2011	In-Progress	4
<input checked="" type="checkbox"/>	Enhance	Kevin Windham	01/03/2011	01/27/2011	In-Progress	2.4

3. From the top of the grid, click **Delete**.
4. In the confirmation pop-up, click **OK**.

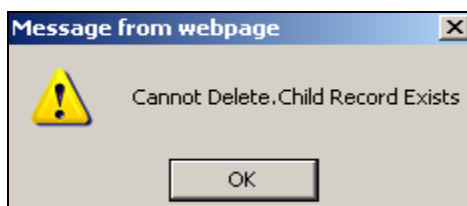


Message from webpage

Are you sure you want to delete ?

OK Cancel

5. If a child record exists, you cannot delete the task and you can see the pop-up shown below.



Message from webpage

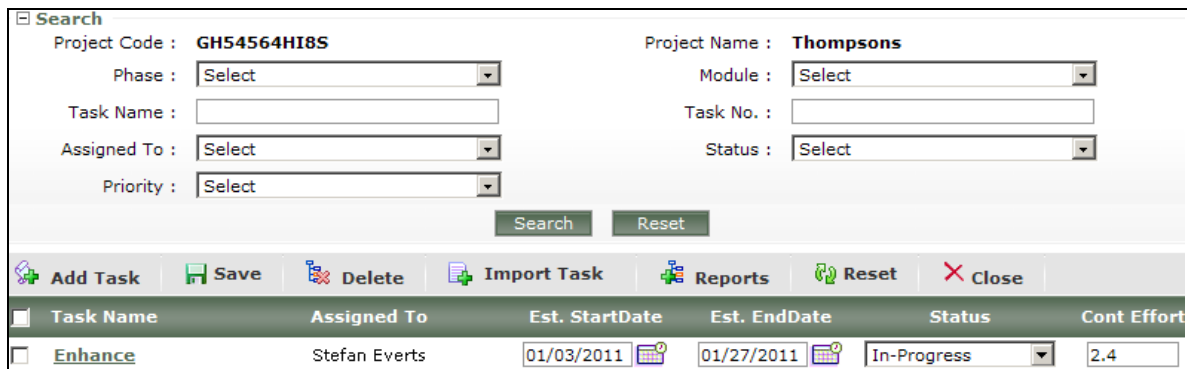
Cannot Delete. Child Record Exists

OK

12.6. Import Tasks

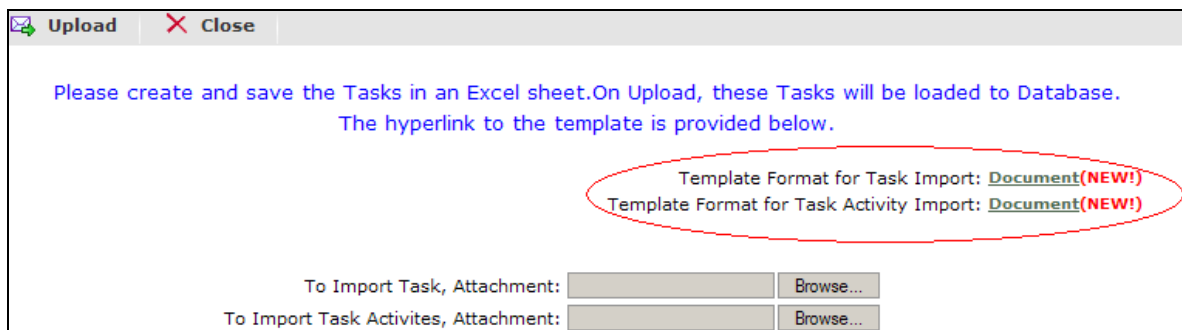
To import a task, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.
2. In the following screen, from below the **Search** section, click **Import Task**.



Task Name	Assigned To	Est. StartDate	Est. EndDate	Status	Cont Effort
Enhance	Stefan Everts	01/03/2011	01/27/2011	In-Progress	2.4

3. In the pop-up, links to specific templates are provided as marked in the image below (download and save the Excel templates, and enter the task details in the templates).



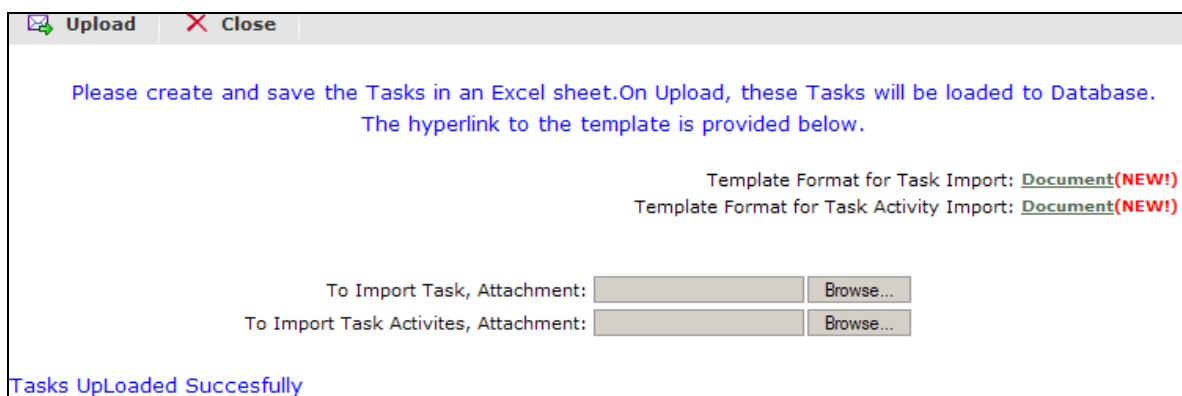
Please create and save the Tasks in an Excel sheet. On Upload, these Tasks will be loaded to Database.
The hyperlink to the template is provided below.

Template Format for Task Import: [Document\(NEW!\)](#)
Template Format for Task Activity Import: [Document\(NEW!\)](#)

To Import Task, Attachment:

To Import Task Activites, Attachment:

4. To attach the Excel template containing the task details, click **Browse**.
5. In the **Choose File to Upload** pop-up, select the file and click **Open**.
6. Click **Upload**.



Please create and save the Tasks in an Excel sheet. On Upload, these Tasks will be loaded to Database.
The hyperlink to the template is provided below.

Template Format for Task Import: [Document\(NEW!\)](#)
Template Format for Task Activity Import: [Document\(NEW!\)](#)

To Import Task, Attachment:

To Import Task Activites, Attachment:

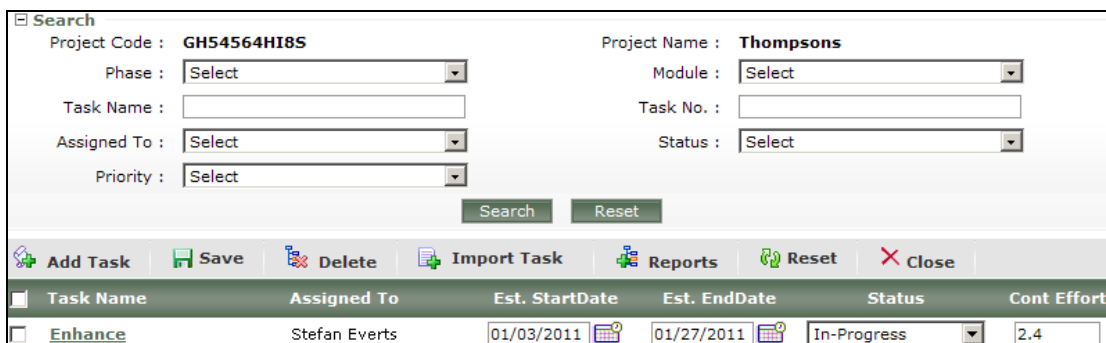
Tasks UpLoaded Succesfully

7. Once the template is uploaded, you can see the confirmation message as shown above.

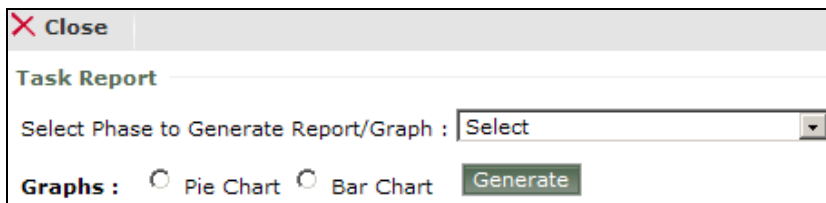
12.7. Generate Report

To generate a report, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column, for which you want to generate the report.
2. In the following screen, from below the **Search** section, click **Reports**.



3. In the **Task Report** screen, for the **Select Phase to Generate Report/Graph** field, select the phase from the drop-down.



4. For the **Graphs** field, select the specific radio button for the type of report you want to generate.
5. Click **Generate**.

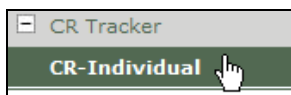
13. CR Tracker

Sometimes, if the user wants some changes in the application, the user can send a **Change Request** (CR). If the CR is valid, the developers implement the changes in the application. A CR can be internal (within the team) or external (client request). The CR Tracker enables you to add a CR, track the progress in the CR, view other details such as when and where the bug occurred, status of the bug, description and more.

13.1. Search for Change Request

To search for a specific change request, follow these steps.

1. From the left menu, click **CR Tracker** (by default, **CR-Individual** sub-module is selected).



- In the **Search** section, enter the **Project Code** and **Project Name**.
- Click **Search**.

Search

Project Code :
 Project Name :

Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

- The grid below the **Search** section shows the projects that meet the search criteria.
- Under **Project Code** column of the grid, click a specific project code link.
- In the following screen, in the **Search** section, enter values in the fields mentioned below.

Project Detail

Project Code : **GH54564HI8S**
 Project Name : **Thompsons**

Search

Project Phase :
 CR No. :

Assigned To :
 Customer Ref No :

Initiated By :
 Status :

Priority :

- **Project Phase** – Select the project phase from the drop-down
- **CR No.** – Enter the change request number
- **Assigned To** – Select the name of the person from the drop-down
- **Customer Ref No** – Enter the customer reference number
- **Initiated By** – Select the name of the person from the drop-down
- **Priority** – Select the priority from the drop-down
- **Status** – Select the status from the drop-down

- Click **Search**.
- The **CR List** grid below the **Search** section shows the list of CRs that match the criteria.

Project Detail

Project Code : **GH54564HI8S**
 Project Name : **Thompsons**

Search

Project Phase :
 CR No. :

Assigned To :
 Customer Ref No :

Initiated By :
 Status :

Priority :

CR List

CR No.	Customer Ref No	Initiated Date	Status	Priority	Initiated By	Assigned To	Description
<input type="checkbox"/> GH54564HI8S-2	800900	02/01/2011	Assigned	Major/High	Internal	Tim Ferry	Rebuild screen components
<input type="checkbox"/> GH54564HI8S-1	900800	02/01/2011	Assigned	Major/High	Internal	Kevin Windham	Session timeout rectification

13.2. Add Change Request

To add a new CR, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Search
 Project Code : Project Name :

Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

2. In the following screen, from below the **Search** section, click **Add CR**.

Project Detail
 Project Code : **GH54564HI8S** Project Name : **Thompsons**

Search
 Project Phase : CR No. :
 Assigned To : Customer Ref No :
 Initiated By : Status :
 Priority :

CR List

CR No.	Customer Ref No	Initiated Date	Status	Priority	Initiated By	Assigned To	Description
<input type="checkbox"/> GH54564HI8S-2	800900	02/01/2011	Assigned	Major/High	Internal	Tim Ferry	Rebuild screen components
<input type="checkbox"/> GH54564HI8S-1	900800	02/01/2011	Assigned	Major/High	Internal	Nick Wey	Session timeout rectification

3. In the **CR Details** screen, enter values in the fields mentioned below.

Project Detail
 Project Code : **GH54564HI8S** Project Name : **Thompsons**

Details
CR Details

Add CR As Module : ☐ Yes ☒ No

*Project Phase :

*CR No. :

Customer Ref No :

*Initiated Date : (mm/dd/yyyy)

Receipt Date : (mm/dd/yyyy)

*Initiated By :

*Priority :

Change Type :

Waiting Time : [number of days CR was on-hold]

*BaseLine/Label :

*Description :

*Module :

CR Name :

Complexity :

Start Date : (mm/dd/yyyy)





Customer Specified Effort :

Initiated Name :

Status :

*Version :

- **Add CR As Module** – If you select the radio button for the option **Yes**, the added CR becomes a Module by itself and the **Module** field is disabled. If you select the radio button for the option **No**, the CR remains in CR Tracker module and the **Module** field is enabled.
 - **Project Phase** - Select the project phase from the drop-down
 - **Module** – Select the module from the drop-down (this field is enabled only when you select the radio button for the option **No** for the **Add CR As Module** field)
 - **CR No.** – This field shows a unique CR number auto generated by the application as soon as you click **Add CR** button in the previous screen
 - **CR Name** – Enter the CR name
 - **Customer Ref No** – Enter the customer reference number
 - **Complexity** – This field automatically shows the complexity based on the **Contracted Effort** field
 - **Initiated Date** - Select the initiated date using the calendar control
 - **Start Date** – This field shows the date when the first timesheet entry for the CR was entered
 - **Receipt Date** - Select the receipt date using the calendar control
 - **Customer Specified Effort** – Enter the customer specified effort
 - **Initiated By** – Select the option from the drop-down
 - **Initiated Name** – Select the option from the drop-down (the option shown in the drop-down depends on the option you select for the **Initiated By** field)
 - **Priority** - Select the option from the drop-down
 - **Status** – By default, the status is shown as **Open**
 - **Change Type** - Select the option from the drop-down
 - **Waiting Time** – Enter the number of days CR was on-hold
 - **BaseLine/Label** – Enter the base line or label, or click the **Select** link to enable the drop-down
 - **Version** - Enter the version, or click the **Select** link to enable the drop-down
 - **Description** – Enter the description of the CR
4. To save the details, click **Save**.
 5. The newly added issue is shown in the **CR List** grid.

CR List								
 Add CR		 Delete		 Import CR		 Close		
<input type="checkbox"/>	CR No.	Customer Ref No	Initiated Date	Status	Priority	Initiated By	Assigned To	Description
<input type="checkbox"/>	GH54564HI8S-2	800900	02/01/2011	Assigned	Major/High	Internal	Nick Wey	Rebuild screen components
<input type="checkbox"/>	GH54564HI8S-1	900800	02/01/2011	Assigned	Major/High	Internal	Nick Wey	Session timeout rectification

13.3. Edit Change Request

To edit a change request, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Search

Project Code : Project Name :

Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

2. In the following screen, from the grid below the **Search** section, click the change request link under **CR No.** column.

Project Detail

Project Code : **GH54564HI8S** Project Name : **Thompsons**

Search

Project Phase : CR No. :

Assigned To : Customer Ref No :

Initiated By : Status :

Priority :

CR List

CR No.	Customer Ref No	Initiated Date	Status	Priority	Initiated By	Assigned To	Description
GH54564HI8S-2	800900	02/01/2011	Assigned	Major/High	Internal	Chris Atkinson	Rebuild screen components
GH54564HI8S-1	900800	02/01/2011	Assigned	Major/High	Internal	Chris Atkinson	Session timeout rectification

3. In the following **Details** (tab) screen, edit the fields mentioned below.

Project Detail

Project Code : **GH54564HI8S** Project Name : **Thompsons**

Details **History** **Comments**

CR Details

Project Phase : DefaultPhase Module : Project Management

*CR No. : GH54564HI8S-2 CR Name :

Customer Ref No : 800900 Complexity :

*Initiated Date : 02/01/2011 (mm/dd/yyyy) Start Date : (mm/dd/yyyy)

Receipt Date : 02/01/2011 (mm/dd/yyyy) Customer Specified Effort :

*Initiated By : Internal Initiated Name :

*Priority : Major/High Status :

Change Type : Change Request-Navigation *Assigned To :

% Completed :

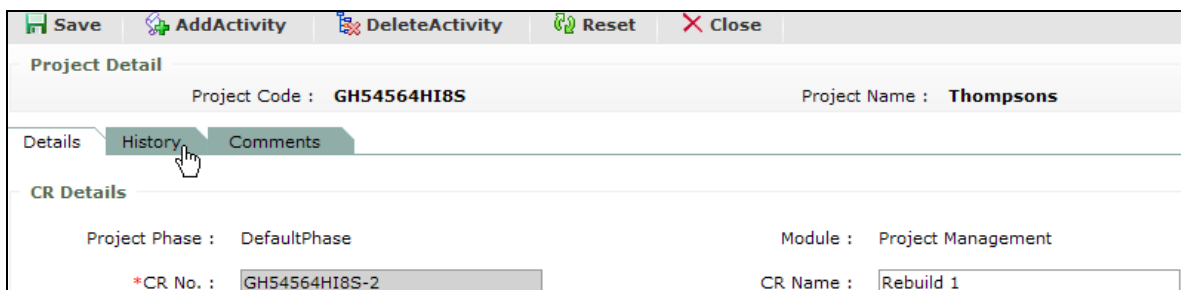
Waiting Time : [number of days CR was on-hold]

*BaseLine/Label : *Version :

*Description :

Remarks :

- **Project Phase** – This field is shown in non-edit mode
 - **Module** – This field is shown in non-edit mode
 - **CR No.** – This field is shown in non-edit mode
 - **CR Name** – Edit the CR name
 - **Customer Ref No** – Edit the customer reference number
 - **Complexity** – This field automatically shows the complexity based on the Contracted Effort field
 - **Initiated Date** - Edit the initiated date using the calendar control
 - **Start Date** – This field shows, the date when the first timesheet entry for the CR was entered, in non-edit mode
 - **Receipt Date** - Edit the receipt date using the calendar control
 - **Customer Specified Effort** – Edit the customer specified effort
 - **Initiated By** – Edit the field using the drop-down
 - **Initiated Name** – Edit the field using the drop-down (the option shown in the drop-down depends on the option you select for the **Initiated By** field)
 - **Priority** - Edit the priority using the drop-down
 - **Status** – Edit the status using the drop-down (if you select the option **Verified** from the drop-down, then after three days, the status automatically changes to **Closed**)
 - **Change Type** – Edit the change type using the drop-down
 - **Assigned To** – Edit the field using the drop-down
 - **% Completed** – Edit the percentage completed
 - **Waiting Time** – Edit the number of days CR was on-hold
 - **BaseLine/Label** – Edit the baseline or label, or click the **Select** link to enable the drop-down
 - **Version** - Edit the version, or click the **Select** link to enable the drop-down
 - **Description** – Edit the description of the CR
 - **Remarks** – Edit the remarks
4. To reset the values, before you click **Save**, click **Reset**.
 5. To save the details, click **Save**.
 6. To view the history of the change request, click the **History** tab.



The screenshot shows a web application interface for managing change requests. At the top, there are buttons for Save, AddActivity, DeleteActivity, Reset, and Close. Below these is a 'Project Detail' section with fields for Project Code (GH54564HI8S) and Project Name (Thompsons). A tabbed interface follows, with 'Details', 'History', and 'Comments' tabs. The 'History' tab is currently selected, as indicated by a mouse cursor. Below the tabs is a 'CR Details' section with fields for Project Phase (DefaultPhase), Module (Project Management), *CR No. (GH54564HI8S-2), and CR Name (Rebuild 1).

7. The **CR History** grid shows the details of the change request.

Close

Project Detail

Project Code : **GH54564HI8S**
 Project Name : **Thompsons**

Details History **Comments**

CR History

User Id	From Date	From Status	To Status	To Date
Not Assigned	02/01/2011	Initial	Open	02/01/2011
Kevin Windham	02/01/2011	Open	Assigned	02/01/2011

8. To view the comments related to the change request, click the **Comments** tab.

Close

Project Detail

Project Code : **GH54564HI8S**
 Project Name : **Thompsons**

Details History **Comments**

CR History

User Id	From Date	From Status	To Status	To Date
Not Assigned	02/01/2011	Initial	Open	02/01/2011
Kevin Windham	02/01/2011	Open	Assigned	02/01/2011

9. The **Comments History** grid shows the comments related to the change request.

Close

Project Detail

Project Code : **GH54564HI8S**
 Project Name : **Thompsons**

Details History **Comments**

Comments History

Status	Modified By	Modified Date	Comments
Initiated Date	Nick_Wey	02/01/2011	Base Line Initiated Date : 02/01/2011
Contracted Effort	Nick_Wey	02/08/2011	Base Line Contracted Effort : 19.0
Estimated Effort	Heath_Voss	02/08/2011	Base Line Estimated Effort : 19

13.4. Add Activity

A Change Request (**CR**) can have multiple activities. To add an activity, a change request must exist. Once you add a CR, you can then add multiple activities to the change request.

To add an activity, follow these steps.

- From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Search

Project Code :
 Project Name :

Search Reset

Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF666JF15	Azonic Activators
RS1685HLM	Database Solutions

- In the following screen, from the grid below the **Search** section, click the specific change request link under **CR No.** column, to which you want to add the activity.

Project Detail

Project Code : **GH54564HI8S** Project Name : **Thompsons**

Search

Project Phase : **Select** CR No. :

Assigned To : **Select** Customer Ref No :

Initiated By : **Select** Status : **Select**

Priority : **Select** **Search** **Reset**

CR List

Add CR **Delete** **Import CR** **Close**

CR No.	Customer Ref No	Initiated Date	Status	Priority	Initiated By	Assigned To	Description
GH54564HI8S-2	800900	02/01/2011	Assigned	Major/High	Internal	Chris Atkinson	Rebuild screen components
GH54564HI8S-1	900800	02/01/2011	Assigned	Major/High	Internal	Chris Atkinson	Session timeout rectification

- In the following **Details** (tab) screen, from the top, click **AddActivity**.

Save **AddActivity** **DeleteActivity** **Reset** **Close**

Project Detail

Project Code : **GH54564HI8S** Project Name : **Thompsons**

Details **History** **Comments**

CR Details

Project Phase : **DefaultPhase** Module : **Project Management**

*CR No. : **GH54564HI8S-2** CR Name : **Rebuild 1**

Customer Ref No : **800900** Complexity : **Medium**

- Once you click **AddActivity**, scroll down the **CR Details** section to view the grid, which now shows a blank row.

Activity Details	SubActivity Details	Cont Effort	Assigned To	Exclude Emp Eff	Estimated Effort	Actual Effort	Detail
Corrective and Prevent	Preventive Activities	3.0	Tim Ferry	<input type="checkbox"/>	3.0	2.0	?
Documentation	Help File Preparation	16.0	Tim Ferry	<input type="checkbox"/>	16.0	13.0	?
Select		0.0	Select	<input type="checkbox"/>	0.0	0.0	?
Total Effort(Hrs) :		19			19	15	

- In the blank row, for the **Activity Details**, **SubActivity Details** and **Assigned To** columns, select appropriate options from the drop-down.
- Enter the effort in the **Cont Effort** box.
- To exclude the employee from the efficiency calculations, select the checkbox for the **Exclude Emp Eff** box (to include the the employee in the efficiency calculations, do not select the checkbox).
- The **Estimated Effort** box automatically shows the effort based on the value entered in **Cont Effort** and **Assigned To**; however, you can edit the value.

9. The **Actual Effort** field shows the actual effort entered in timesheet, in non-edit mode.
10. The **Total Effort(Hrs)** field shows the cumulative time (in hours) spent on all the activities of the change request, in non-edit mode.
11. To save the details, click **Save**.

13.5. Edit or Delete Activity

To edit an activity details, follow these steps.

1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Search
 Project Code : Project Name :

Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

2. In the following screen, from the grid below the **Search** section, click the specific change request link under **CR No.** column, which you want to edit.

Project Detail
 Project Code : **GH54564HI8S** Project Name : **Thompsons**


Search
 Project Phase : CR No. :
 Assigned To : Customer Ref No :
 Initiated By : Status :
 Priority :

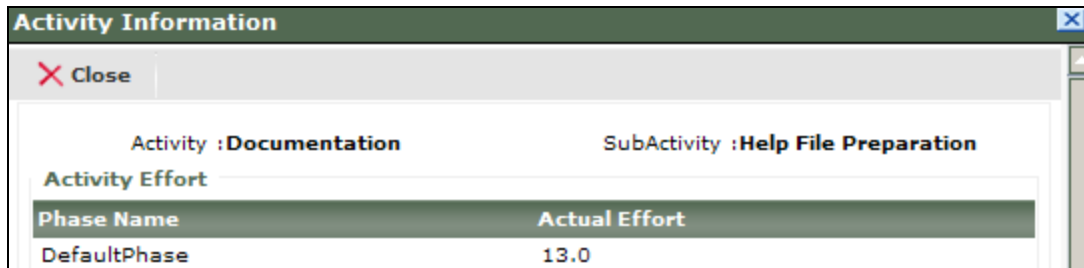
CR List

CR No.	Customer Ref No	Initiated Date	Status	Priority	Initiated By	Assigned To	Description
GH54564HI8S-2	800900	02/01/2011	Assigned	Major/High	Internal	Chris Atkinson	Rebuild screen components
GH54564HI8S-1	900800	02/01/2011	Assigned	Major/High	Internal	Chris Atkinson	Session timeout rectification

3. In the following **Details** (tab) screen, scroll-down the **CR Details** section to view the grid.

Activity Details	SubActivity Details	Cont Effort	Assigned To	Exclude Emp Eff	Estimated Effort	Actual Effort	Detail
<input type="checkbox"/> Corrective and Prevent	Preventive Activities	3.0	Tim Ferry	<input type="checkbox"/>	3.0	2.0	?
<input type="checkbox"/> Documentation	Help File Preparation	16.0	Tim Ferry	<input type="checkbox"/>	16.0	13.0	?
<input type="checkbox"/> Select		0.0	Select	<input type="checkbox"/>	0.0	0.0	?
Total Effort(Hrs) :		19			19	15	

4. Edit the activity details (**Actual Effort** column and the **Total Effort(Hrs)** fields are non-editable).
5. To reset the values, before you click **Save**, click **Reset**.
6. To save the details, click **Save**.
7. To view the phase details of a specific activity, click the corresponding  icon.



Activity Information

Close

Activity : **Documentation** SubActivity : **Help File Preparation**

Activity Effort

Phase Name	Actual Effort
DefaultPhase	13.0

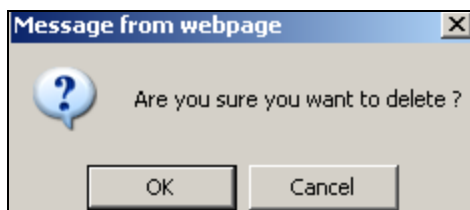
8. The **Activity Information** pop-up shows the phase in which the activity was involved.
9. To close the pop-up, click **Close**.
10. To delete an activity, select the corresponding checkbox from the first column of the grid (circled in red below), for the activity you want to delete.

	Activity Details	SubActivity Details	Cont Effort	Assigned To	Exclude Emp Eff	Estimated Effort	Actual Effort	Detail
<input checked="" type="checkbox"/>	Corrective and Prevent	Preventive Activities	3.0	Nick Wey	<input type="checkbox"/>	3.0	2.0	?
<input type="checkbox"/>	Documentation	Help File Preparation	16.0	Kevin Windham	<input type="checkbox"/>	16	13.0	?
<input checked="" type="checkbox"/>	Rework	Re-Reviews	1.0	Heath Voss	<input type="checkbox"/>	1	0.0	?
Total Effort(Hrs) :			31			31	25	

11. From the top of the screen, click **DeleteActivity**.



12. In the confirmation pop-up, click **OK**.

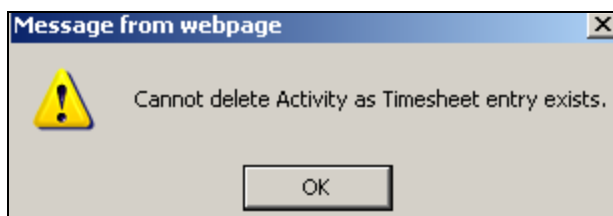


Message from webpage

Are you sure you want to delete ?

OK Cancel

13. If a timesheet entry exists for the activity you want to delete, you can see the pop-up shown below.



Message from webpage

Cannot delete Activity as Timesheet entry exists.

OK

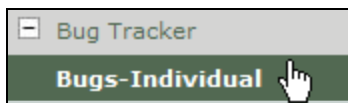
14. Bug Tracker

The **Bug Tracker** module contains details of bugs that are identified during the testing phase. Testers can use this module to enter the bug details, assign bugs, re-open bugs, and close the bugs after the developers have fixed the issue. It also specifies the project and phase in which the tester has identified the bug.

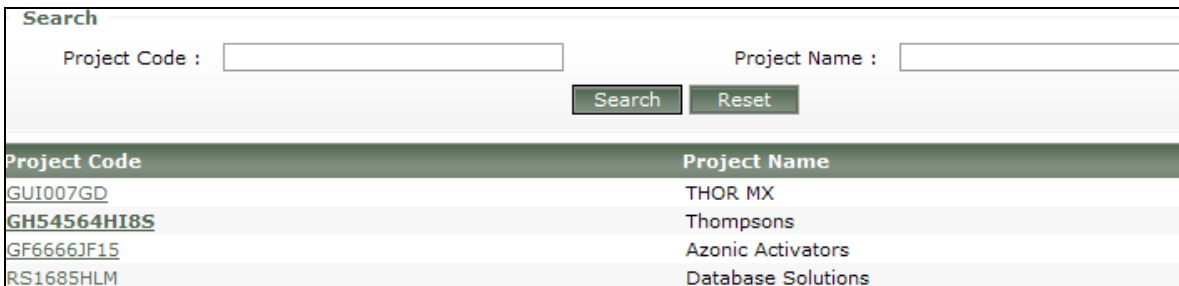
14.1. Search for Bug

To search for a specific bug, follow these steps.

1. From the left menu, click **Bug Tracker** (by default, **Bugs-Individual** is selected).

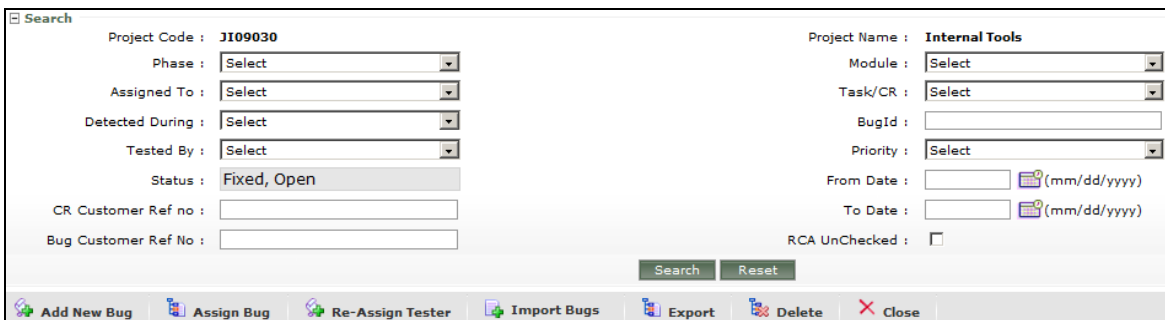


2. In the **Search** section, enter the **Project Code** and **Project Name**.



Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

3. Click **Search**.
4. The grid below the **Search** section shows the projects that meet the search criteria.
5. Under **Project Code** column of the grid, click a specific project code link.
6. In the following screen, in the **Search** section, enter values in the fields mentioned below.



Project Code : **J109030** Project Name : **Internal Tools**

Phase : **Select** Module : **Select**

Assigned To : **Select** Task/CR : **Select**

Detected During : **Select** BugId :

Tested By : **Select** Priority : **Select**

Status : **Fixed, Open** From Date : (mm/dd/yyyy)

CR Customer Ref no : To Date : (mm/dd/yyyy)

Bug Customer Ref No : RCA UnChecked : ☐

Search **Reset**

Add New Bug
 Assign Bug
 Re-Assign Tester
 Import Bugs
 Export
 Delete
 Close

- **Project Code** – This field shows the project code in non-edit mode
- **Project Name** – This field shows the project name in non-edit mode
- **Phase** – Select the phase from the drop-down
- **Module** – Select the module from the drop-down
- **Assigned To** – Select the name of the person from the drop-down
- **Task/CR** – Select the task / CR from the drop-down

- **Detected During** – Select the activity from the drop-down
 - **BugId** – Enter the bug ID
 - **Tested By** – Select the name of the person from the drop-down
 - **Priority** – Select the priority from the drop-down
 - **Status** – Select the status (you can select multiple statuses) from the drop-down by selecting the corresponding checkbox
 - **From Date** – Select the date from the calendar control
 - **CR Customer Ref no** – Enter the CR customer reference number
 - **To Date** – Select the date from the calendar control
 - **Bug Customer Ref No** – Enter the bug customer reference number
 - **RCA UnChecked** – To search for a bug for which Root Cause Analysis (RCA) fields are not entered, select the checkbox for this field and then perform the search
7. Click **Search**.
 8. The grid below the **Search** section shows the list of bugs that match the criteria.
 9. From the bottom right corner of the screen, for the **No. of Records** field, select the number of records you want to view, from the drop-down.

14.2. Add Bug

To add a new bug, follow these steps.

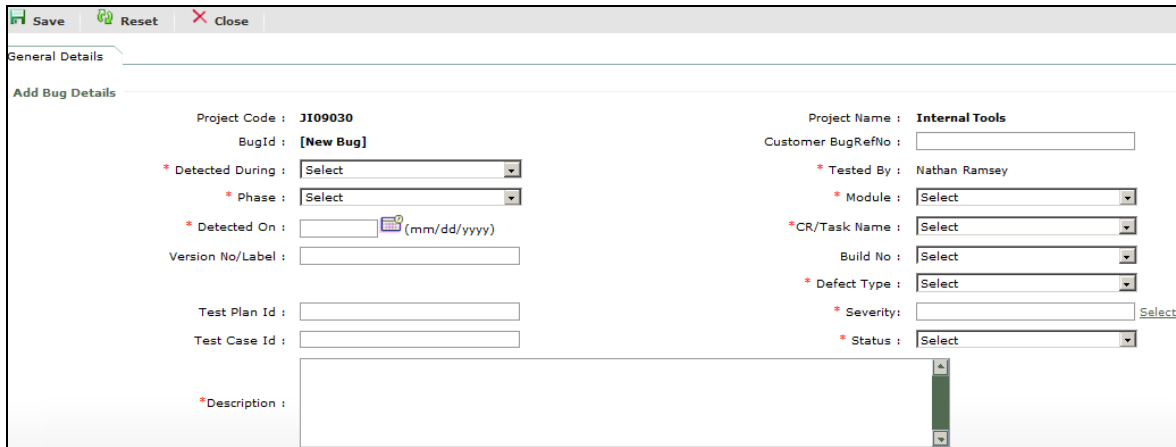
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.

Search	
Project Code : <input type="text"/>	Project Name : <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/>	
Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

2. In the following screen, from below the **Search** section, click **Add New Bug**.

Search	
Project Code : J109030	Project Name : Internal Tools
Phase : <input type="text" value="Select"/>	Module : <input type="text" value="Select"/>
Assigned To : <input type="text" value="Select"/>	Task/CR : <input type="text" value="Select"/>
Detected During : <input type="text" value="Select"/>	BugId : <input type="text"/>
Tested By : <input type="text" value="Select"/>	Priority : <input type="text" value="Select"/>
Status : <input type="text" value="Fixed, Open"/>	From Date : <input type="text"/> (mm/dd/yyyy)
CR Customer Ref no : <input type="text"/>	To Date : <input type="text"/> (mm/dd/yyyy)
Bug Customer Ref No : <input type="text"/>	RCA UnChecked : <input type="checkbox"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/>	
<input type="button" value="Add New Bug"/> <input type="button" value="Assign Bug"/> <input type="button" value="Re-Assign Tester"/> <input type="button" value="Import Bugs"/> <input type="button" value="Export"/> <input type="button" value="Delete"/> <input type="button" value="Close"/>	


3. In the **General Details** screen, enter values in the fields mentioned below.





- **Project Code** – Shows the project code that you have selected in the previous screen.
 - **Bug ID** – Unique number to identify the bug record.
 - **Detected During** - Select the appropriate testing phase when you detected this bug.
 - **Phase** - Select the project phase from the drop-down list.
 - **Detected On** - Click the calendar icon to select the date.
 - **Version Number/Label** – Enter the version number or label of the bug.
 - **Test Plan ID** – Enter the test plan ID.
 - **Test Case ID** – Enter the test case ID.
 - **Customer BugRefNo** - Enter the reference number (this field becomes mandatory if you select the option **Acceptance Testing** for the **Detected During** field).
 - **Module** – Select an option from the drop-down list.
 - **CR/Task Name** – Select the CR or task name.
 - **Build No.** - Select the build number.
 - **Defect Type** - Select the type of defect.
 - **Severity** - Select the priority of the defect.
 - **Status** - Select the status of the bug.
 - **Description** – Enter any other details related to this issue.
4. Click **Save**.
 5. To re-enter the details, click **Reset**.
 6. To close the screen, click **Close**.

14.3. Upload Document

You can also upload a document that contains the images of the relevant screens and the defects. To do so,

1. In the **Bug Tracking Search** screen, click the **Upload**  icon shown in the last column to see the **File Upload** window.

 **Upload**
 **Close**

Please Select the Files

File Name

- To select the specific file, click **Browse**.
- The file path and name are shown in the **File Name** field.
- Click **Upload**.
- The system shows this message in the window.

Please Select the Files

File Name




The file has been written to /opt/sepg-templates/SAMPLETASK/22159

- Click **Close**.

14.4. Assign Bug

After adding a new bug, the Project Manager has to assign this bug to the concerned developer. The developer works on the code, fixes the defect, and notifies the tester that the defect has been fixed.

- In the left menu, click **Bug Tracker – Bugs Individual**.
- Select the appropriate **Project Code**.
- In the following screen, click **Assign Bug**.

 Save  Reset  Close						
BugID ^	OldBugId	BugType	Severity	Assigned To	Priority	
15409	20391	Exception handling	Critical/Fatal	<input type="text" value="Not Assigned"/>	<input type="text" value="Low"/>	<input type="checkbox"/>
15410	20392	Data Handling	Medium	<input type="text" value="Not Assigned"/>	<input type="text" value="Low"/>	<input type="checkbox"/>
15411	20393	Data Handling	Medium	<input type="text" value="Not Assigned"/>	<input type="text" value="Low"/>	<input type="checkbox"/>
15412	20394	Logic/Semantic	Medium	<input type="text" value="Not Assigned"/>	<input type="text" value="Low"/>	<input type="checkbox"/>
15353	20334	Cosmetic	Minor/Low	<input type="text" value="Not Assigned"/>	<input type="text" value="Low"/>	<input type="checkbox"/>
15354	20335	Logic/Semantic	Medium	<input type="text" value="Not Assigned"/>	<input type="text" value="Low"/>	<input type="checkbox"/>
15355	20336	GUI Standards	Medium	<input type="text" value="Not Assigned"/>	<input type="text" value="Low"/>	<input type="checkbox"/>
15356	20337	Cosmetic	Minor/Low	<input type="text" value="Not Assigned"/>	<input type="text" value="Low"/>	<input type="checkbox"/>

- In the **Search** section, enter values in the fields mentioned below.

Search

ProjectId : **J109030**

Phase :

Assigned To :

Detected During :

Tested By :

CR No. :

Bug Customer Ref No :

Project Name : **Internal Tools**

Module :

Status :

BugId :

Priority :

CR Customer Ref no :

☐ Assigned ☒ Not Assigned

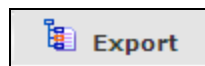
- **Phase** - Select the project phase from the drop-down
- **Module** - Select the module name from the drop-down

- **Assigned To** - Select the name of the member to whom this bug was assigned
 - **Status** - Select the status of the detected bug from the drop-down
 - **Detected During** - Select the stage when the bug was detected
 - **BugId** - Enter the bug ID
 - **Tested By** - Select the name of the person who tested the application from the drop-down
 - **Priority** - Select the priority from the drop-down
 - **CR No.** - Enter the CR number
 - **CR Customer Ref no** - Enter the CR customer reference number
 - **Bug Customer Ref No** - Enter the bug customer reference number
5. If the bug is assigned, select the radio button for the **Assigned** option; if the bug is not assigned, then select the radio button for the **Not Assigned** option.
 6. Click **Search**.
 7. The specific records are shown in the table below.
 8. To view the details of the bug, click the **BugId** link in the first column.
 9. In the **Assigned To** column, select the name of the developer to whom you want to assign this record.
 10. In the **Priority** column, select the priority level.
 11. Click **Save**.
 12. The system sends an email to the developer about the assignment.

14.5. Export Bugs

Bug details can be exported to Excel using this function. To export a bug details,

1. From below the **Search** section, click **Export**
2. In the **File Download** pop-up, click **Save**.



3. In the **Save As** pop-up, select a location and click **Save**.

14.6. Edit Bug Details


To edit bug details, follow the steps given below.


1. In the **Project Code** column, click the **Project Id**.
2. In the **Project Details** screen, click the specific **Bug Id**.
3. In the **Edit Bug Details** screen, edit the fields mentioned below.

General Details		History	
Edit Bug Details			
Project Code :	JI09030	Project Name :	Internal Tools
BugId :	72108	Bug Customer Ref No :	54646
* Detected During :	System Testing	* Tested By :	Nathan Ramsey
* Phase :	SEPG	* Module :	General
* Detected On :	02/04/2011 (mm/dd/yyyy)	* CR/Task Name:	Testing Task related to SEPG-created in decmeber 2010
Version No/Label :	4645	Build No :	Select
Test Plan Id:	55	* Defect Type :	Cosmetic
Test Case Id :	4756	* Severity :	Minor/Low
Assigned To :	Nathan Ramsey	* Status :	Fixed
		TimeSheet Entry :	0:00
		RCA Entered :	<input checked="" type="checkbox"/>

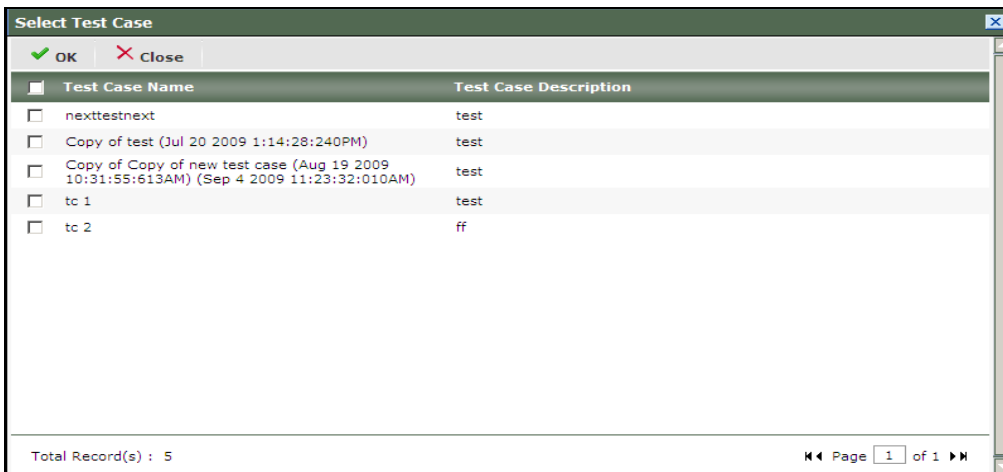
* Description :	In CR detail screen for Assigned Date add (mm/dd/yyyy) and Change in CR History screen, change name User Id as Updated by.		
* Impacted Items :	1. <bean:message key="date.format"/> added in cr-add-edit.jsp. 2. crtracker.userid Updated By name changed in a application.properties		
* Root Cause :	Project Related	* Root Cause category :	Requirement Changes
* Root Cause description :	NA		
* Correction Taken :	NA		
* Corrective / Preventive Action :	NA		
* Priority :	High		
* Origin :	Change Request		
	Cumulative Time Taken :	6 Hrs	45 Mins

- **Project Code** – This field shows the project code in non-edit mode

- **Project Name** – This field shows the project name in non-edit mode
- **Bug ID** – This field shows the unique number to identify the bug record in non-edit mode
- **Bug Customer Ref No** – Edit the bug customer reference number (this field becomes mandatory if you select the option **Acceptance Testing** for the **Detected During** field)
- **Detected During** – Select the appropriate testing phase when this bug was detected from the drop-down
- **Phase** – This field is shown in non-edit mode
- **Module** – This field is shown in non-edit mode
- **Detected On** – Select the date using the calendar control
- **CR/Task Name** – This field is shown in non-edit mode; click the link to view the **Related Task/CR Detail** pop-up
- **Version Number/Label** – Edit the version number or label of the bug
- **Build No** – Select the build number from the drop-down
- **Defect Type** – Select the defect type from the drop-down
- **Test Plan Id** – Edit the test plan ID
- **Severity** – Select the severity from the drop-down by clicking the **Select** link
- **Test Case Id** – Edit the test case ID
- **Status** – Select the status of the bug from the drop-down (if you select the option **Verified** from the drop-down, then after three days, the status automatically changes to **Closed**)
- **Assigned To** – This field shows the name of the person to whom the bug is assigned in non-edit mode
- **TimeSheet Entry** – Users can enter the timesheet details for the bug in the **Timesheet Entry** pop-up, by clicking the  icon
- **RCA Entered** – If you select this checkbox, the **Root cause**, **Root Cause category**, **Root Cause description**, **Correction Taken**, **Corrective / Preventive Action**, and **Priority** fields become mandatory fields
- **Description** – Edit the description
- **Impacted Items** – Edit the impacted items
- **Root cause** – Select the root cause from the drop-down
- **Root Cause category** – Select the root cause category from the drop-down
- **Root Cause description** – Edit the root cause description
- **Correction Taken** – Edit the correction taken
- **Corrective / Preventive Action** – Edit the corrective / preventive action
- **Priority** – Select the priority from the drop-down

- **Origin** – Select the origin from the drop-down (for the **Status** field, if you select the option **Fixed**, **Re-Open** or **Verified**, this field becomes mandatory)
 - **Cumulative Time Taken** – This field shows the cumulative time taken to handle the bug, in non-edit mode
 -  - When you click this icon, the **Cumulative Time Taken** pop-up opens, which shows the total time taken to fix the bug by all the concerned resources.
4. To select a test case, from the top of the **Edit Bug Details** screen, click **Select Test Case**

Case  **Select Test Case**

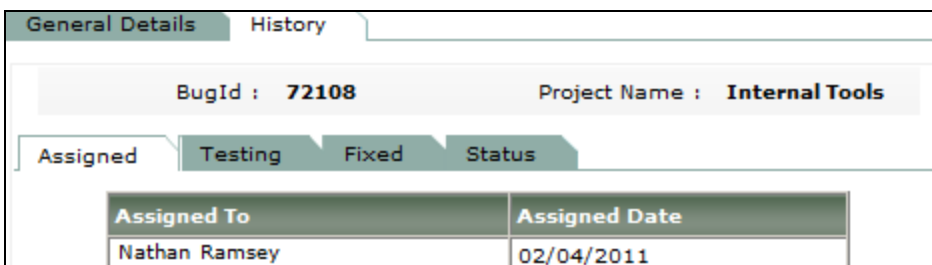


The 'Select Test Case' pop-up window displays a table with the following data:

Test Case Name	Test Case Description
<input type="checkbox"/> nexttestnext	test
<input type="checkbox"/> Copy of test (Jul 20 2009 1:14:28:240PM)	test
<input type="checkbox"/> Copy of Copy of new test case (Aug 19 2009 10:31:55:613AM) (Sep 4 2009 11:23:32:010AM)	test
<input type="checkbox"/> tc 1	test
<input type="checkbox"/> tc 2	ff

Total Record(s) : 5

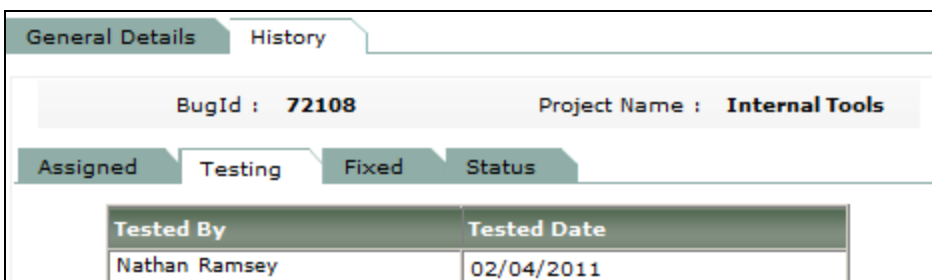
5. In the **Select Test Case** pop-up, select the corresponding checkbox for the test case you want to select.
6. Click **OK**.
7. To view the history of the changes in the bug, click the **History** tab.
8. The **History** tab, in turn, contains four sub-tabs – **Assigned**, **Testing**, **Fixed** and **Status** (the screenshots of the respective sub-tabs are shown below).



The 'Assigned' sub-tab shows the following information:

BugId : **72108** Project Name : **Internal Tools**

Assigned To	Assigned Date
Nathan Ramsey	02/04/2011



The 'Testing' sub-tab shows the following information:

BugId : **72108** Project Name : **Internal Tools**

Tested By	Tested Date
Nathan Ramsey	02/04/2011

General Details		History
BugId : 72108		Project Name : Internal Tools
Assigned	Testing	Fixed
Fixed By		Fixed Date
Nathan Ramsey		03/10/2011

General Details		History
BugId : 72108		Project Name : Internal Tools
Assigned	Testing	Fixed
From Status		To Status
		Open
Open		Fixed
		Status Date
		02/04/2011
		03/10/2011

14.7. Close Bugs

After the developer fixes the bug and sends a confirmation email to the tester, the tester verifies the bug. Once the bug is verified, the bug will be automatically closed after three days from the verified date.

Note: Only the person who created the bug can verify the bug.

To close the bug record, follow these steps.

1. Click the relevant **Project Code**.
2. Click the specific **Bug Id** you want to close.
3. In the **Edit Bug Details** screen, for the **Status** field, select **Closed** option from the drop-down.
4. You can see the updated record in the **Bug Tracking** screen.

Note: In some cases, if the bug is closed in the SEPG application, but the client raises a bug, this bug is considered as "acceptance testing" and is added as a task in the task list. This bug can be related to the old bug or task.

14.8. Re-Assign Tester

1. From below the **Search** section, click **Re-Assign Tester**.
2. In the **Re-Assign Tester** pop-up, under **Re-Assign Tester** column, select a tester from the drop-down.

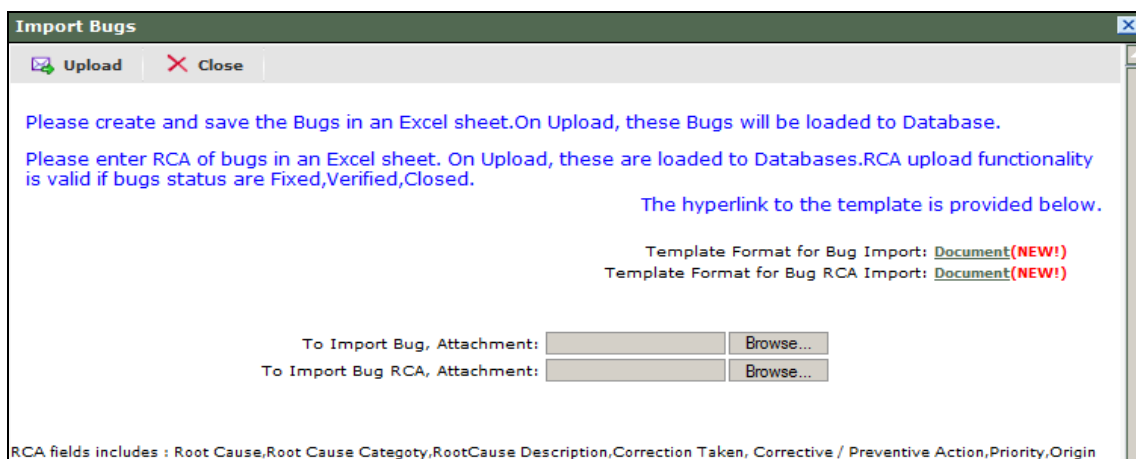


BugId	Tested By	ReAssign Tester
83228	Nathan Ramsey	Select
83227	Stefan Everts	Select
83225	Nathan Ramsey	Select
82953	Stefan Everts	Select
81549	Nathan Ramsey	Select

3. To save the changes, click **Save**.
4. To reset values, click **Reset**.
5. To close the pop-up, click **Close**.

14.9. Import Bugs

1. From below the **Search** section, click **Import Bugs**.
2. In the **Import Bugs** pop-up, links to specific templates are provided as marked in the image below (download and save the Excel templates, and enter the task details in the templates).



Import Bugs

[Upload](#) [Close](#)

Please create and save the Bugs in an Excel sheet. On Upload, these Bugs will be loaded to Database.

Please enter RCA of bugs in an Excel sheet. On Upload, these are loaded to Databases. RCA upload functionality is valid if bugs status are Fixed, Verified, Closed.

The hyperlink to the template is provided below.

Template Format for Bug Import: [Document\(NEW!\)](#)

Template Format for Bug RCA Import: [Document\(NEW!\)](#)

To Import Bug, Attachment: [Browse...](#)

To Import Bug RCA, Attachment: [Browse...](#)

RCA fields includes : Root Cause, Root Cause Category, Root Cause Description, Correction Taken, Corrective / Preventive Action, Priority, Origin

3. To attach the Excel template containing the task details, click **Browse**.
4. In the **Choose File to Upload** pop-up, select the file and click **Open**.
5. Click **Upload**.

15. Timesheet

The **Time Sheet** module enables users to enter project details such as time spent on a project, phase, activity, sub-activity, and planned activities for the forthcoming week.

15.1. Enter Timesheet Details

1. In the left menu, click **Time Sheet**.

Search	
ProjectId: <input type="text"/>	Project Name: <input type="text"/>
<input type="button" value="Search"/>	<input type="button" value="Reset"/>

Project Code ^	Project Name
JV01104	SPAN Intranet
Others	Others
CL05008	Proof-of-concept Projects
AP06014	BidConEL - ElWind
CE07011	Fleetilla
JV07018	Ralip
AP05014	Maldives Travel Project
AP04023	Harbor Payments
JV07029	HPC-AMEX EIPS Maintenance
T012008	Test Project

- In the **Project Code** column, click the specific project code.

OR

- To search for a specific project ID, in the **Search** section, enter the **ProjectId** and the **Project Name**.
- Click **Search**.
- In the **Phase List** screen, various phases of the project are shown in the grid. You can also see the **Start Date**, **Estimated End Date**, and **Status** (when you run the mouse over the **Phase Name** column, a tool tip shows if time sheet entry is found or not for a specific phase).

Note: If you are a member of a specific project, you can see the phase details of only that project.

Phase List			
Project Code : JV01104		Project Name : SPAN Intranet	
Phase Name ^	Start Date	Est End Date	Status
Phase III Q3 - 2008	07/31/2002	07/30/2010	In Progress
Phase I Q1 2009	01/01/2009	12/31/2009	In Progress
SEPGQ3-2008	07/01/2008	09/30/2008	In Progress
Copy of Phase 2000 manual	01/01/2008	03/31/2008	Completed

- Click the appropriate phase to see the **Timesheet Entry** screen.
- Enter the details in the fields mentioned below.

Save Reset Close

TimeSheet Entry
 Project Code : **HY863H6** Project Name : **Thompson and Thomphson** Project Phase : **SEPG**

TimeSheet Entry On

* Date : 02/01/2013 (mm/dd/yyyy)

* Module :

* Activity :

* Effort : Hrs Mins

Details :

Task Plans & Open Issues :

* Task/CR :

* SubActivity :

* Remarks :

Module	Task/CR	BugId	Activity	SubActivity	Effort	Details	Remarks	Delete
Project Support	Meeting with Stake holders and Team meeting- Jan, Feb 2013	0	Process Improvement/SEPG	Project Management	1.00	Team meeting	LE	
Project Support	Preparing updates for help document	0	Process Improvement/SEPG	Checklist preparation	5.00	Preparing list of all CRs in SEPG for updates in Help document	LE	
Project Support	Resolving helpdesk tickets and production move - Jan 2013	0	Product Support	Investigation	2.15		LE	
Total Effort(Hrs) :					8.15			

- **Date** – By default, the current date is shown in the field. To select any previous date, click the calendar icon shown next to the **Date** field and select appropriate date.
 - **Module** - Select the module name on which you are currently working.
 - **Object/Task** - Select the task/CR based on the module selected (if you enter time sheet for a task on a date greater than the verified date, where status of the task is **Verified**, then an alert message is shown, indicating that you cannot enter the timesheet for a date greater than the verified date).
 - **Bug Id** – Select the bug id based on the **Object/Task** selected.
 - **Bug Desc.** – Displays the description of the selected bug.
 - **Activity** - Select the activity.
 - **Sub-Activity** - Select the sub-activity based on the **Activity** selected.
 - **Effort** - Enter time spent (hours, minutes) on the selected sub-activity.
 - **Remarks** – Enter remarks for late entry.
 - **Details** – Enter a brief description about the task and the activity.
8. Click **Save**.
- Note:** Users cannot enter the time sheet for a **Scrapped** phase and for the time sheet entries, which are already validated or freezed.
9. The details entered and saved in the **Timesheet Entry** screen is shown in the **Timesheet Entry** grid.
10. The **Total Effort(Hrs)** field below the grid shows the total of the effort entered for the selected date.
11. To clear the values, click **Reset** button and re-enter the details.
12. To close the screen and go back to the **Phase List Details** screen, click **Close**.
13. Follow the same procedure to enter the timesheet details for another project.

Note: **Object/Task** list contains Tasks, which are not in **Completed** status and **CRs**, which are not in **Open** or **Closed** status. **Bug Id** list contains Bugs, which are not in **Closed** status.

Note: * symbol indicates mandatory fields.

15.1.1. Enter Task Plans and Open Issues

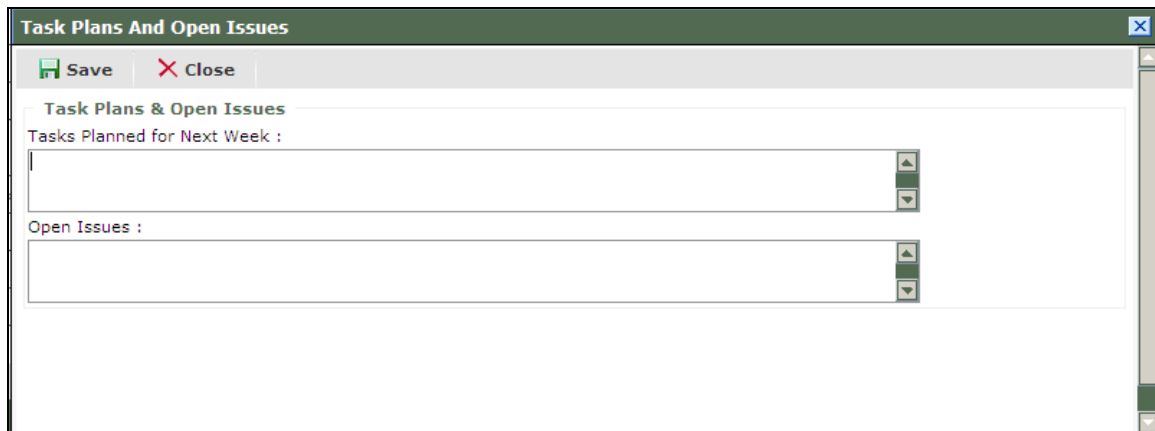
Task Plans and Open Issues allow you to enter the details of the tasks that you want to handle during the week. You can enter the task details at the beginning of each week. During the week, you can change the details if required.

To do so,

1. In the **Timesheet Entry** screen, click the **Task Plans & Open Issues**



2. In the **Task Plans & Open Issues** window, enter the details.



3. To save the details, click **Save**.
4. To close the window, click **Close**.

15.2. Validation

TLs and above can validate the employees' timesheet. They can view the timesheet details for the entire week. Also, PM and PLs can view the details.

15.2.1. Validate Timesheet

This option is available only to the Project Managers (PMs) and users to whom the Project Manager has delegated the task of validation. To validate the timesheet, follow these steps.

1. In the left menu, click **Validation**.

2. Click appropriate **Project Code** to view **Phase List** screen (when you run the mouse over the **Phase Name** column, a tool tip shows if time sheet entry is found or not for a specific phase).
3. In the **TimeSheet Validation Details** screen, you can see the list of all the members working on this phase.




✓ UnFreeze
✗ Close

TimeSheet Validation Details

Project Code : **J109030**
 Start Date : 02/08/2010 (mm/dd/yyyy)
 End Date : 02/14/2010 (mm/dd/yyyy)

Project Name : **Internal Tools**
 Project Phase : **SEPG**

Name	Timesheet Entry	Ignore	Validated	Remarks
Ashwini.K	35:20	<input type="checkbox"/>	✓	
Lavanva Gangula	0:00	<input type="checkbox"/>	?	
Lola G E	32:35	<input type="checkbox"/>	✓	
Madhuri D B	0:00	<input type="checkbox"/>	?	
Padmapriya M	0:00	<input type="checkbox"/>	?	
Ramesh Anna	0:00	<input type="checkbox"/>	?	


- **Name** – Name of the members working on this phase of the project
 - **Timesheet Entry** – Total Timesheet Entry for the date ranges for date selected.
 - **Ignore** – If the checkbox is checked, it indicates that the member must be ignored for the validation.
 - **Validated** – Shows the following icons:
 -  - The member has not entered the timesheet details for the specific week.
 -  - Timesheet entry is present but not validated.
 -  - Timesheet has been validated.
 - **Remarks** – Enter any details related to the validation.
4. To validate the record, in the **Name** column, click the specific name.
 5. The system shows the timesheet details and the SAMS entries.

TimeSheet Validation Details

Project Code : **J109030**
 Project Phase : **SEPG**
 Start Date : **05/09/2011**

Project Name : **Internal Tools**
 Employee Name : **Stefan Everts**
 End Date : **05/15/2011**

Module Name	Object	Activity	SubActivity	BugId	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
General	Data Analysis / Data Gathering	Process Improvement/SEPG	Checklist preparation	0			1.0 ?	2.0 ?				3:00
General	Discussions regarding SEPG	Process Improvement/SEPG	Project Management	0				1.0 ?				1:00
Total:					0:00	0:00	1:00	3:00	0:00	0:00	0:00	4:00
Other Phase	Project Name	Phase Name										
	Internal Tools	HRMS			1.0				3.0			4:00
	Internal Tools	WFMS		5.0	5.0	3.0			1.0			14:00
	Internal Tools	Presales Application				4.0		5.0				9:00
	Internal Tools	Resume Manager		3.0					2.0			5:00
Grand Total					8:00	6:00	8:00	8:00	6:00	0:00	0:00	
SAMS:					08:17	05:59	08:05	07:53	07:18	0:00	0:00	

- If the entries are valid, click the **Validate**  icon.
- If you find a mismatch in the entries, click **Send Mail** icon to send an email to the concerned person reminding the person to enter the timesheet details.
- In the **Send Mail** pop-up window, enter the subject and the message.

Send Mail

Employee Name : **Nathan Ramsey**

Start Date : **05/09/2011**

End Date : **05/15/2011**

* Subject :

* Message :

- Click **Send**.
- A link for SAMS is provided in the validation screen, where you can view **Move In and Out Detail** along with **Check In and Out Detail**.

Send Mail

Employee Detail


Employee Name : **Stefan Everts** Date : **05/12/2011**

Check In and Out Detail

Check In	Check Out	Total Time In	Total Time Out
11:09:19	19:33:59	07:53:12	00:31:28

Move In and Out Detail

Move Out	Move In	Out Time
14:05:25	14:36:53	00:31:28

- To close and return to the **Timesheet Validation Details** screen, click **Close**.
- Once you have validated timesheet details of all the members, click the  **Freeze** button.

Note: You can freeze the details only if you validate all the records.

16. Index

A

Acceptance Testing 23

Add Task 21

Assign Bug 29

B

Baseline/Label 35

C

Copy Phase 15

Customer Specified Effort 34

E

Enable Cost Calculation 12

Estimated Effort 23

F

Follow up Date 53

I

Initial Risk 52

R

Risk Exposure 52

Risk Threshold 55

S

Send Mail 10

SPAN Marketing Person 63

T

Total Effort 36

U

Upload Document 28

Using Templates 24