Software Engineering Process Group

User Manual

Version 1.4

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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,

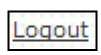
The procedure to log into the application may vary for the employees of Bangalore and Chandigarh.

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**.

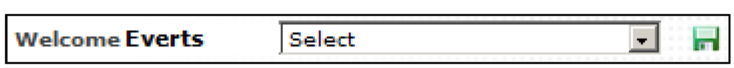
- SPAN Bangalore employees must use (URL: http://intranet.spanservices.com).
- SPAN Chandigarh employees must use (URL: http://chd-hrms.spanservices.com).

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.

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

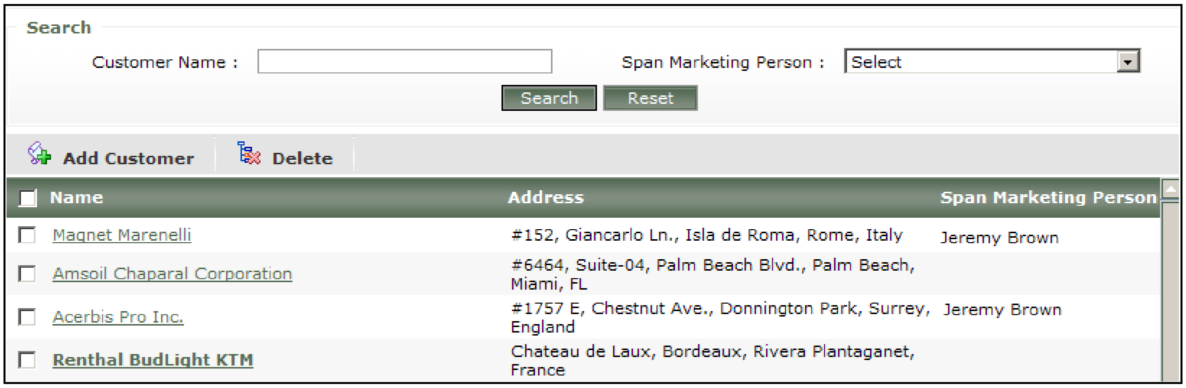
5. Customer

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.

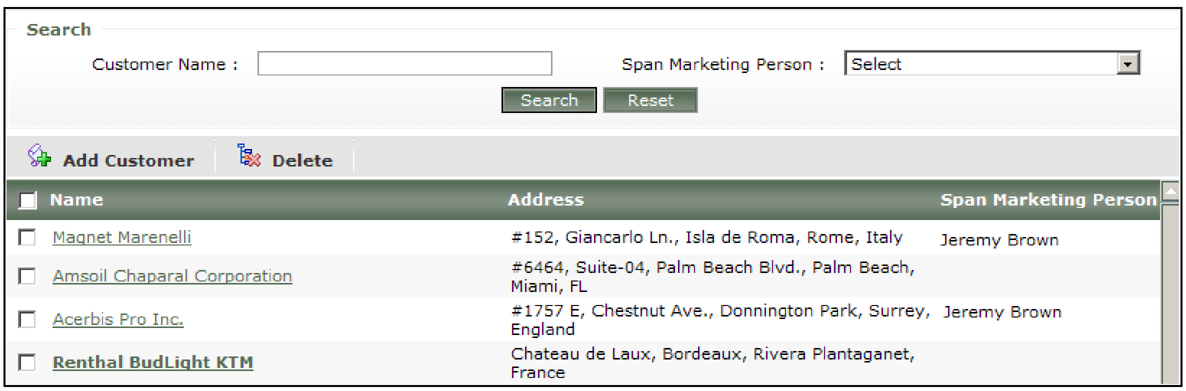
1. In the left menu, click **Customers** (by default, **Customer-Induvidual** is selected).
2. In the **Search** section, enter the **Customer Name** and select a name from the drop-down for the **Span Marketing Person** field.
3. Click **Search**.
4. The grid below the **Search** section shows the list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



5.2. Add Customer Details

To add a new customer details, follow these steps.

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

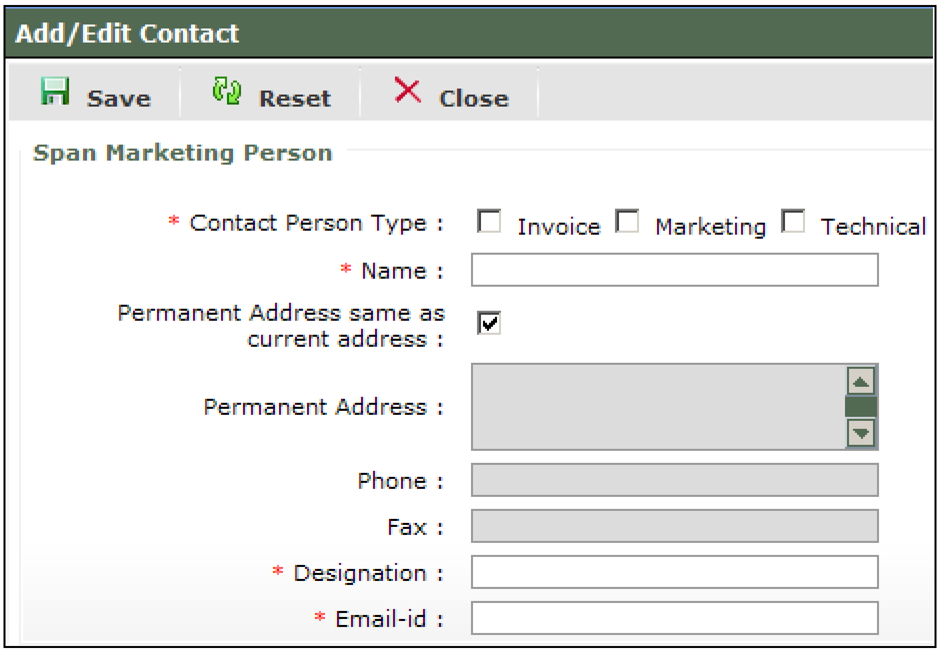


3. In the following screen, enter values in the fields mentioned below.

- **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.

6. Click **Add Contact**.



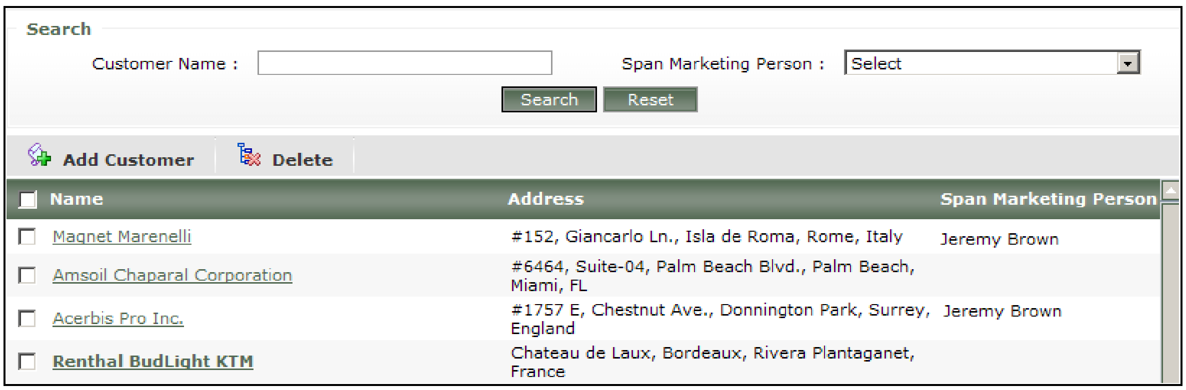
7. In the **Add/Edit Contact** pop-up, for the **Contact Person Type** field, select the checkbox for an option.
8. For the **Name** field, enter the name of the contact person.
9. If the permanent address of the contact person is the same as the current address, select the checkbox for the **Permanent 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, ente 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.

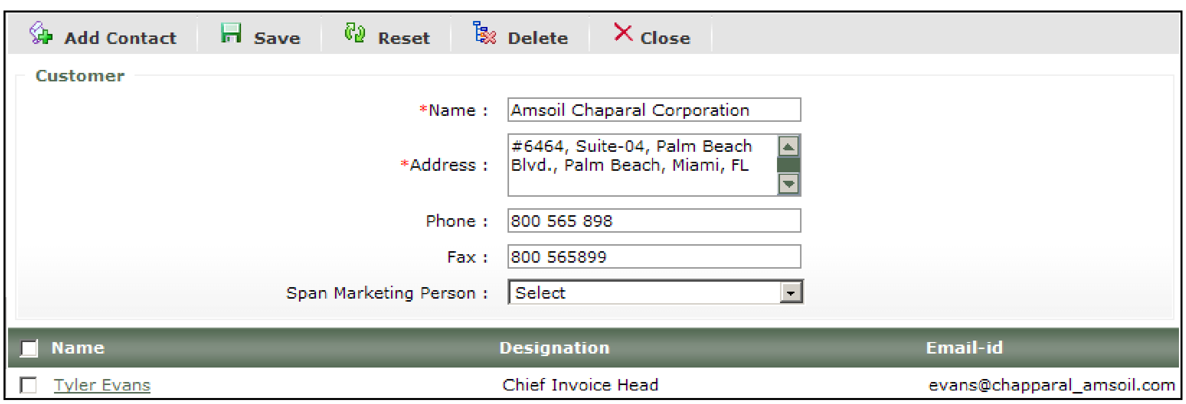
5.3. Edit Customer Details

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

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



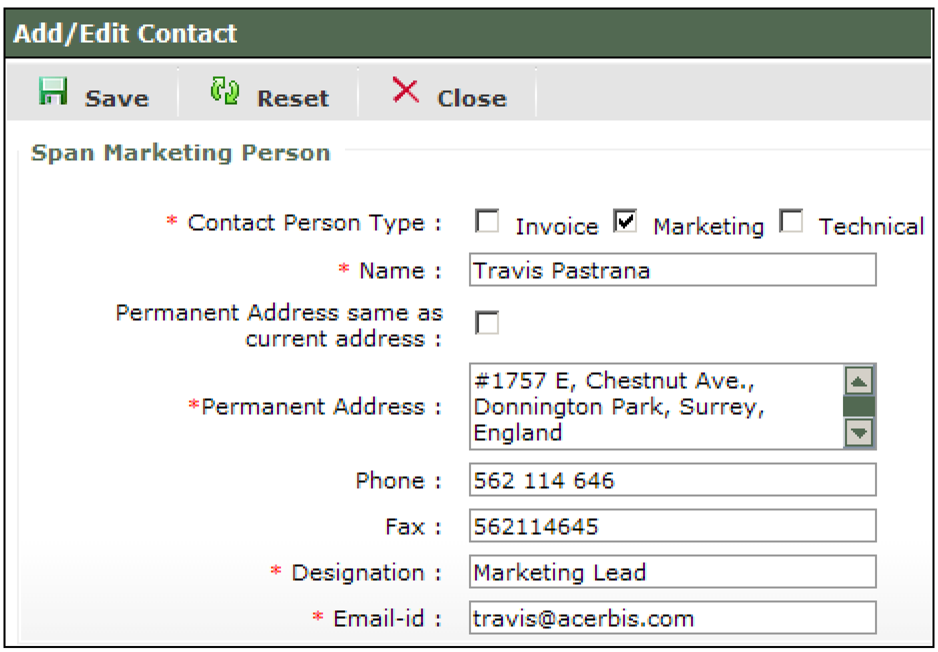
4. To search for a specific customer, in the **Search** section, enter the **Customer Name** and select the **Span Marketing Person**.
5. Click **Search**.
6. From the grid below the **Search** section, under **Name** column, click the customer name link.



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**.

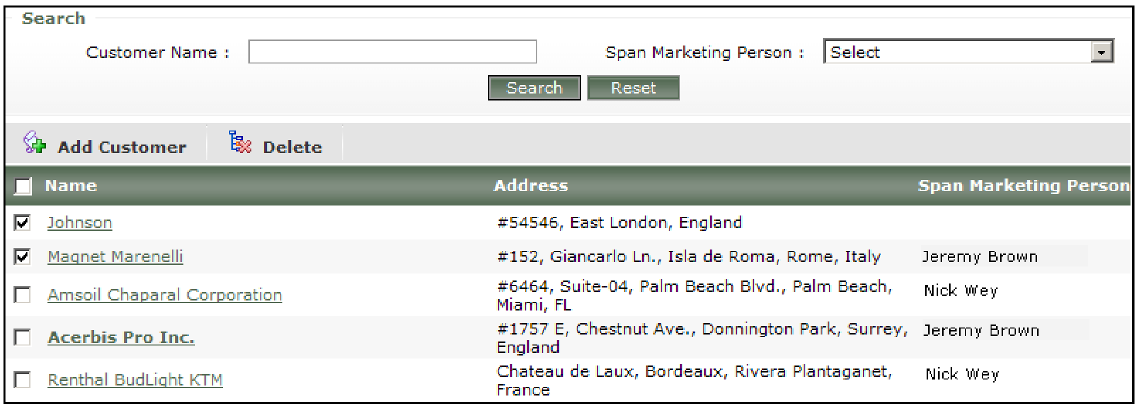
5.4. Delete Customer Details

To delete a customer details, follow these steps.

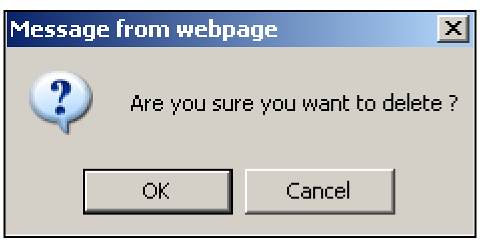
1. In the left menu, click **Customers**.
2. By default, **Customer-Induvidual** is selected.

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.

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.



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.

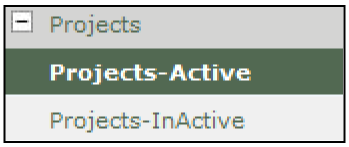
6. Projects

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.

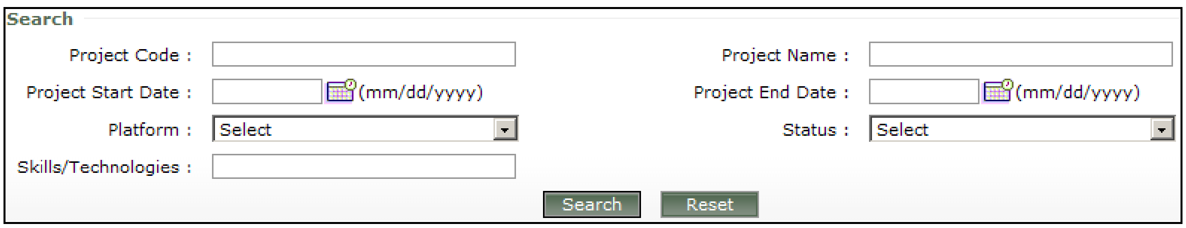
You can also copy a particular phase in a project to create a new phase.

To search for a specific project, follow these steps.

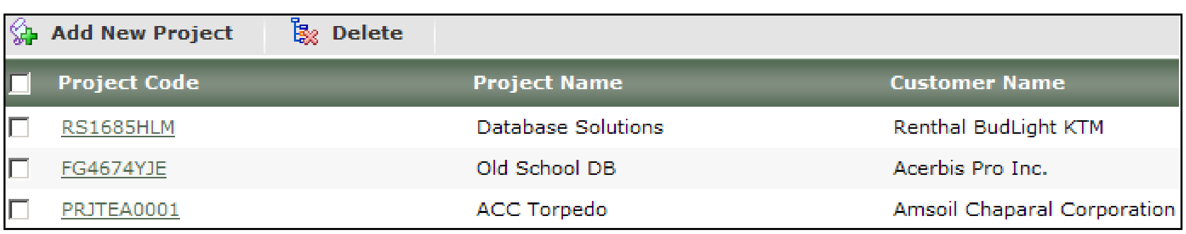
1. From the left menu, click **Projects**.



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



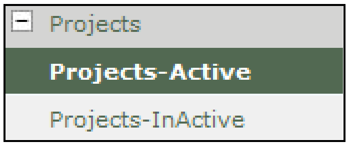
3. In the **Search** section, enter values in the fields mentioned below.
   - **Project Code** – Enter the project code
   - **Project Name** – Enter the project name
   - **Project Start Date** – Select the project start date using the calendar control
   - **Project End Date** – Select the project 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
4. Click **Search**.
5. The specific projects are shown in the grid below the **Search** section based of the search criteria.



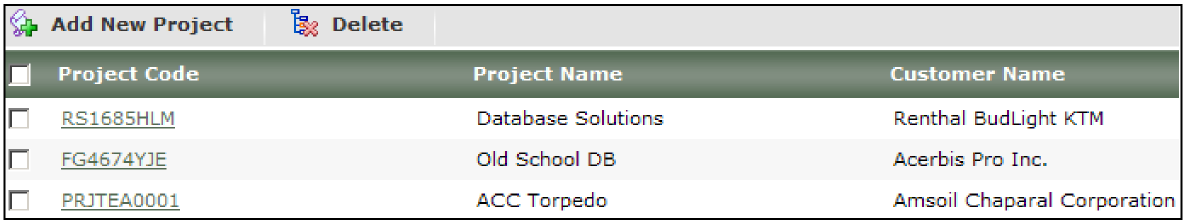
6.1. Add New Project

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

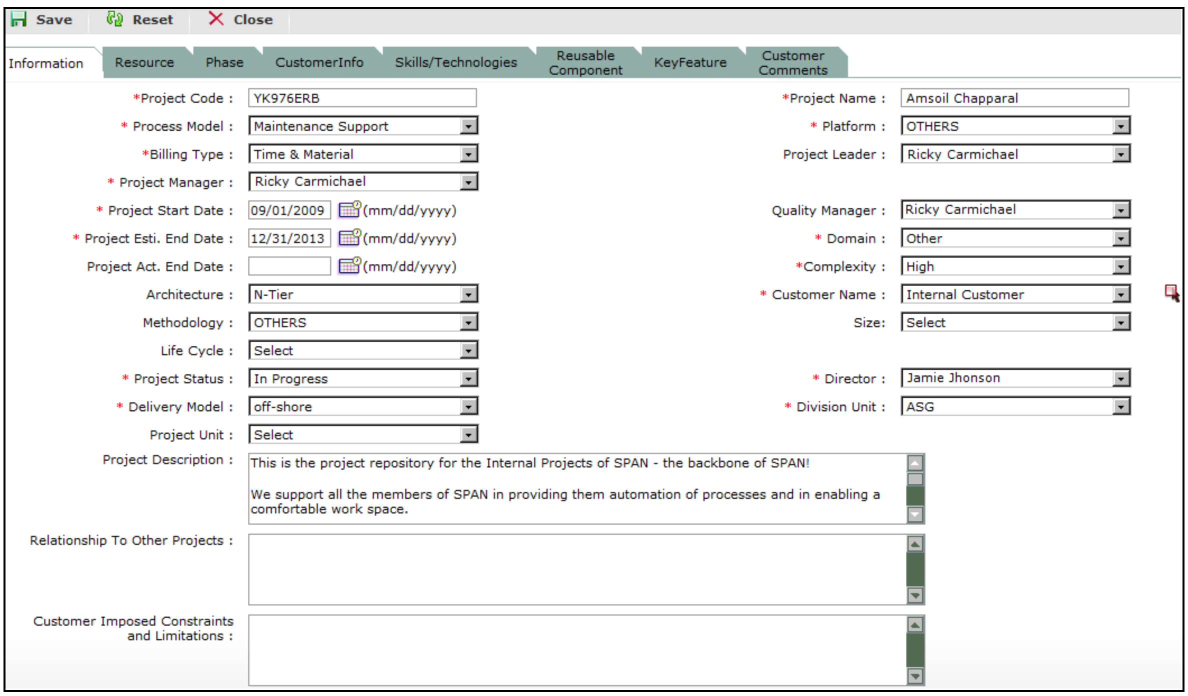
1. From the left menu, click **Projects**.



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



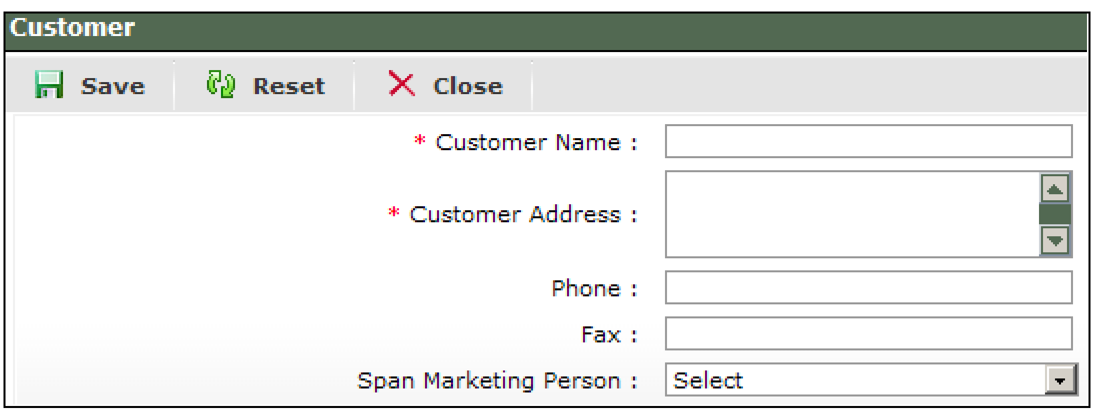
4. By default, **Information** (tab) screen is shown first.
5. Enter the details in the various fields mentioned below.



- **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

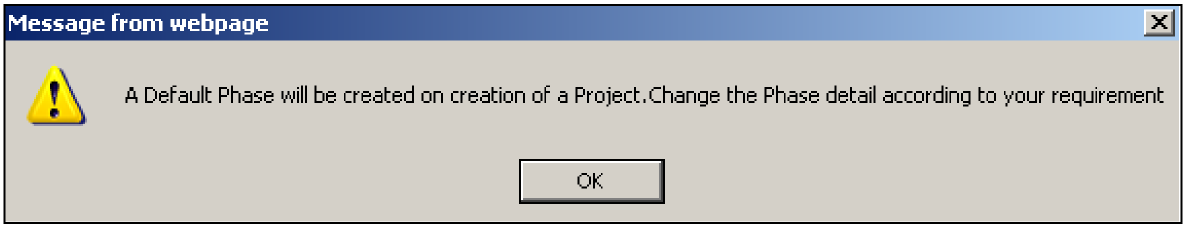
6. To add the details of the customer, right next to the **Customer Name** field, click the  icon.
7. In the **Customer** pop-up, enter values in the fields mentioned below.



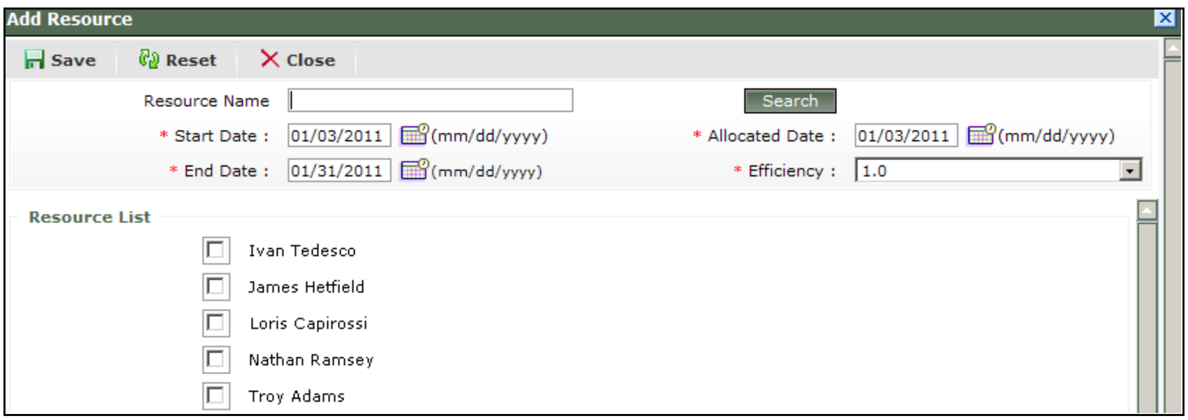
- **Customer Name** – Enter the customer name
- **Customer Address** – Enter the customer address
- **Phone** – Enter the customer’s telephone number
- **Fax** – Enter the customer’s fax number

- **Span Marketing Person** – Select the SPAN marketing person from the drop-down

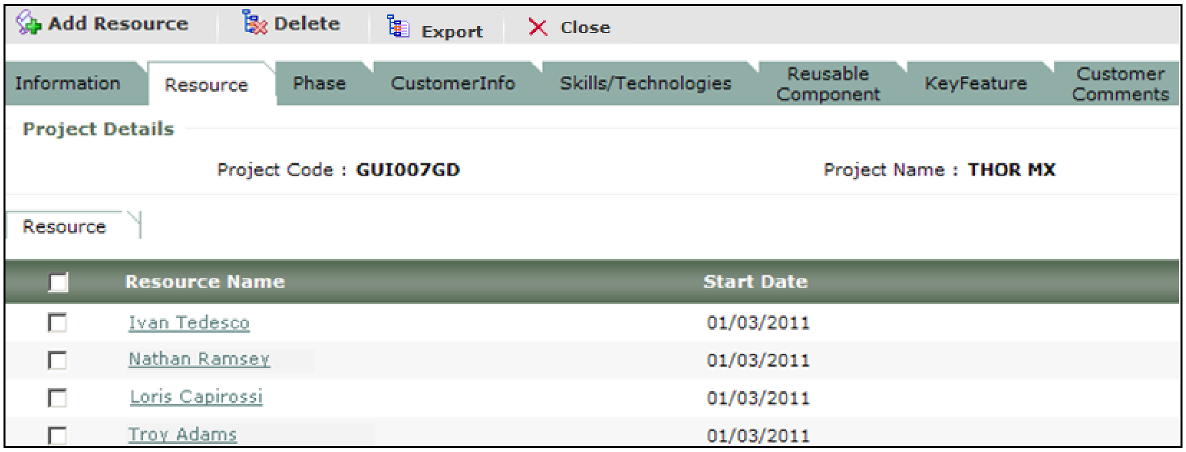
8. To save the details, in the **Customer** pop-up, click **Save** (you can add the customer's details in the **Customer** module also).
9. In the **Information** screen, click **Save**.
10. Once you click **Save**, you can see the pop-up shown below.



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

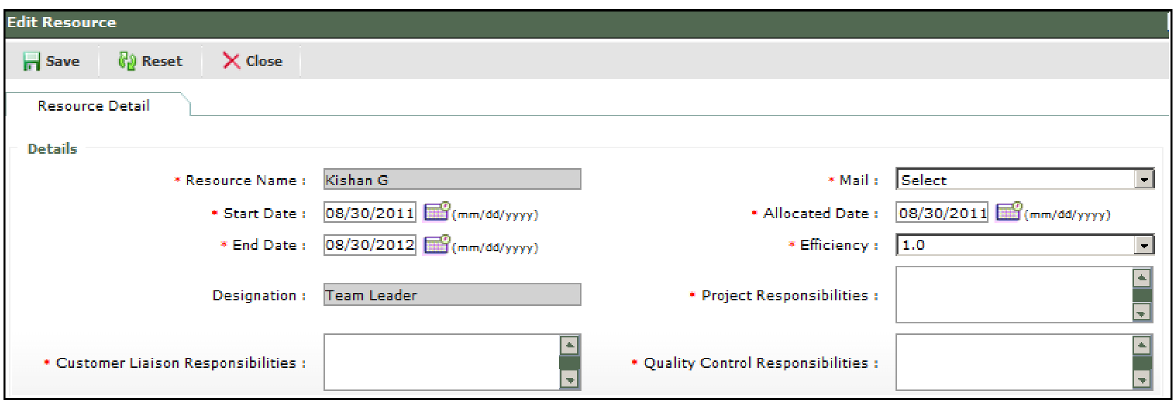


14. In the **Add Resource** pop-up, click **Search**.
15. The **Resource List** section shows the names of all the employees.
16. Select the corresponding checkbox for the resource you want to add (you can add multiple resources simultaneously).
17. The **Start Date** and **Allocated Date** fields, by 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.

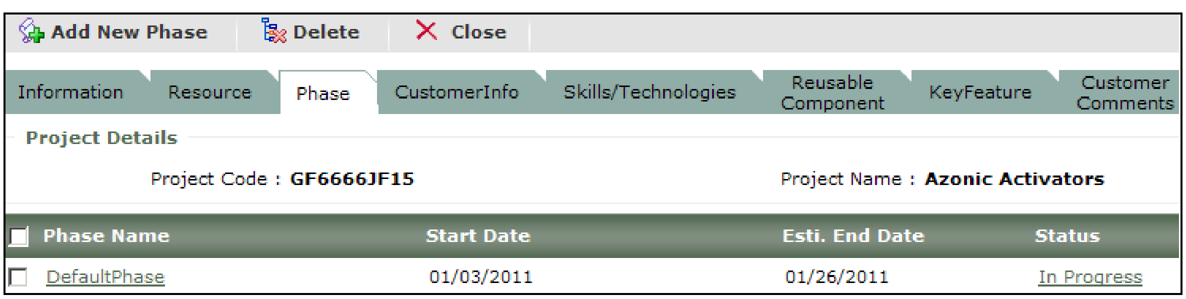


22. In the **Edit Resource** pop-up, for the **Mail** field, select an option from the drop-down.
23. For the **Project Responsibilities** field, enter the responsibilities of the resource.
24. For the **Customer Liasion Responsibilities** field, enter the customer liasion responsibilities.
25. For the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

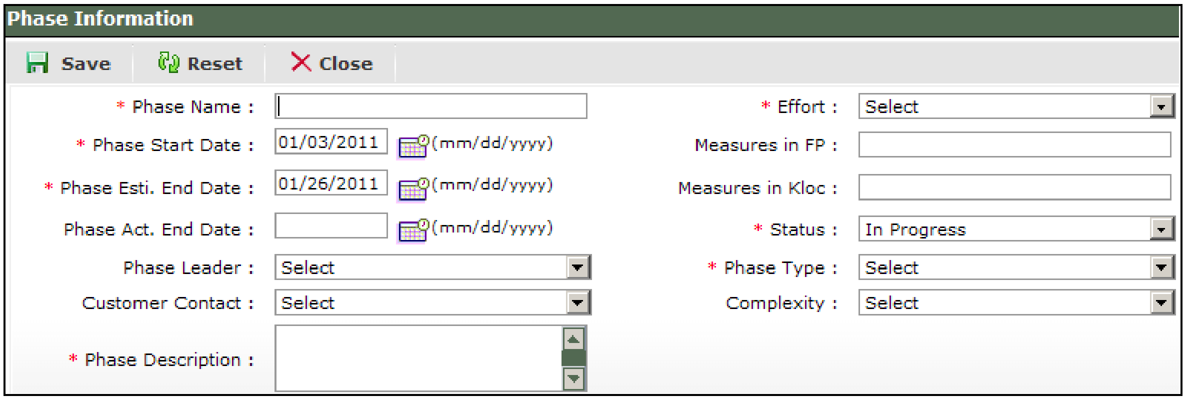
> **Note**: All other fields already show the details, which you can edit, if necessary. The **Resource Name** and **Designation** fields cannot be edited.



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.

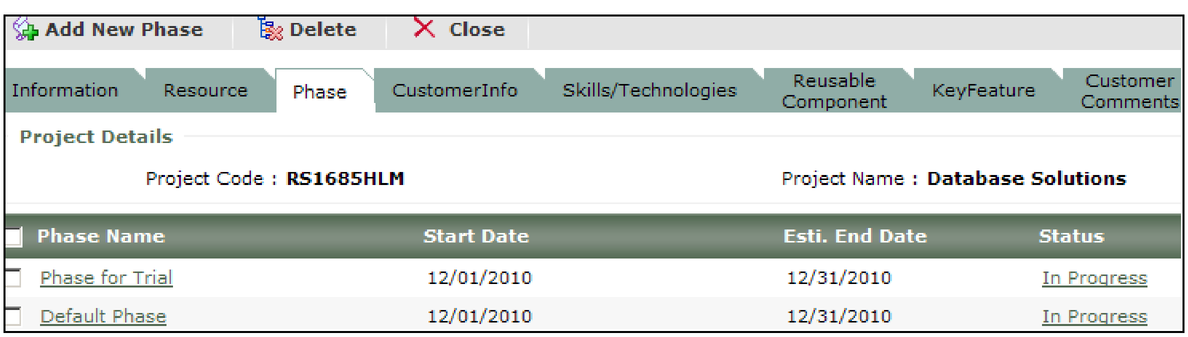


29. To add a new phase, click **Add New Phase** (you may also rename the system created default phase).
30. In the **Phase Information** pop-up, enter values in the fields mentioned below.

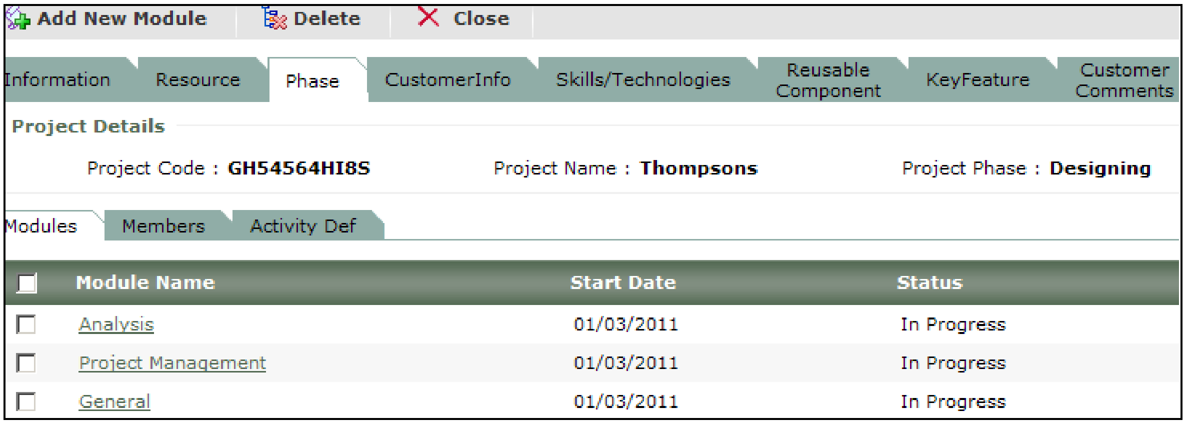


- **Phase Name** – Enter the phase name
- **Effort** – Select the effort from the drop-down
- **Phase Start Date** – By default, the project start date is shown
- **Measures in FP** – Enter the measures taken in functional points
- **Phase Esti. End Date** – By default, the project estimated end date 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

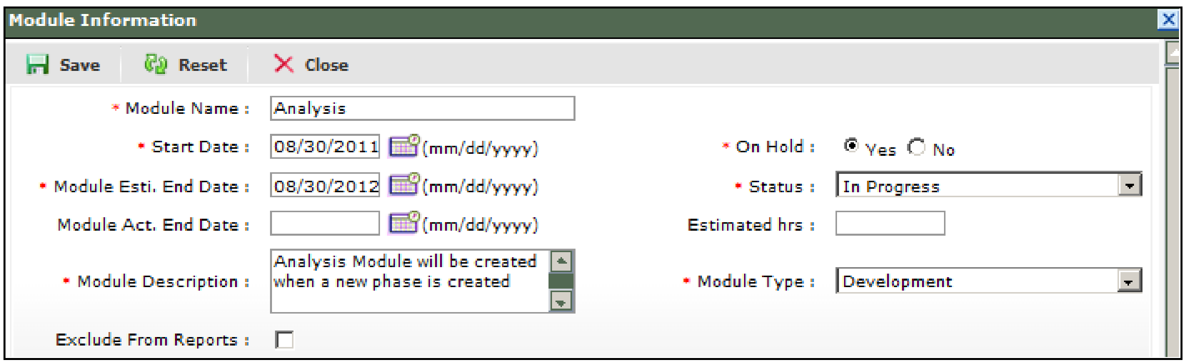
31. To save the details, in the **Phase Information** pop-up, click **Save**.
32. To close the pop-up, click **Close**.
33. The newly added phase details are shown in the grid below the **Project Details** section, as shown below.



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**.



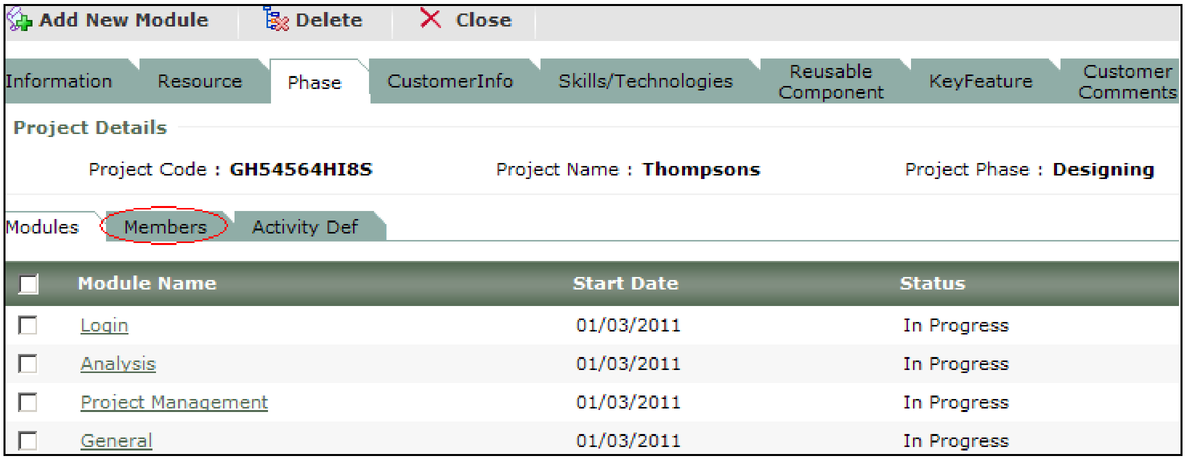
36. In the **Module Information** pop-up, enter values in the fields mentioned below.



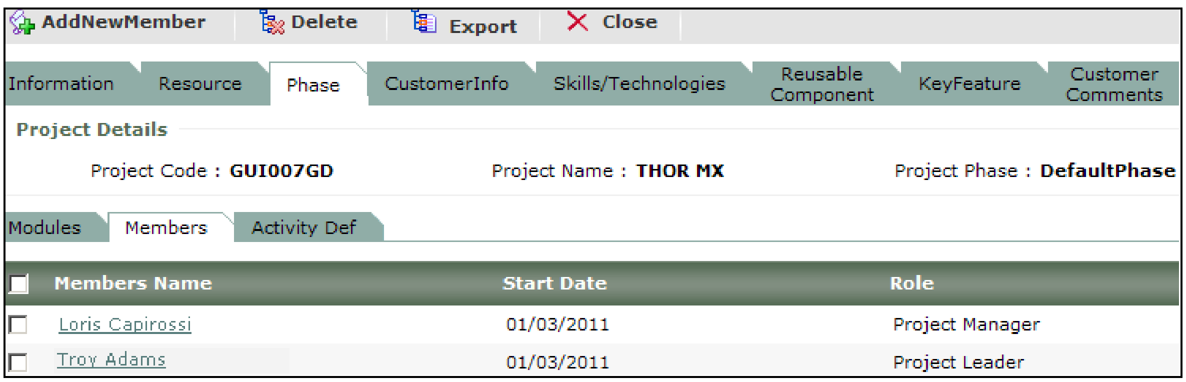
- **Module Name** – Enter the module name
- **Start Date** – By default, the project start date is shown
- **On Hold** – Select the radio button (by default, **No** is selected)
- **Module Esti. End Date** – By default, the project estimated end date is shown
- **Status** – Select the status from the 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.

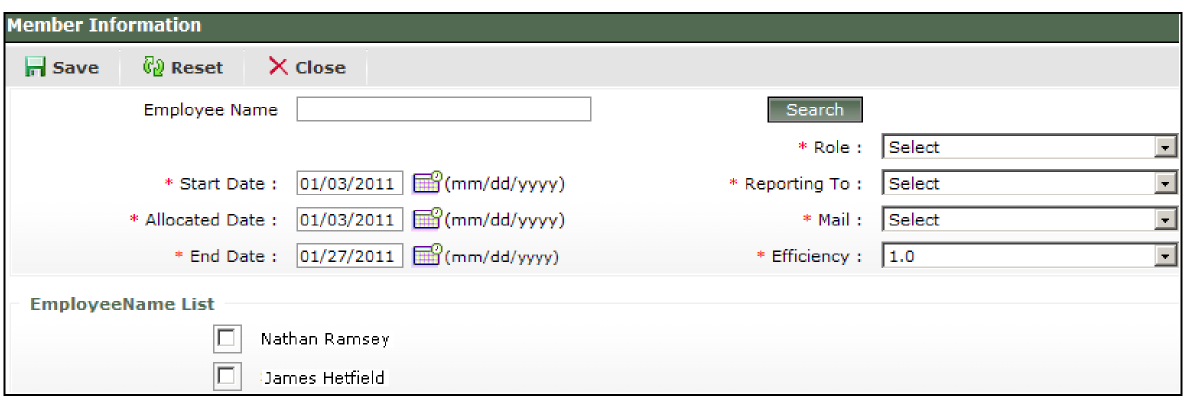
39. To add a member to the created module, from below the **Project Details** section, click **Members** tab.



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



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).

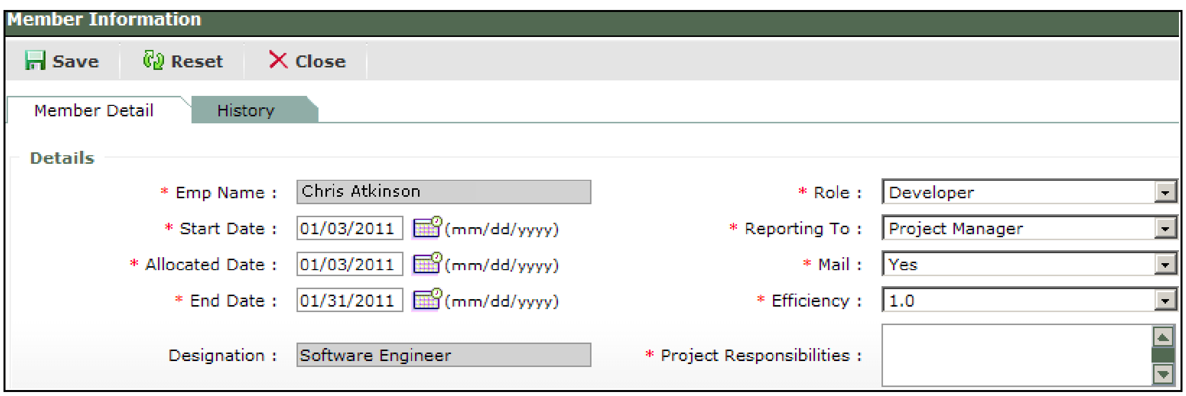


42. From the **EmployeeName List**, select the corresponding checkbox for the employees whom you want to add as members.

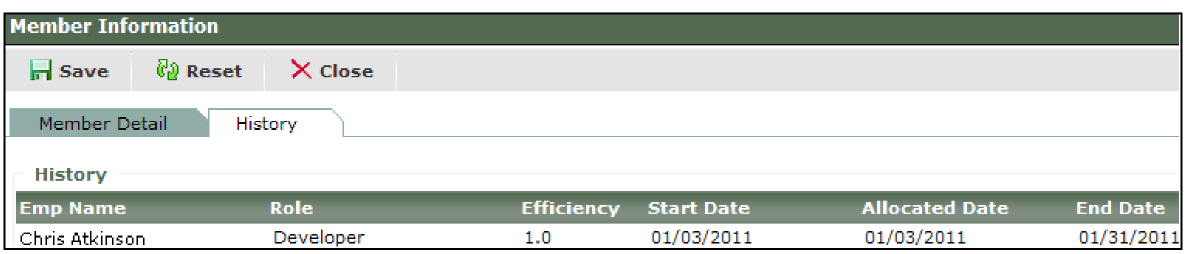
43. Enter values in the fields mentioned below.

- **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

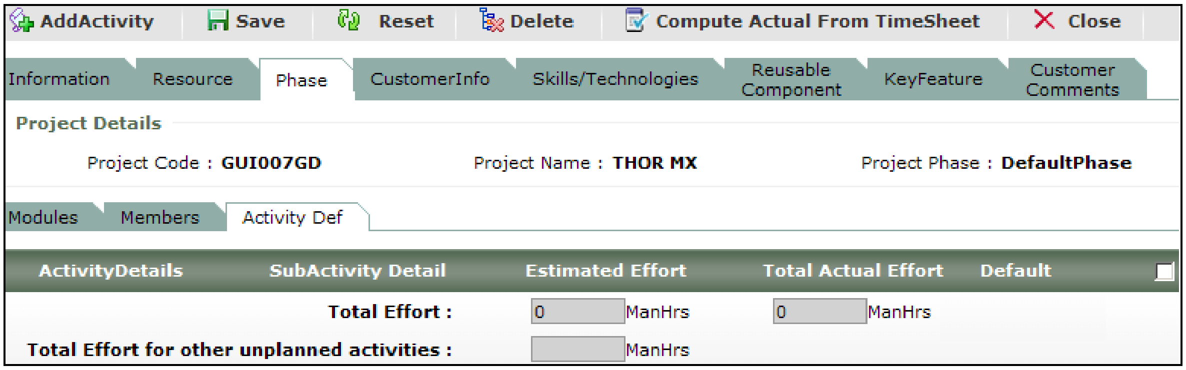
44. To save the details, click **Save**.
45. The names of the newly added members are shown in the grid.
46. To add the project responsibilities for a member, from the **Members Name** column of the grid, click the member name link.
47. In the **Member Information** pop-up, under **Member Detail** tab, for the **Project Responsibilities** field, enter the project responsibilities of the member.



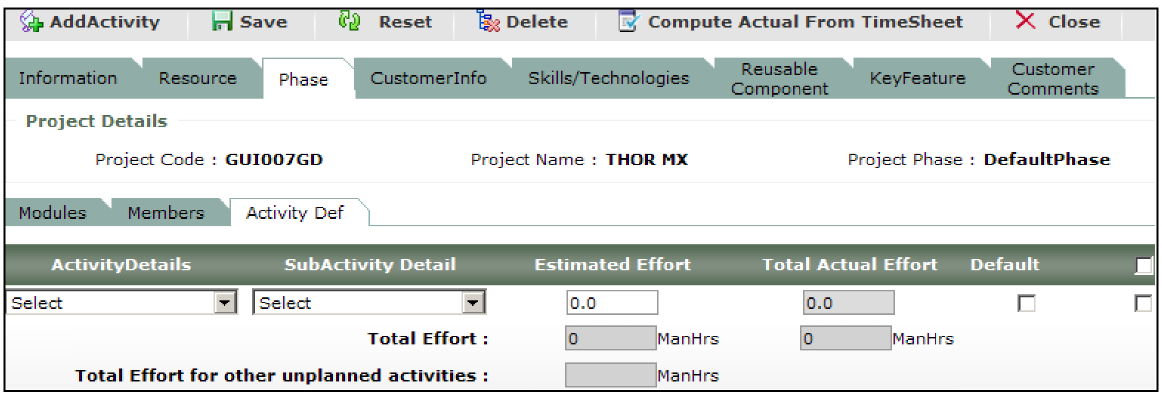
48. To view the history of the member's project details, click the **History** tab.



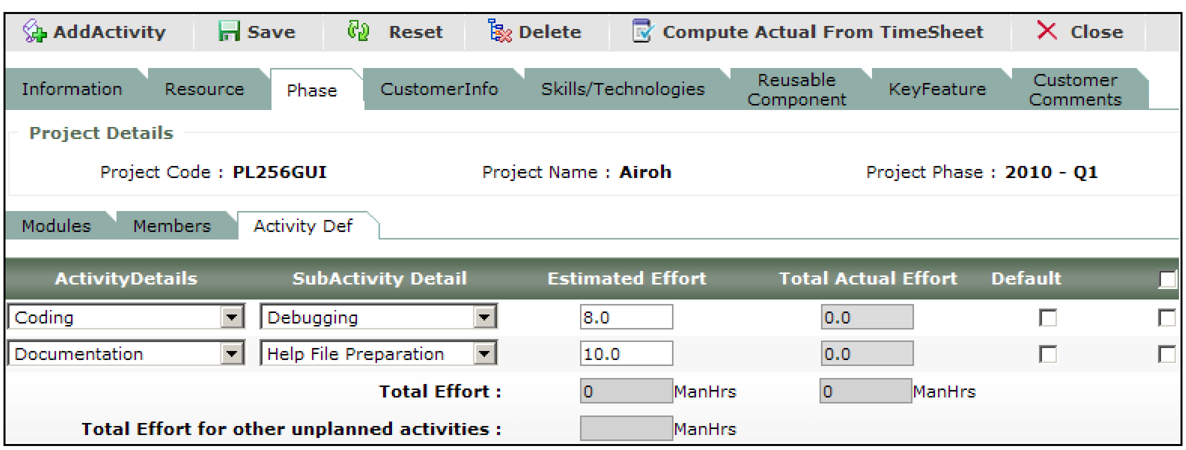
49. To save the project responsibilities of the member, click **Save**.
50. To add the activity definition for the project, click the **Activity Def** tab.



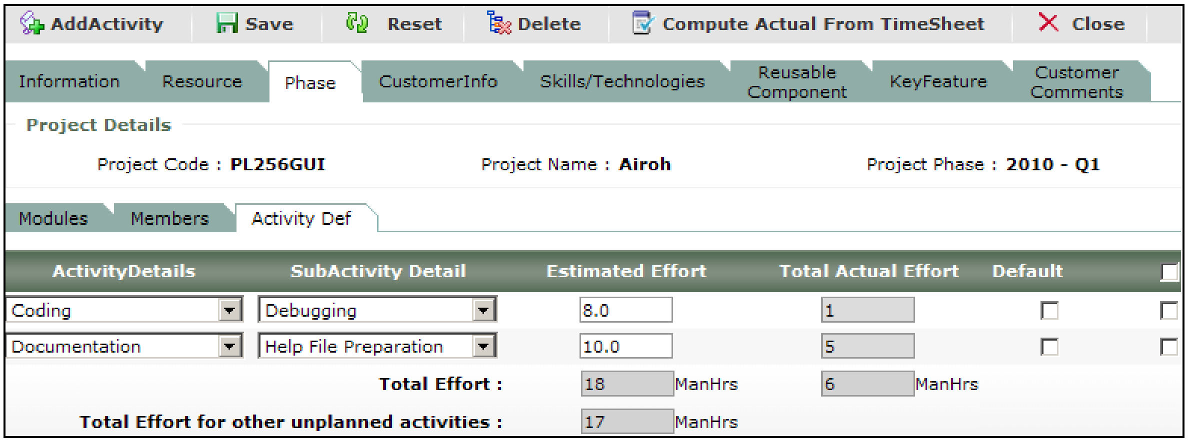
51. Click **AddActivity**.
52. Once you click **AddActivity**, you can see that a new row is inserted in the grid (see image below).
53. Under the **ActivityDetails** column of the grid, select an activity from the drop-down.
54. Under the **SubActivity Detail** column of the grid, select a sub-activity 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.



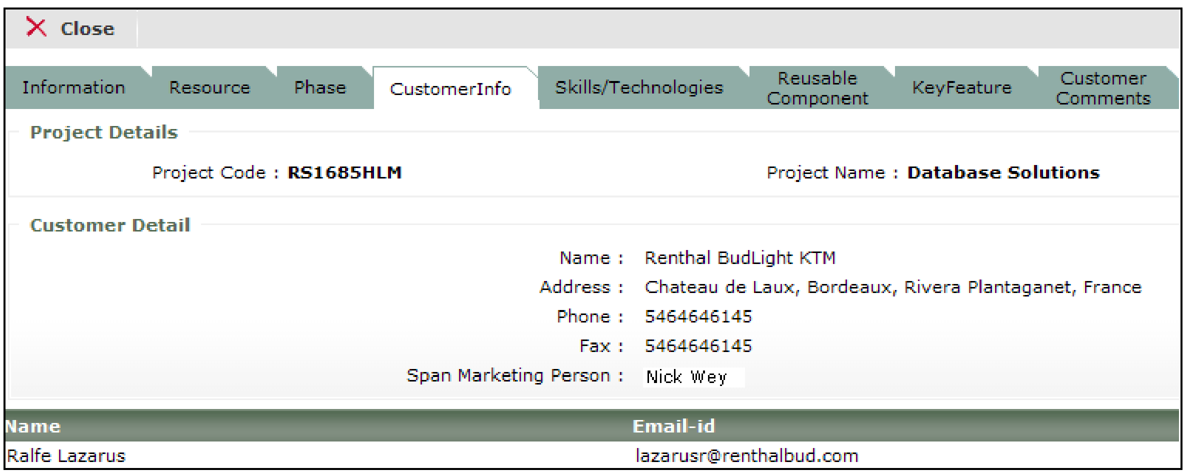
56. Once you enter the **Estimated Effort**, the **Total Effort** box in the same column shows the total time (effort) spent on all the activities in terms of man-hours.



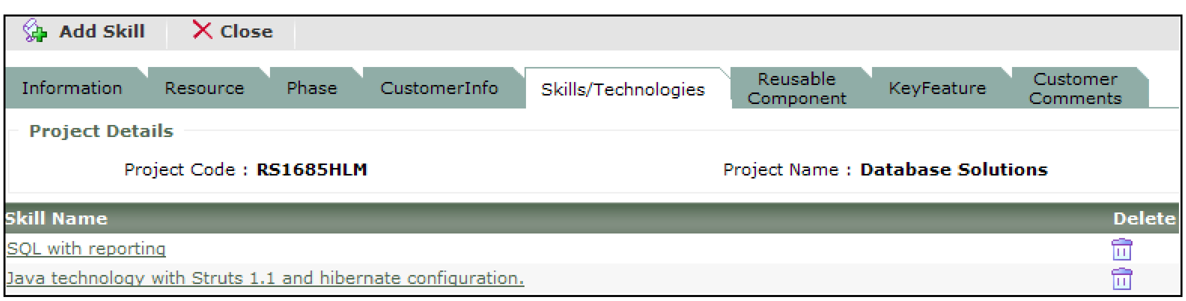
57. To calculate the **Total Actual Effort** (actual effort for the activity as entered by the resource in **Time Sheet** module), click **Compute Actual From TimeSheet**.



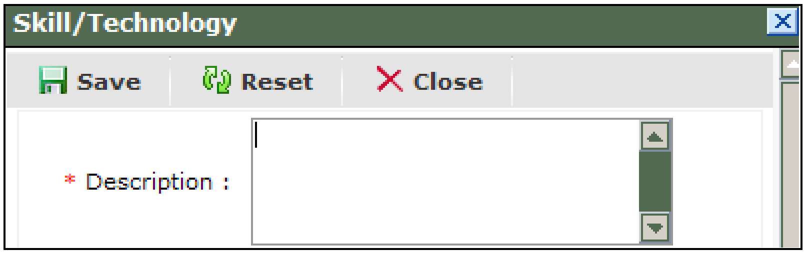
58. The **Total Actual Effort** column shows the total actual effort for each activity as well as the total actual effort for all the activities put together.
59. The **Total Effort for other unplanned activities** box shows the effort (time spent) for unplanned activities.
60. To view the details of the customer of the project, click **CustomerInfo** tab.



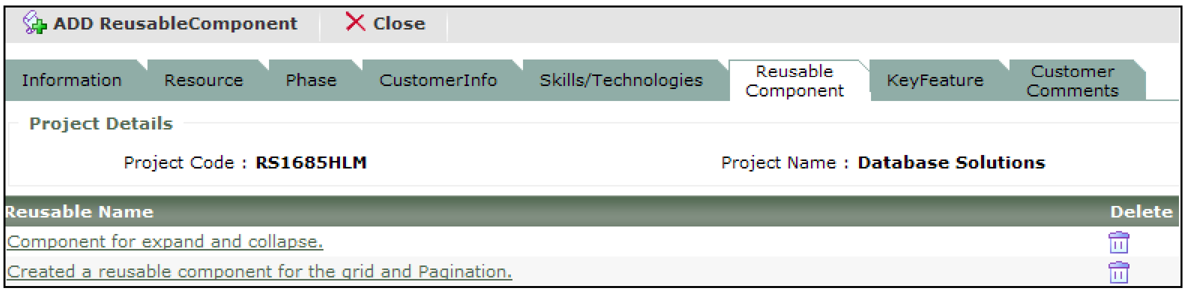
61. The **Customer Detail** section shows the details related to the customer and the grid below the **Customer Detail** section shows the name and email address of the customer contact person.
62. To add the skills and technologies related to the project, click the **Skills/Technologies** tab.



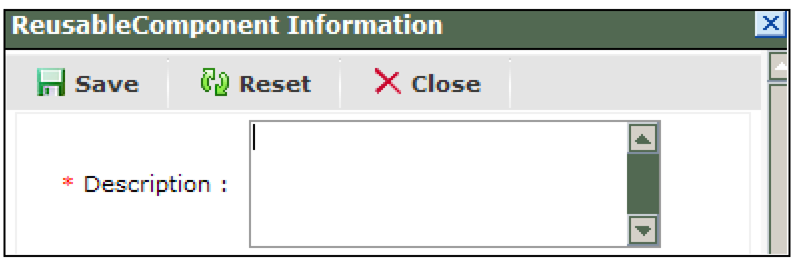
63. Click **Add Skill**.



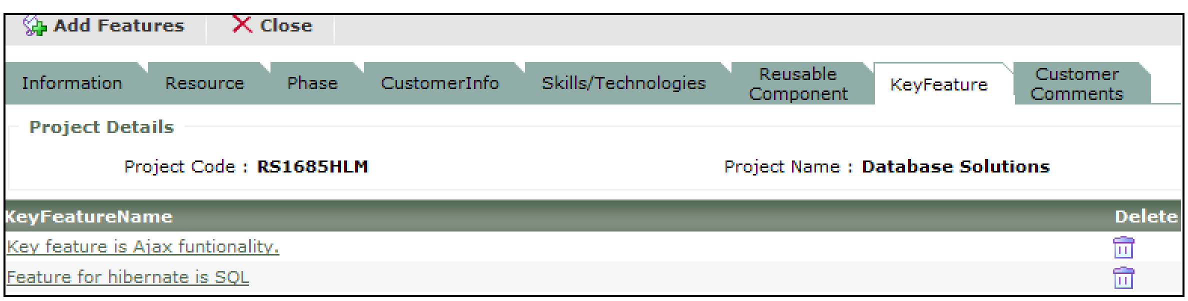
64. In the **Skill/Technology** pop-up, for the **Description** field, enter the skills and technologies involved.
65. To save the details, click **Save**.
66. To add reusable components to the project, click the **Reusable Component** tab.



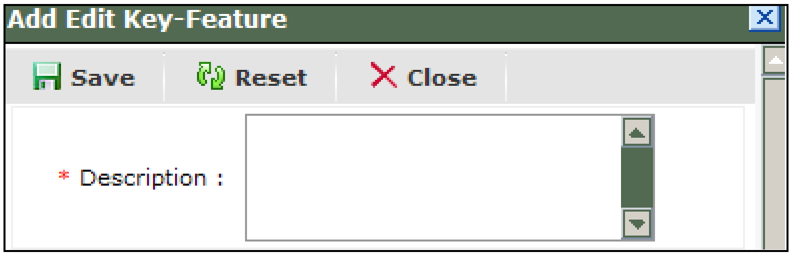
67. Click **ADD ReusableComponent**.



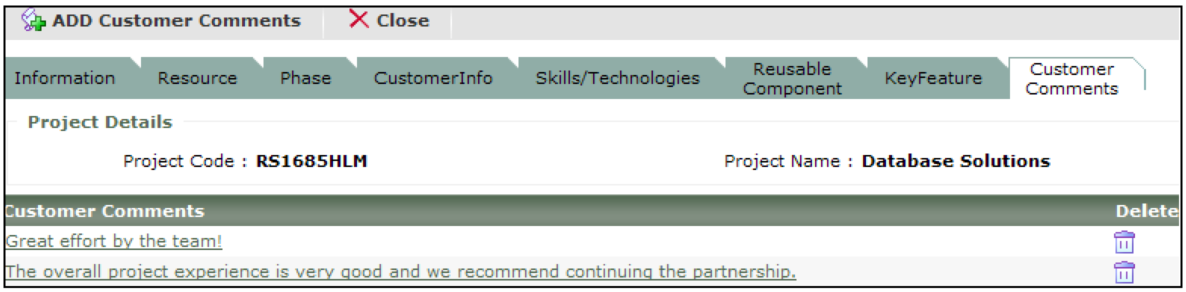
68. In the **ReusableComponent Information** pop-up, for the **Description** field, enter the reusable components.
69. To save the details, click **Save**.
70. To add the key features of the project, click the **KeyFeature** tab.



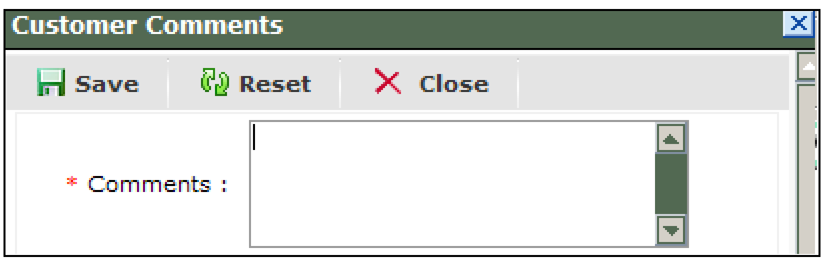
71. Click **Add Features**.



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.



75. Click **ADD Customer Comments**.

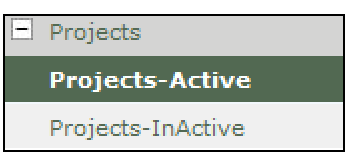


76. In the **Customer Comments** pop-up, for the **Comments** field, enter the comments given by the customer.
77. To save the details, click **Save**.

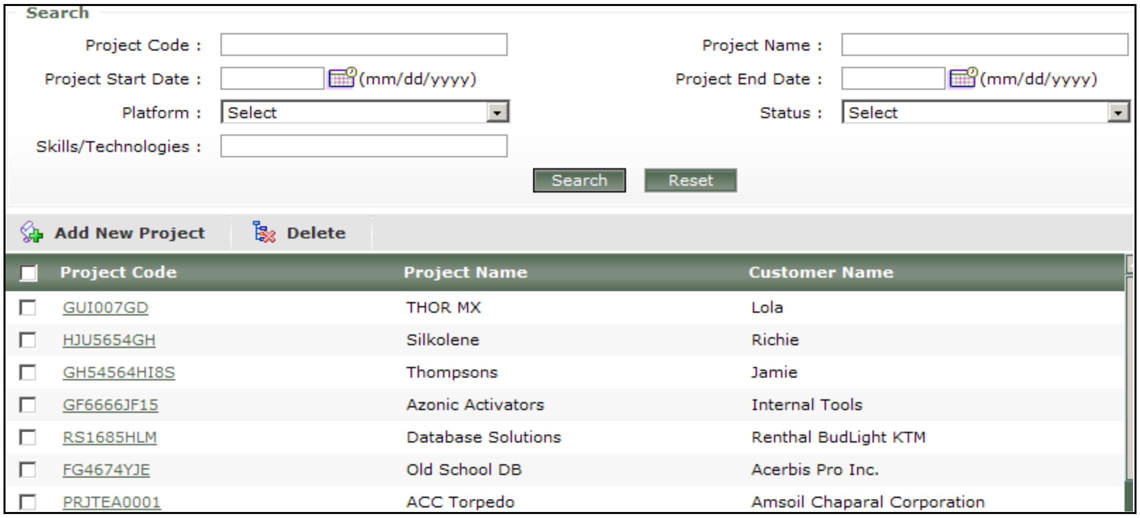
6.2. Edit Project Details

To edit a project details, follow these steps.

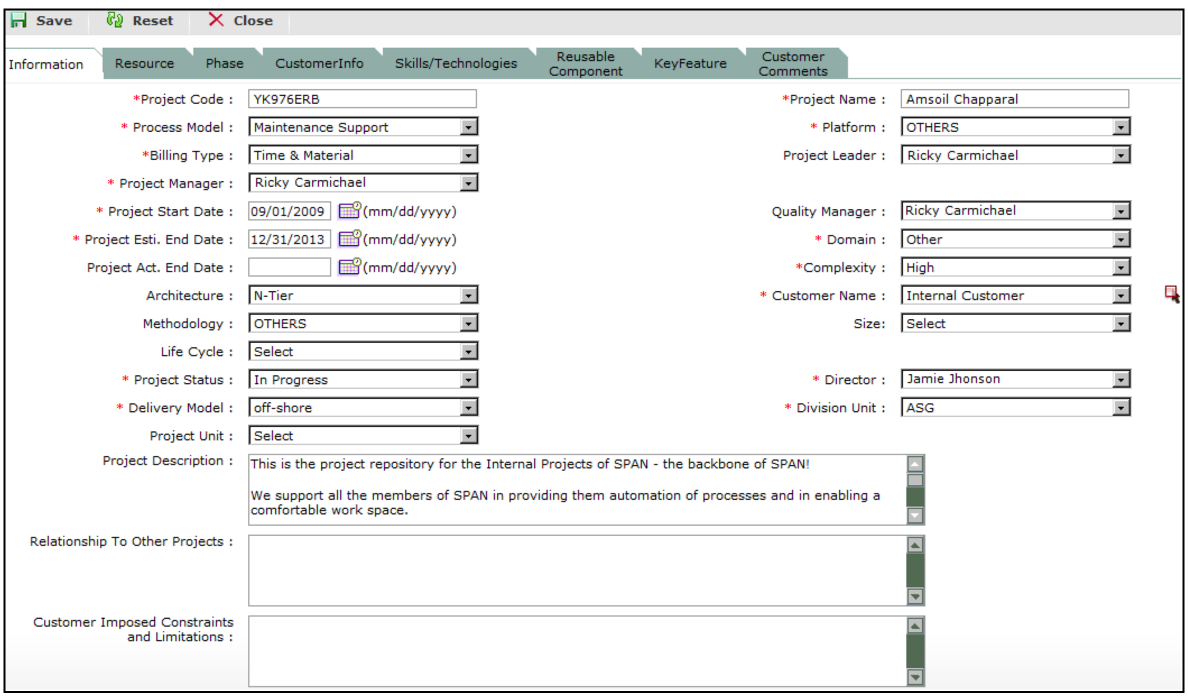
1. From the left menu, click **Projects**.



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**.



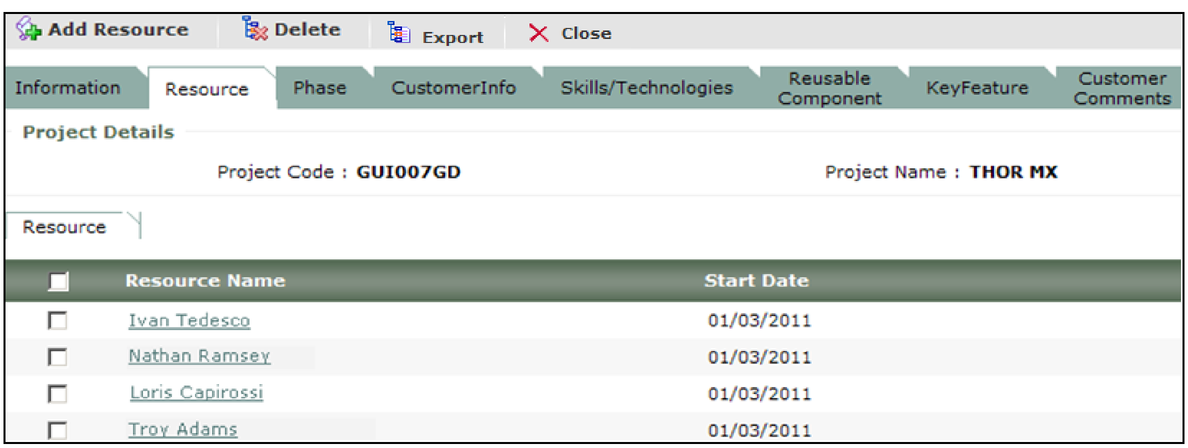
4. The grid shows the list of projects that meet the search criteria.
5. In the grid, from the **Project Code** column, click the specific project code link that you want to edit.
6. In the following **Information** (tab) screen, edit the fields mentioned below.



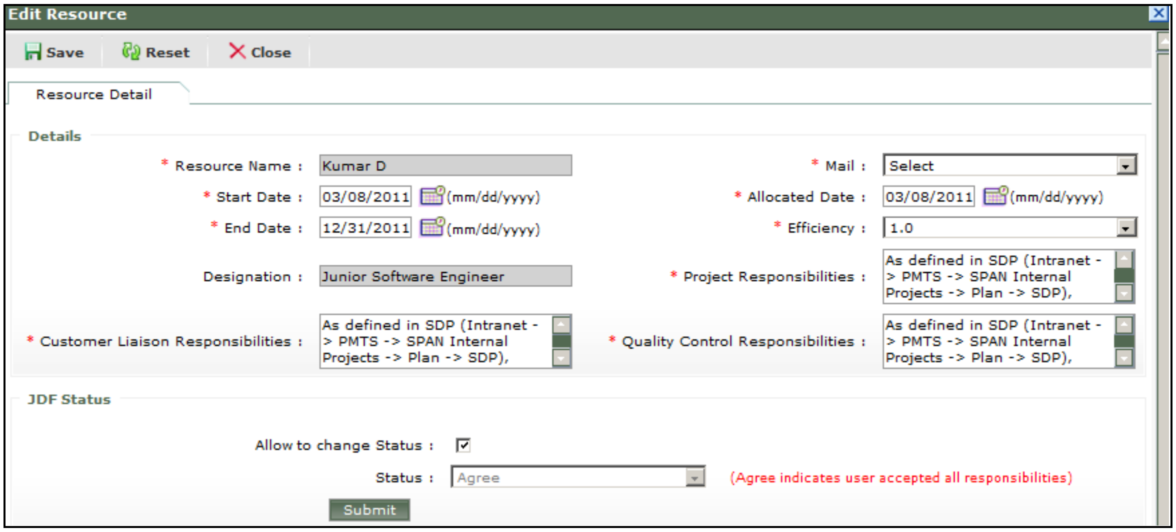
- **Project Code** – Edit the project code
- **Project Name** – Edit the project name
- **Process Model** – Select the process model from the drop-down
- **Platform** – Select the platform from the drop-down
- **Billing Type** – Select the billing type from the drop-down
- **Project Leader** – Select 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.



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

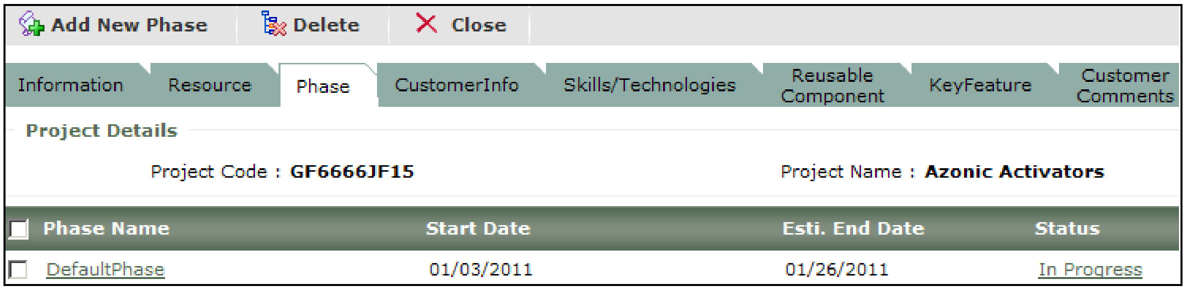


- **Resource Name** – This field is shown in non-edit mode
- **Mail** – Select an option from the drop-down (if you select **Yes** from the drop-down, the information changed is emailed to the resource)
- **Start Date** – Edit the start date using the calendar control
- **Allocated Date** – Edit the 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

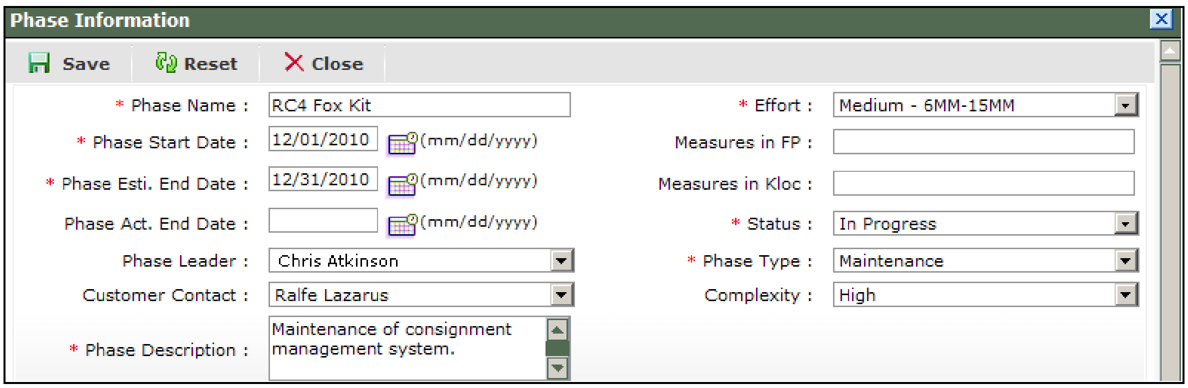
12. To reset the values, before you click **Save**, click **Reset**.
13. To save the details, click **Save**.
14. In the **JDF Status** section, to change the status, select the checkbox for the **Allow to change Status**.

> **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.

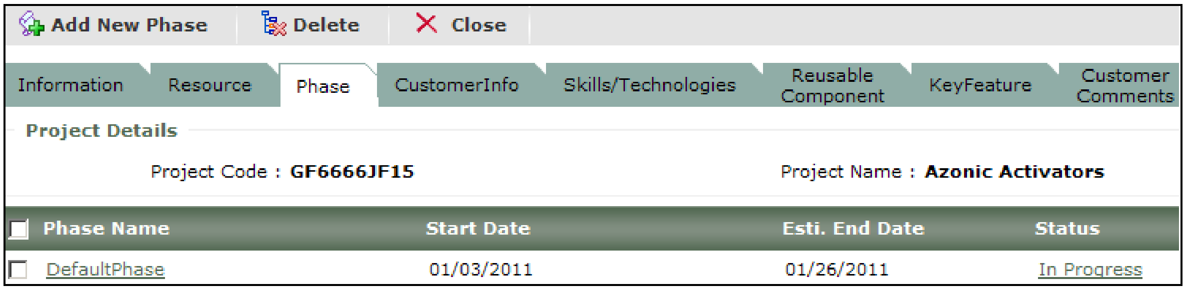


17. The grid below the **Project Details** section shows the **Phase Name**, **Start Date**, **Esti. End Date** and **Status** of the phase.
18. To edit the phase details, click the phase name link in the **Phase Name** column.
19. In the **Phase Information** pop-up, edit the fields mentioned below.

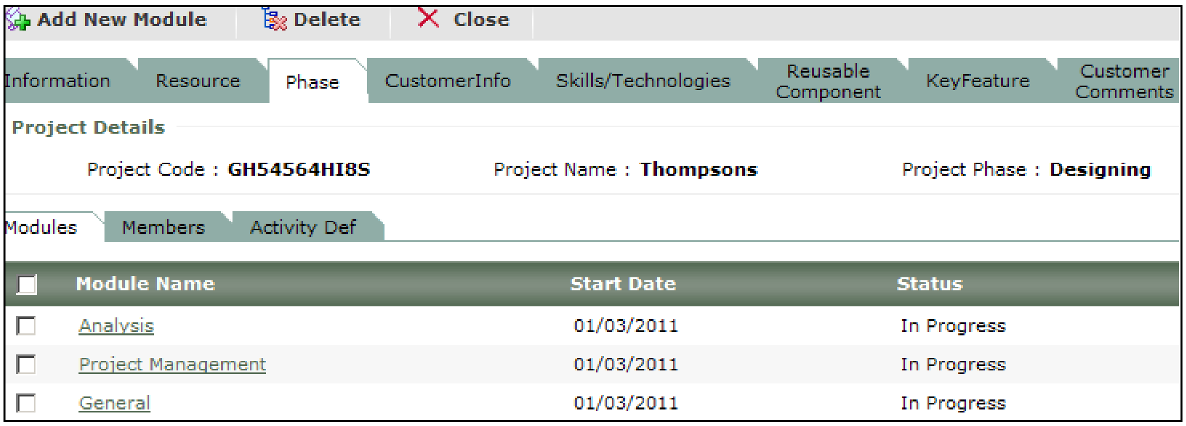


- **Phase Name** – Edit the phase name
- **Effort** – Select the effort from the drop-down
- **Phase Start Date** – Edit the project start date using the calendar control
- **Measures in FP** – Edit the measures taken in functional points
- **Phase Esti. End Date** – Edit the project estimated end date 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

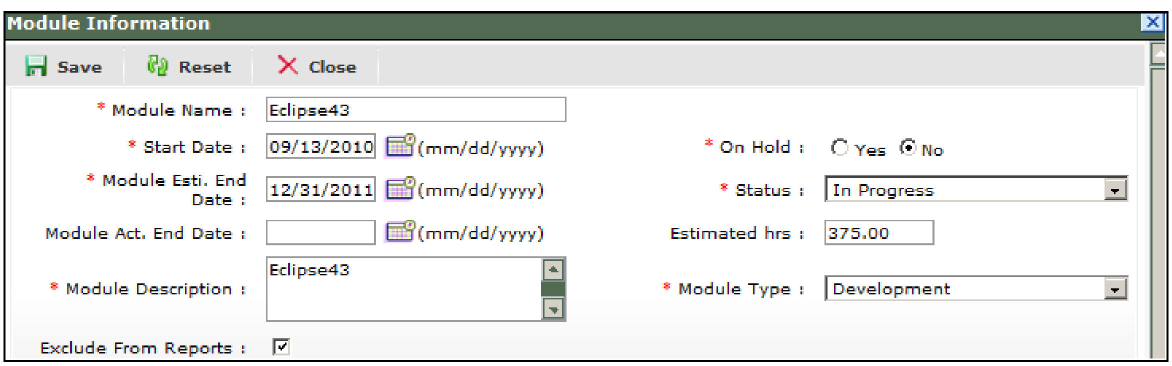
20. To reset the values, before you click **Save**, click **Reset**.
21. To save the details, click **Save**.
22. To edit the module details, member details and activity details, click the status link in the **Status** column.



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.



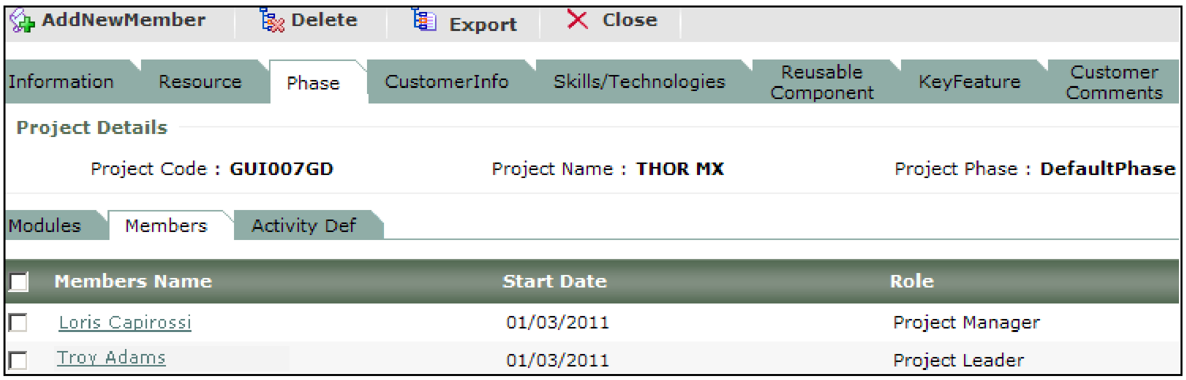
24. To edit module details, from the grid, click the specific module name link in the **Module Name** column.
25. In the **Module Information** pop-up, edit the fields mentioned below.



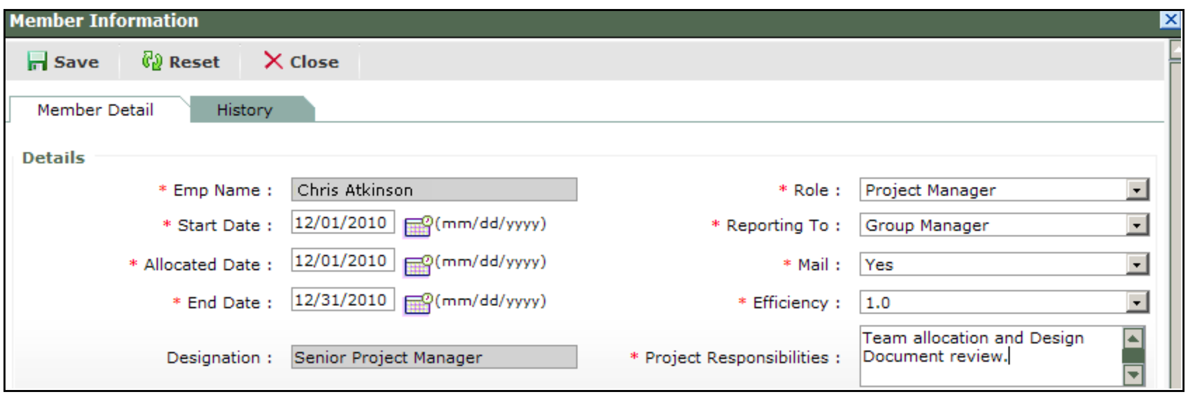
- **Module Name** – Edit the module name
- **Start Date** – Edit the project start date using the calendar control
- **On Hold** – Select the radio button (by default, **No** is selected)
- **Module Esti. End Date** – Edit the project estimated end date using the calendar control
- **Status** – Select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



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.

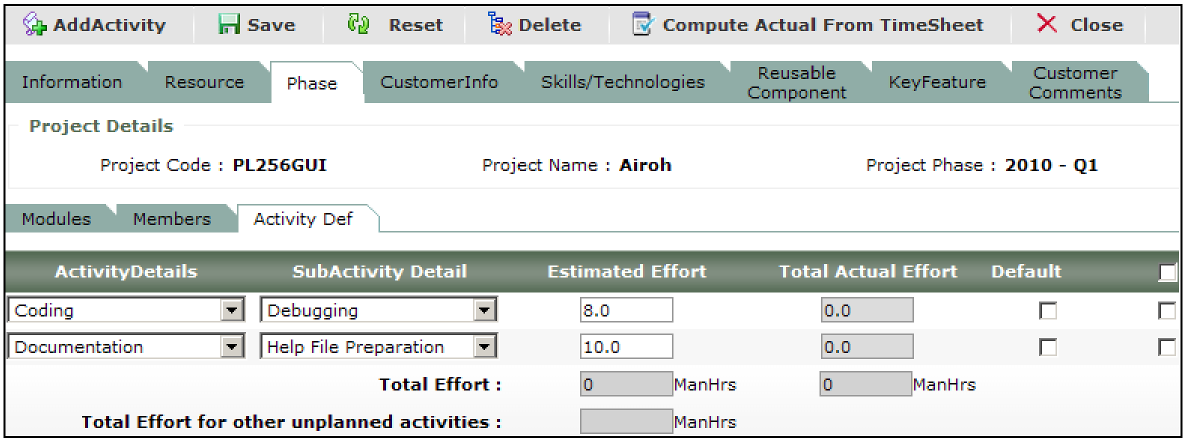


- **Emp Name** – This field is shown in non-edit mode
- **Role** – Select the role from the drop-down
- **Start Date** – Edit the start date using the calendar control
- **Reporting To** – Select an option from the drop-down
- **Allocated Date** – Edit the allocated date using the calendar control
- **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.



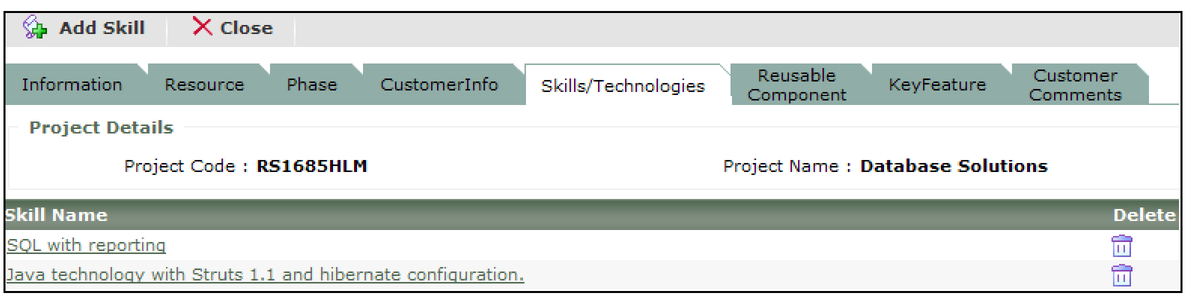
34. To edit the **ActivityDetails** and **SubActivity Detail** column, select an option from the drop-down, and edit the **Estimated Effort**.

> **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.

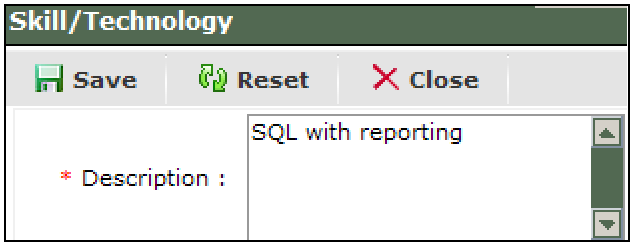
35. To reset the values, before you click **Save**, click **Reset**.
36. To save the details, click **Save**.

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

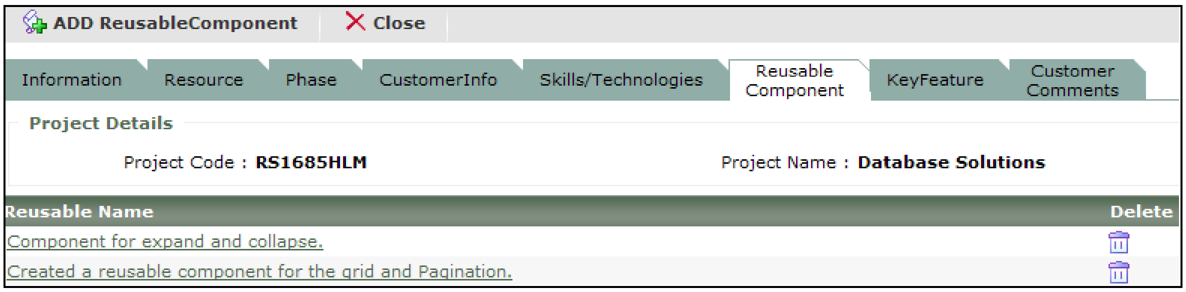
37. To edit skill and technology details, click the **Skills/Technologies** tab below the **Project Details** section.



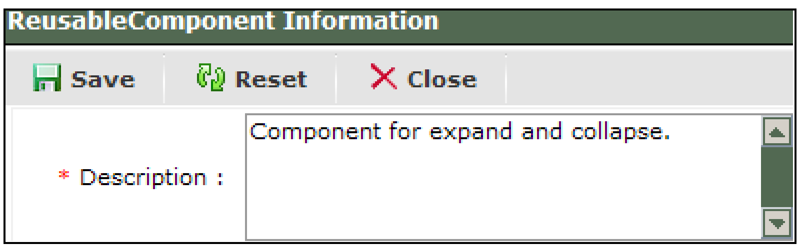
38. From the grid below the **Project Details** section, under **Skill Name** column, click the skill name link that you want to edit.
39. In the **Skill/Technology** pop-up, edit the **Description** field.



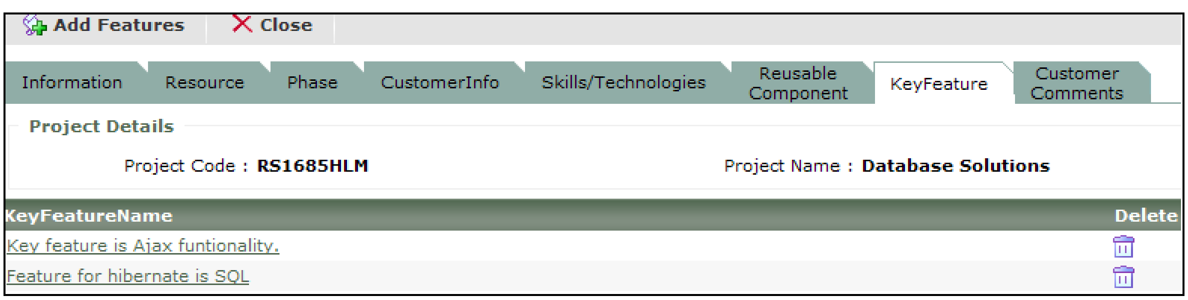
40. To reset the values, before you click **Save**, click **Reset**.
41. To save the details, click **Save**.
42. To edit the reusable component details, click the **Reusable Component** tab.



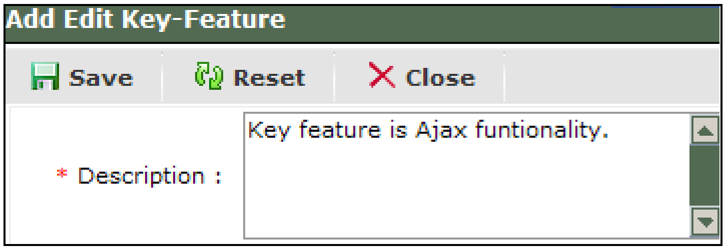
43. From the grid below the **Project Details** section, under **Reusable Name** column, click the reusable name link you want to edit.
44. In the **ReusableComponent Information** pop-up, edit the **Description** field.



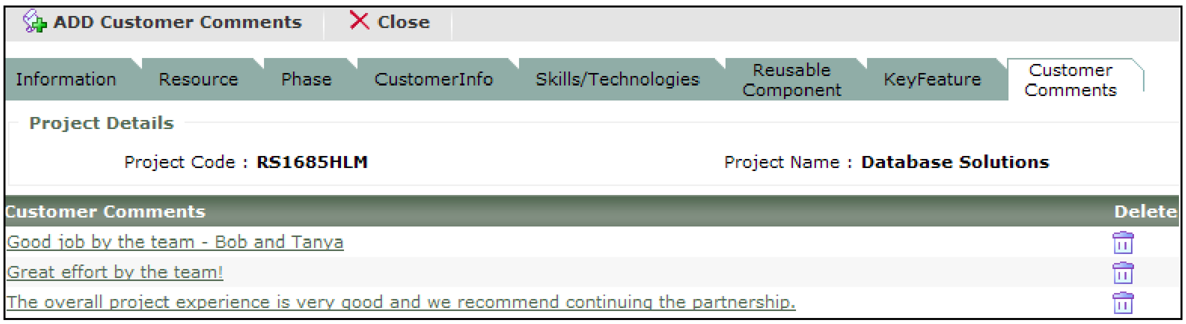
45. To reset the values, before you click **Save**, click **Reset**.
46. To save the details, click **Save**.
47. To edit the key features, click the **KeyFeature** tab.



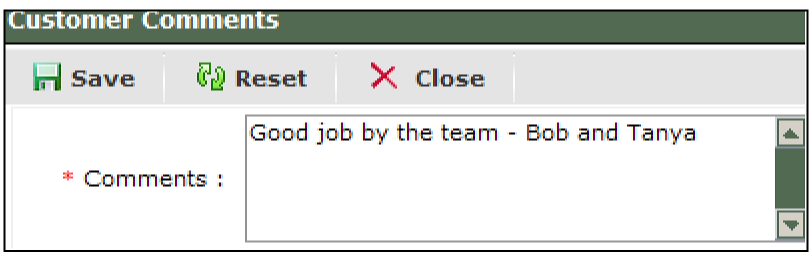
48. From the grid below the **Project Details** section, under **KeyFeatureName** column, click the key feature name link you want to edit.
49. In the **Add Edit Key-Feature** pop-up, edit the **Description** field.



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.



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.

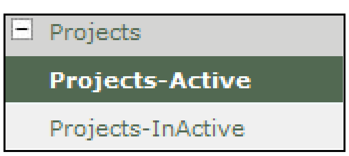


55. To reset the values, before you click **Save**, click **Reset**.
56. To save the details, click **Save**.

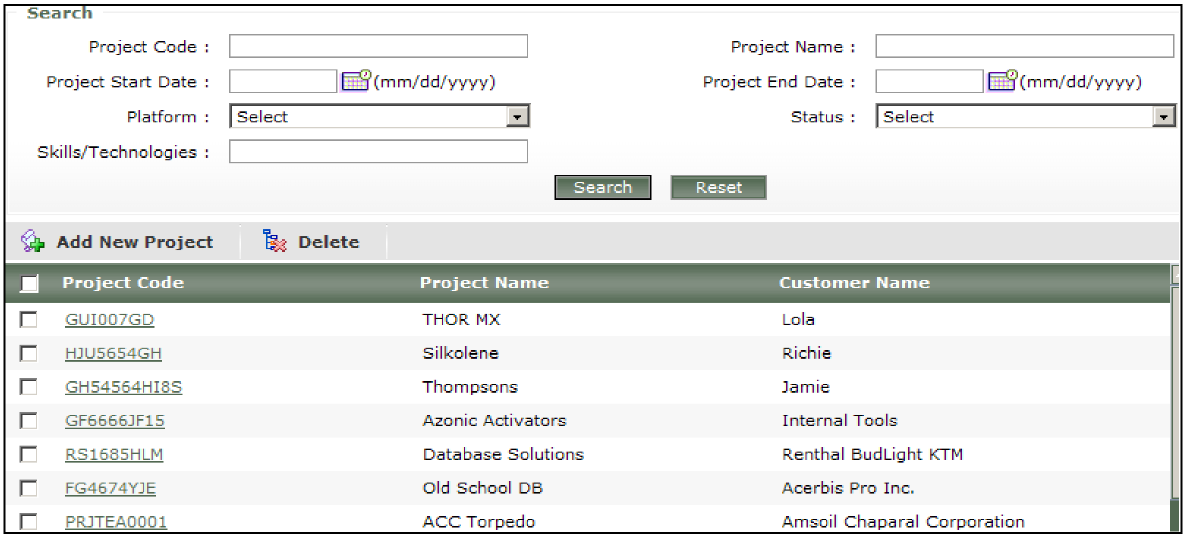
6.3. Delete Project Details

To delete a project details, follow these steps.

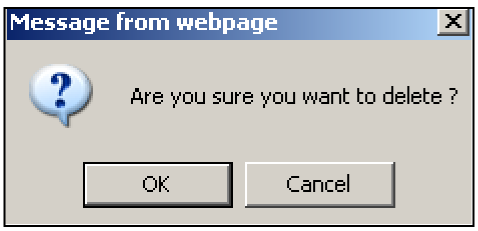
1. From the left menu, click **Projects**.



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.

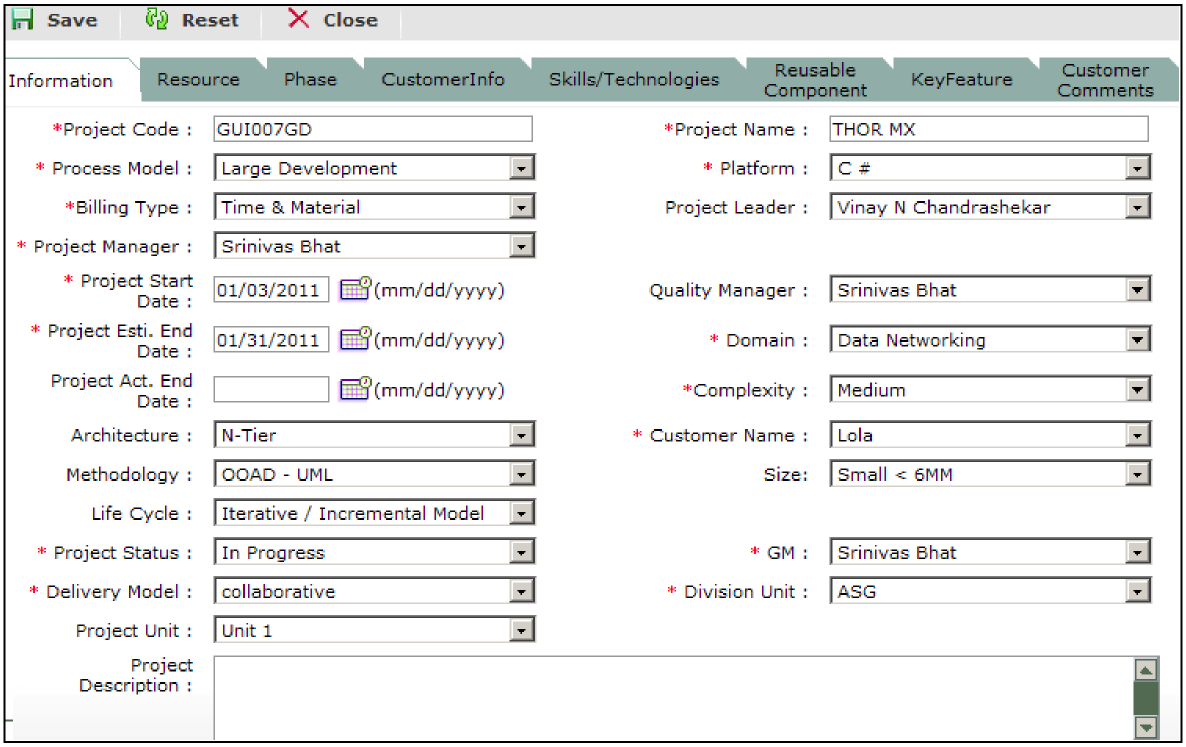


5. In the grid, select the corresponding checkbox for the project you want to delete.
6. Click **Delete**.
7. In the confirmation pop-up, click **OK**.

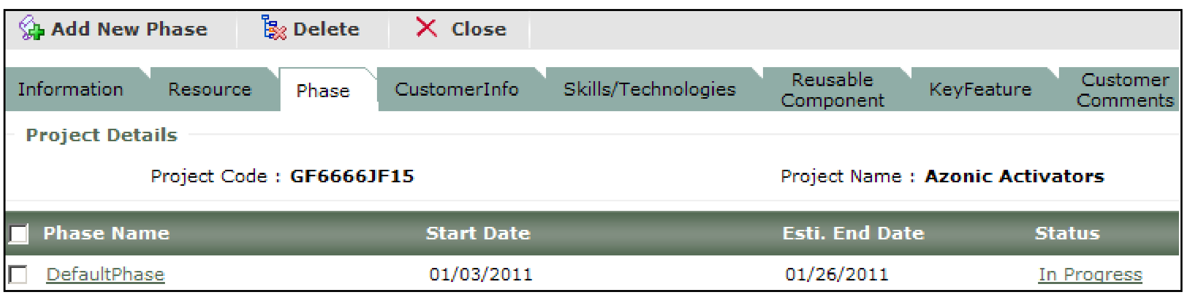


8. If child records exist, you can see the warning pop-up shown below.

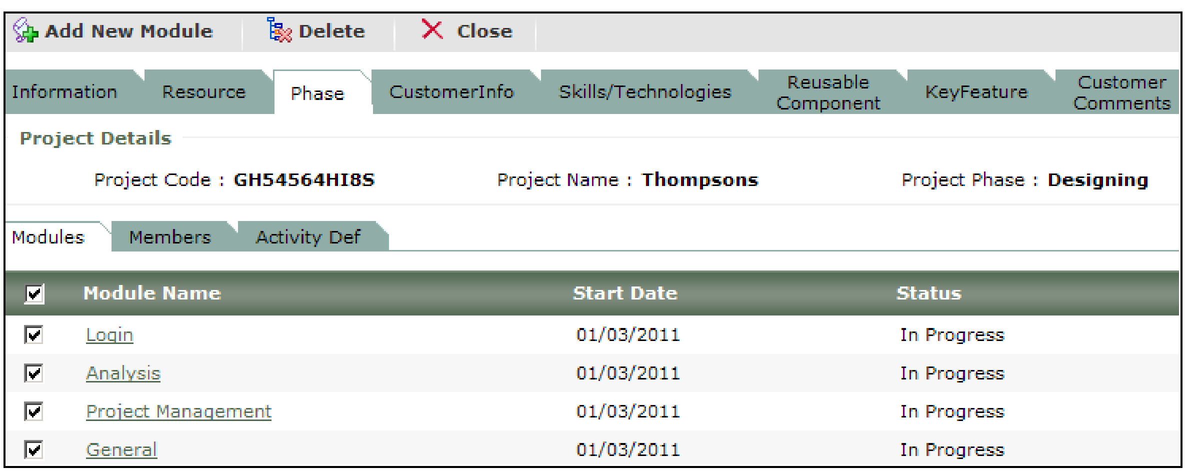
9. Click **OK**.
10. From the list of projects in the grid below the **Search** section, click the specific project code link.
11. In the following screen (**Information** tab), click the **Phase** tab.



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.

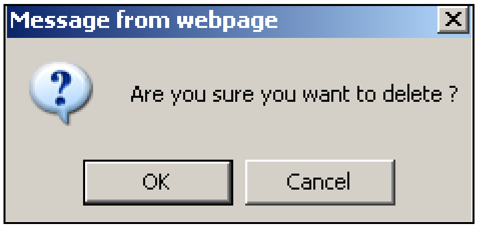


13. In the following screen (by default **Modules** tab is shown), select the checkboxs for all the modules.

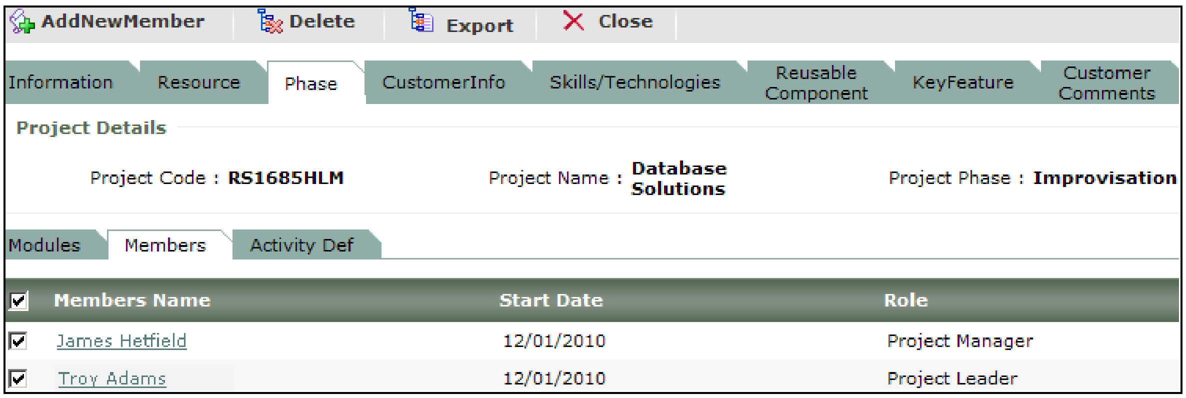


14. Click **Delete**.

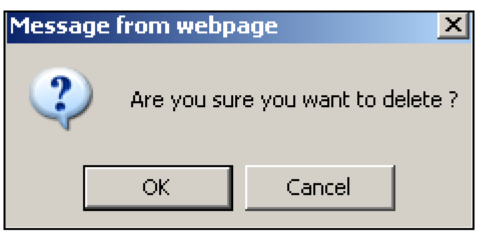
15. In the confirmation pop-up, click **OK**.



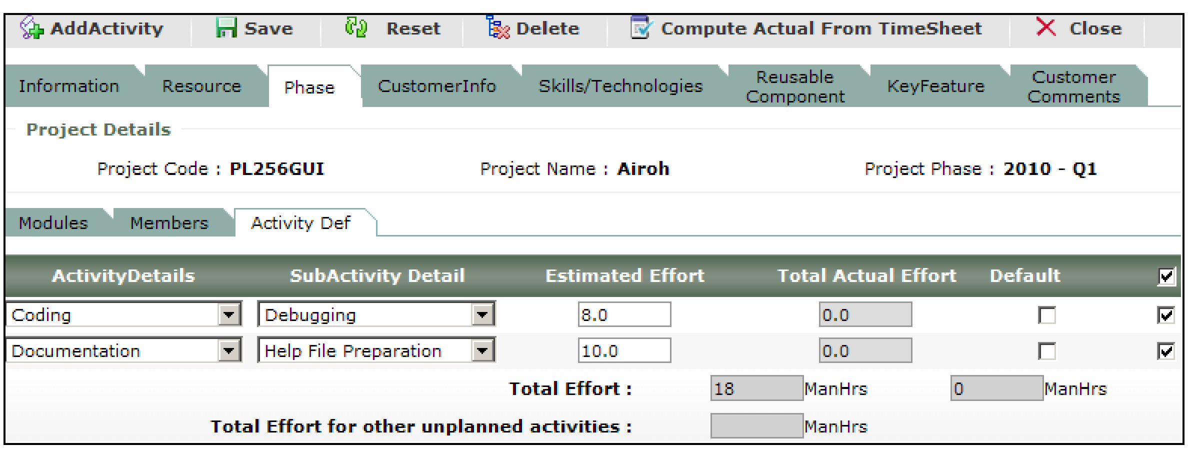
16. Click the **Members** tab.
17. In the grid, select the corresponding checkboxes for all the members.



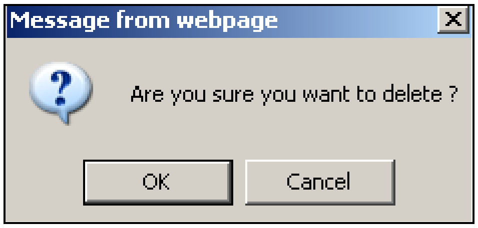
18. Click **Delete**.
19. In the confirmation pop-up, click **OK**.



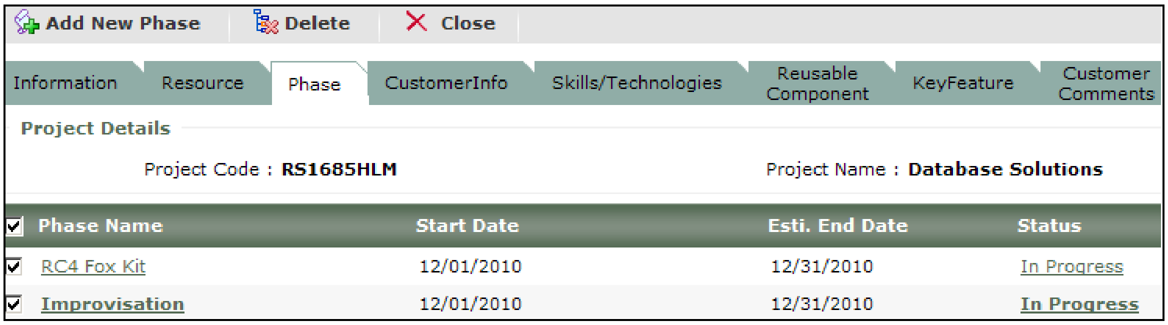
20. Click the **Activity Def** tab.



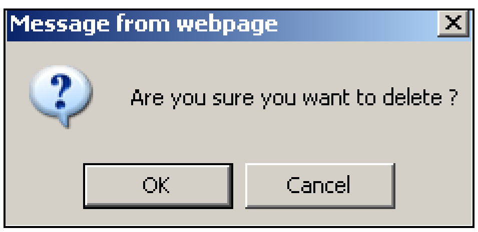
21. In the grid, select the corresponding checkboxes for all the activities.
22. Click **Delete**.
23. In the confirmation pop-up, click **OK**.



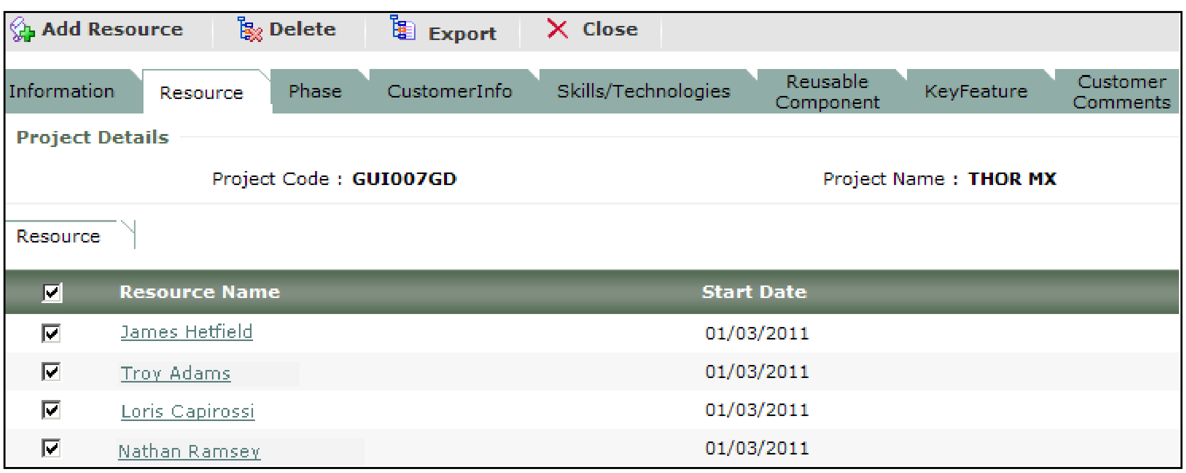
24. To close the screen, click **Close**.
25. In the following screen (**Phase** tab), select the corresponding checkboxes for all the phases.



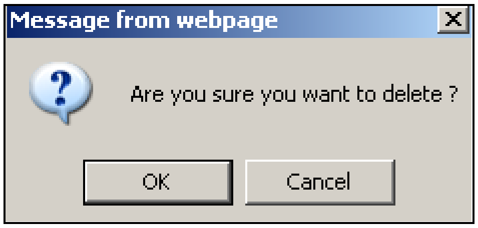
26. Click **Delete**.
27. In the confirmation pop-up, click **OK**.



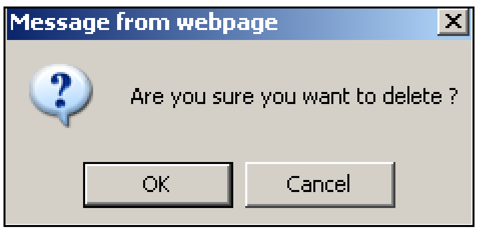
28. Click the **Resource** tab.
29. In the grid, select the corresponding checkboxes for all the resources.



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**.

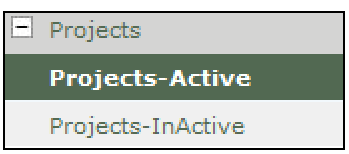


> **Note**: If a project status must be changed to **Completed** or **Scrapped**, then the status of its corresponding child records, i.e., phases, modules, tasks, bugs must also be changed to **Completed** or **Scrapped**.

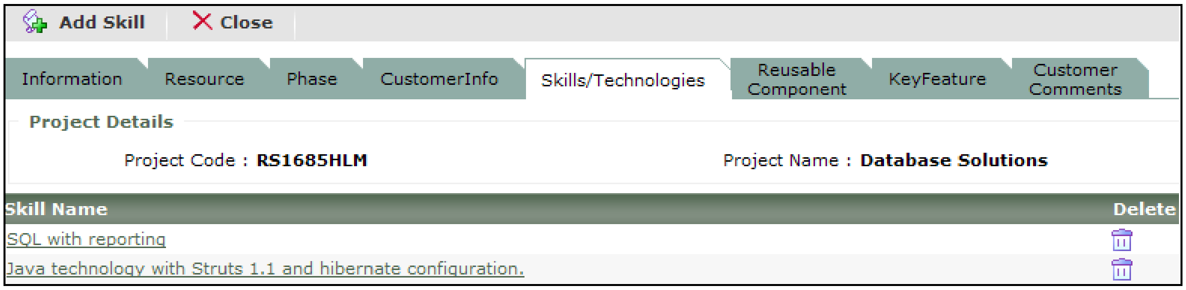
6.3.1. Delete Skill Name Details

To delete skill and technology details, follow these steps.

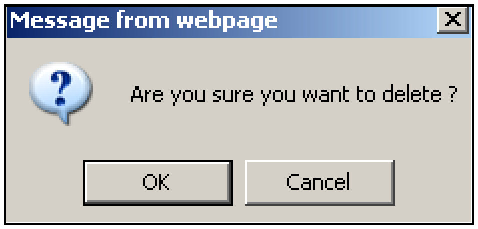
1. From the left menu, click **Projects**.



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.



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

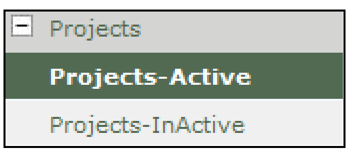


8. In the confirmation pop-up, click **OK**.

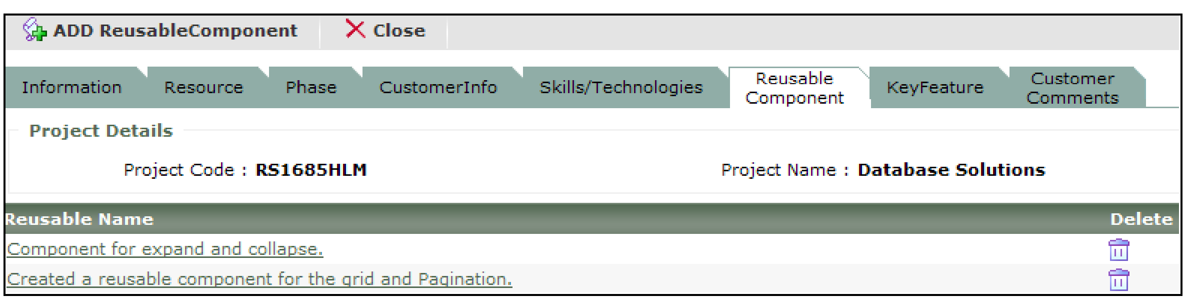
6.3.2. Delete Reusable Component Details

To delete reusable component details, follow these steps.

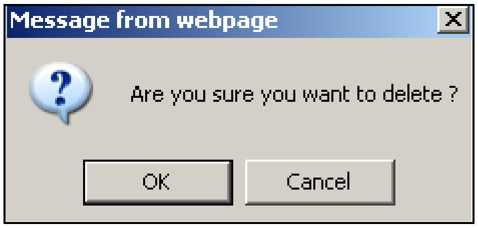
1. From the left menu, click **Projects**.



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 **Reusable Component** tab.



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

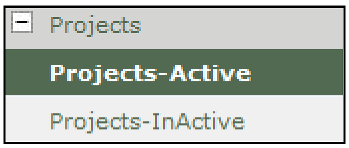


8. In the confirmation pop-up, click **OK**.

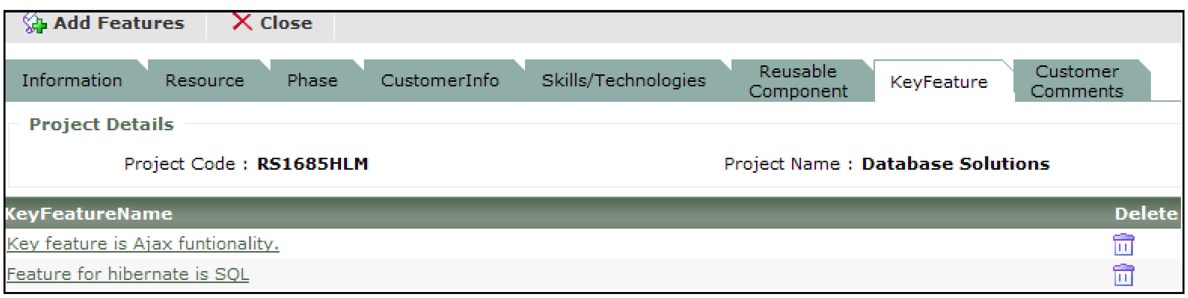
6.3.3. Delete Key Feature Details

To delete key feature details, follow these steps.

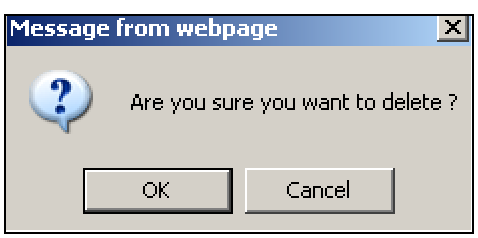
1. From the left menu, click **Projects**.



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.

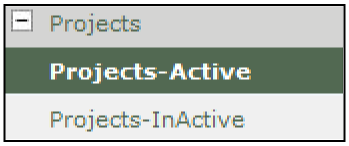


8. In the confirmation pop-up, click **OK**.

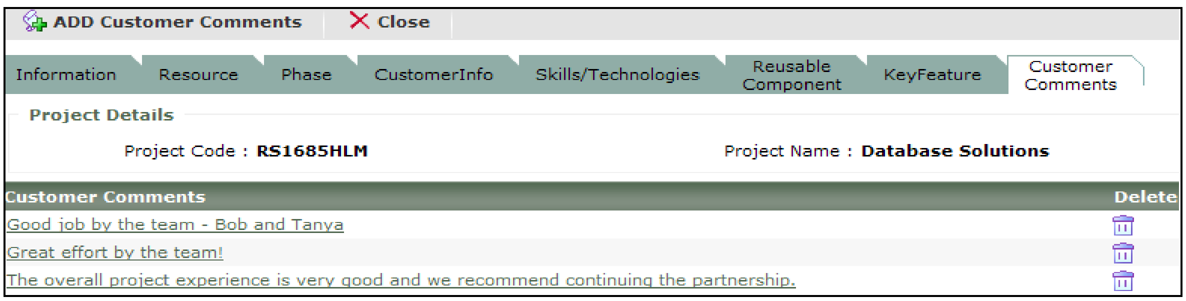
6.3.4. Delete Customer Comments

To delete customer comments, follow these steps.

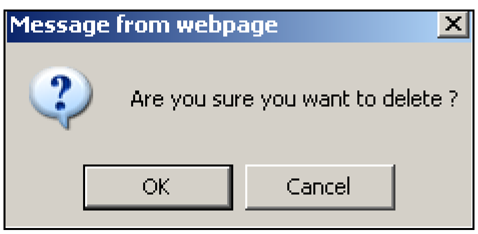
1. From the left menu, click **Projects**.



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**.

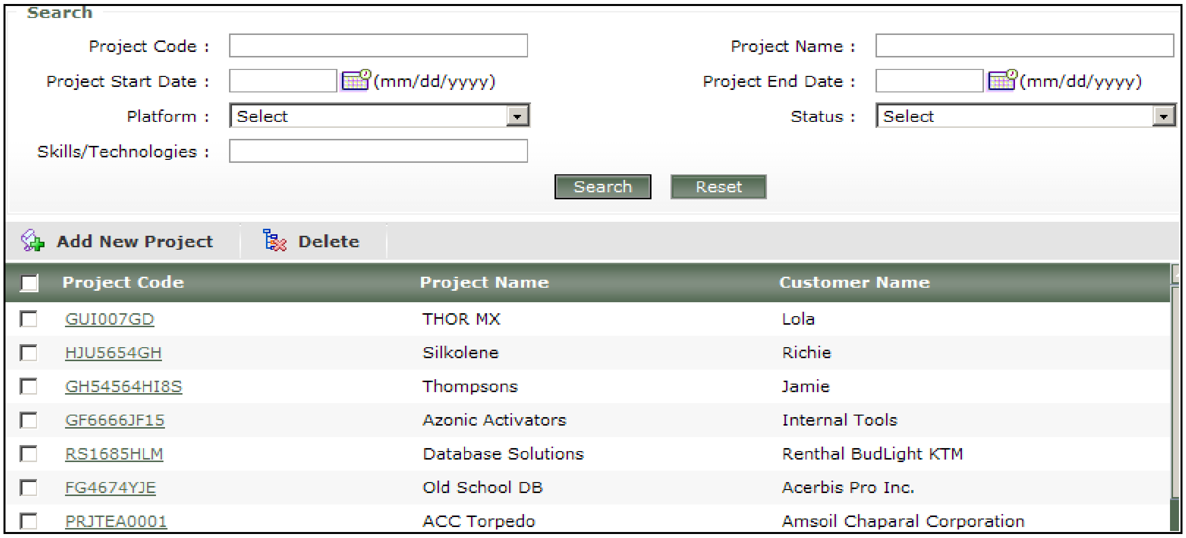
Note: Before deleting a project, the issue records and risk records related to the project must be deleted first.

6.3.5. Export in Excel Format

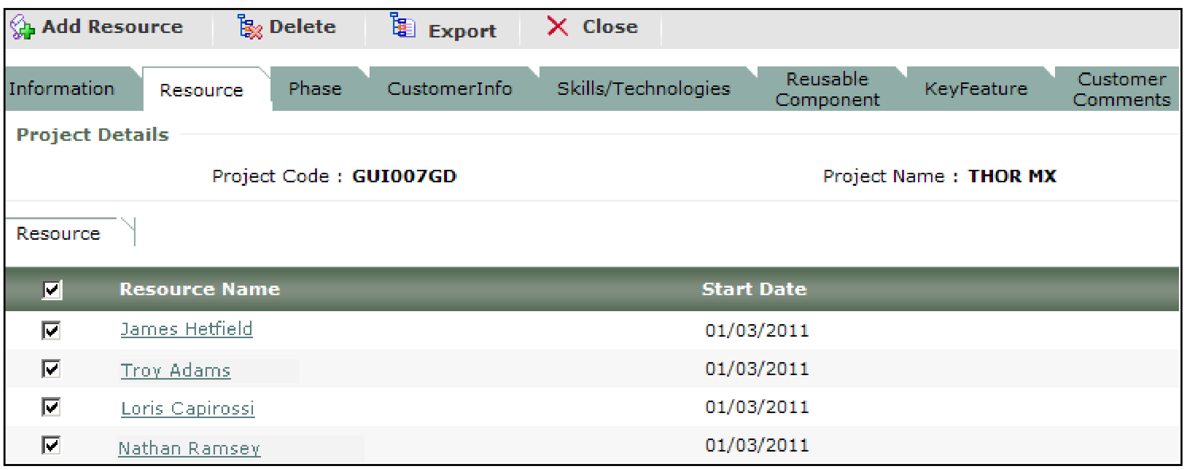
You can view the details related to the project and the phase, and the employee's role in the phase or project in Excel format. While the **Export** option in the **Resource** tab provides the details of the employees added at the project level, the **Export** option in the **Members** tab (located within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

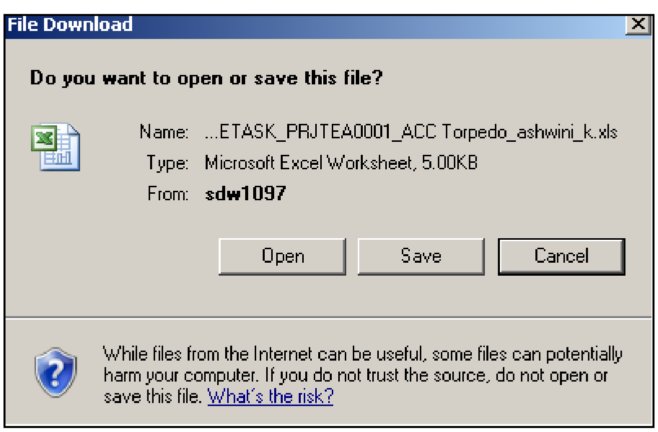
1. From the grid showing the list of projects below the **Search** section, click a specific project code link.



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



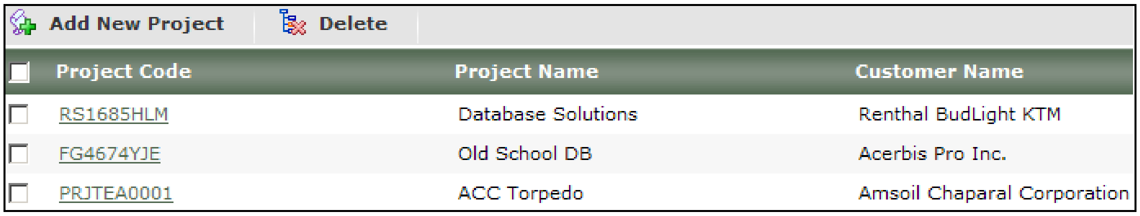
3. Click **Export**.
4. In the **File Download** pop-up, click **Save**.



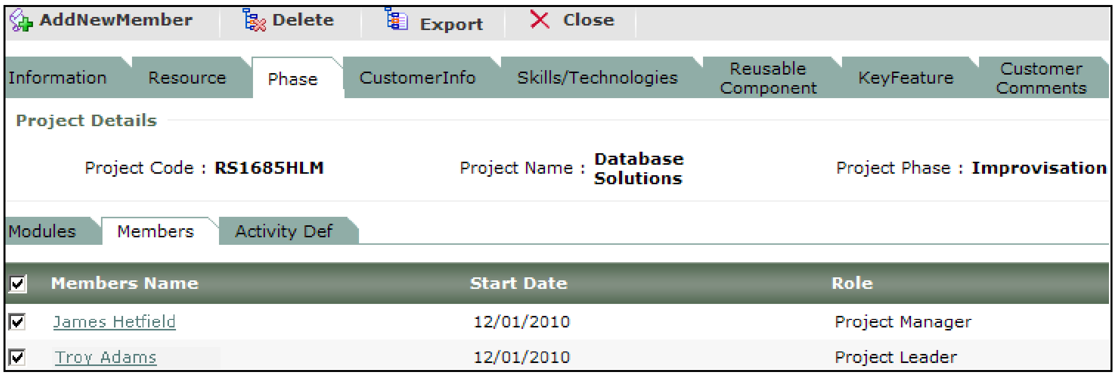
5. In the **Save As** pop-up, select a location to save the file and click **Save**.

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.



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



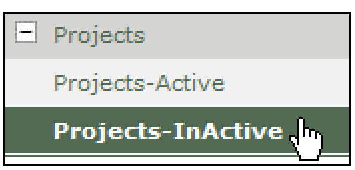
3. Click **Export**.
4. In the **File Download** pop-up, click **Save**.
5. In the **Save As** pop-up, select a location to save the file and click **Save**.

6.4. Projects-Inactive

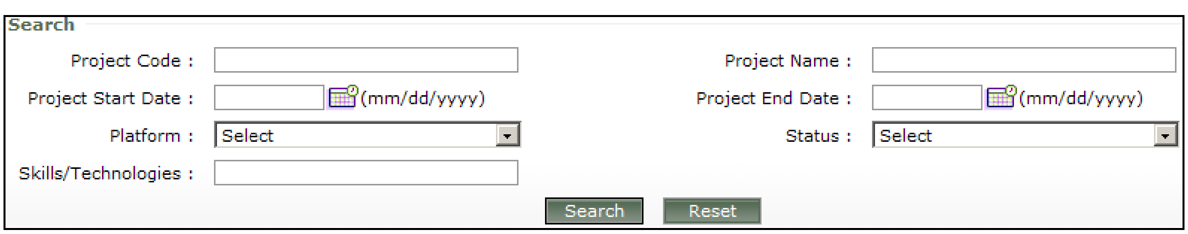
Projects that are in **Completed** or **Scrapped** status are shown in this sub-module.

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**.



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

7. Estimation

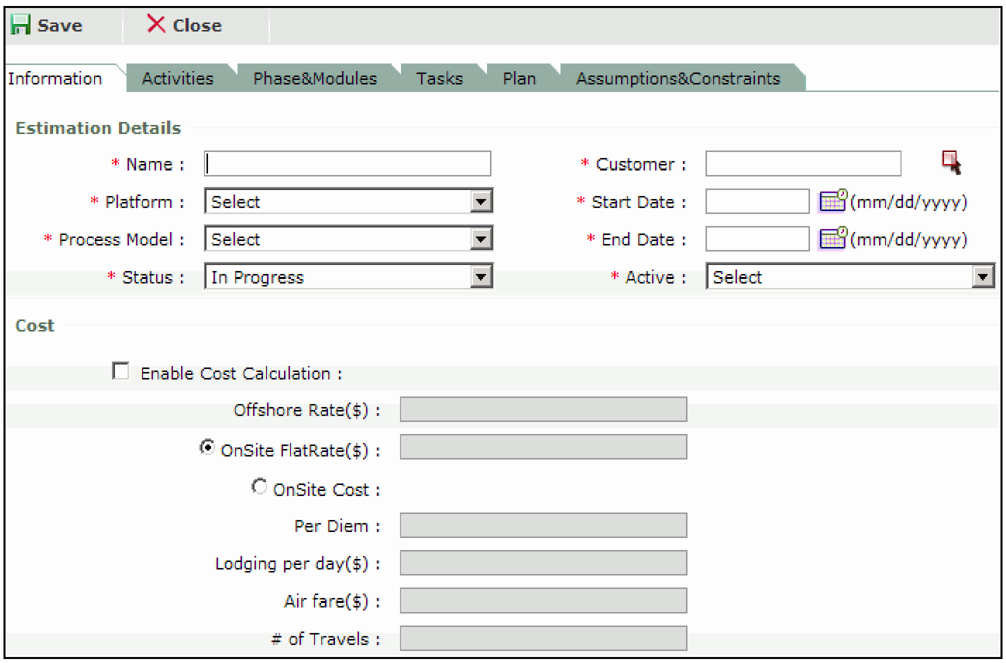
Estimation section enables you to prepare an initial estimate for the project before the actual work starts. This estimation is a reference to prepare the actual estimation and the project plan.

7.1. Add New Estimate

To add a new estimate, follow these steps:

1. In the left menu, click **Estimation**.
2. Click the 

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.

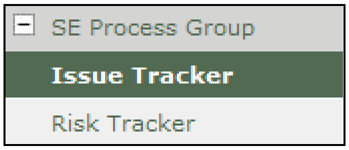
8. SE Process Group

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.

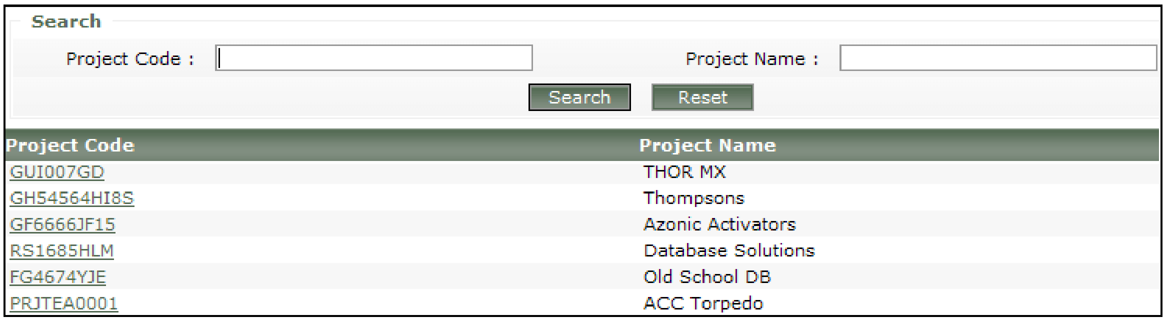
8.1. Issue Tracker - Search for Issues

To search for a specific issue, follow these steps.

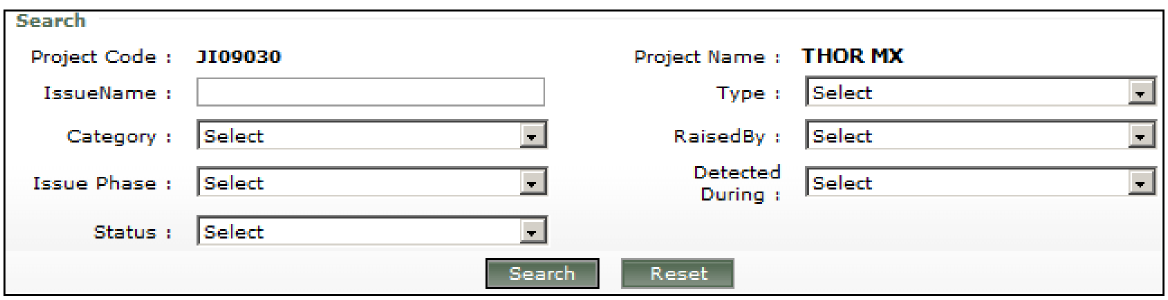
1. From the left menu of the application, click **SE Process Group** (by default, **Issue Tracker** sub-module is selected).



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

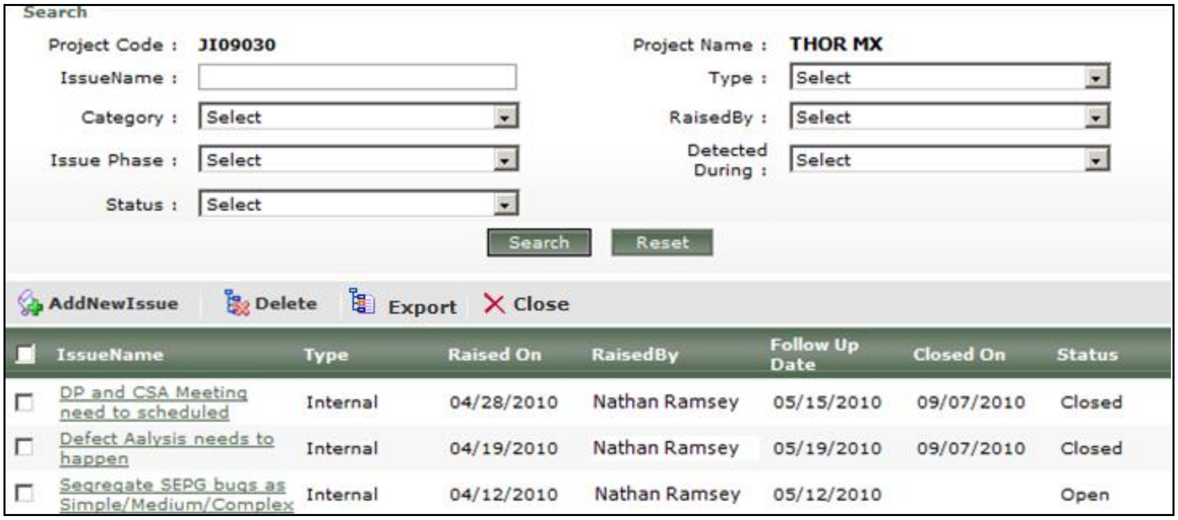


3. Click **Search**.
4. The grid below the **Search** section shows the projects that meet the search criteria.
5. Under **Project Code** column of the grid, click a specific project code.
6. In the following screen, in the **Search** section, enter values in the fields mentioned below.



- **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

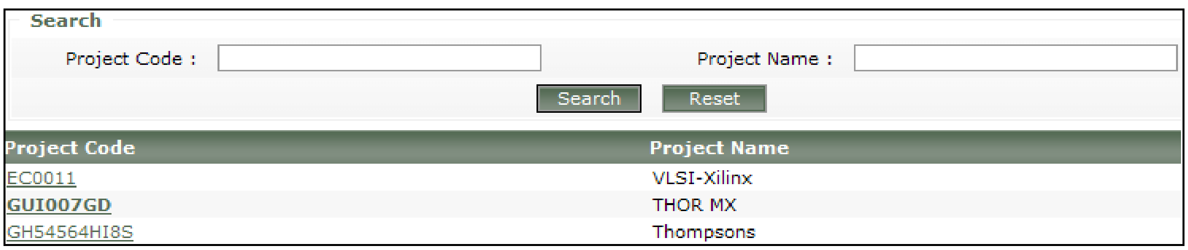
7. Click **Search**.
8. The grid below the **Search** section shows the list of issues that match the search criteria.



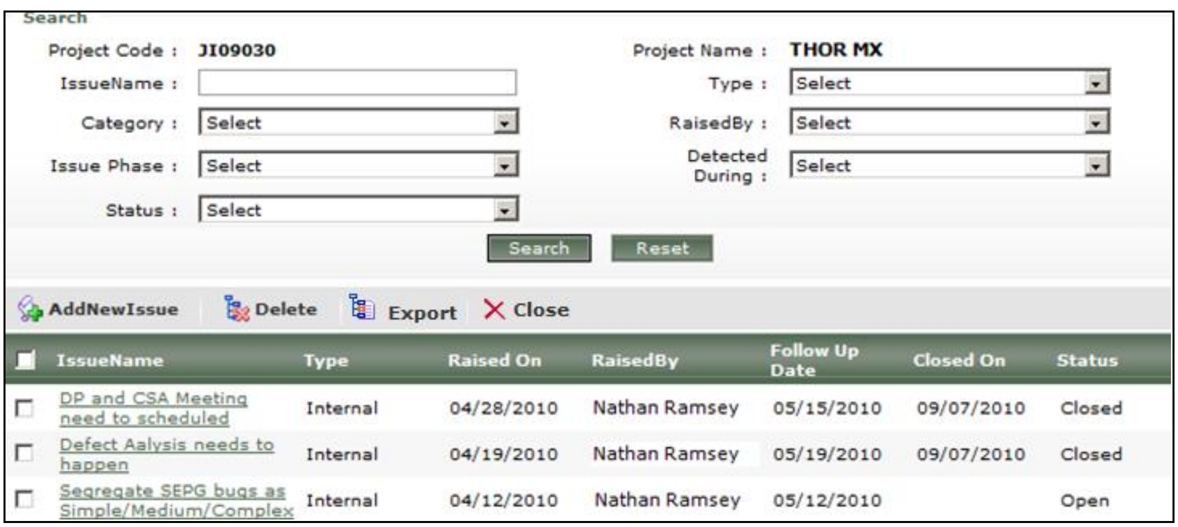
8.1.1. Add Issue

To add a new issue, follow these steps.

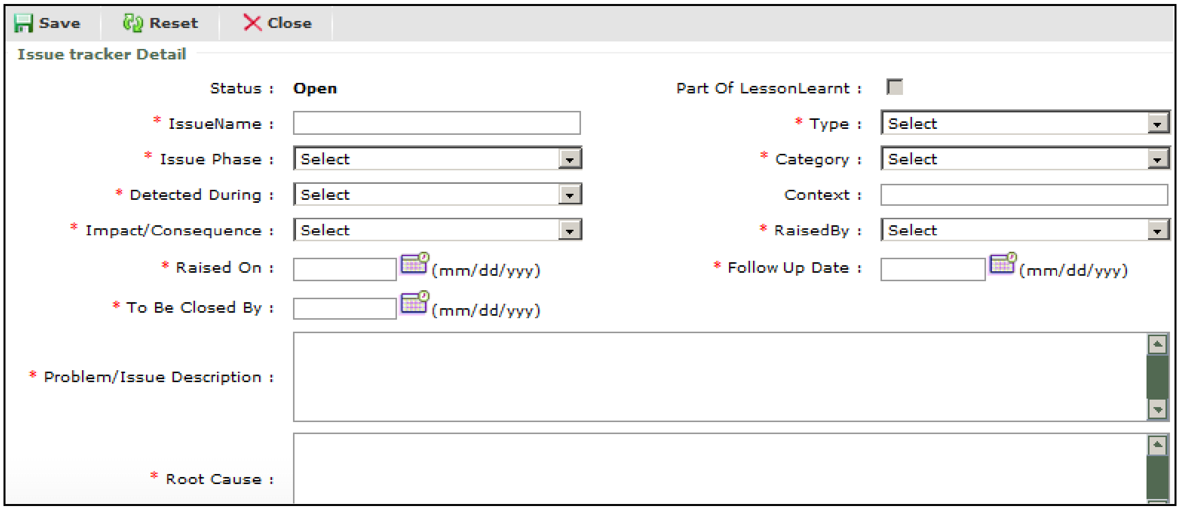
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



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



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



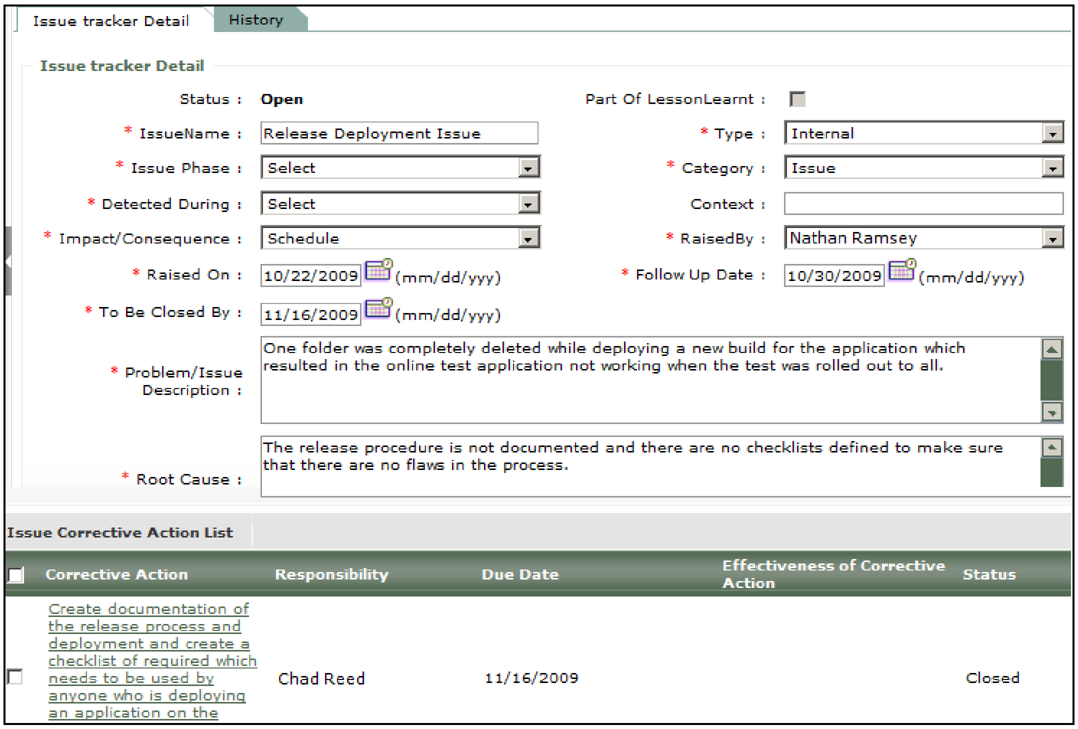
- **Status** - By default, the status is shown in non-edit mode as **Open**
- **Part of LessonLearnt** - If a corrective action is approved, this checkbox is selected.
- **IssueName** – Enter the name of the issue
- **Type** - Select the type of issue from the drop-down
- **Issue Phase** – Select the 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

4. To save the details, click **Save**.
5. The newly added issue is shown in the grid.

8.1.2. Edit Issue

To edit an issue, follow these steps.

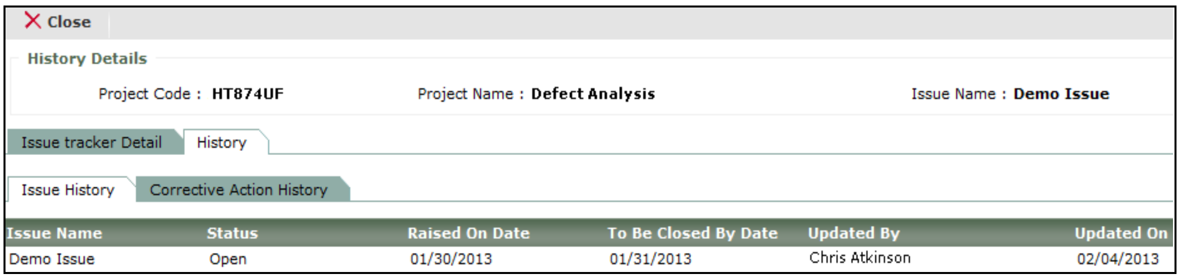
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.
2. In the following screen, from the grid below the **Search** section, click the issue name link under **IssueName** column.
3. In the **Issue tracker Detail** screen, edit the fields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



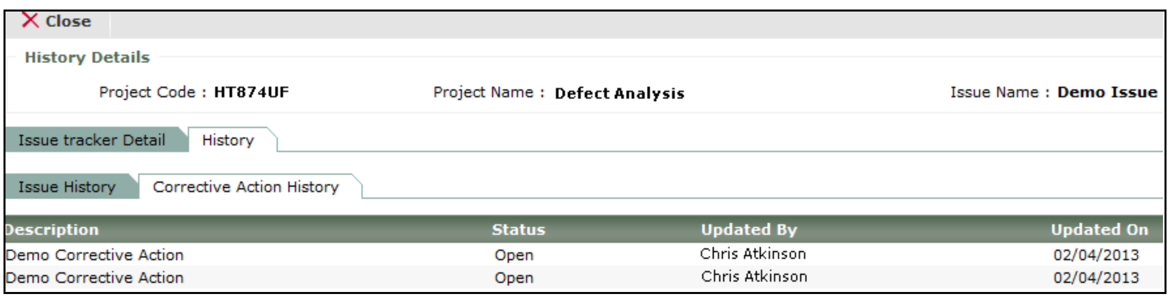
- **Status** - By default, the status is shown in non-edit mode as **Open**
- **Part of LessonLearnt** - If a corrective action is approved, this checkbox is selected.
- **IssueName** – Edit the name of the issue
- **Type** - Select the type of issue from the drop-down
- **Issue Phase** – Select the 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)

- **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** – Edit the description of the problem / issue
- **Root Cause** – Edit the description of the root cause of the issue

4. To reset values, before you click **Save**, click **Reset**.
5. To save the details, click **Save**.
6. To view the history of the changes made to the issue, click the **History** tab.
7. By default, the **Issue History** grid displays the records as shown below.



8. To view the history of the corrective action taken, click the **Corrective Action History** tab.

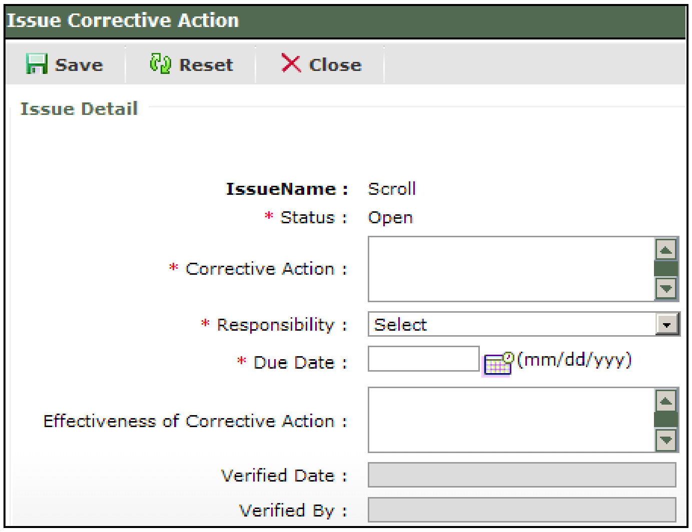


9. To close the screen, click **Close**.

8.1.3. Add, Edit and Delete Corrective Action

To add a corrective action, follow these steps.

1. From the **Issue tracker Detail** screen, click **Add Corrective Action**.
2. In the **Issue Corrective Action** pop-up, enter values in the fields mentioned below.

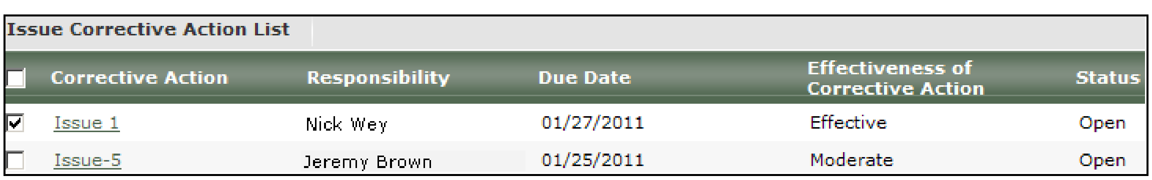


- **IssueName** – This field shows the issue name in non-edit mode
- **Status** – This field shows the status of the issue in non-edit mode
- **Corrective Action** – Enter the corrective action taken
- **Responsibility** – Select the person responsible for the corrective action from the drop-down
- **Due 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.

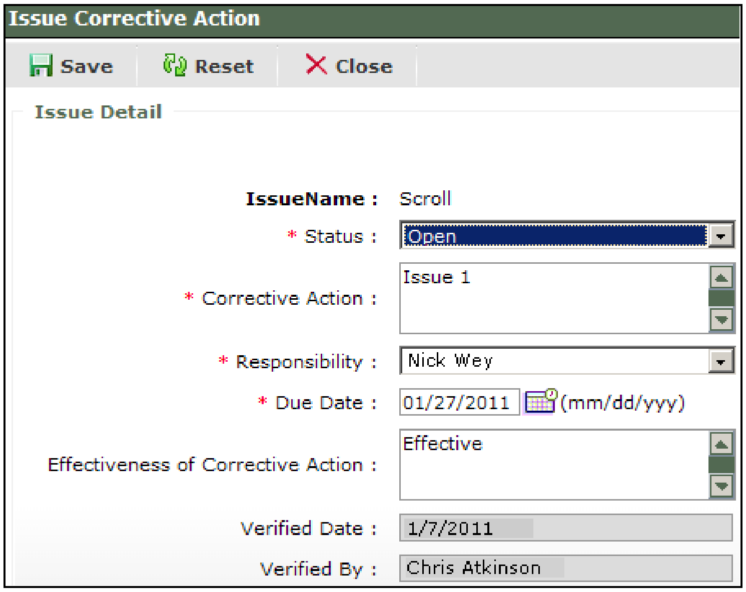
1. From the **Issue tracker Detail** screen, scroll down to view the **Issue Corrective Action List** grid.



Issue Corrective Action List

	Corrective Action	Responsibility	Due Date	Effectiveness of Corrective Action	Status
☑	Issue 1	Nick Wey	01/27/2011	Effective	Open
☐	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.

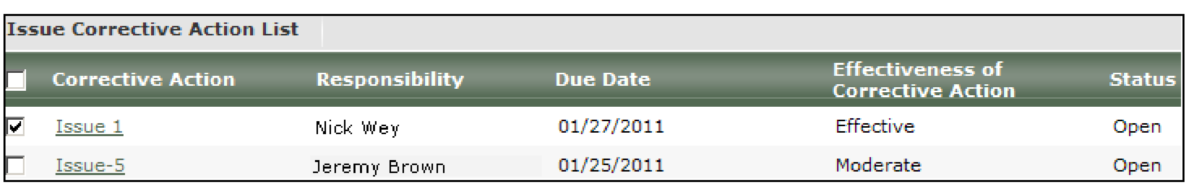


- **IssueName** – This field shows the issue name in non-edit mode
- **Status** – Select the status from the drop-down
- **Corrective Action** – Edit the corrective action taken
- **Responsibility** – Select the person responsible for the corrective action from the drop-down
- **Due Date** – Select the 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

4. To reset values, before you click **Save**, click **Reset**.
5. To save the changes, click **Save**.

To delete a corrective action, follow these steps.

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



Issue Corrective Action List

	Corrective Action	Responsibility	Due Date	Effectiveness of Corrective Action	Status
☑	Issue 1	Nick Wey	01/27/2011	Effective	Open
☐	Issue-5	Jeremy Brown	01/25/2011	Moderate	Open

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

3. Click **Delete Corrective Action**.

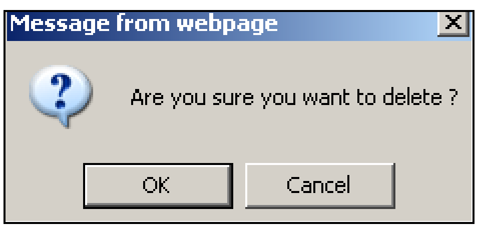
4. In the confirmation pop-up, click **OK**.

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.

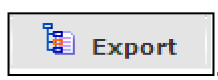
1. From the grid below the **Search** section, select the corresponding checkbox for the issue you want to delete.
2. Click **Delete**.

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

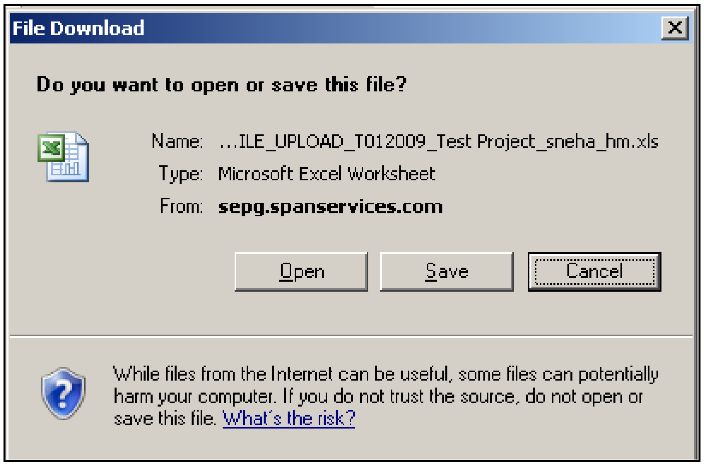


8.1.5. Export Issue

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**.

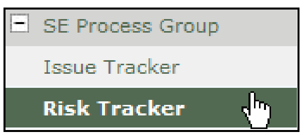


3. In the **Save As** pop-up, select a location and click **Save**.

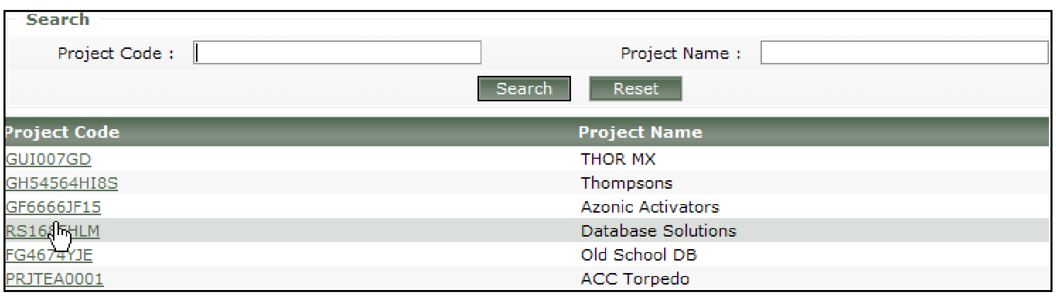
8.2. Risk Tracker – Search for Risks

To search for a specific risk, follow these steps.

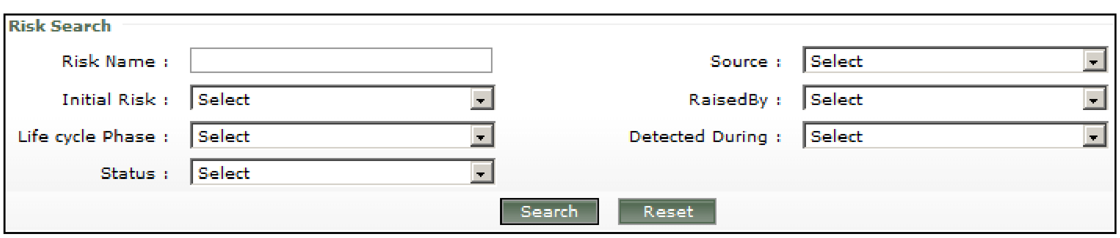
1. From the left menu of the application, click **SE Process Group**.
2. Click **Risk Tracker** sub-module.



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



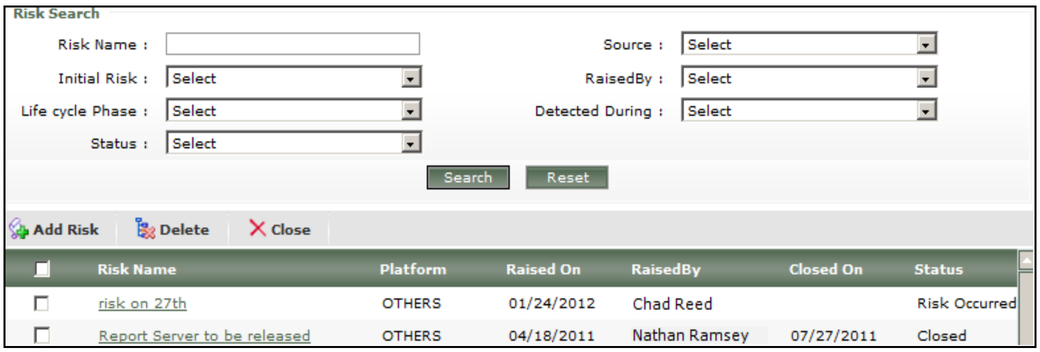
5. The grid below the **Search** section shows the projects that meet the search criteria.
6. Under **Project Code** column of the grid, click a specific project code link.
7. In the following screen, in the **Risk Search** section, enter values in the fields mentioned below.



- **Risk 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

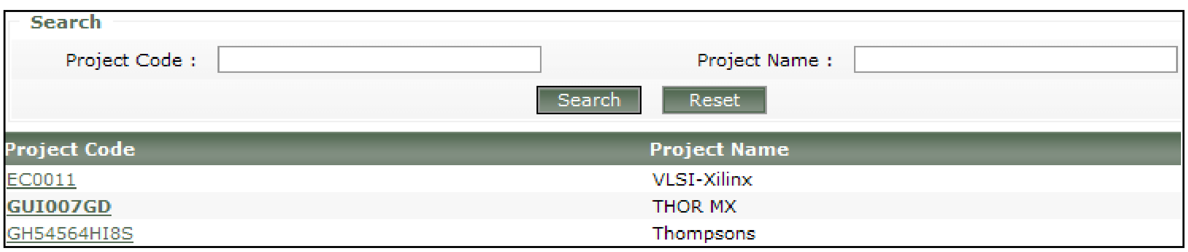
8. Click **Search**.
9. The grid below the **Search** section shows the list of risks that match the search criteria.



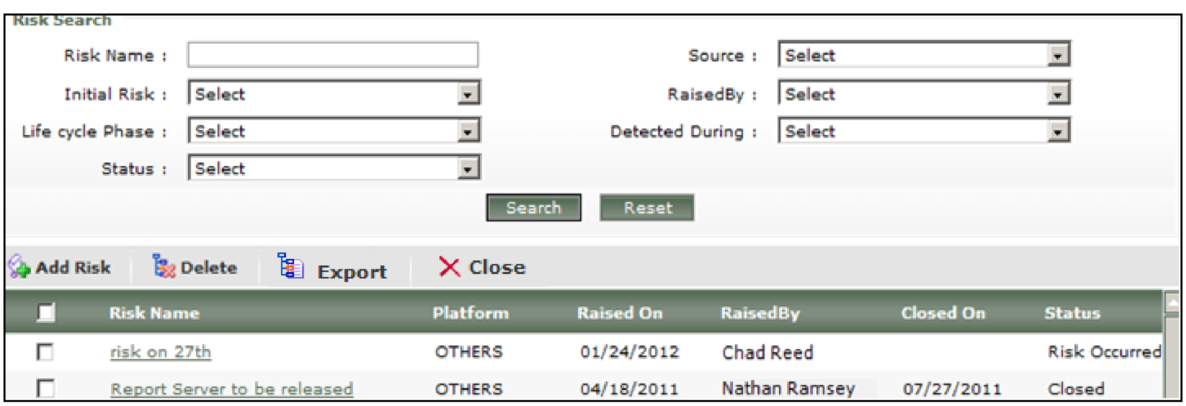
8.2.1. Add Risk

To add a new risk, follow these steps.

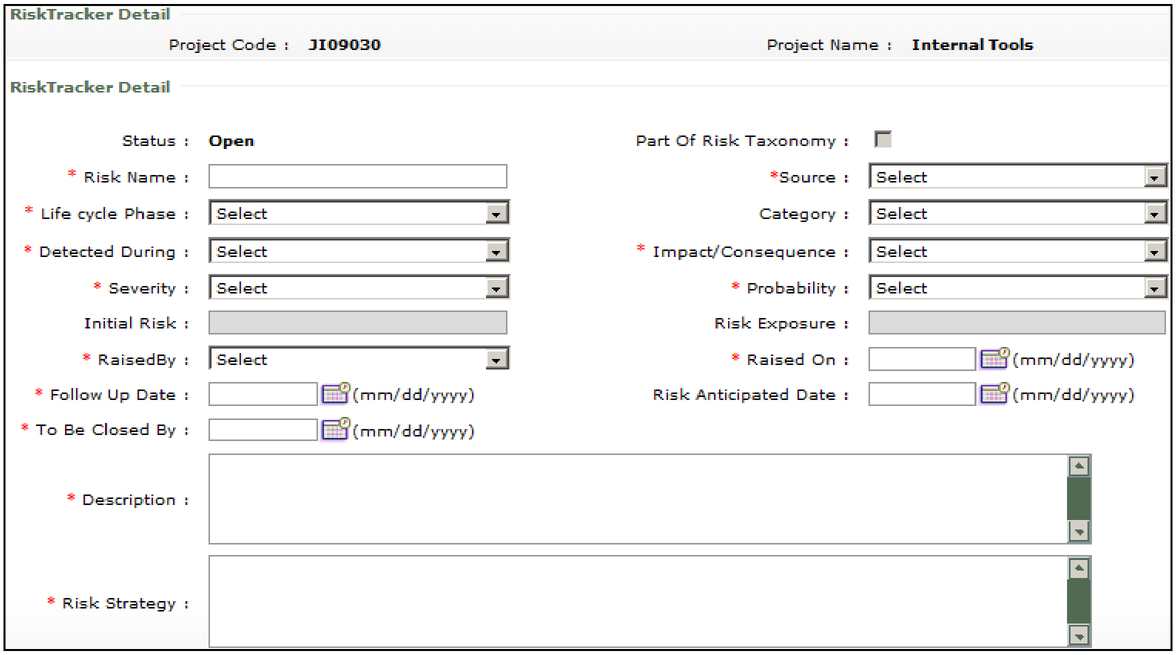
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column



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



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



- **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.

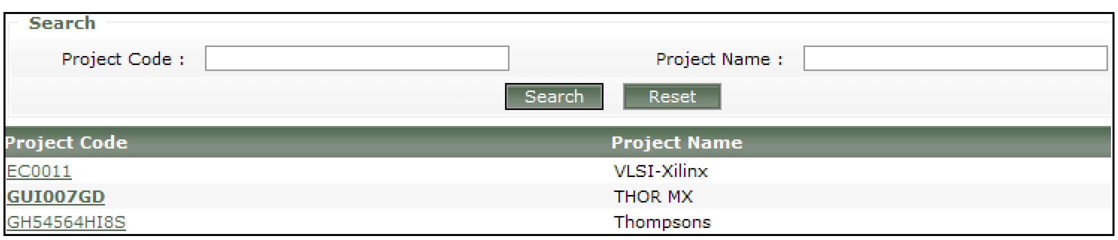
- **Risk Exposure** - Based on the value in the **Severity** and **Probability** fields, the risk exposure value is shown in non-edit mode
- **RaisedBy** – Select the name of the employee from the drop-down
- **Raised On** – Select the date when this issue was raised using the calendar control (selected 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.

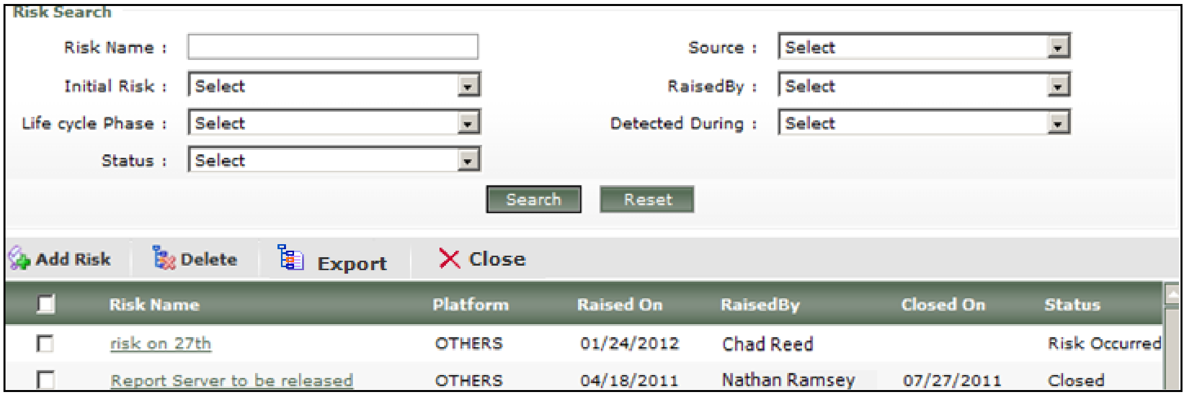
8.2.2. Edit Risk

To edit a risk, follow these steps.

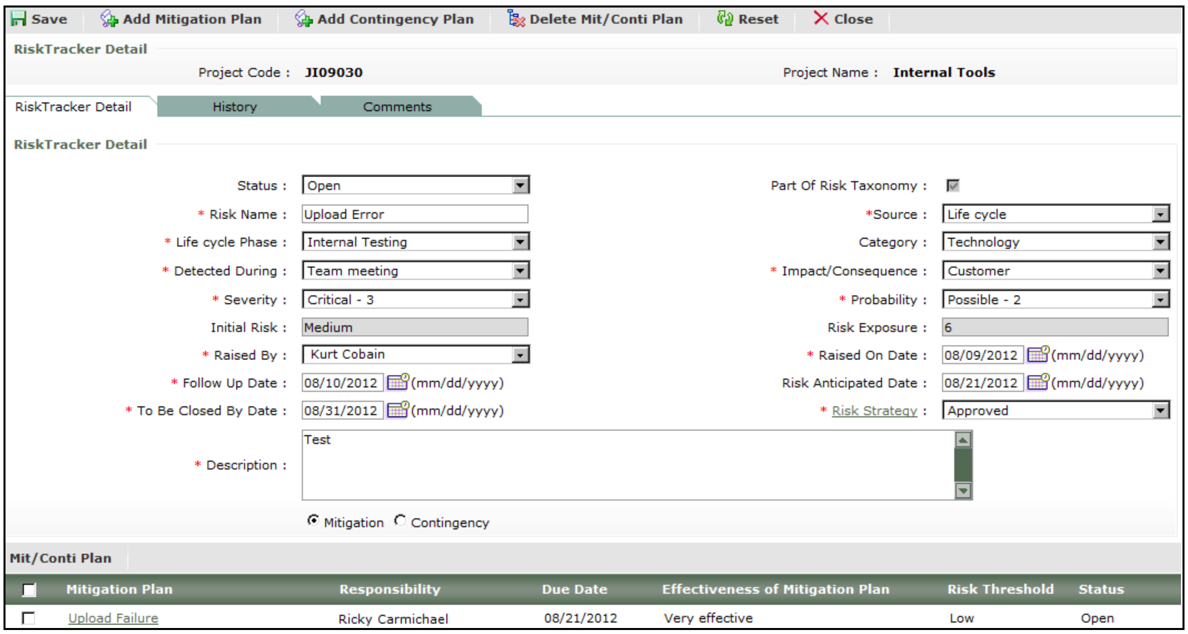
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



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



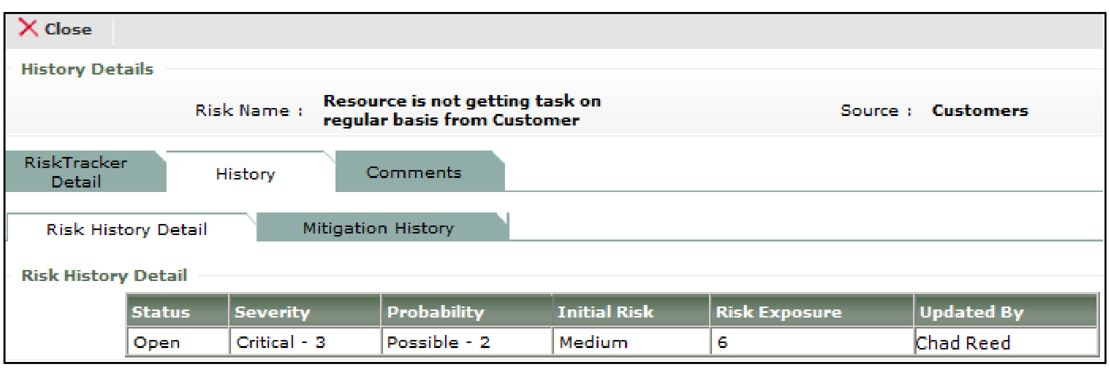
3. In the **RiskTracker Detail** screen, edit the fields mentioned below.

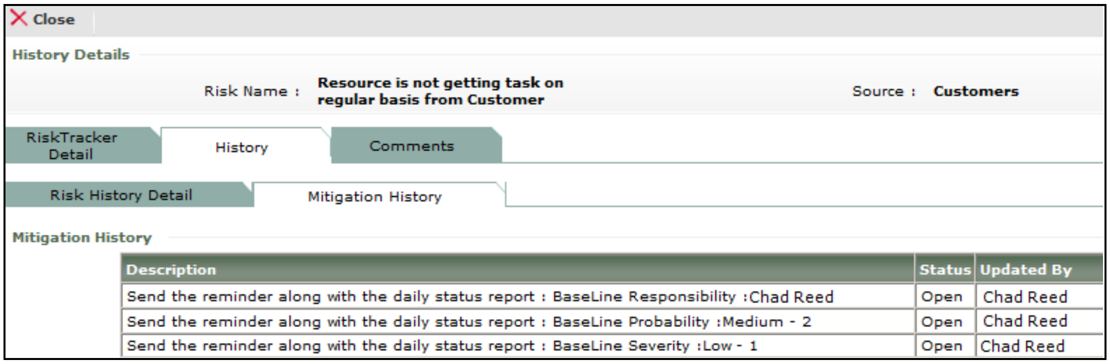


- **Status** – Select the status from the drop-down (if you select the option **Risk Occurred**, the risk is considered as an issue, and is also displayed in the **Issue Tracker** sub-module. The **Issue Name** is the same as that of the **Risk Name**. Similarly, if you select the option **Closed** to 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

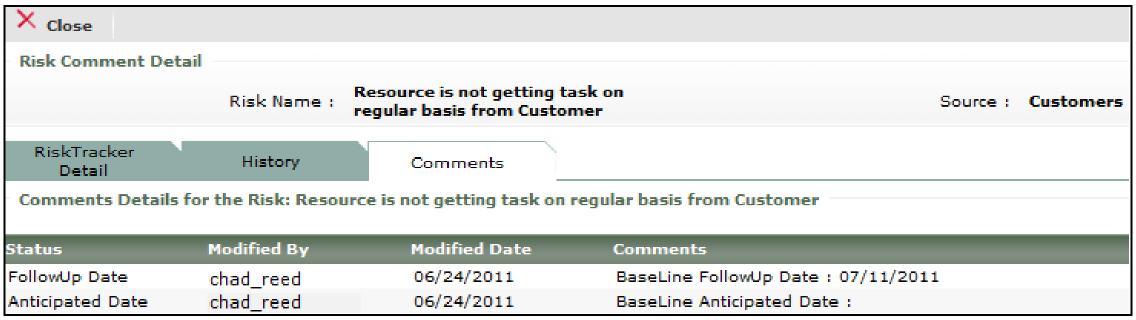
- **Severity** – Select the severity of the risk from the drop-down
- **Probability** – Select the probability of the risk occurrence from the drop-down
- **Initial Risk** – Based on the value in the **Severity** and **Probability** fields, the initial risk value is shown in non-edit mode
- **Risk Exposure** - 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.





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



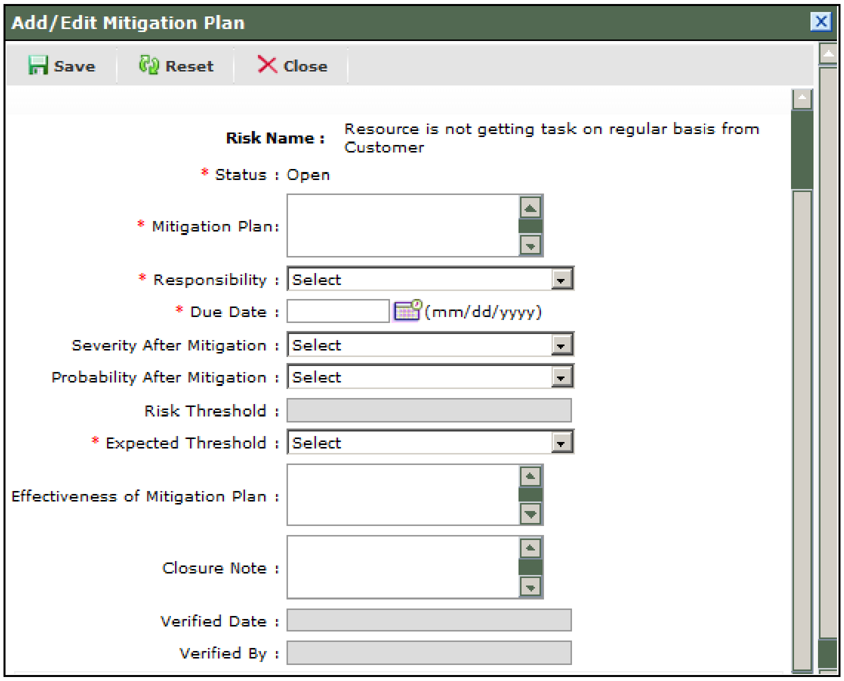
9. To close the screen, click **Close**.

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

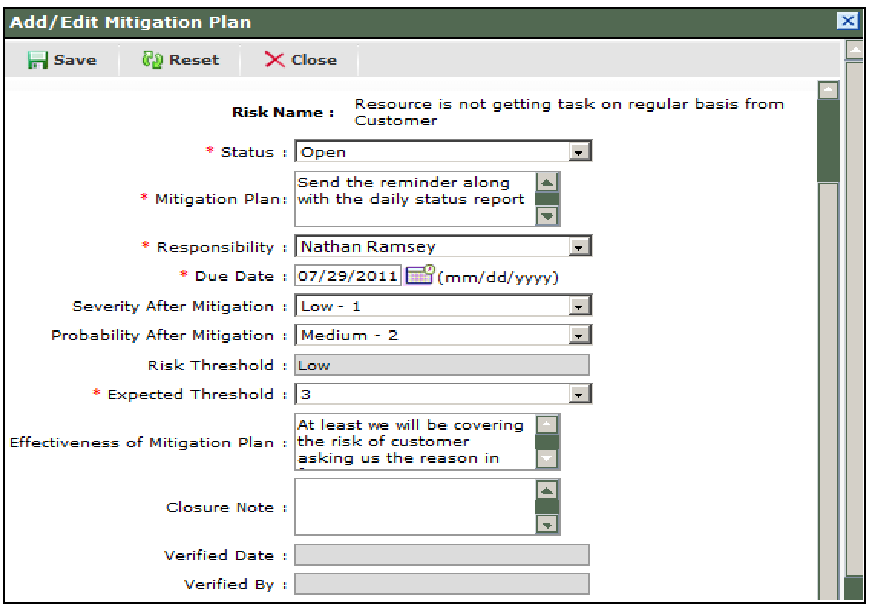
- **Closure Note** – Enter the closure note
- **Verified Date** – This field shows the date when this plan was verified, in non-edit mode. This date is picked up from the **RiskTracker Details** screen once the plan is verified.
- **Verified By** – This field shows the name of the person who verified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

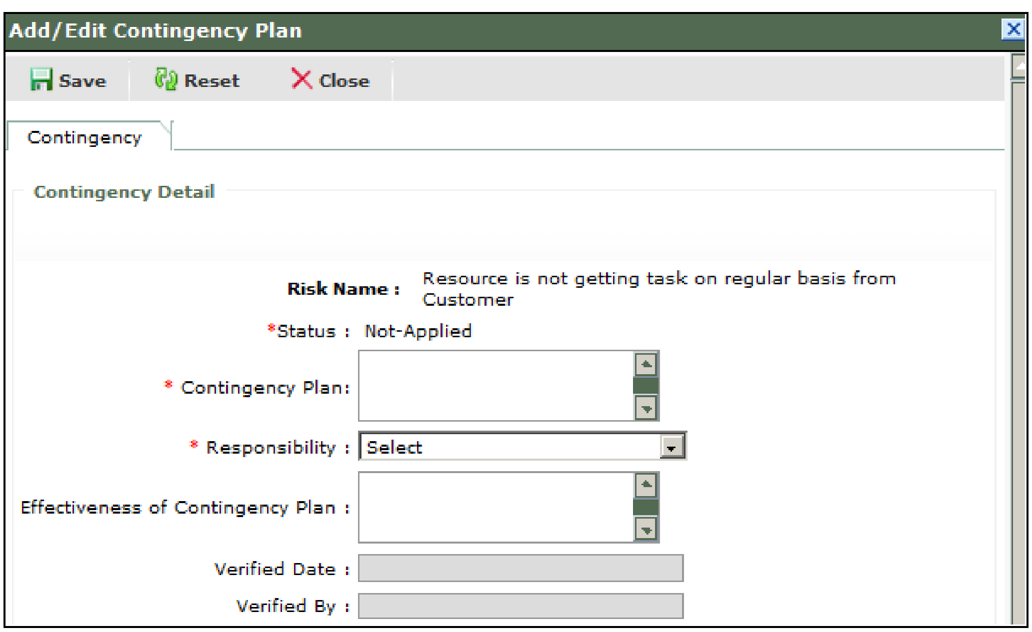
4. Click **Save**.
5. To clear the values, click **Reset**.

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

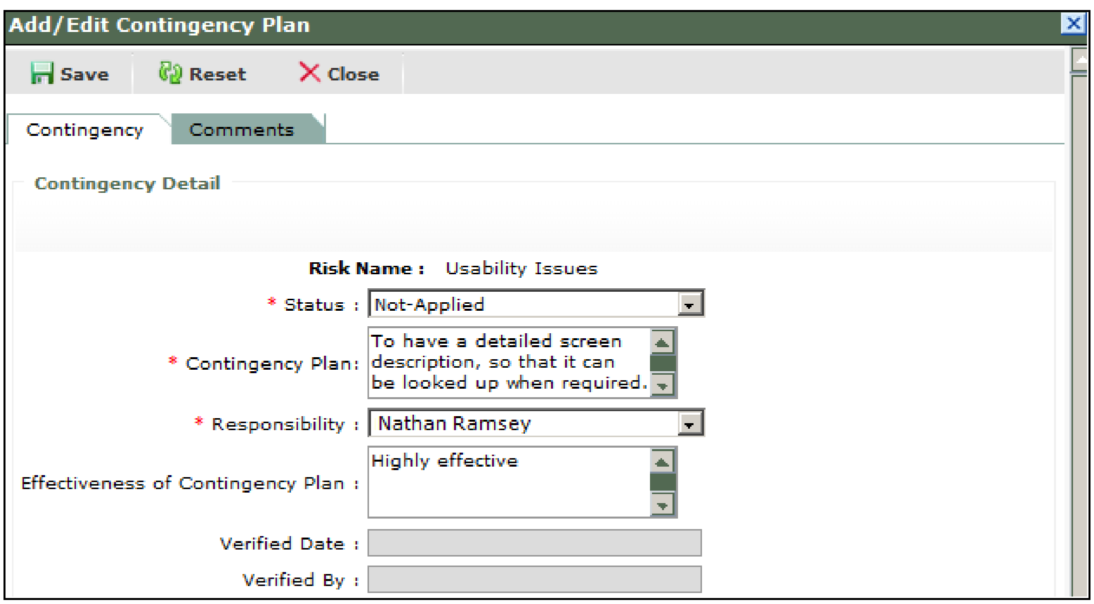
- **Contingency Plan** – Enter the contingency plan details
- **Responsibility** – Select the name of the person responsible from the drop-down
- **Effectiveness of Contingency Plan** – Enter the effectiveness of the contingency plan
- **Verified Date** – This field shows the date when this plan was 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.

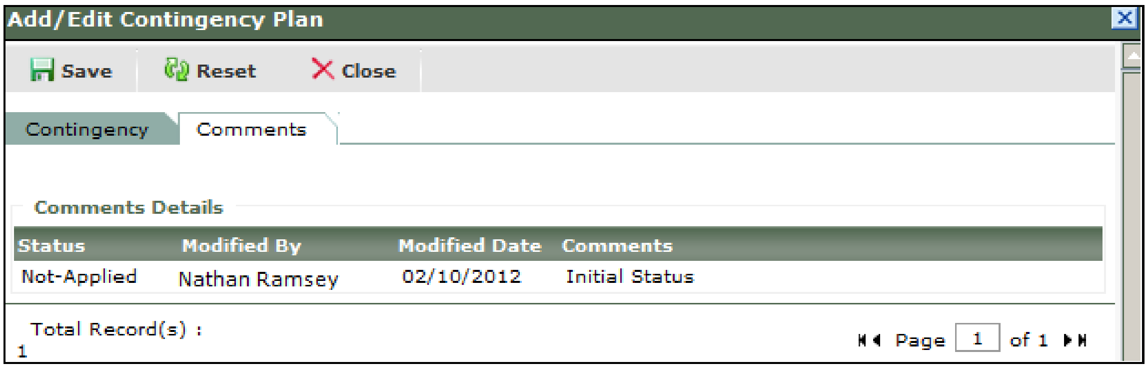
1. From the grid below the **Risk Search** section, click a **Risk Name** link.
2. In the **RiskTracker Detail** screen, from the **Miti/Conti Plan** grid, click the specific mitigation link you want to edit.
3. In the **Add/Edit Contingency Plan** pop-up, edit the fields mentioned below.



- **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.



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**.

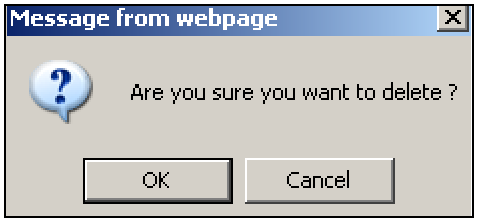
4. In the confirmation pop-up, click **OK**.

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**.

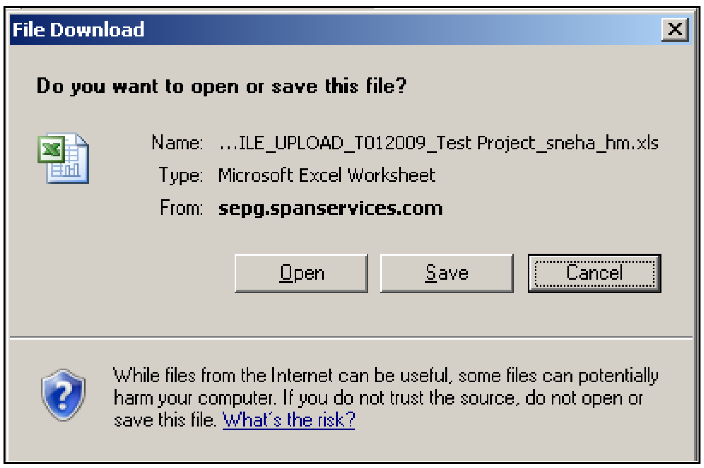


8.2.9. Export Risk

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**.

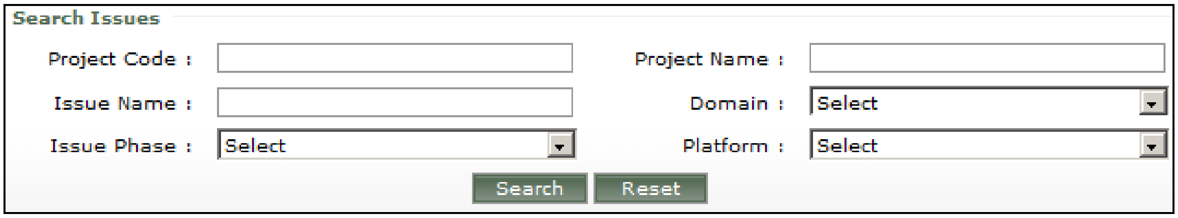
9. Approve Lesson Learnt/Risk

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.



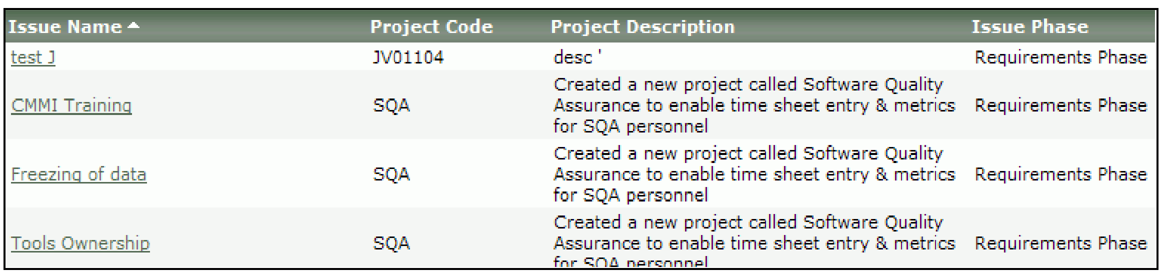
- **Project Code** – Enter the project code
- **Project Name** – Enter the project name
- **Issue Name** – Enter the issue name
- **Domain** – Select the domain from the drop-down
- **Issue Phase** - Select issue phase from the drop-down
- **Platform** – Select the platform from the drop-down

4. Click **Search**.
5. The grid below the **Search Issues** section shows the records that match the criteria.

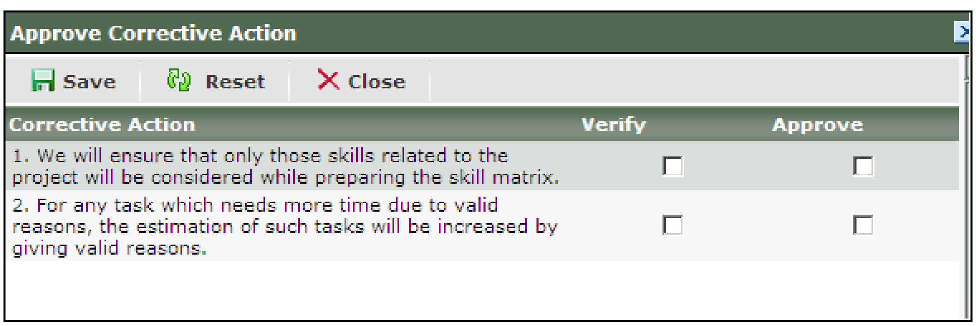
9.1.1. Approve Corrective Action

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

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



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



3. To approve or verify the action taken, select the checkbox for **Verify** and **Approve** columns respectively.
4. 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.

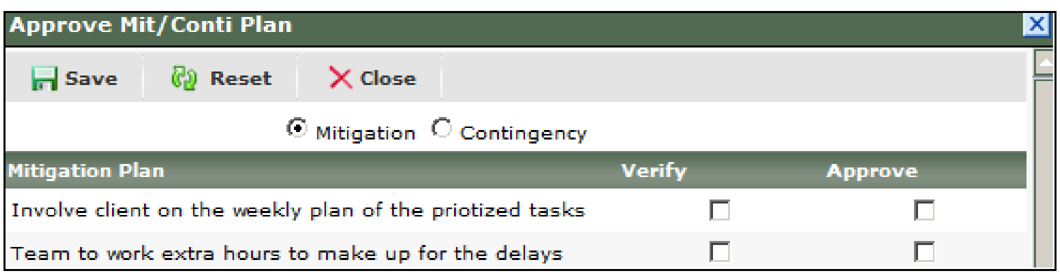
- **Project Code** – Enter the project code
- **Project Name** – Enter the project name
- **Risk Name** – Enter the risk name
- **Domain** – Select the domain from the drop-down
- **Life cycle Phase** - Select the life cycle phase from the drop-down
- **Platform** – Select the platform from the drop-down

4. Click **Search**.
5. The grid below the **Search Issues** section shows the records that match the criteria.

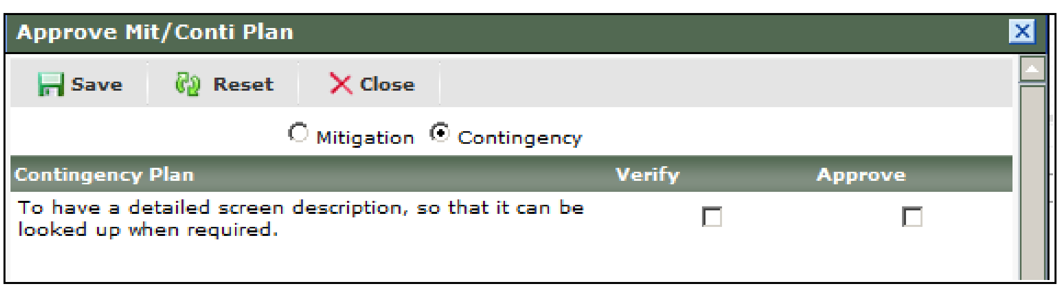
9.2.1. Approve Mit/Conti Plan

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**.



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



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.

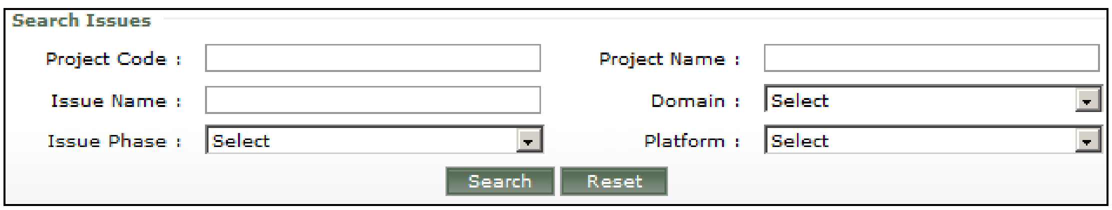
10. View Lesson Learnt/Risk

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.



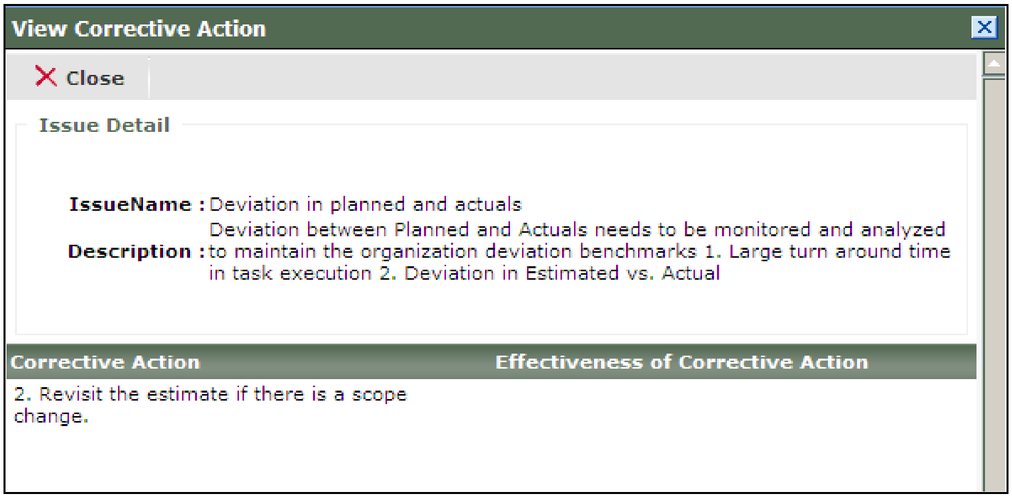
- **Project Code** – Enter the project code
- **Project Name** – Enter the project name
- **Issue Name** – Enter the issue name
- **Domain** – Select the domain from the drop-down
- **Issue Phase** - Select issue phase from the drop-down
- **Platform** – Select the platform from the drop-down

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.

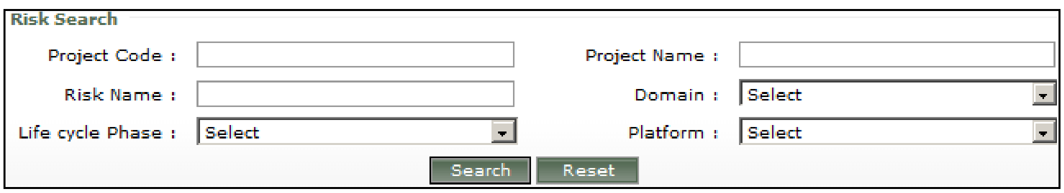
1. In the left menu, click **View Lesson Learnt/Risk** to expand the menu.
2. Click **View Lesson Learnt** option.
3. In the grid below the Searchj Issue section, click the **Issue Name** link.
4. In the **View Corrective Action** pop-up, you can see the issue details.



10.2. 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

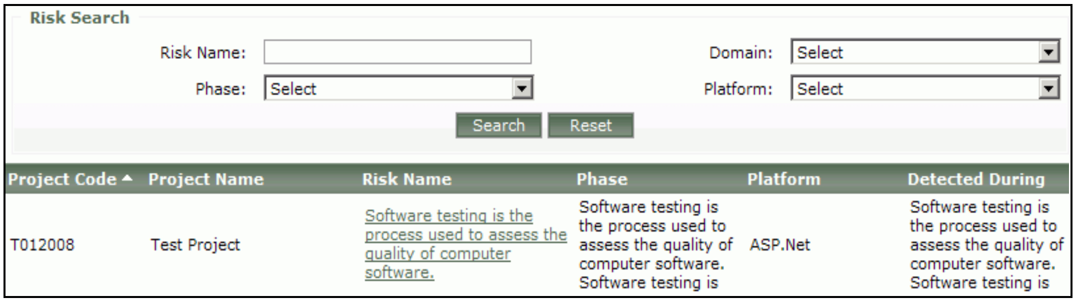
4. Click **Search**.
5. The grid below the **Search Issues** section shows the records that match the criteria.

10.2.1. View Risk Taxonomy

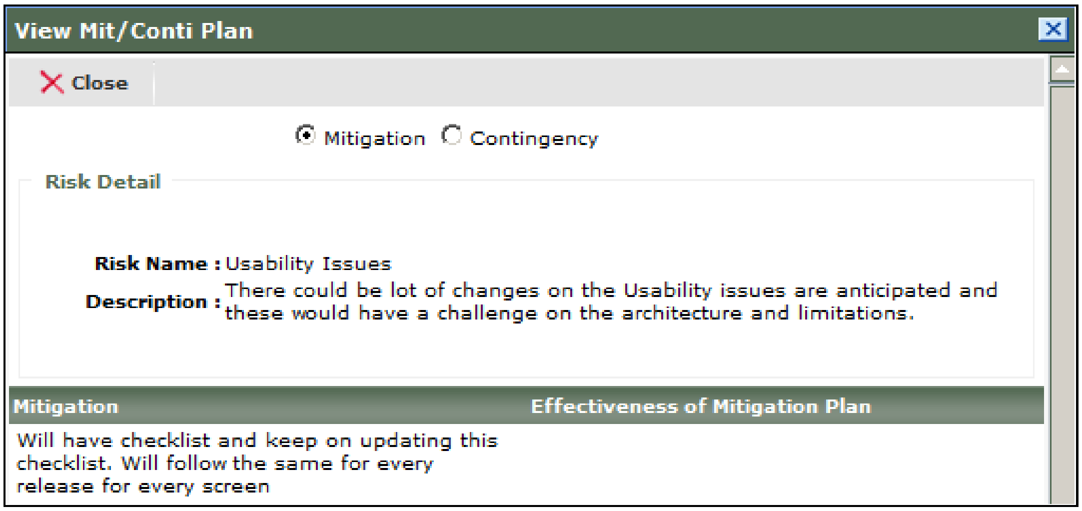
Risk taxonomy section enables you to record all the details of the identified risks at the organization and project level. This process applies to all types of projects currently executed in SPAN.

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

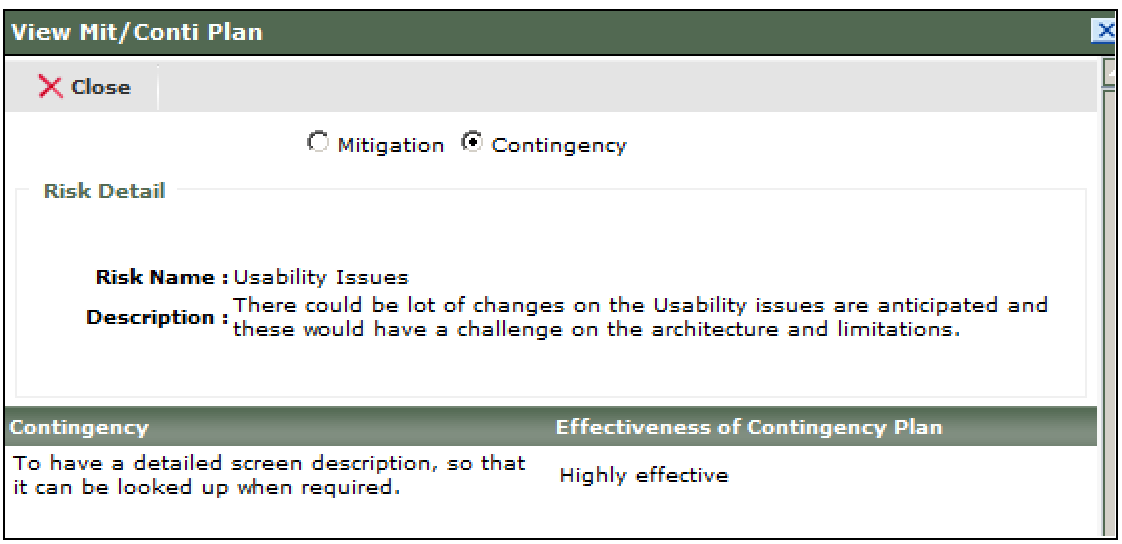
1. In the **Risk Search** section, in the **Risk Name** column, click a specific risk name.



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



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



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.

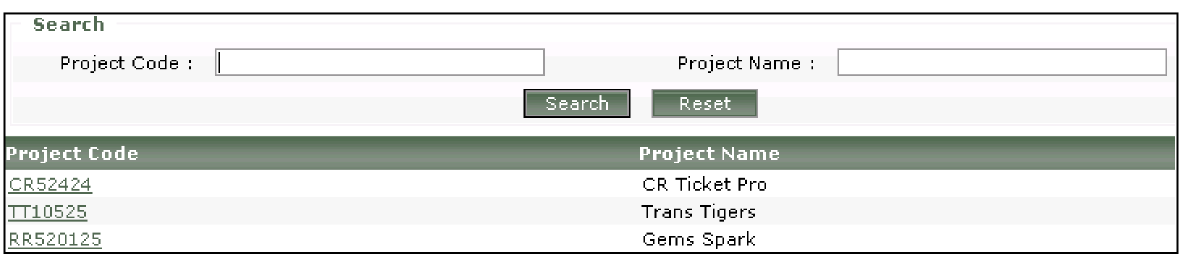
11.1. Search Project

To search for a specific project,

1. From the left menu, click **Causal Analysis** (by default, the **Defect Prevention** 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 project code and project name.



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

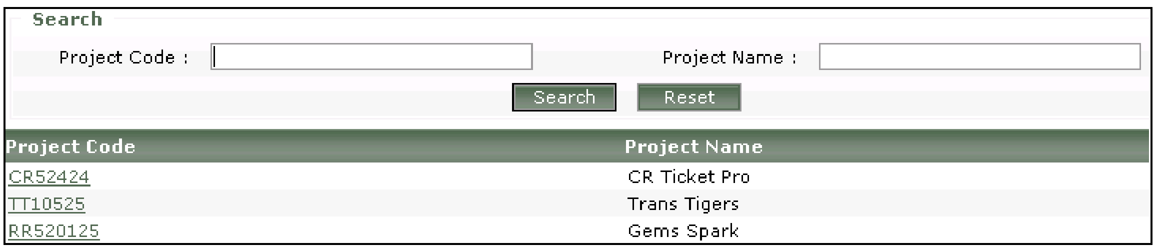
11.2. Add Iteration

To add a new iteration,

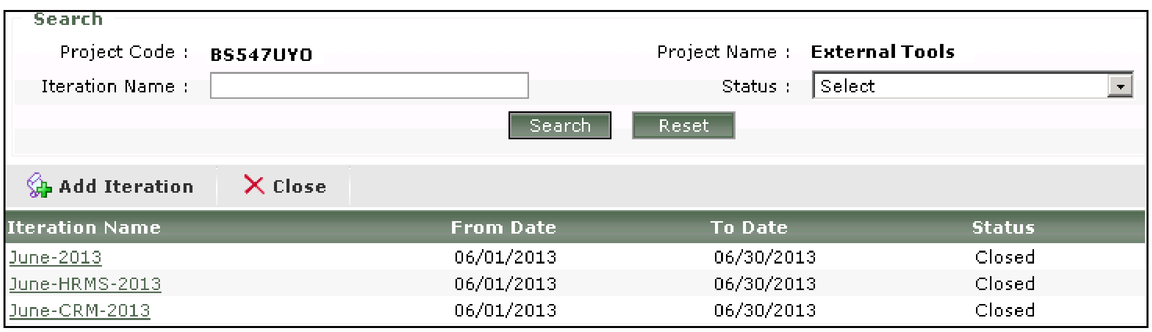
1. From the left menu, expand the **Causal Analysis** module to view the **Defect Prevention** sub-module (by default, when you click **Causal Analysis**, the **Defect Prevention** sub-module is seen).

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

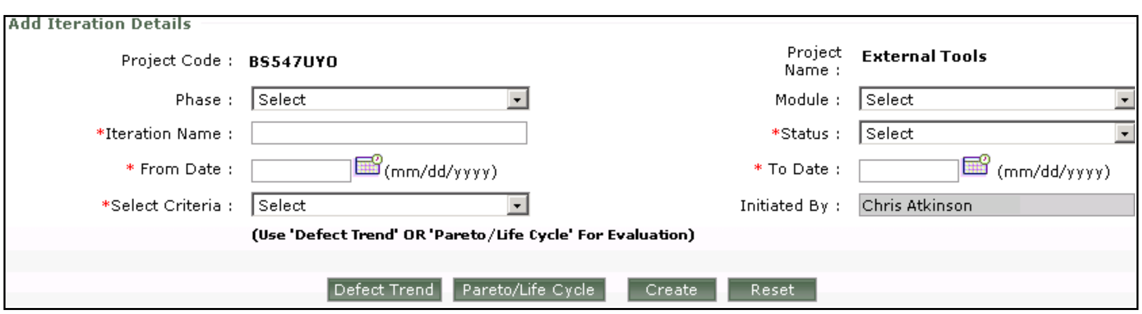
3. Click **Search**.
4. The grid below the **Search** section shows the project code and project name.



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

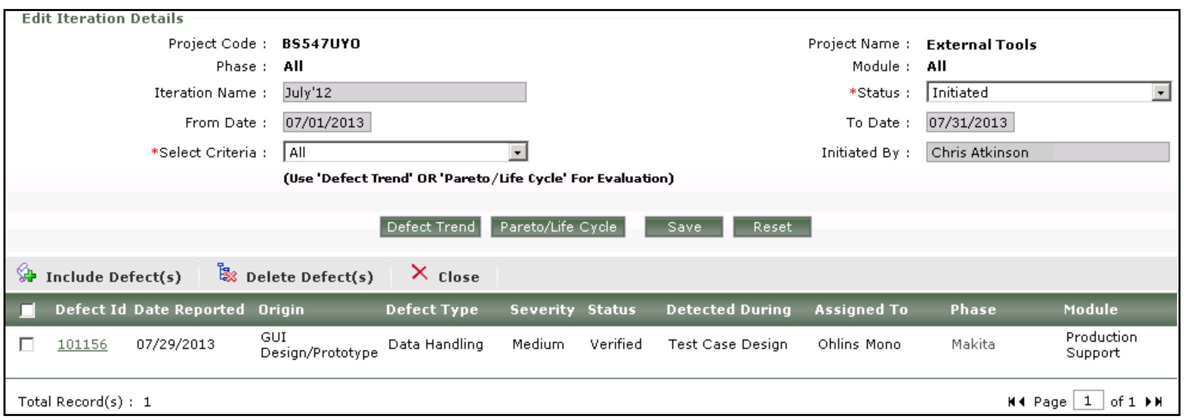


7. Below the **Search** section, click **Add Iteration**.
8. In the **Add Iteration Details** screen, enter values in the fields mentioned below.



- **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.

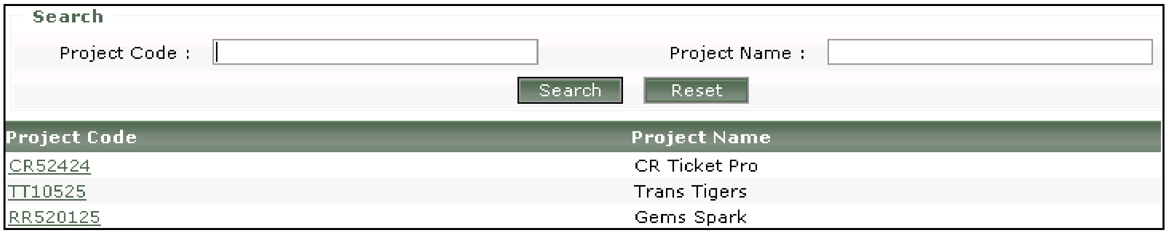


Note: The **Phase** and **Module** fields show the project phase and project module respectively, for which defect RCA must be conducted and is important when RCA is done on Development Project defects.

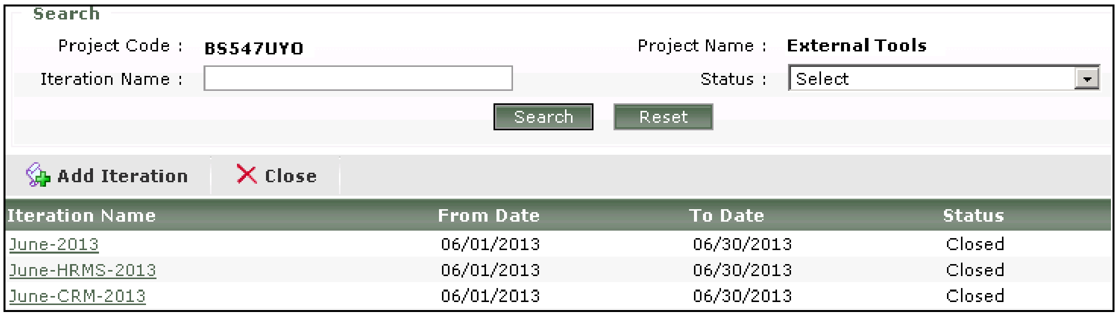
11.3. Edit Iteration Details

To edit iteration details,

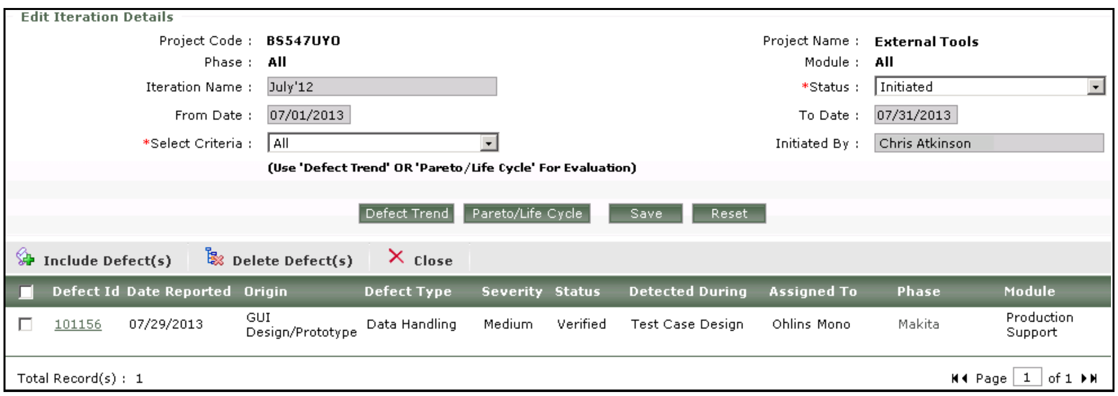
1. From the grid in the **Defect Prevention** sub-module, select the **Project Code**.



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



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



- **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

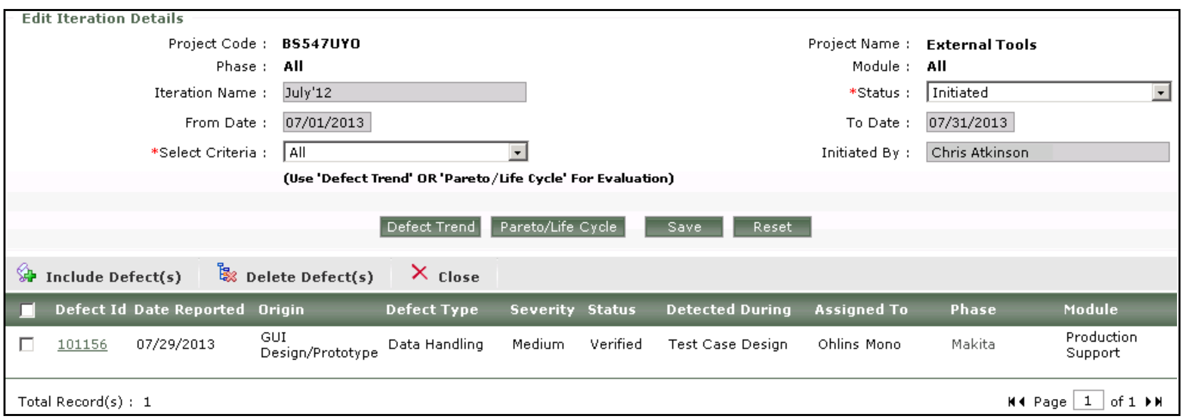
click **Save**. When you click **Save**, you are navigated back to the screen that shows the list of iterations. If you click **Cancel** in the confirmation pop-up, the **Reviewed By** field is added showing the name of the person who reviewed it. Also, once the status is changed to **Reviewed**, then 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.

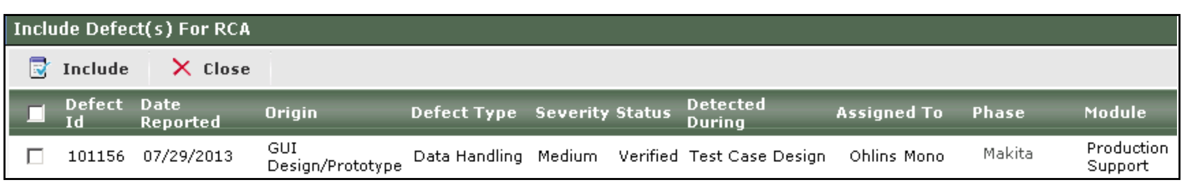
4. If you change the status to **Rejected** and save the details, then you cannot edit the existing causal analysis and preventive action details.

- **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.



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.



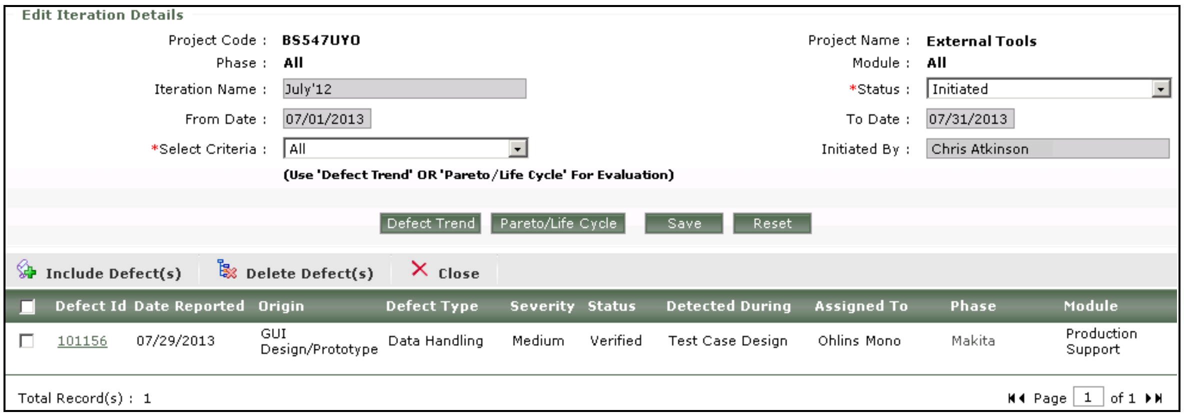
6. In the **Include Defects For RCA** pop-up, under **Defect Id**, select the corresponding checkbox for the defect to be selected and click **Include**.

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

11.4. Delete Defect

To delete a defect,

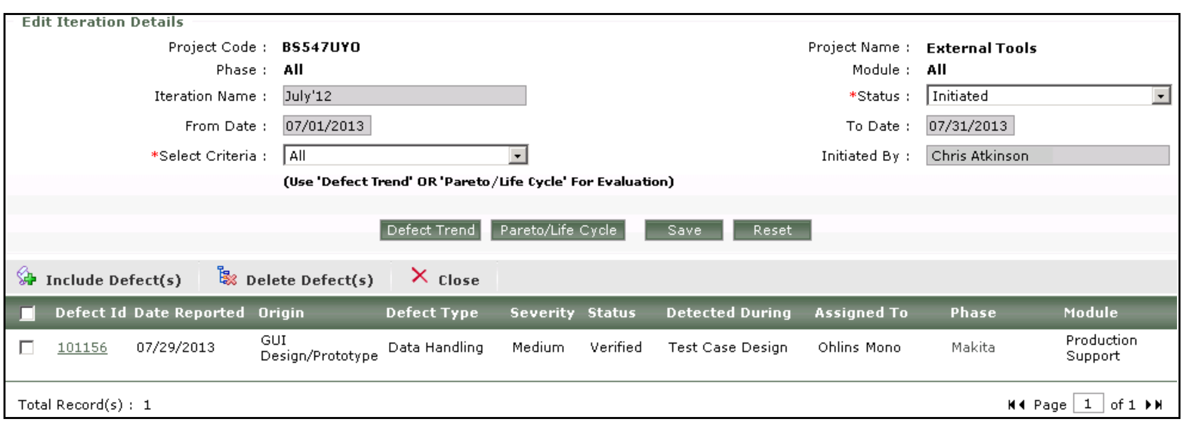
1. In the **Edit Iteration Details** screen, from the grid, select the corresponding checkbox for the defect you want to delete.



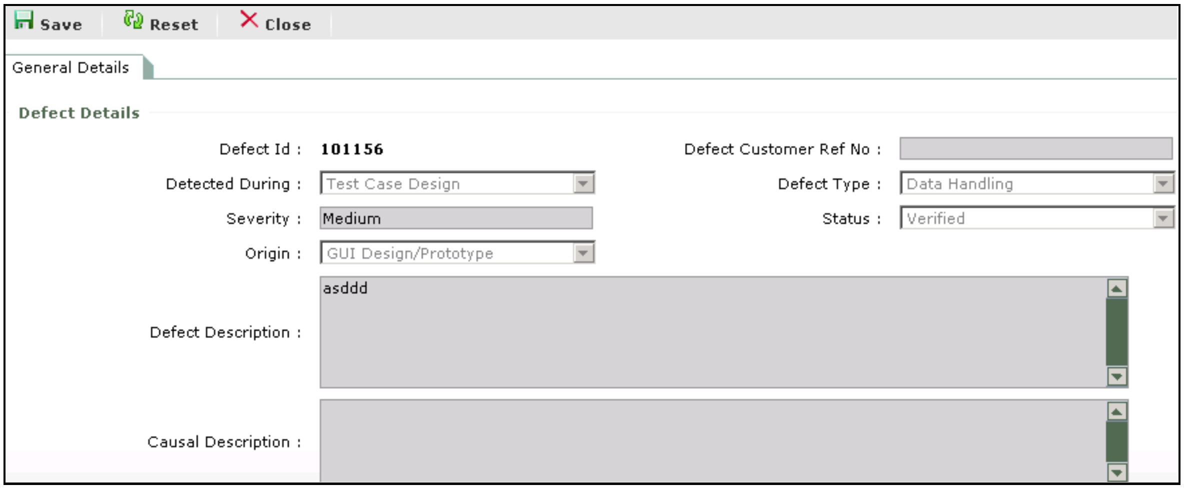
2. Click **Delete Defect(s)**.
3. In the confirmation pop-up, click **OK**.
4. If a preventive action exists for the defect, you can see an alert message, which says that a child record exists and that must be first deleted before deleting the defect (refer section 11.8. Delete Preventive Action in this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

11.5. Add / Edit Causal Analysis

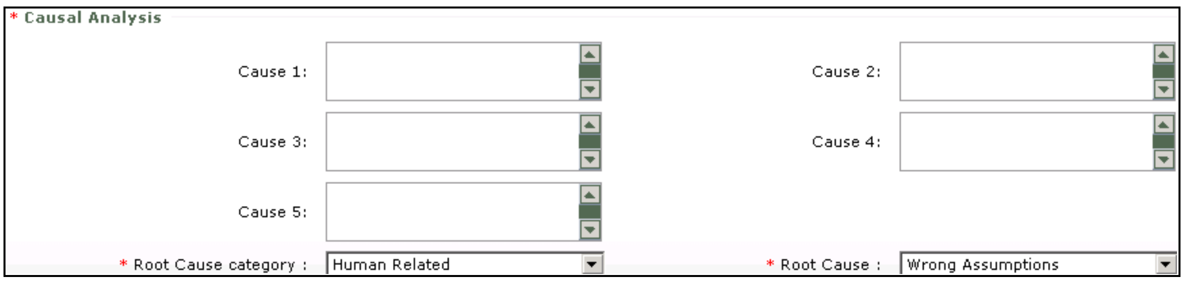
1. To specify the causal analysis of a defect, from the **Defect Id** column of the grid, click the **Defect Id** link.



2. 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).



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

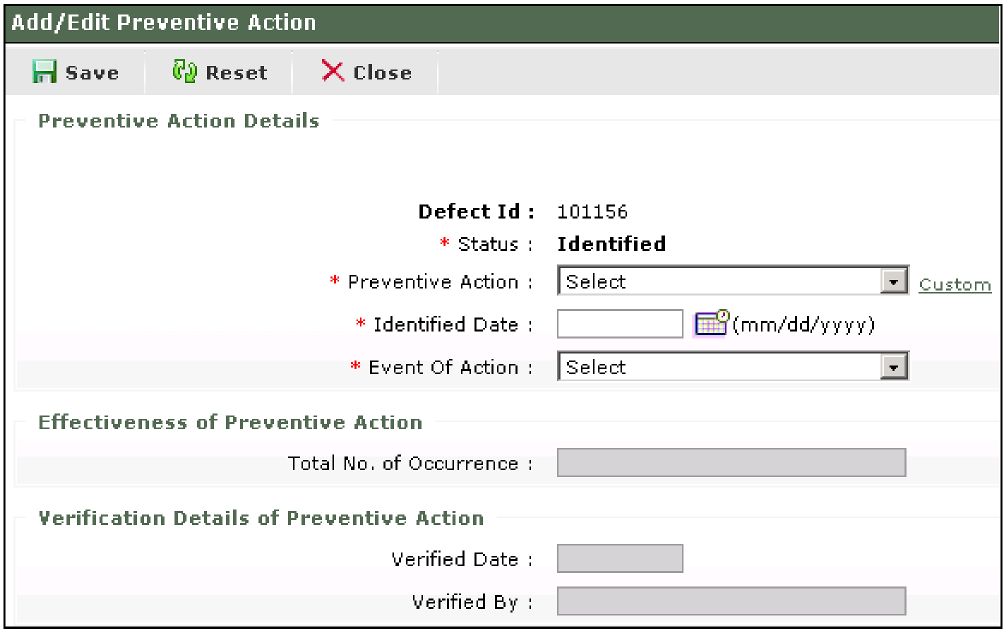


4. For the **Root Cause Category** and **Root Cause** fields, select options from the drop-down (the values shown in these two fields are taken from the **Edit Bug Details** screen of the **Bug Tracker** module).
5. Click **Save**.
6. Once you click **Save**, the cause(s) of the defect is saved and the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

11.6. Add Preventive Action

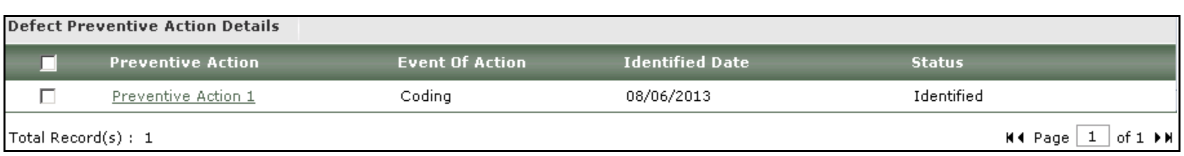
To add preventive action,

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.



- **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

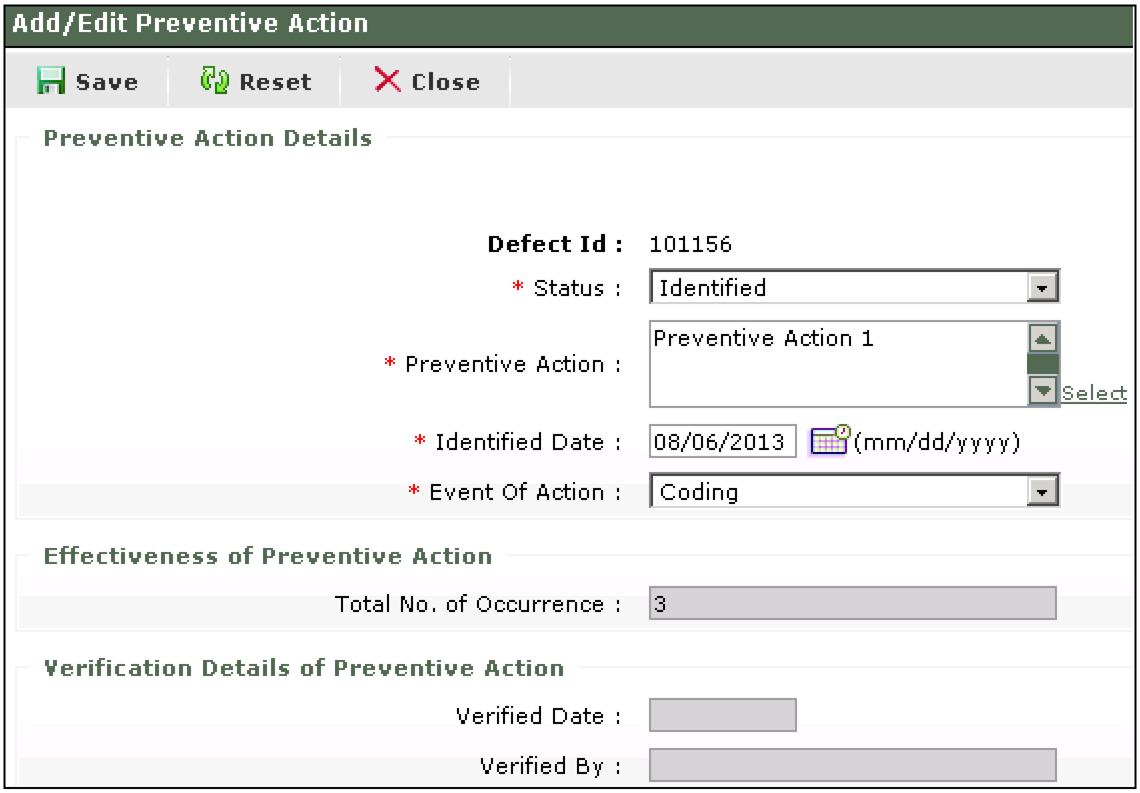
3. In the **Effectiveness of Preventive Action** section, the **Total No. of Occurrence** field shows the value in non-edit mode, based on the selected preventive action.
4. In the **Verification Details of Preventive Action** section, the **Verified Date** and **Verified By** fields show the values 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.



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.

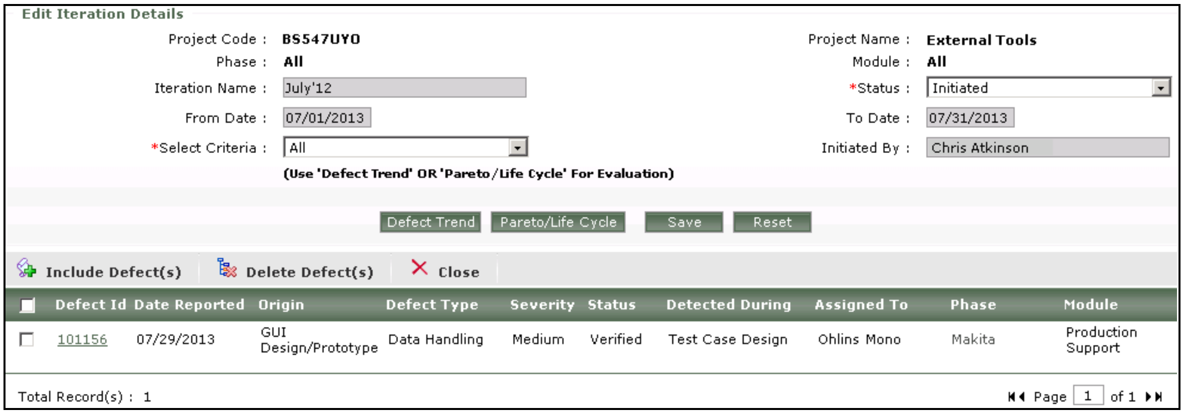


2. In the **Add/Edit Preventive Action** pop-up, edit the fields mentioned below.
   - **Defect Id** – This field automatically shows the defect ID in non-edit mode
   - **Status** – Select the status from the drop-down (if the status of the preventive action is changed to **Verified**, then in the **Add/Edit 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**.

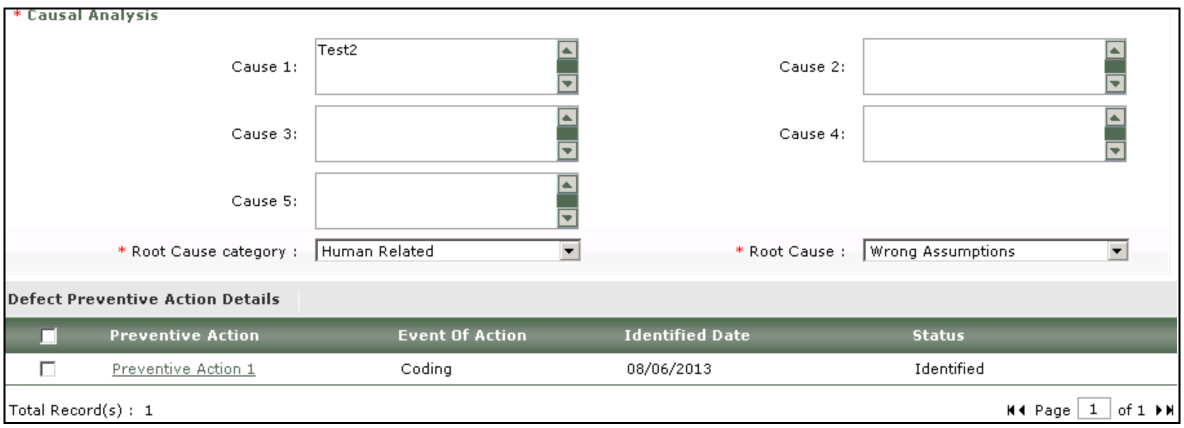
11.8. Delete Preventive Action

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**.

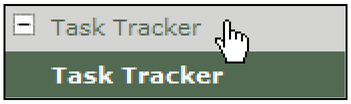
12. Task Tracker

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.

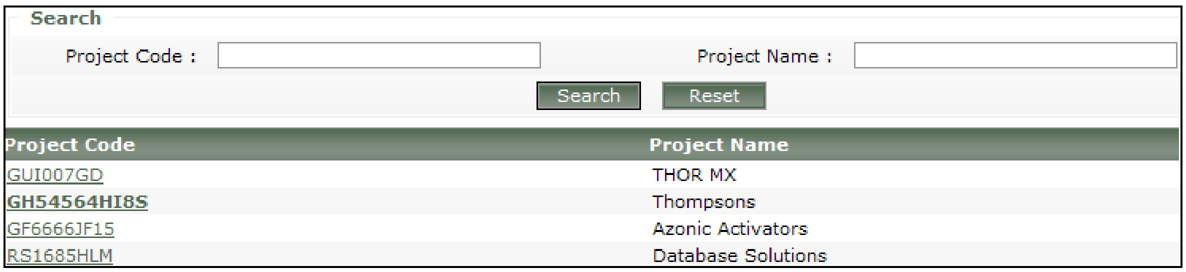
12.1. Search for Tasks

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.

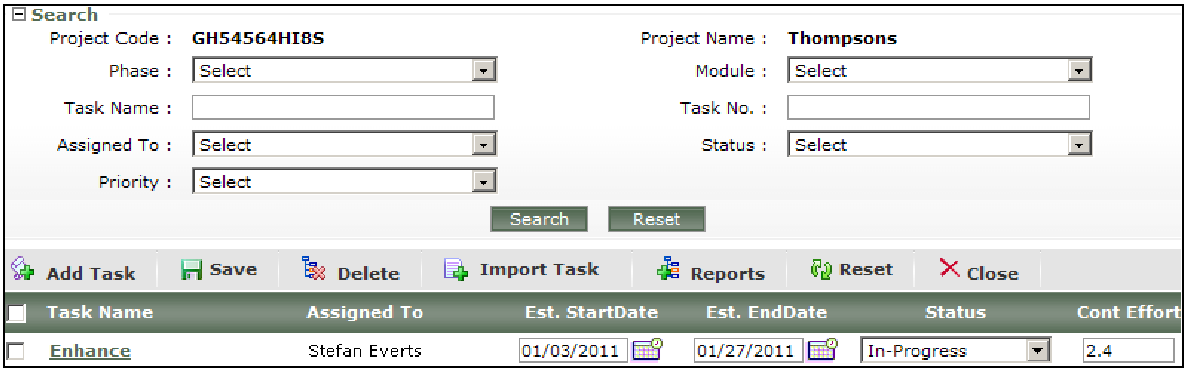


Project Code	Project Name
GUI007GD	THOR MX
GH54564HI8S	Thompsons
GF6666JF15	Azonic Activators
RS1685HLM	Database Solutions

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.

- **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)

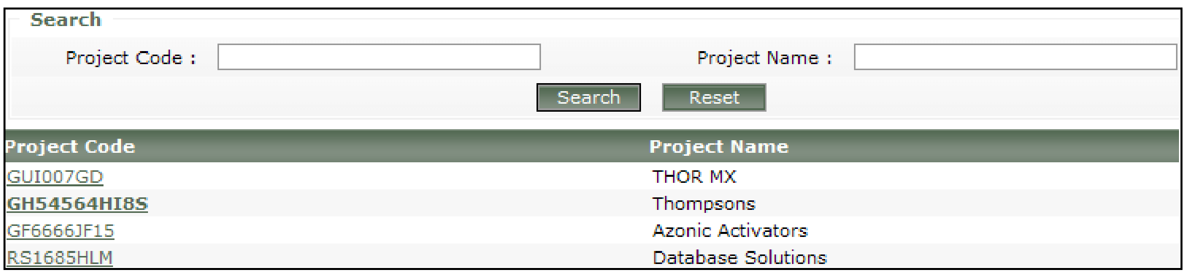
7. Click **Search**.
8. The grid below the **Search** section shows the list of issues that match the search criteria.



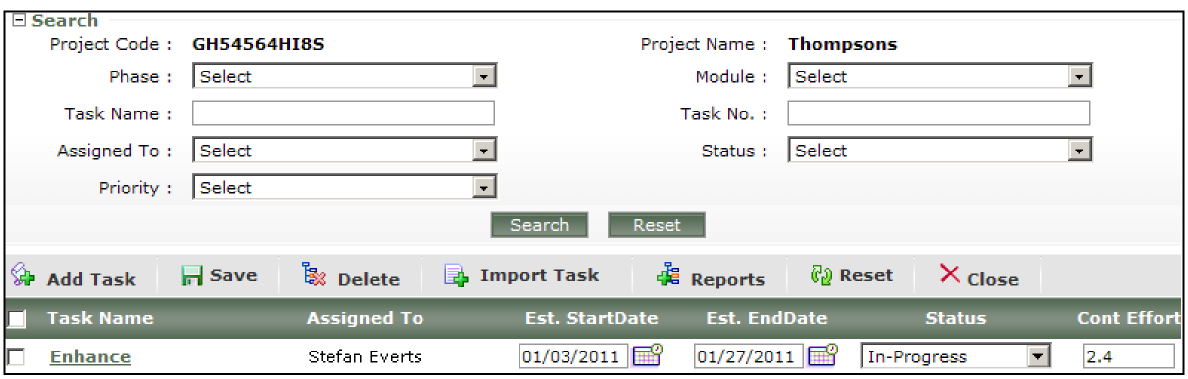
12.2. Add Tasks

To add a new 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 **Add Task**.



3. 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 **Maintainence**, 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.

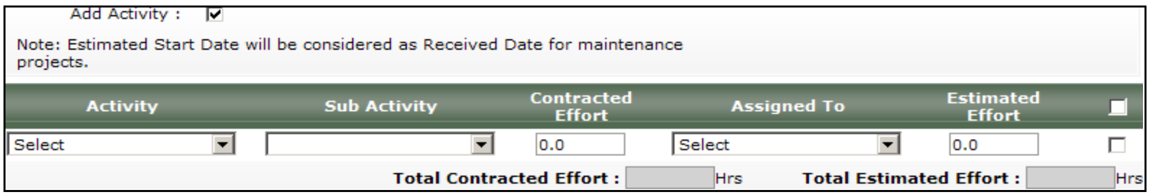
- **Task Name** – Enter the task name.
- **Task No.** – The task number is auto-generated and is shown in non-edit mode.
- **Priority** – Select the priority from the drop-down.
- **Est. StartDate** – Enter the estimated start date using the calendar control.
- **Est. EndDate** – Enter the estimated 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.

4. 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.

5. Click **AddActivity**.

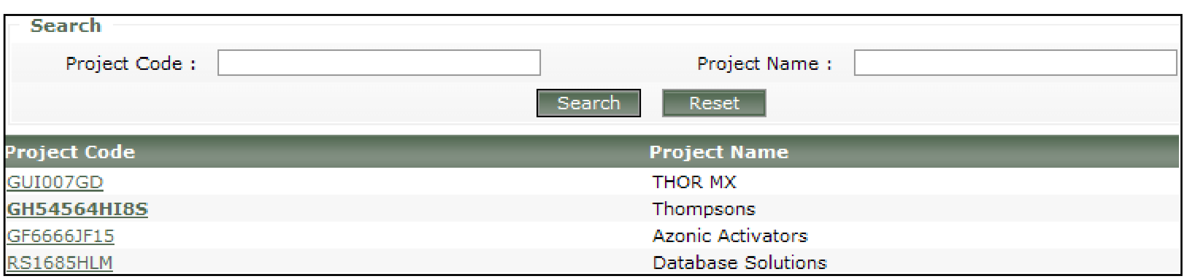


6. In the grid below, select an option for the **Activity**, **Sub Activity** and **Assigned To** fields from the drop-down.
7. For the **Contracted Effort** field, enter the complete contracted effort spent on the activity.
8. Based on the **Contracted Effort** and the efficiency of the person to whom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

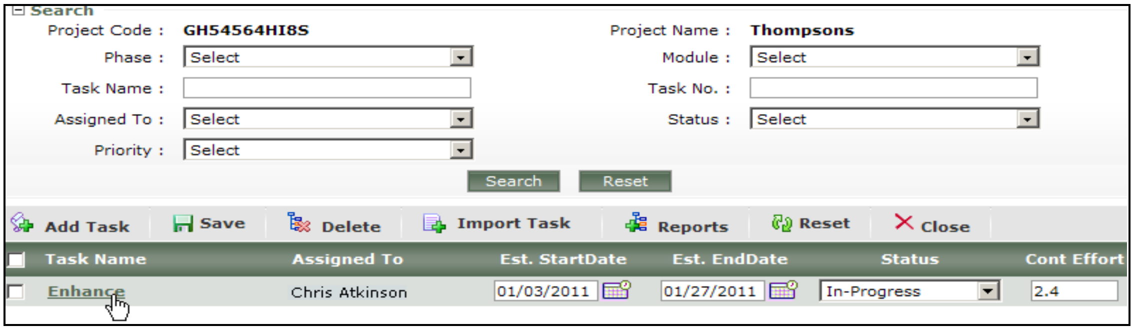
12.3. Edit Tasks

To edit a task, follow these steps.

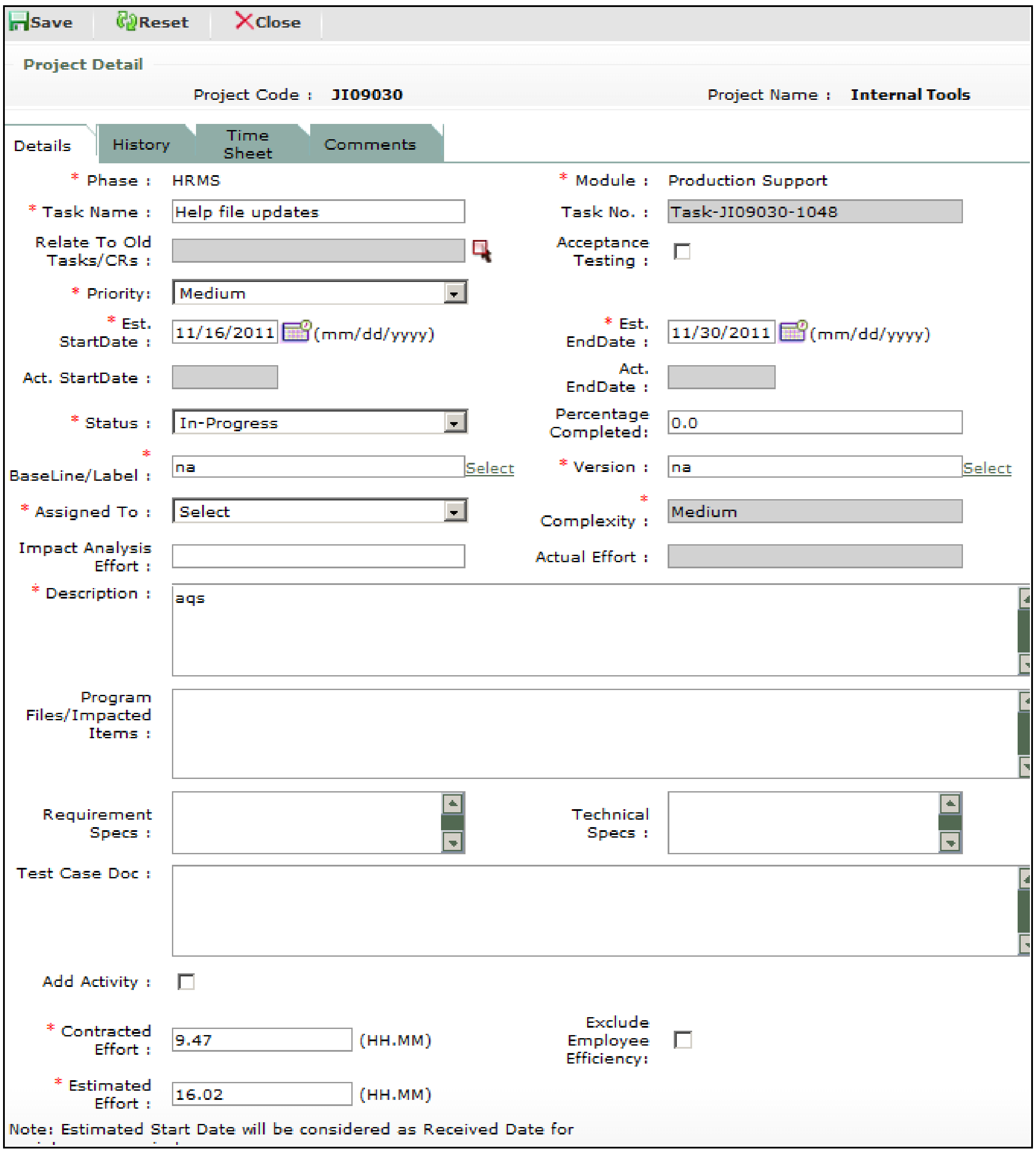
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



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



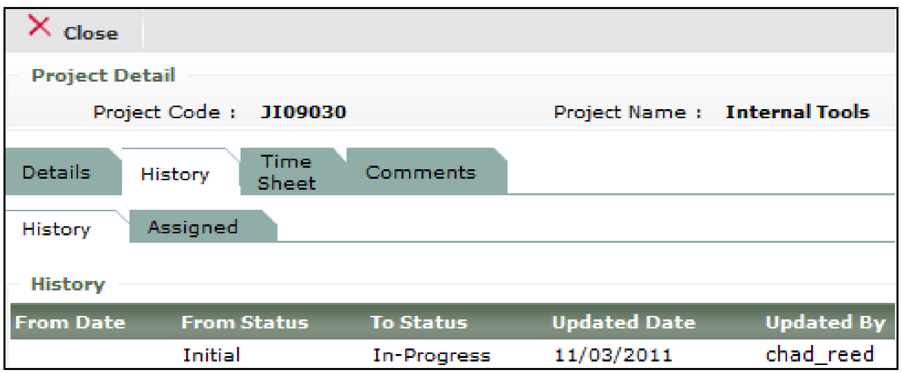
3. In the following **Details** (tab) screen, edit the fields mentioned below.



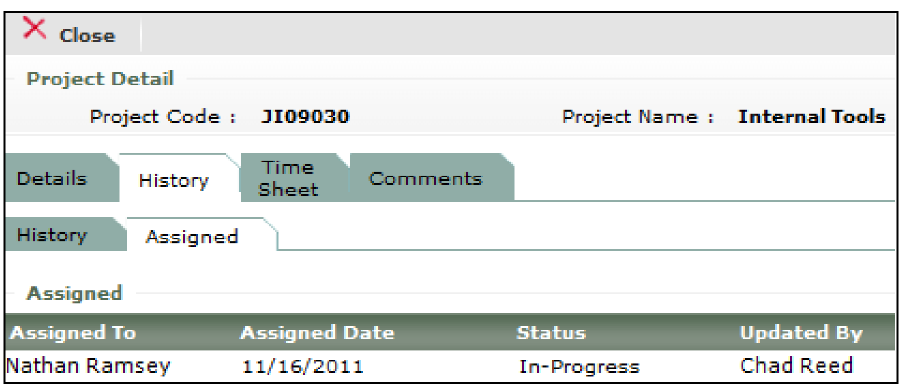
- **Phase** – This field is shown in non-edit mode
- **Module** - This field is shown in non-edit mode
- **Task Name** – Edit the task name
- **Relate To Old Tasks/CRs** – This field shows the related old tasks or CR in non-edit mode (click the icon to open the **Old Tasks** pop-up to select the task; 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.

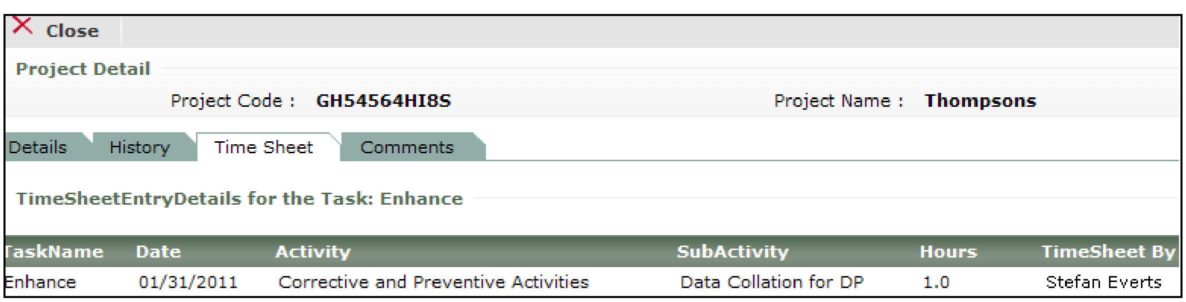
4. To reset the values, before you click **Save**, click **Reset**.
5. To save the details, click **Save**.
6. To view the history of the changes in the task, click the **History** tab.



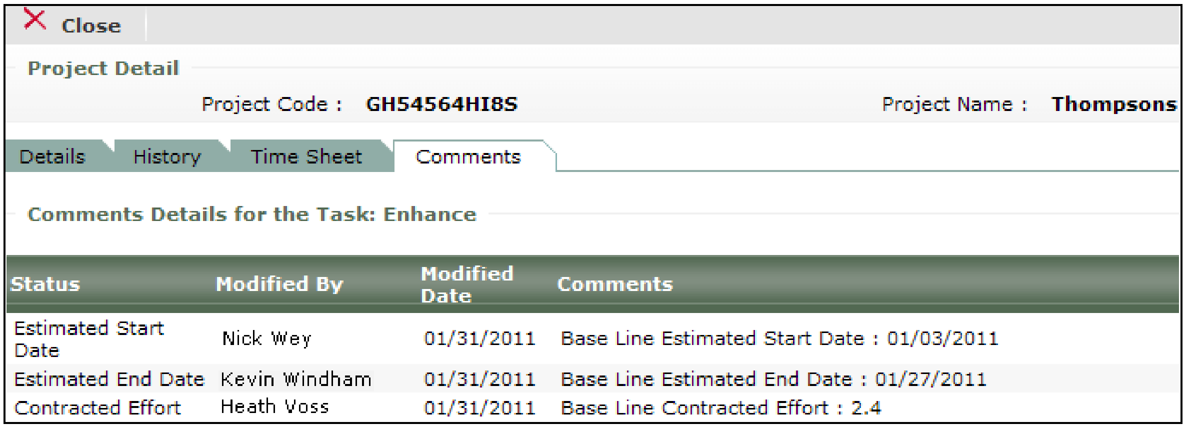
7. The **History** grid shows the details of the task.
8. To view the history of the task assigned, in the **History** tab, click **Assigned**.



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



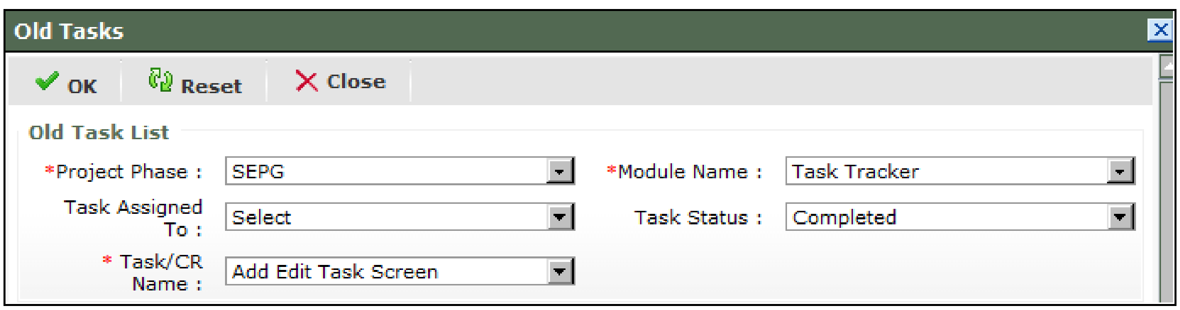
10. The grid shows the details of the time spent on the task.
11. To view the comments related to the task, click the **Comments** tab.



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  icon.



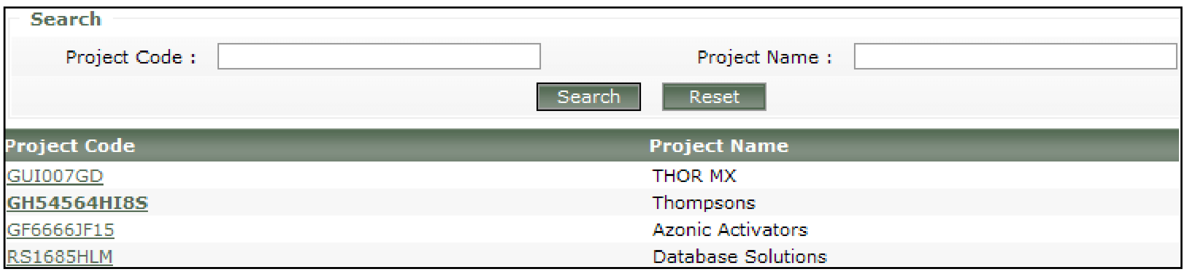
2. In the **Old Tasks** pop-up, select the options from the drop-down for the fields mentioned below.
   - **Project Phase** – Select the project phase from the drop-down
   - **Module name** - Select the module name from the drop-down (options shown in the drop-down are based on the selected project 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**.

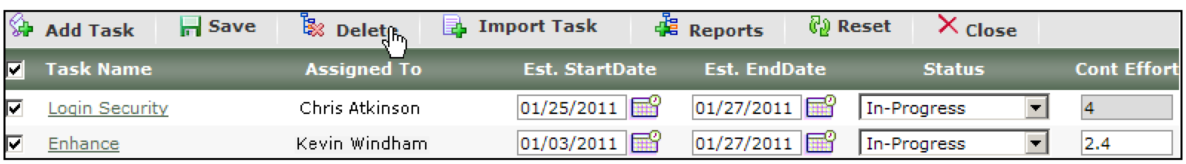
12.5. Delete Task

To delete a task, follow these steps.

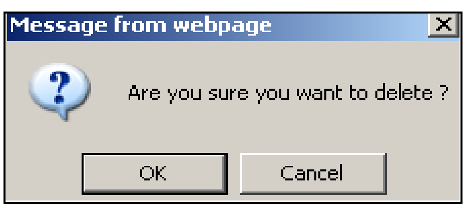
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



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



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

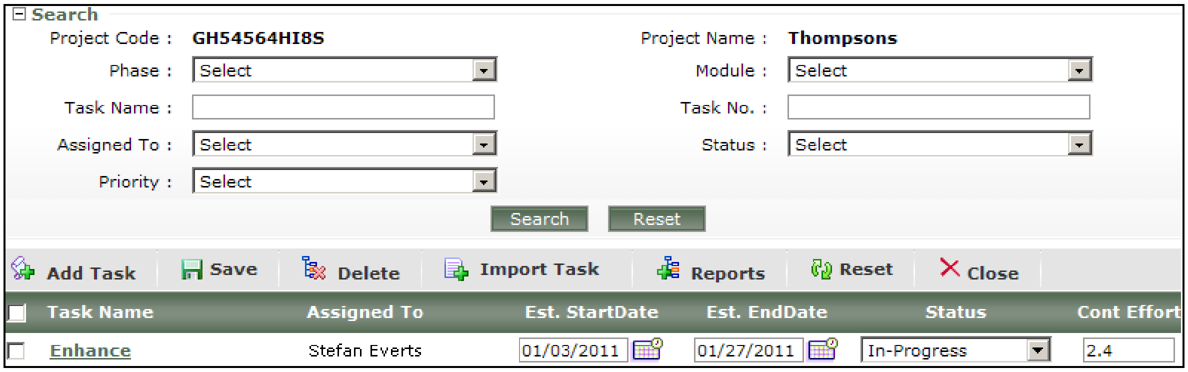


5. If a child record exists, you cannot delete the task and you can see the pop-up shown below.

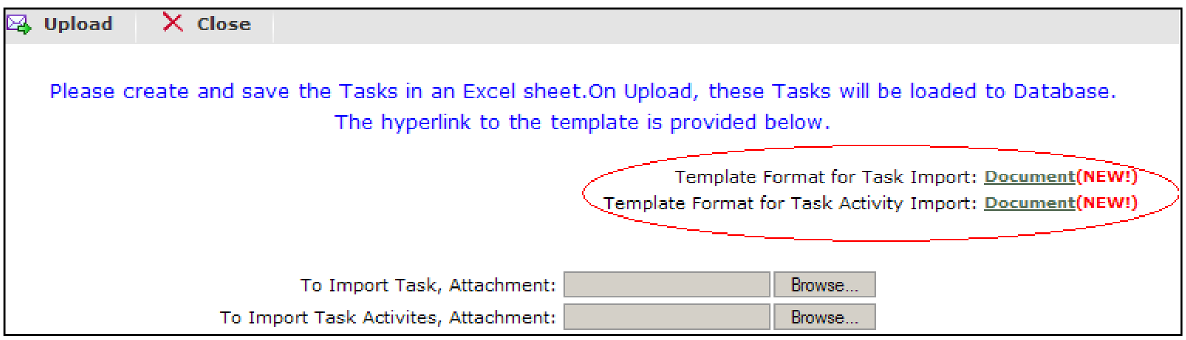
12.6. Import Tasks

To import a task, follow these steps.

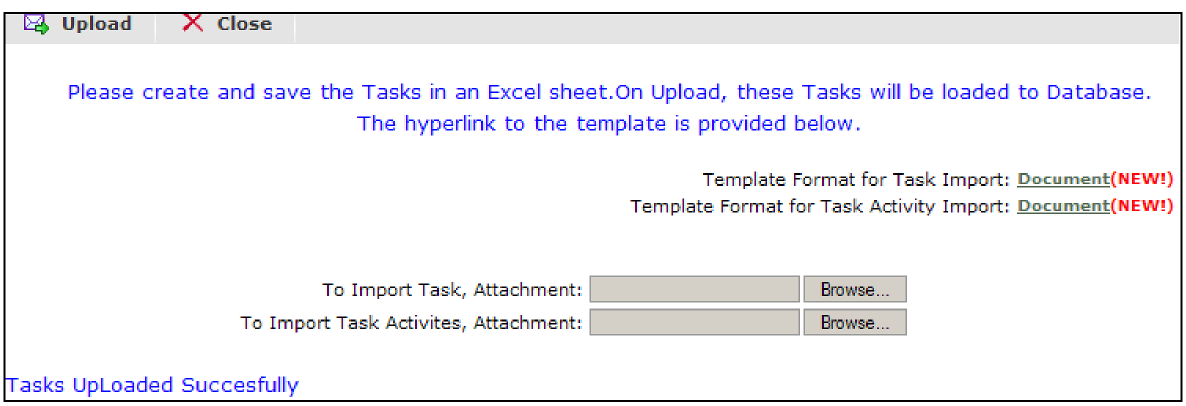
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.
2. In the following screen, from below the **Search** section, click **Import Task**.



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).



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**.

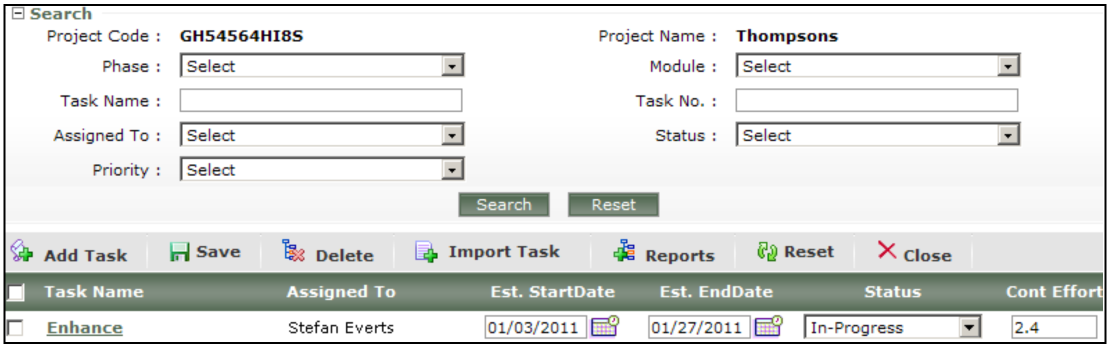


7. Once the template is uploaded, you can see the confirmation message as shown above.

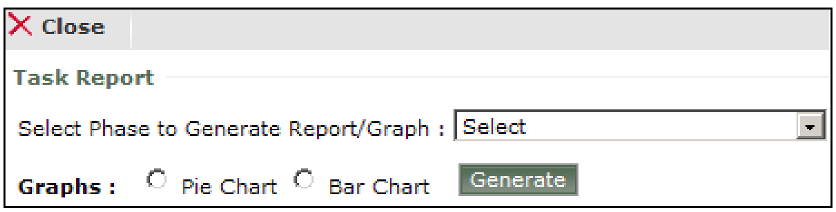
12.7. Generate Report

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**.

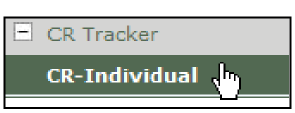
13. CR Tracker

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.

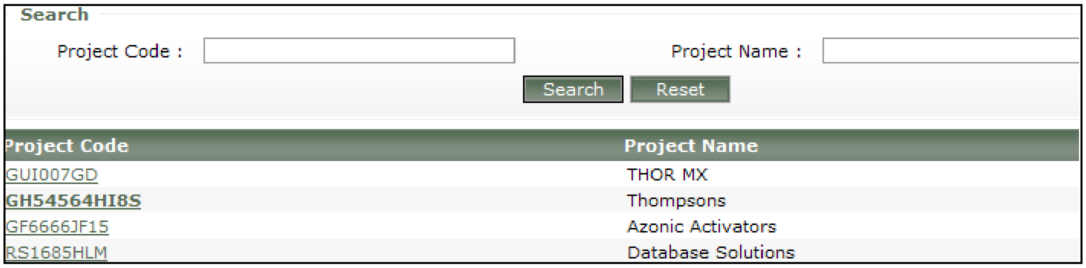
13.1. Search for Change Request

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

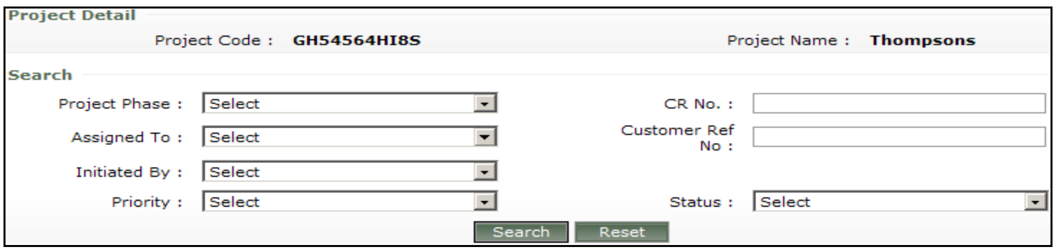
1. From the left menu, click **CR Tracker** (by default, **CR-Individual** sub-module is selected).



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

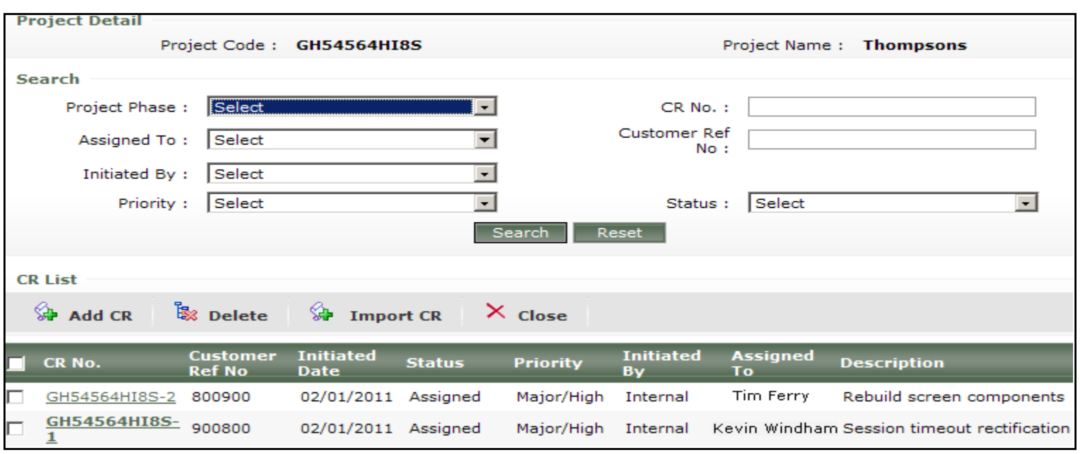


4. The grid below the **Search** section shows the projects that meet the search criteria.
5. Under **Project Code** column of the grid, click a specific project code link.
6. In the following screen, in the **Search** section, enter values in the fields mentioned below.



- **Project 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

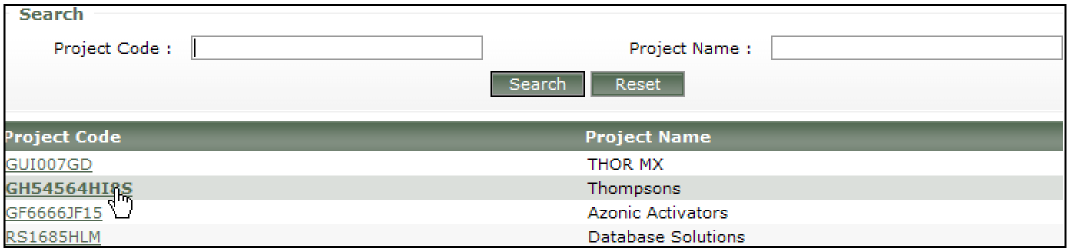
7. Click **Search**.
8. The **CR List** grid below the **Search** section shows the list of CRs that match the criteria.



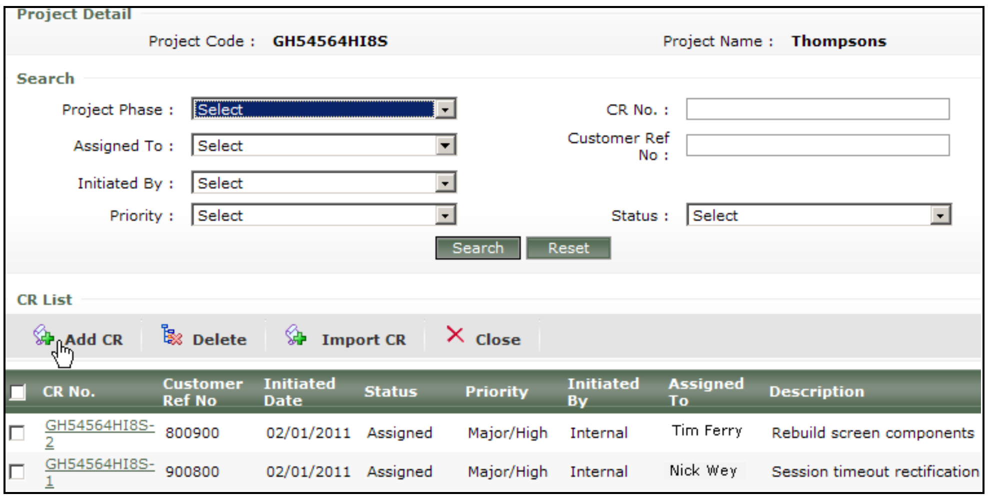
13.2. Add Change Request

To add a new CR, follow these steps.

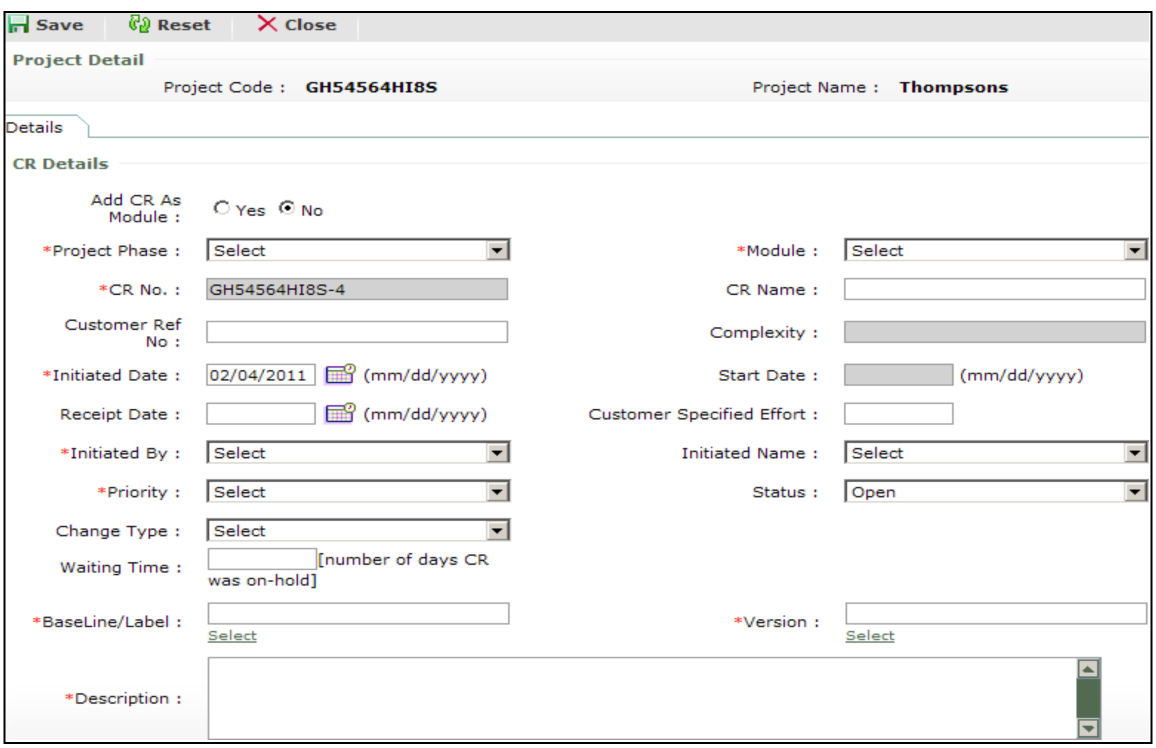
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



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

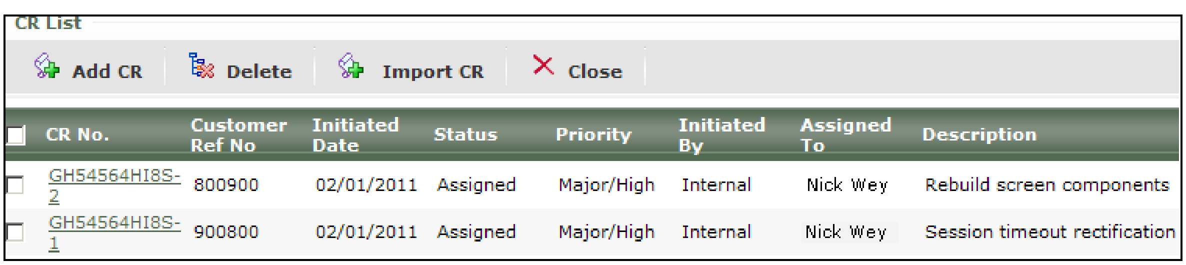


3. In the **CR Details** screen, enter values in the fields mentioned below.



- **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

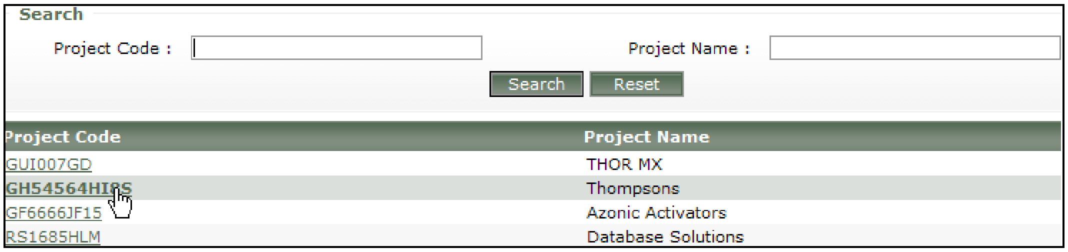
Add CR | Delete | Import CR | Close

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

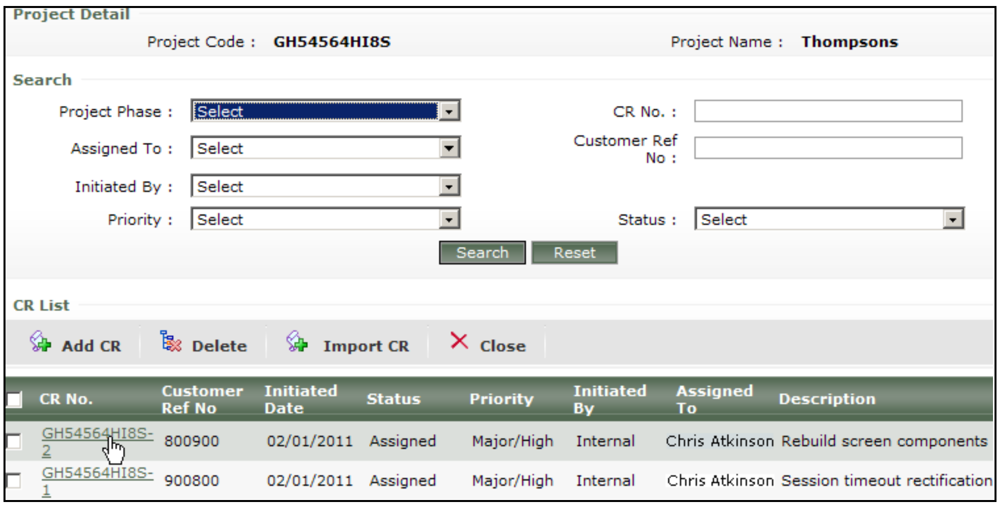
13.3. Edit Change Request

To edit a change request, follow these steps.

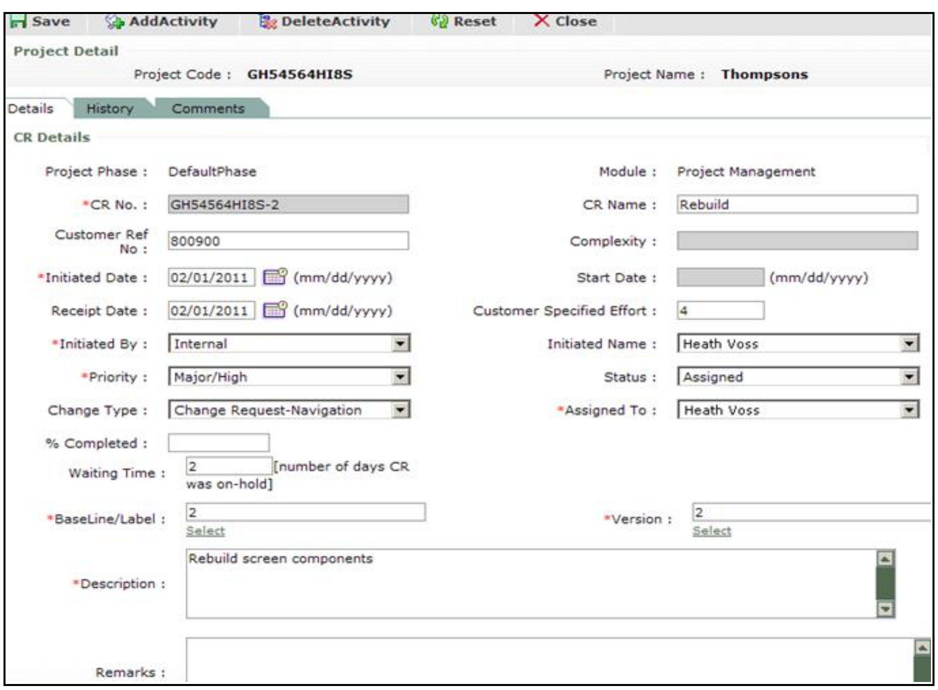
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



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

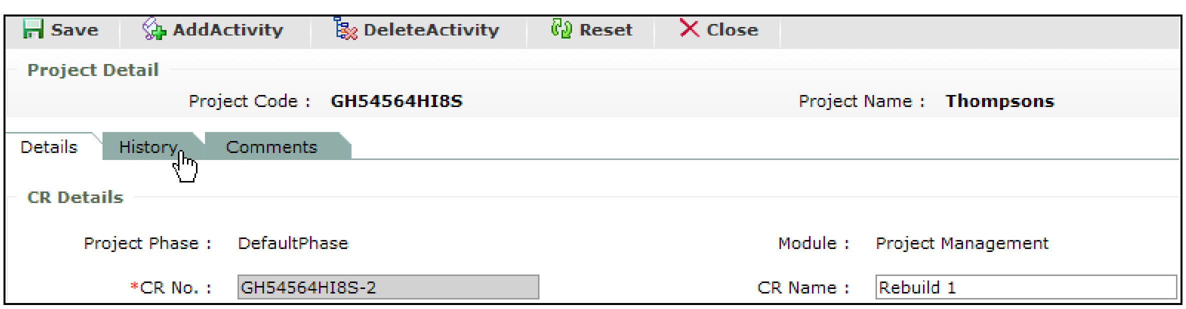


3. In the following **Details** (tab) screen, edit the fields mentioned below.

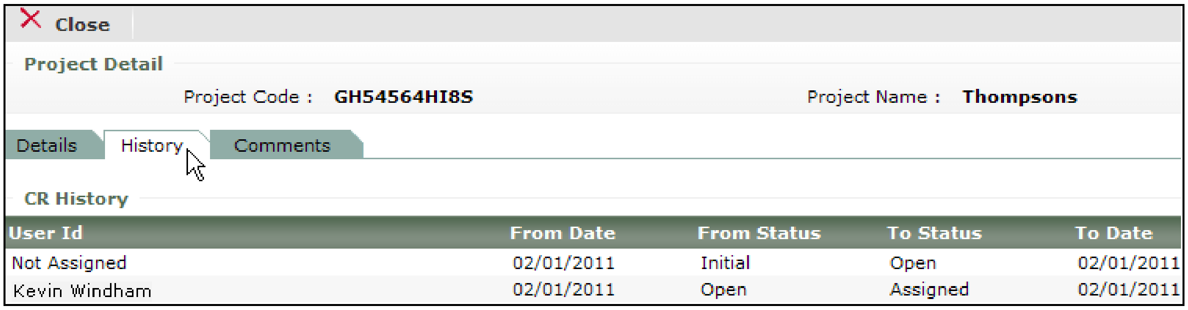


- **Project Phase** – This field is shown in non-edit mode
- **Module** – This field is shown in non-edit mode
- **CR No.** – This field is shown in non-edit mode
- **CR Name** – Edit the CR name
- **Customer Ref No** – Edit the customer reference number
- **Complexity** – This field automatically shows 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

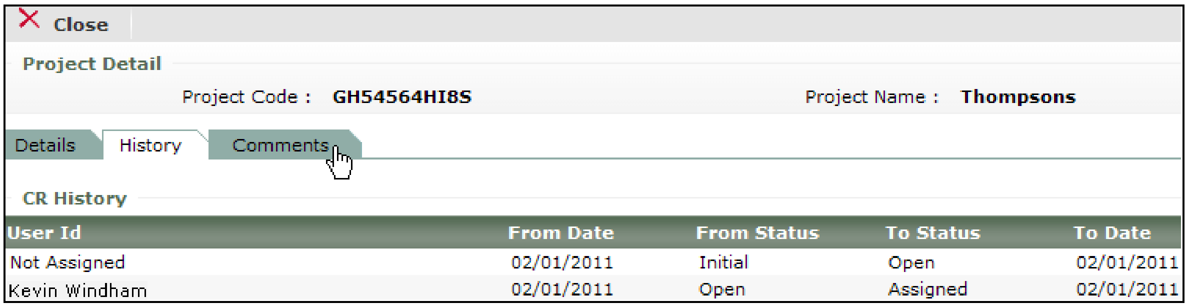
4. To reset the values, before you click **Save**, click **Reset**.
5. To save the details, click **Save**.
6. To view the history of the change request, click the **History** tab.



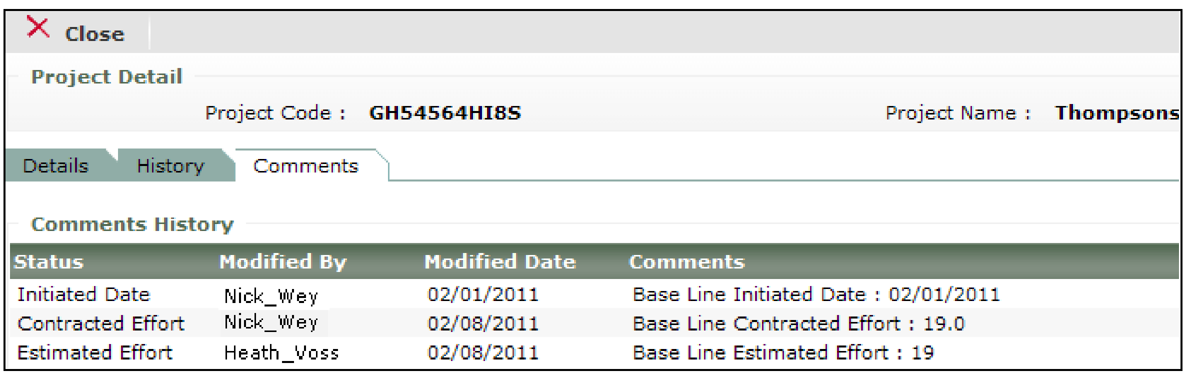
7. The **CR History** grid shows the details of the change request.



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



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

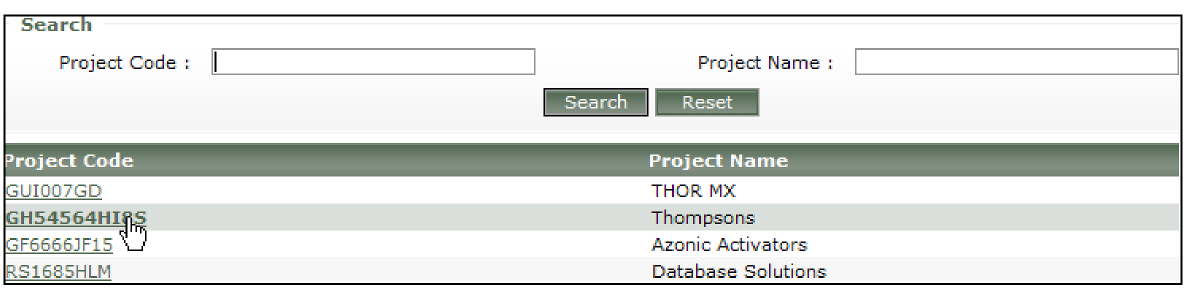


13.4. Add Activity

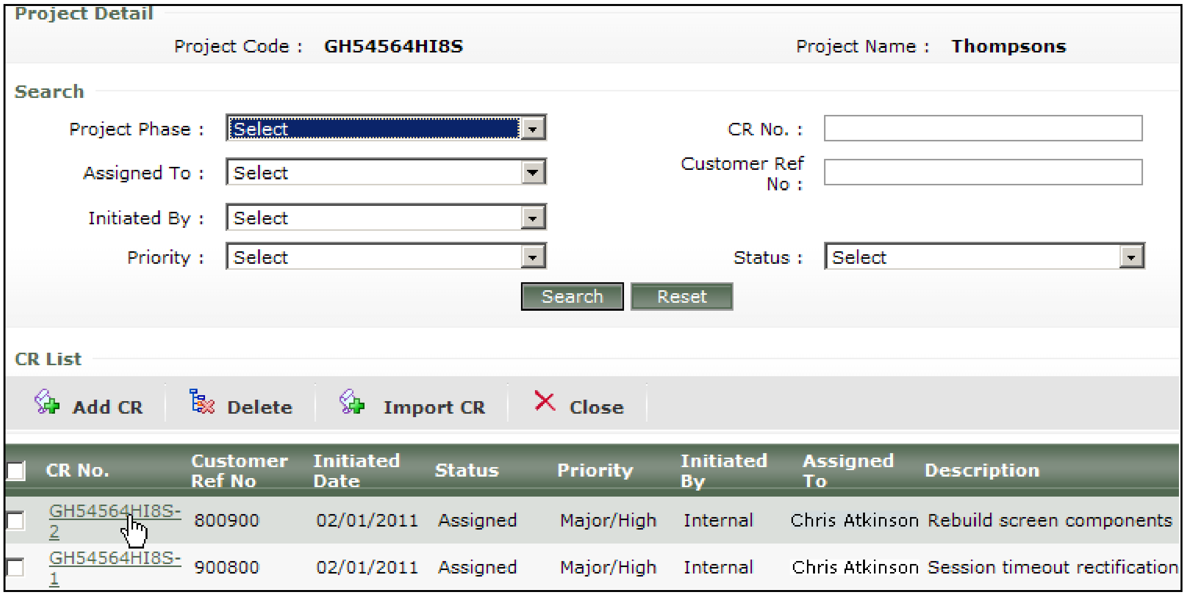
A Change Request (**CR**) can have multiple activities. To add an activity, a change request must exist. Once you add a CR, you can then add multiple activities to the change request.

To add an activity, follow these steps.

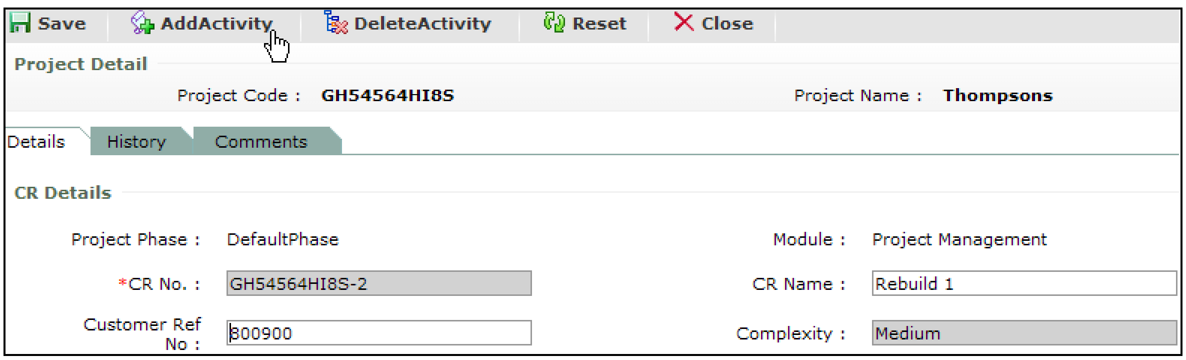
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



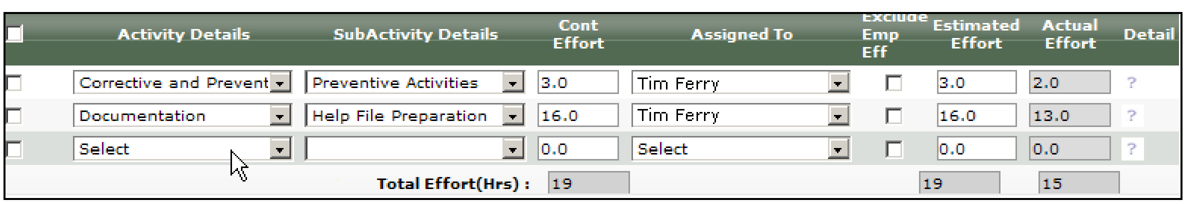
2. In the following screen, from the grid below the **Search** section, click the specific change request link under **CR No.** column, to which you want to add the activity.



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



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



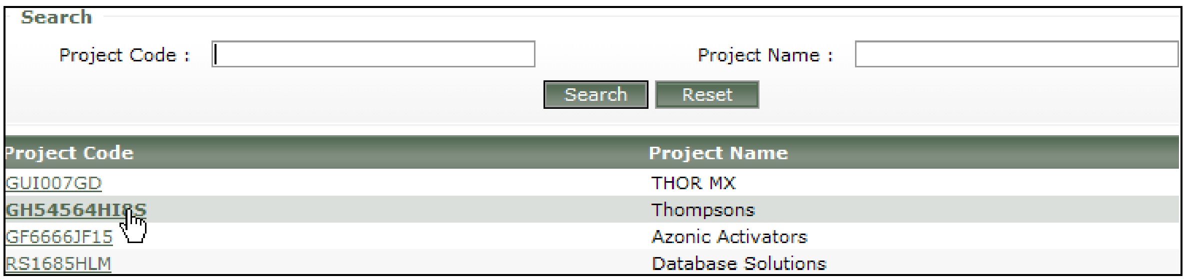
5. In the blank row, for the **Activity Details**, **SubActivity Details** and **Assigned To** columns, select appropriate options from the drop-down.
6. Enter the effort in the **Cont Effort** box.
7. To exclude the employee from the efficiency calculations, select the checkbox for the **Exclude Emp Eff** box (to include the the employee in the efficiency calculations, do not select the checkbox).
8. 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**.

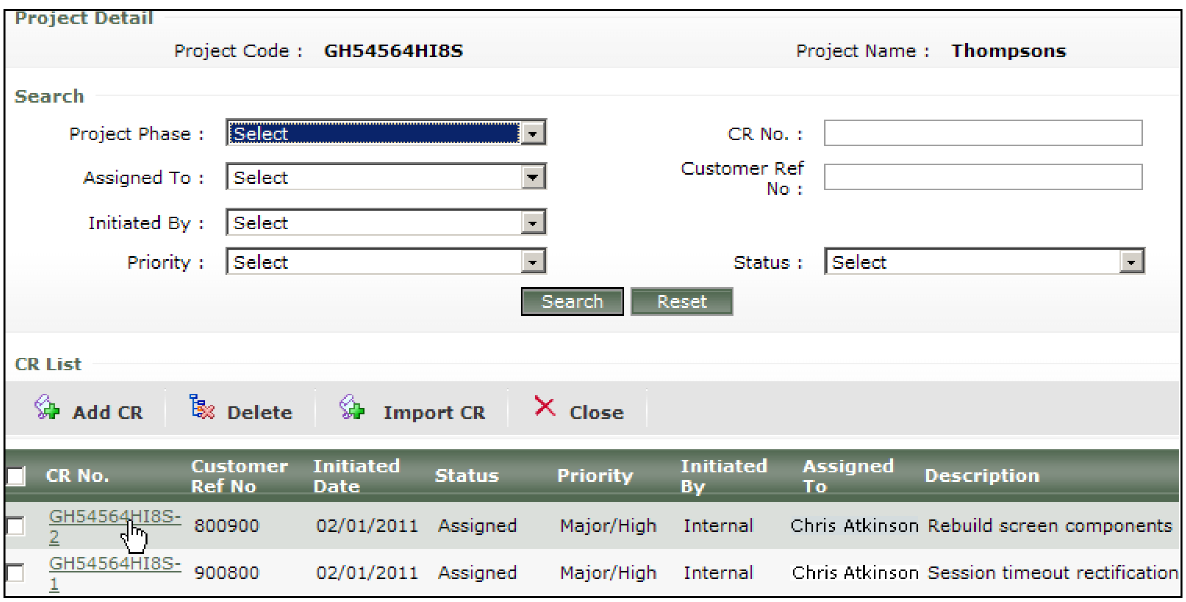
13.5. Edit or Delete Activity

To edit an activity details, follow these steps.

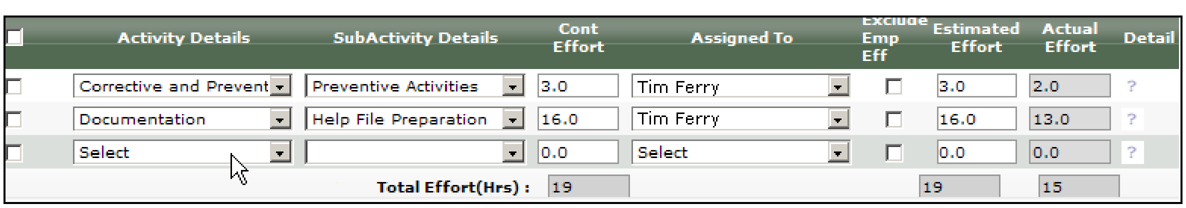
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



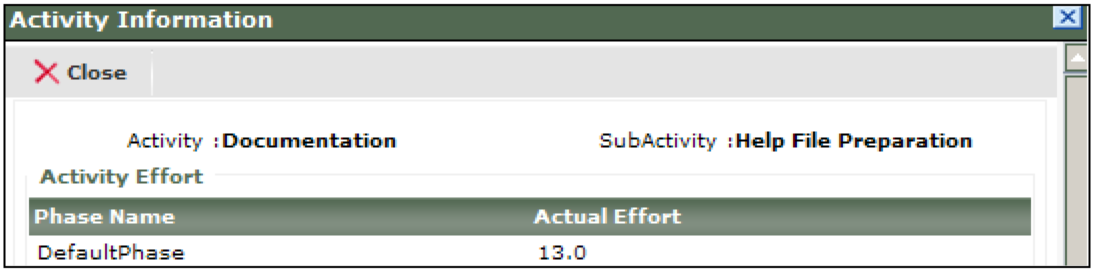
2. In the following screen, from the grid below the **Search** section, click the specific change request link under **CR No.** column, which you want to edit.



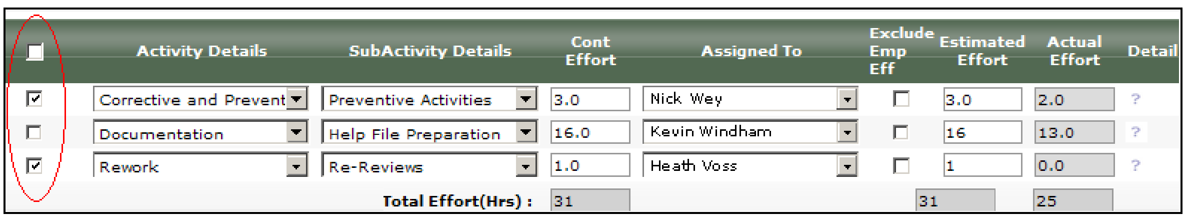
3. In the following **Details** (tab) screen, scroll-down the **CR Details** section to view the grid.



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.

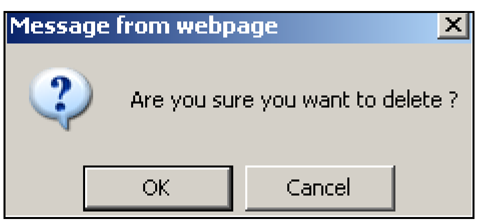


8. The **Activity Information** pop-up shows the phase in which the activity was involved.
9. To close the pop-up, click **Close**.
10. To delete an activity, select the corresponding checkbox from the first column of the grid (circled in red below), for the activity you want to delete.



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

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



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

14. Bug Tracker

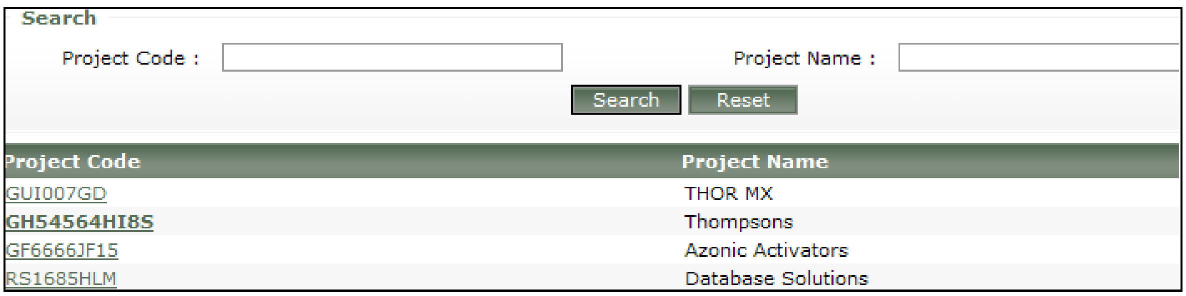
The **Bug Tracker** module contains details of bugs that are identified during the testing phase. Testers can use this module to enter the bug details, assign bugs, re-open bugs, and close the bugs after the developers have fixed the issue. It also specifies the project and phase in which the tester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

14.1. Search for Bug

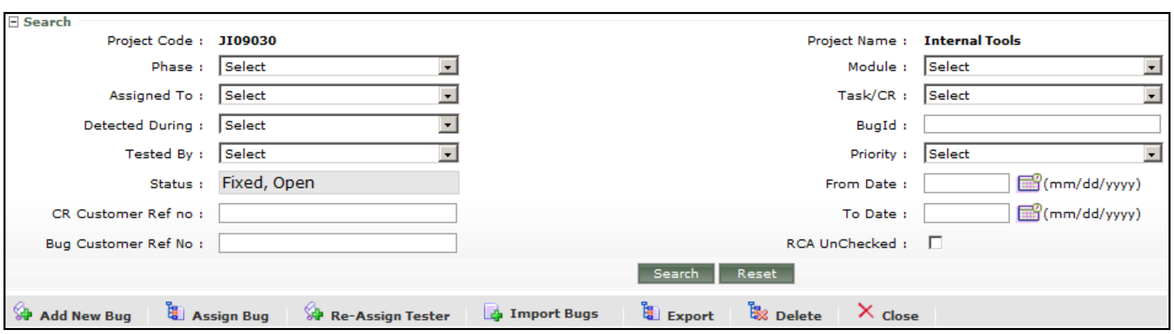
To search for a specific bug, follow these steps.

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**.



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** – 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 tack / CR from the drop-down

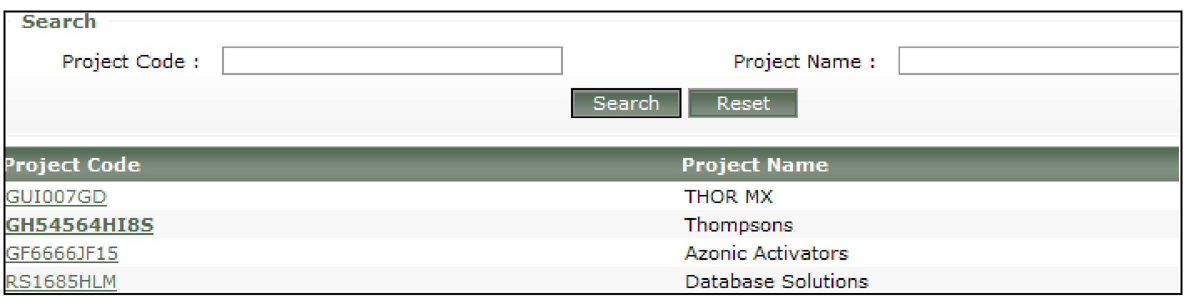
- **Detected During** – Select the activity from the drop-down
- **BugId** – Enter the bug ID
- **Tested By** – Select the name of the person from the drop-down
- **Priority** – Select the priority from the drop-down
- **Status** – Select the status (you can select multiple statuses) from the drop-down 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.

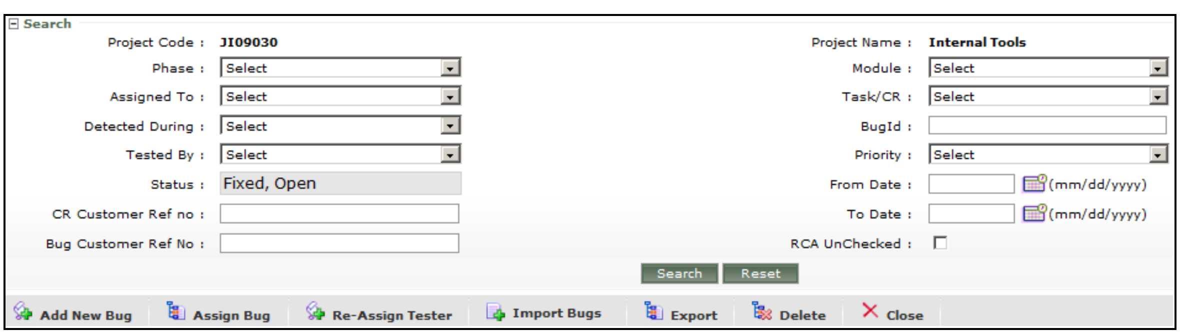
14.2. Add Bug

To add a new bug, follow these steps.

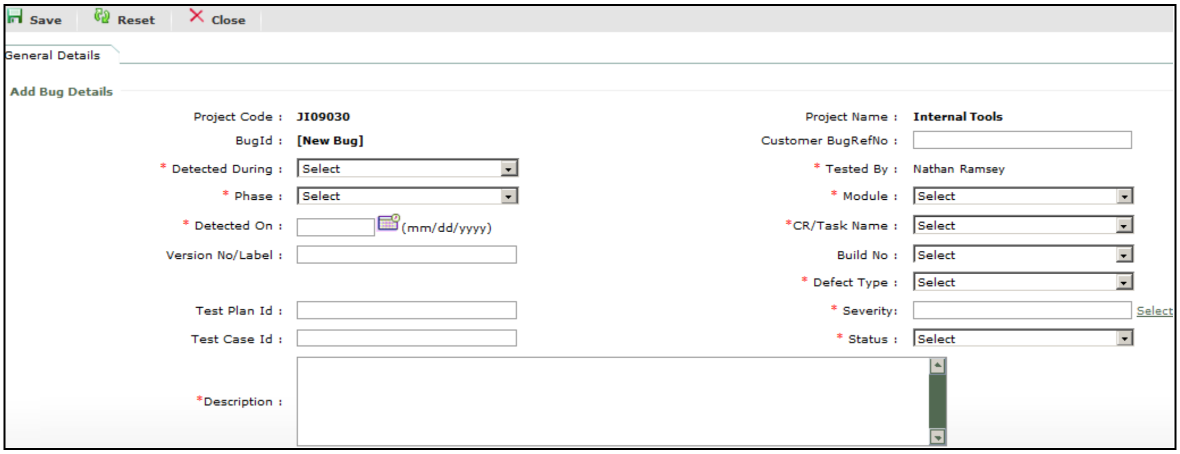
1. From the grid below the **Search** section, click the specific project code link in the **Project Code** column.



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



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



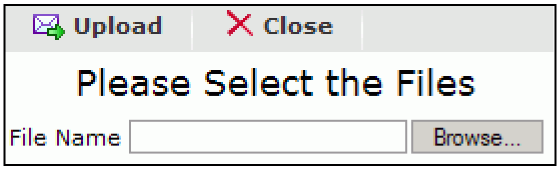
- **Project Code** – Shows the project code that you have selected in the previous screen.
- **Bug ID** – Unique number to identify the bug record.
- **Detected During** - Select the appropriate testing phase when you detected this bug.
- **Phase** - Select the project phase from the drop-down list.
- **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**.

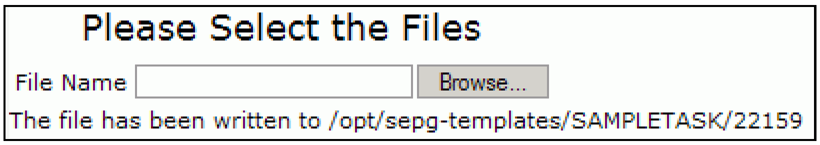
14.3. Upload Document

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.



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

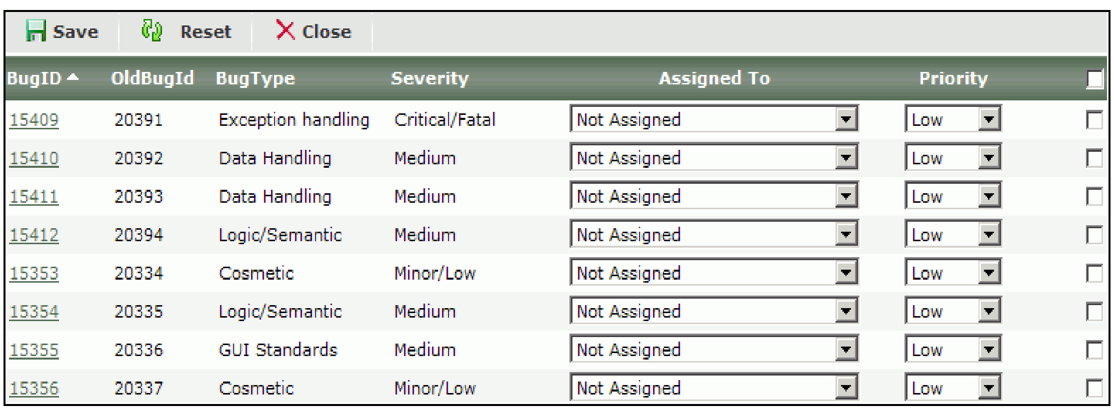


6. Click **Close**.

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.

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



BugID	OldBugId	BugType	Severity	Assigned To	Priority	
15409	20391	Exception handling	Critical/Fatal	Not Assigned	Low	
15410	20392	Data Handling	Medium	Not Assigned	Low	
15411	20393	Data Handling	Medium	Not Assigned	Low	
15412	20394	Logic/Semantic	Medium	Not Assigned	Low	
15353	20334	Cosmetic	Minor/Low	Not Assigned	Low	
15354	20335	Logic/Semantic	Medium	Not Assigned	Low	
15355	20336	GUI Standards	Medium	Not Assigned	Low	
15356	20337	Cosmetic	Minor/Low	Not Assigned	Low	

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

- **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
- **Prioroty** - 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

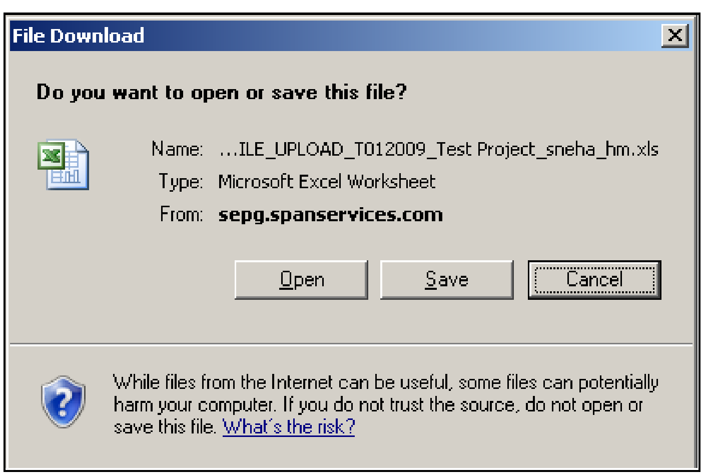
5. If the bug is assigned, select the radio button for the **Assigned** option; if the bug is not assigned, then select the radio button for the **Not Assigned** option.
6. Click **Search.**
7. The specific records are shown in the table below.
8. To view the details of the bug, click the **BugId** link 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.**

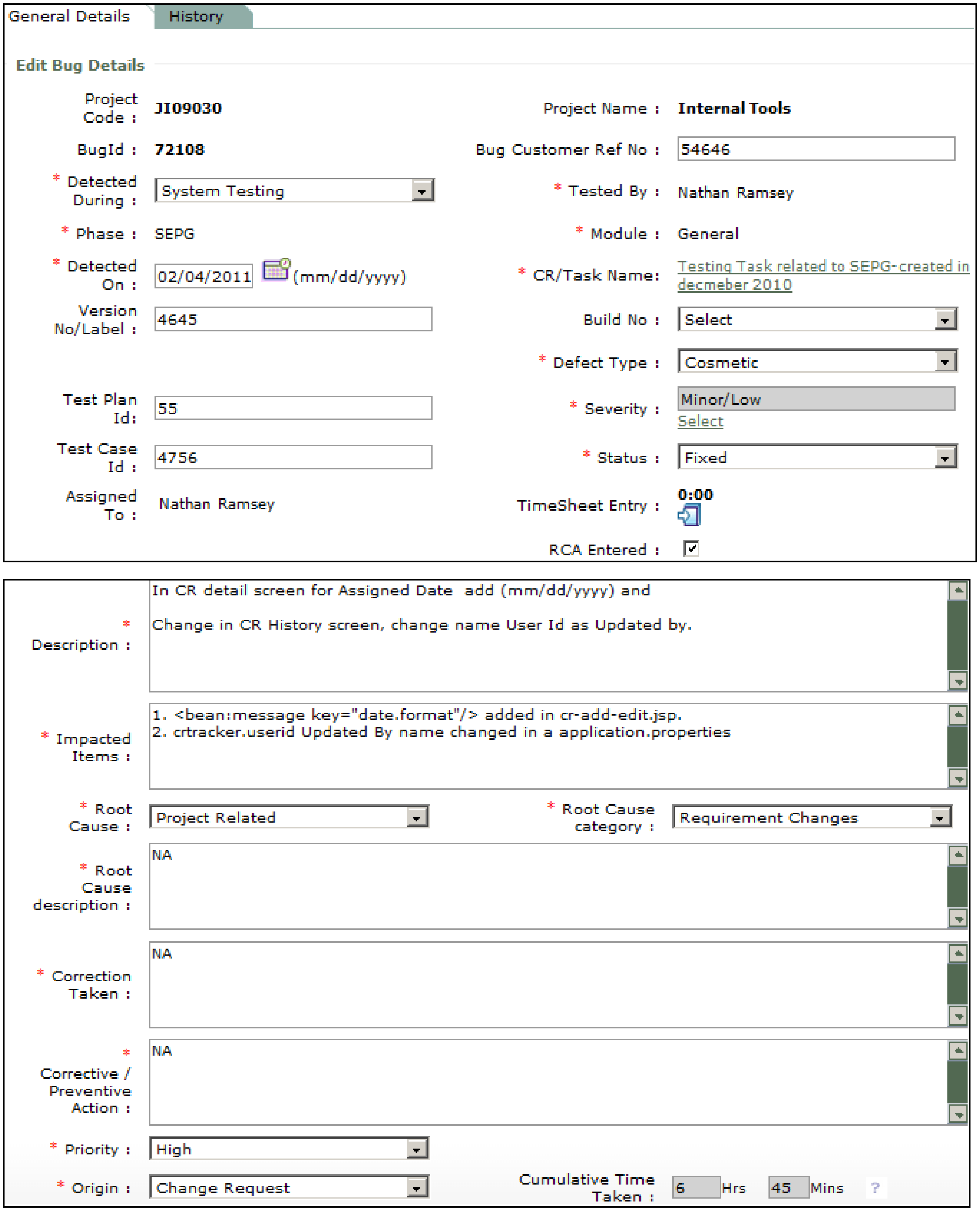


3. In the **Save As** pop-up, select a location and click **Save.**

14.6. Edit Bug Details

To edit bug details, follow the steps given below.

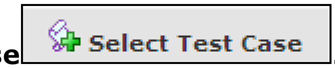
1. In the **Project Code** column, click the **Project Id**.
2. In the **Project Details** screen, click the specific **Bug Id**.
3. In the **Edit Bug Details** screen, edit the fields mentioned below.

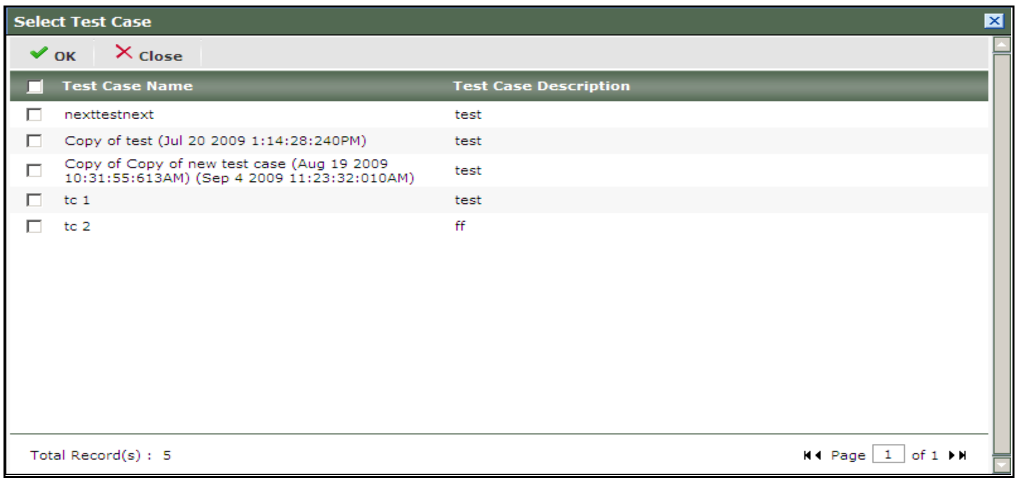


- **Project Code** – This field shows the project code in non-edit mode

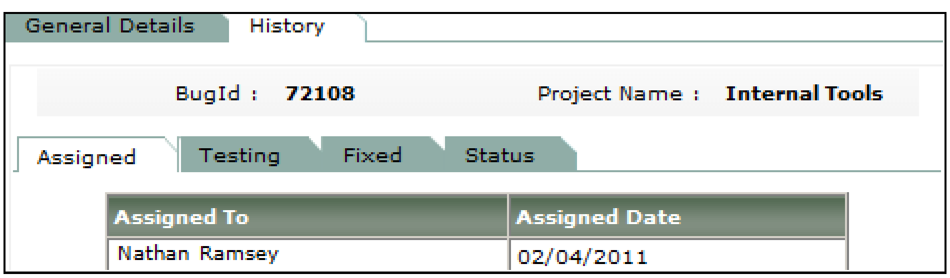
- **Project Name** – This field shows the project name in non-edit mode
- **Bug ID** – This field shows the unique number to identify the bug record in non-edit mode
- **Bug Customer Ref No** – Edit the bug customer reference number (this field becomes mandatory if you select the option **Acceptance 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

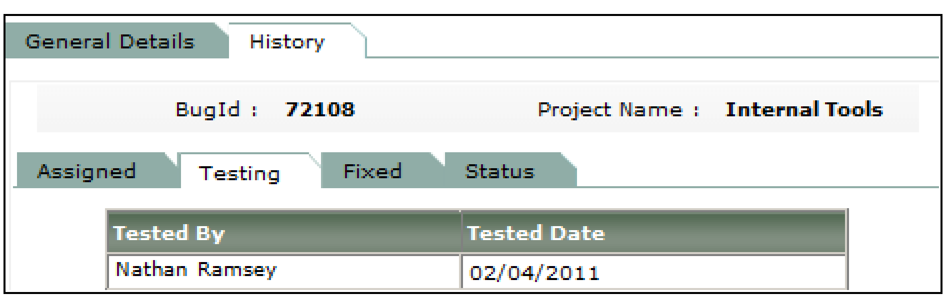
- **Origin** – Select the origin from the drop-down (for the **Status** field, if you select the option **Fixed**, **Re-Open** or **Verified**, this field becomes mandatory)
- **Cumulative Time Taken** – This field shows the cumulative time taken to handle the bug, in non-edit mode
- ? - When you click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

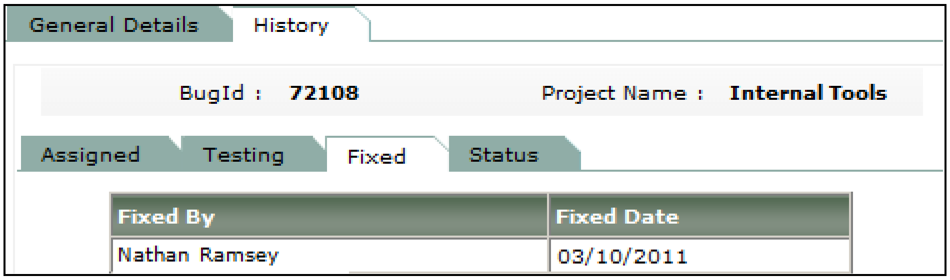
4. To select a test case, from the top of the **Edit Bug Details** screen, click **Select Test Case** .

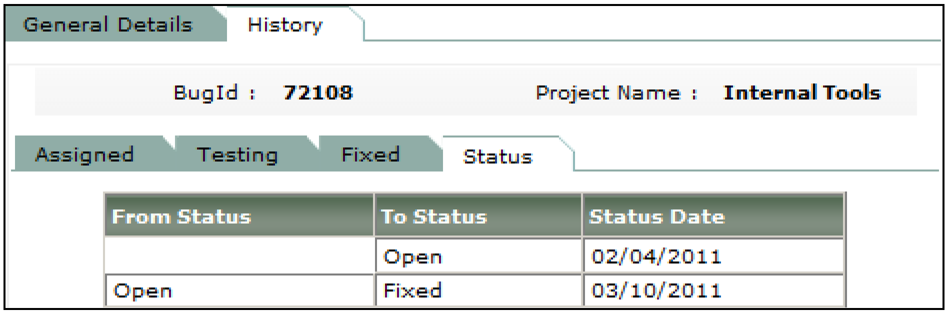


5. In the **Select Test Case** pop-up, select the corresponding checkbox for the test case you want to select.
6. Click **OK**.
7. To view the history of the changes in the bug, click the **History** tab.
8. The **History** tab, in turn, contains four sub-tabs – **Assigned**, **Testing**, **Fixed** and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









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.

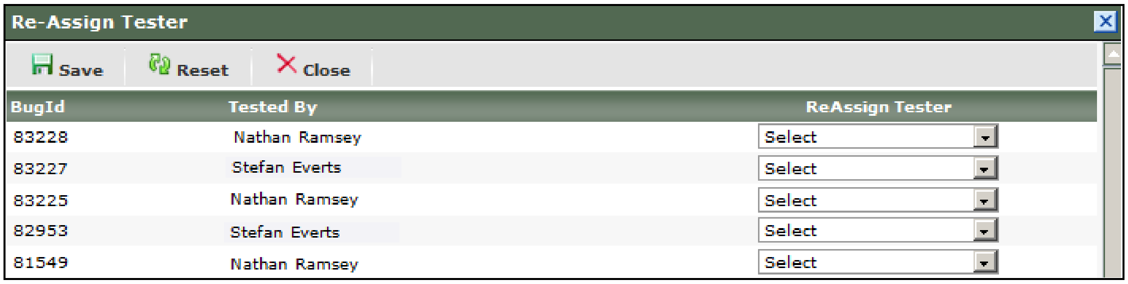
To close the bug record, follow these steps.

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

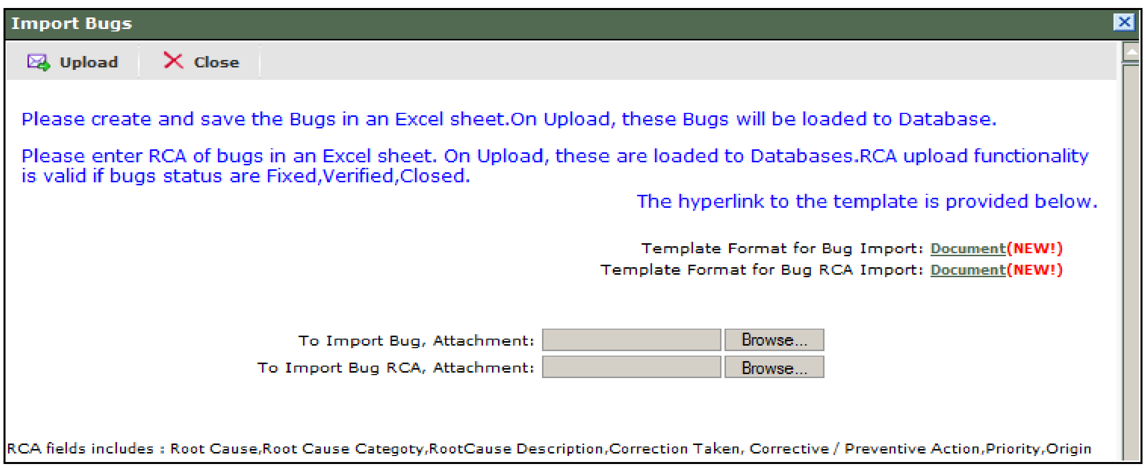
1. From below the **Search** section, clilck **Re-Assign Tester**.
2. In the **Re-Assign Tester** pop-up, under **Re-Assign Tester** column, select a tester from the drop-down.



3. To save the changes, click **Save**.
4. To reset values, click **Reset**.
5. To cloes 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).



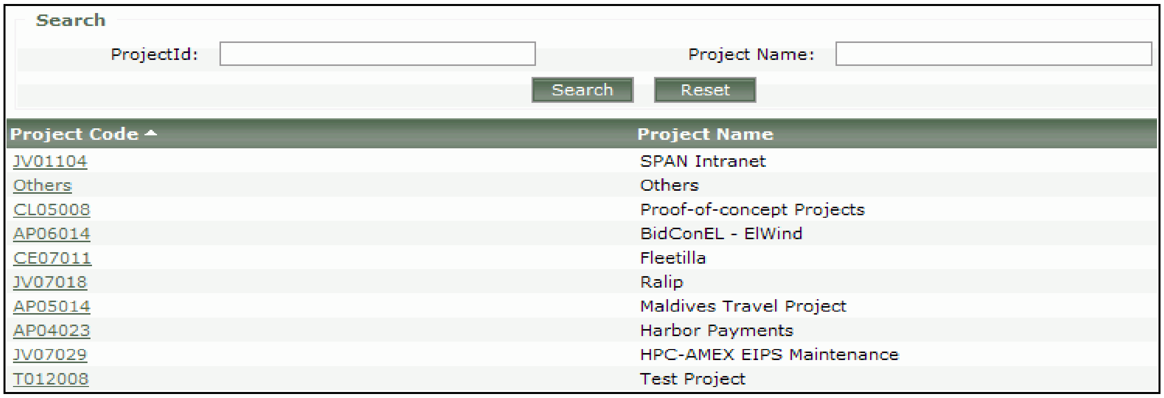
3. To attach the Excel template containing the task details, click **Browse**.
4. In the **Choose File to Upload** pop-up, select the file and click **Open**.
5. Click **Upload**.

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: Project Name:

Search Reset

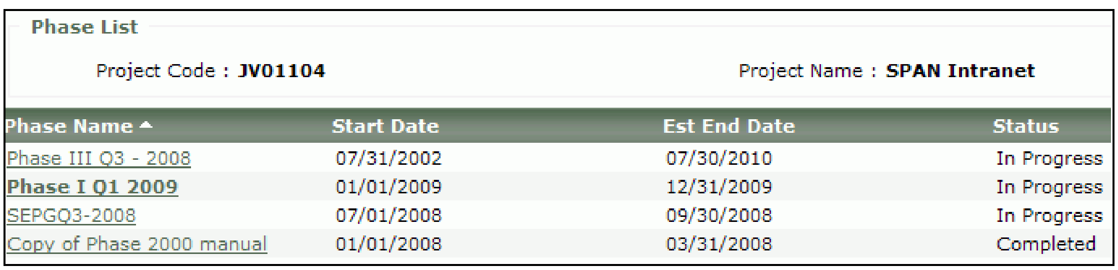
Project Code	Project Name
JV01104	SPAN Intranet
Others	Others
CL05008	Proof-of-concept Projects
AP06014	BidConEL - ElWind
CE07011	Fleetilla
JV07018	Ralip
AP05014	Maldives Travel Project
AP04023	Harbor Payments
JV07029	HPC-AMEX EIPS Maintenance
T012008	Test Project

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

OR

3. To search for a specific project ID, in the **Search** section, enter the **ProjectId** and the **Project Name**.
4. Click **Search**.
5. 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.

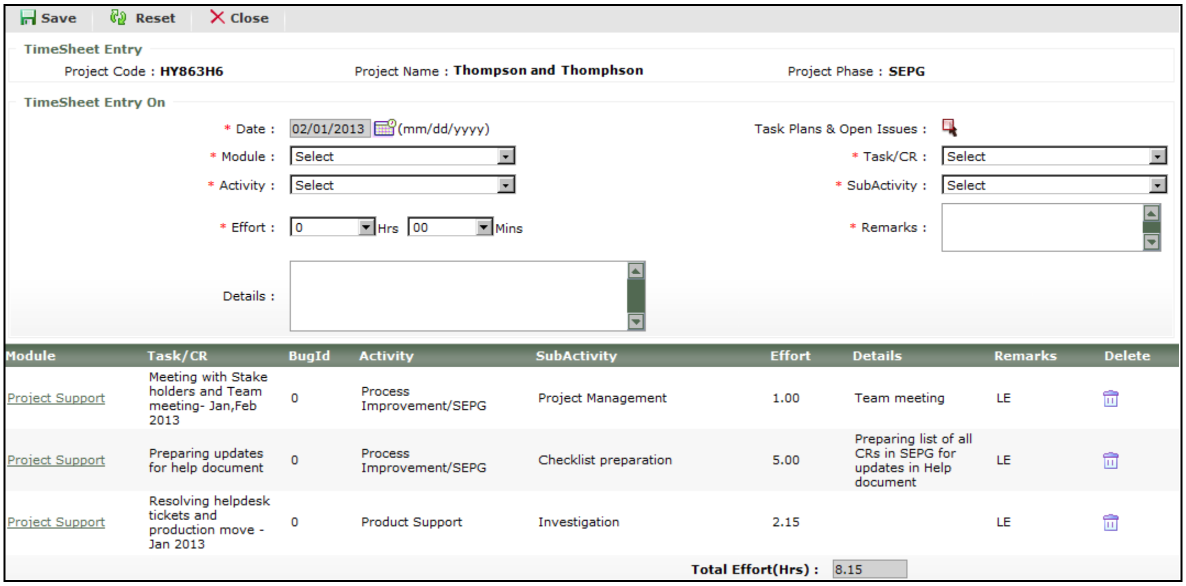


Phase List

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

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



- **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.

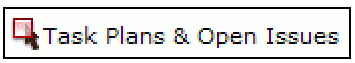
Note: Object/Task list contains Tasks, which are not in **Completed** status and **CR**s, which are not in **Open** or **Closed** status. **Bug Id** list contains Bugs, which are not in **Closed** status.

Note: * symbol indicates mandatory fields.

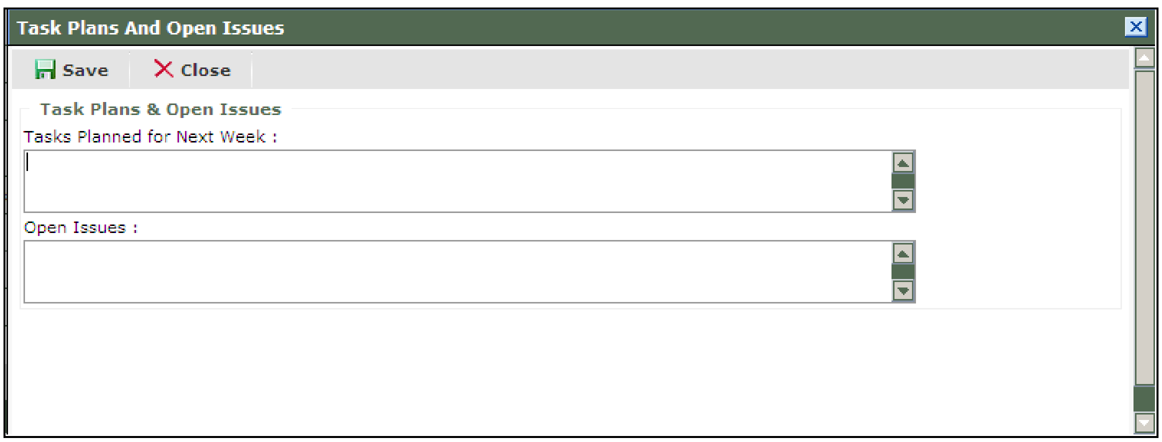
15.1.1. Enter Task Plans and Open Issues

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** 

link.
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

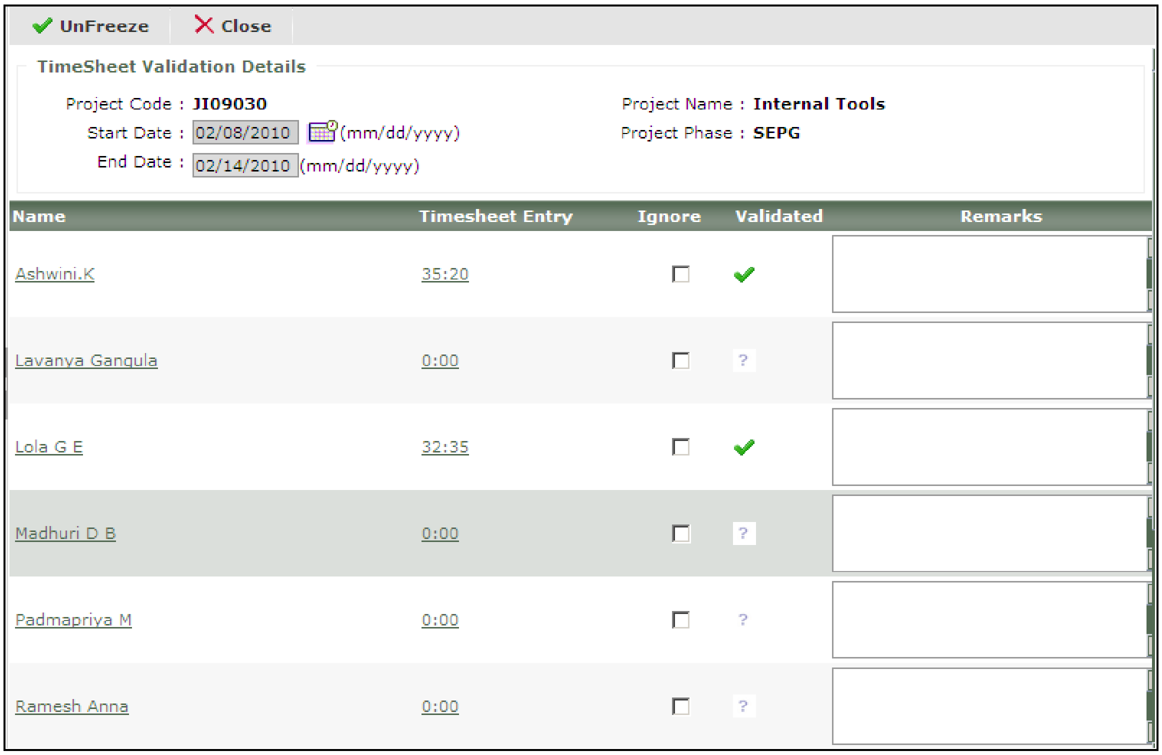
TLs and above can validate the employees' timesheet. They can view the timesheet details for the entire week. Also, PM and PLs can view the details.

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.

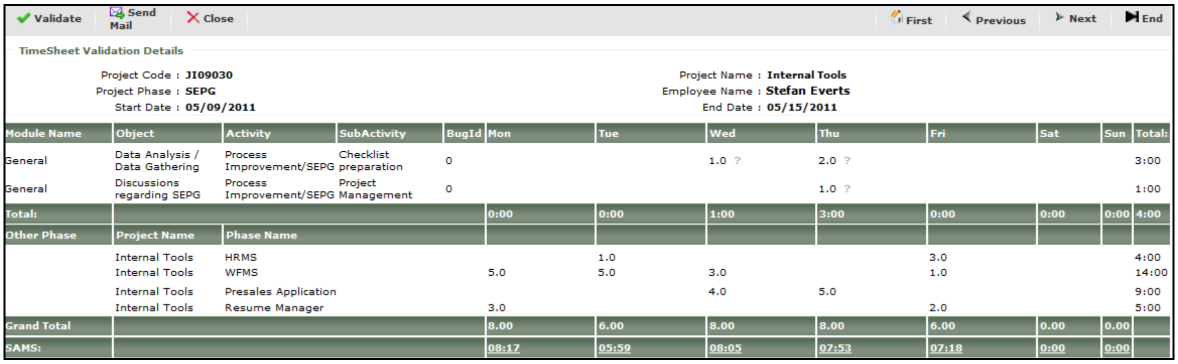
1. In the left menu, click **Validation**.

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.



- **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.



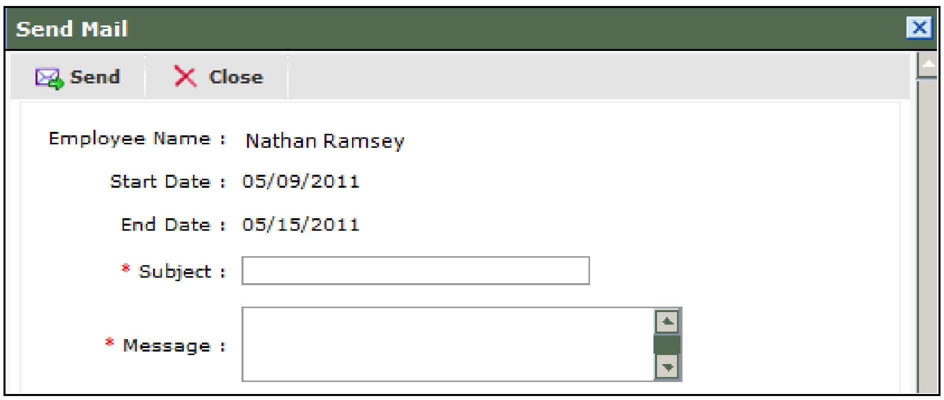
Validate | Send Mail | Close | First | Previous | Next | End

TimeSheet Validation Details

Project Code : JI09030 | Project Name : Internal Tools
Project Phase : SEPG | Employee Name : Stefan Everts
Start Date : 05/09/2011 | 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	

6. If the entries are valid, click the **Validate** Validate icon.
7. 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.
8. In the **Send Mail** pop-up window, enter the subject and the message.

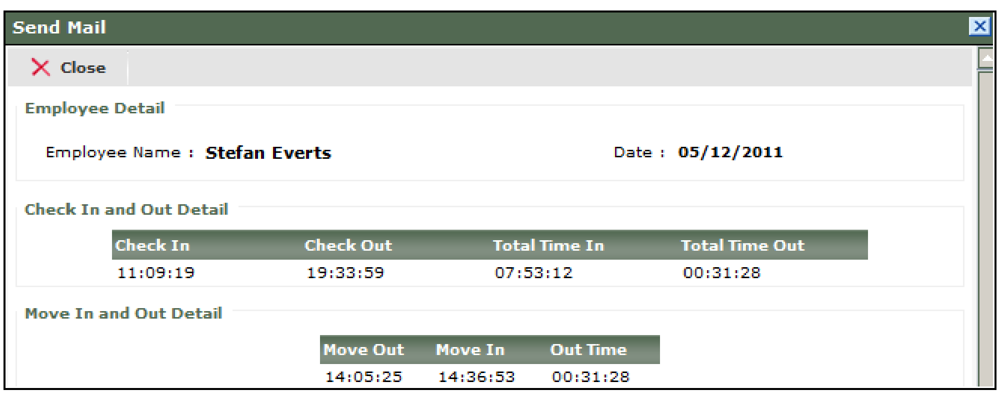


Send Mail

Send | Close

Employee Name : Nathan Ramsey
Start Date : 05/09/2011
End Date : 05/15/2011
* Subject :
* Message :

9. Click **Send**.
10. 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

Close

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

11. To close and return to the **Timesheet Validation Details** screen, click **Close**.
12. 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