

# WBMS

## USER MANUAL

REV 0.1

WHITE BIRRD INDIA PVT LTD.

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# WBMS User manual

## 1 INTRODUCTION TO BIRRD MANAGEMENT SYSTEM

BMS is ideally like any other management system which helps to manage end to end projects with a user-friendly user interface.

### The Modules available in First Phase

- Admin,
- MBO (**Man**age-**By**-**Ob**jective),
- Attendance.

Link to WBMS: <http://bms.whitebirrd.com/#/login-form>

### The Module available in Second Phase

- B3,
- Salary Calculation

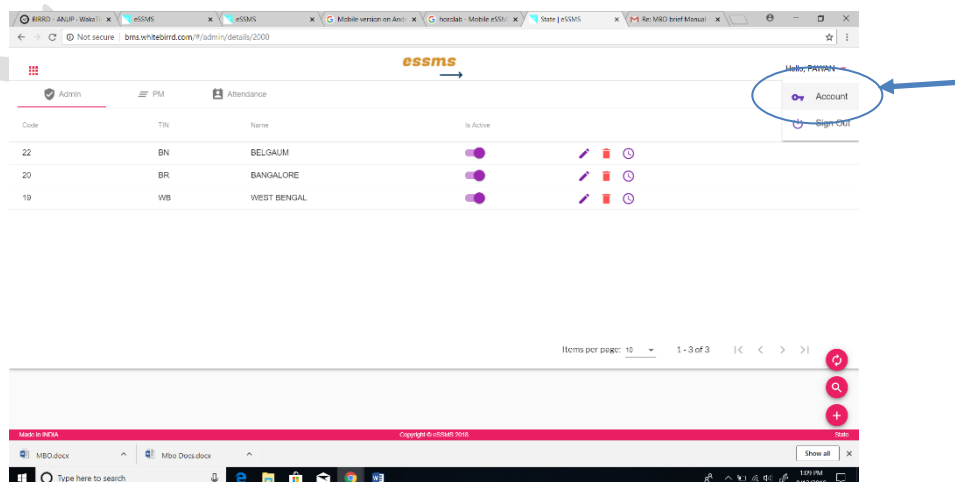
### Let's Start First Phase –

SSO – Single Sign-ON is a unique requirement made available in BIRRD Initiatives, which will allow a single sign on member to login to various client software with same User ID and Password (Upon certain permission)

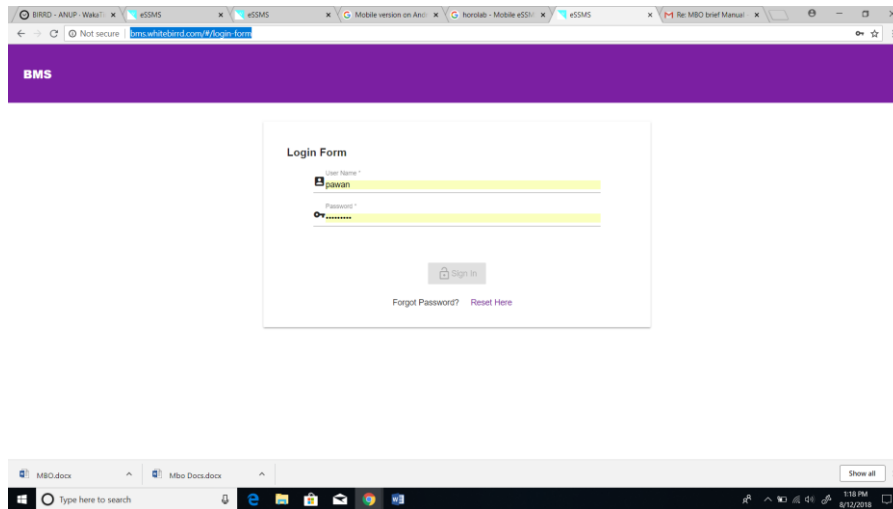
## 2 LOGIN:

Login module has 2 submodules

**Account** This shows the Profile details of the user. User can see all his permissions and roles in the profile and, he can set the privacy for his account.



**Sign in/Sign out** All the users must register to have a login account. It has other submodules like Register and forgot/reset password

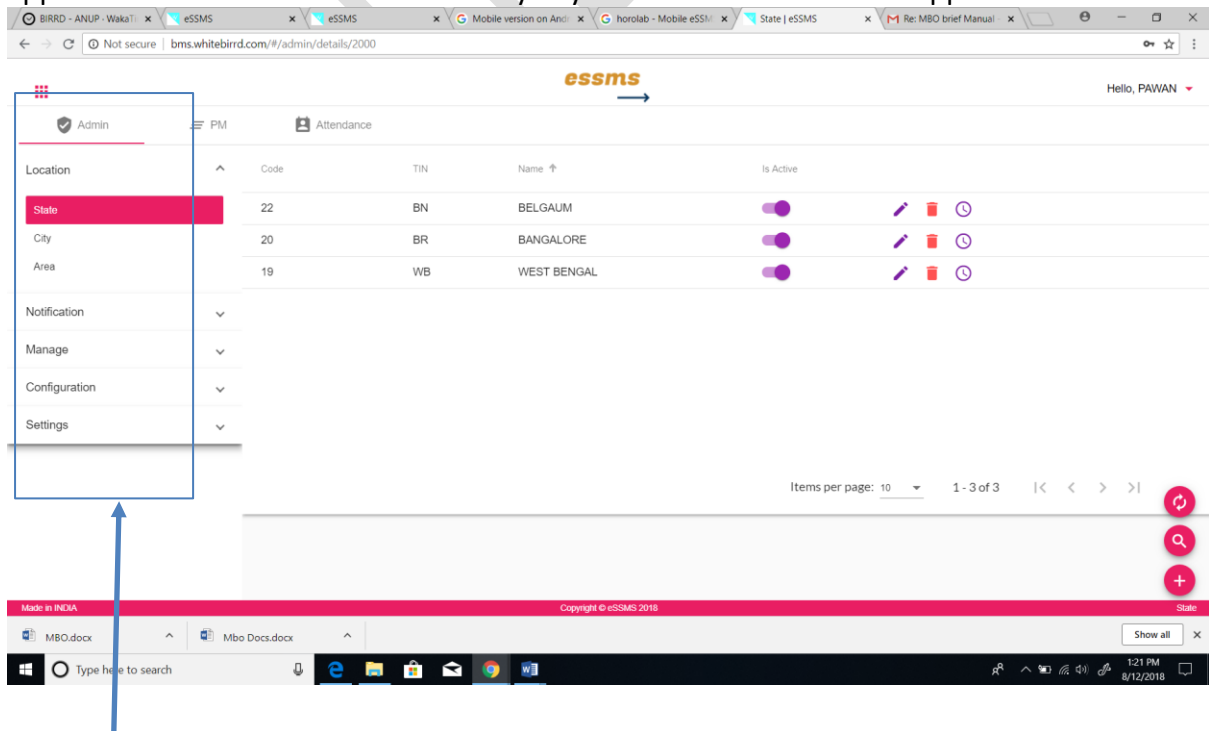


### 3 ADMIN

#### Requirements

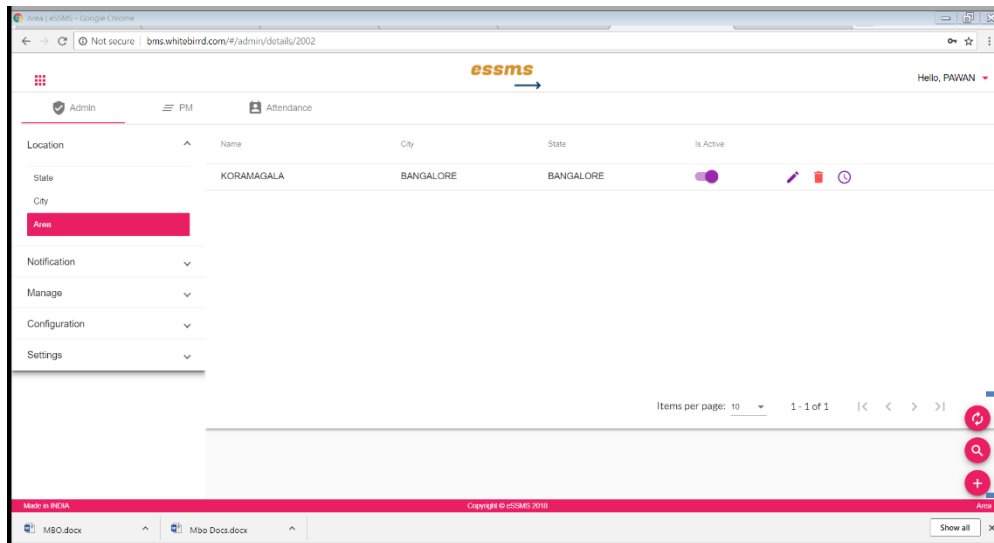
- ✓ The User must be registered in the BMS application.
- ✓ The User must have ADMIN role provided.

Admin module is to manage complete application. Admin user has all privileges of the applications. Admin can edit and modify any modules available in the application.



Admin has sub modules as shown in Figure

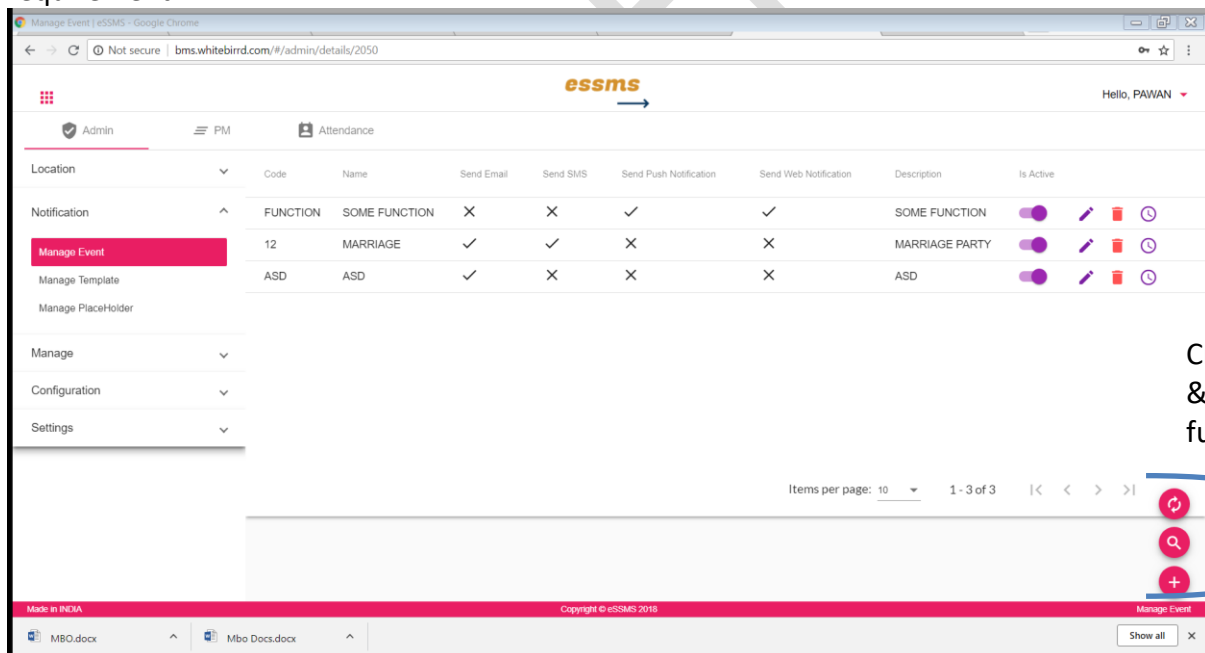
## Location



Create, search & Refresh functionality

Admin can create/edit/modify State, City, Areas and make it active/inactive according to the project requirement.

**Notification** is to manage events, templates & Placeholders for the applications as the requirement



Create, search & Refresh functionality

**Manage** is to manage all users associated permissions. There are 2 sub modules under Manage.

- Manage users** Users Contact details & permissions can be created/modify
- Manage roles** Roles can be created according to the project requirement

essms

Hello, PAWAN

Admin PM Attendance

Location	Name	Mobile No	Email	Username	Permission	Is Active
Notification	PAWAN	9090909091	PAWAN@WHITEBIRRD.COM	PAWAN	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
Manage	Kumar Gaurav	+919590011666	gaurav@whitebird.com	GAURAV	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
Manage Users	RAMESH	7760976466	RAMESHAM@BAJAJCAPITAL.COM	RAMESH	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
Manage Roles	ANUP SHARMA	9088883403	ONLYANUP@LIVE.IN	ANUP	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
Configuration	EKAMRA NAYAK	8093968680	EKAMRABIHARINAYAK2@GMAIL.COM	NAYAK	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
Settings	NAVYA	886905649361	NEUNAVS@GMAIL.COM	NAVYA	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
	RAGHAVENDRA BHAT	9986270636	RAGHU.BHATTA@GMAIL.COM	RAGHU	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
	SANGEETA	886966787434	SANGEETAKANADE111@GMAIL.COM	SANGEETA	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>

Items per page: 10 1 - 8 of 8

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Manage Users

Show all

Create,  
search  
& Refresh  
functionality

essms

Hello, PAWAN

Admin PM Attendance

Name	Permission	Is Active
DEVELOPER	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
SALES	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
TECHNICAL HEAD	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
BUSINESS ANALYST	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
ATTENDANCE	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
MBO	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>
ADMIN	<a href="#">Manage Permission</a>	<input checked="" type="checkbox"/>

Items per page: 10 1 - 7 of 7

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Manage Roles

Show all

Create, search  
& Refresh  
functionality

## Configurations

NA

## Settings

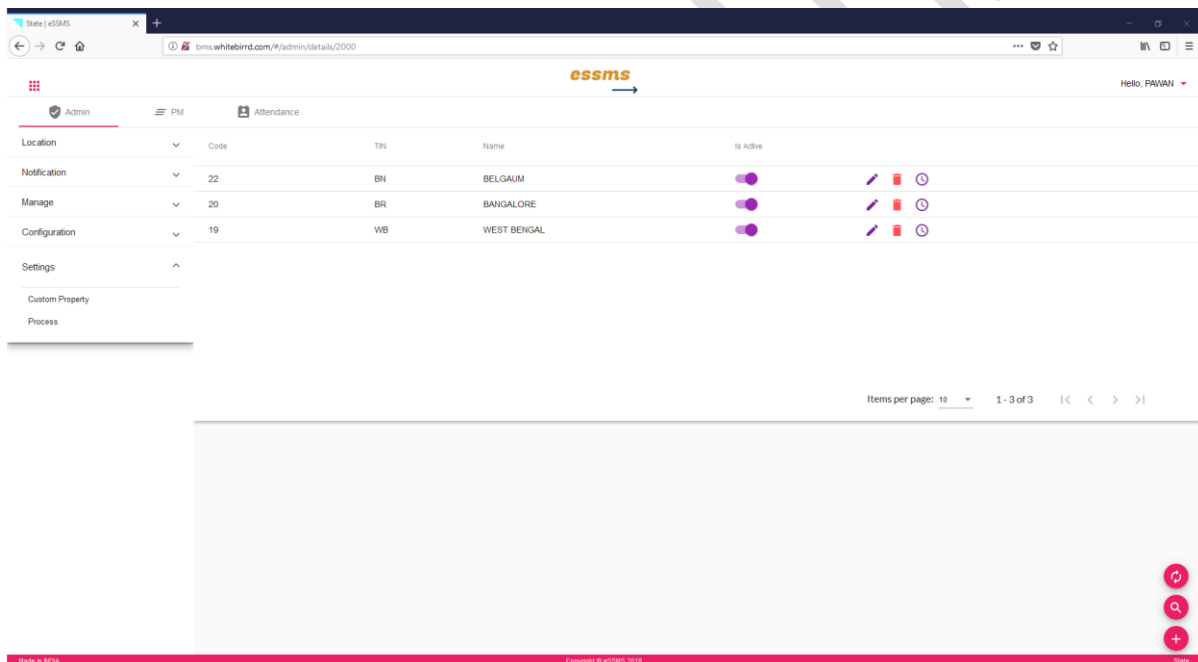
Admin can set additional features for the applications using custom property and process. Custom property is to create new fields for Projects, Modules, sub modules, milestones and objectives as per the project requirement

## Custom Property

This is to add new properties to the project. All the four level of project structure can have dynamic properties. Custom property is the area where one can create these dynamic properties and attach to any level. There are 4 types of property supported.

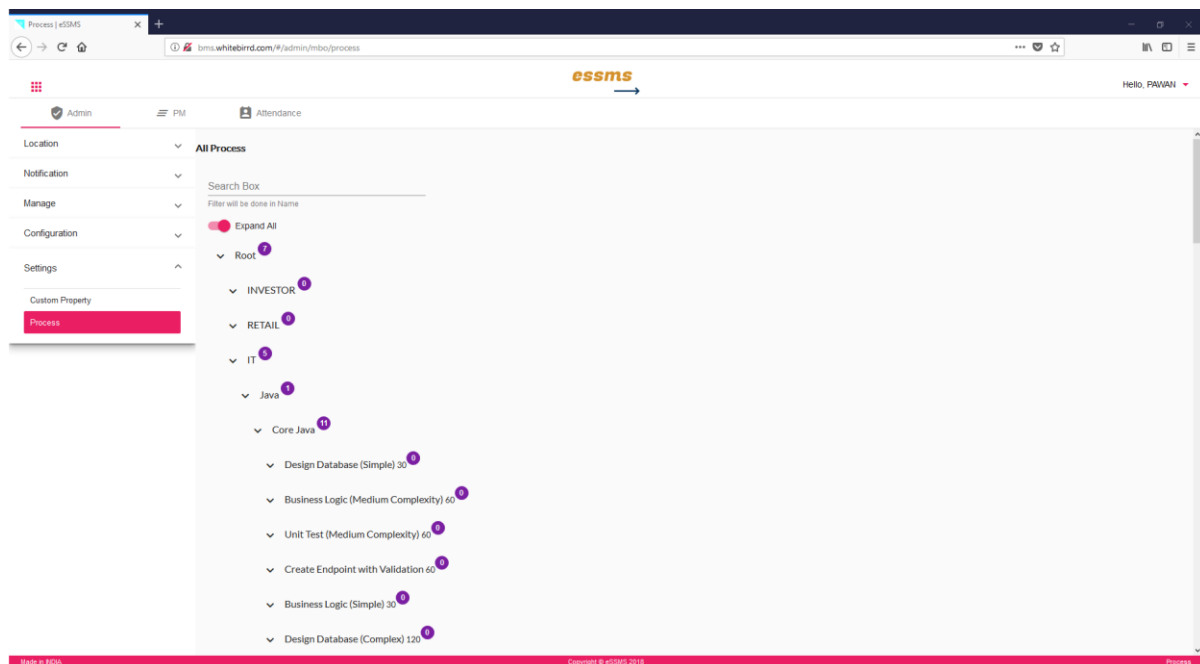
- 1) Text Property
- 2) Numeric Property
- 3) Date Property
- 4) Boolean Property

Text Property can be either Static or Dynamic. For static text value, the type of property must be set as Select list and its options have to be entered in option field. For Dynamic text value, the type of property must be a textbox. For numeric a numeric field is displayed as numeric editor and a Boolean property is displayed as checkbox.



## Process

The process is the standard procedure to complete a task. It is also a hierarchically placed different procedures and must be created before creating Objectives. The structure of process comes as a tree. A process consists of Title, Description, Minutes to complete and Documents. Make sure the leaf process has Minutes otherwise its branch will not be available to select as base process in objective creation form.

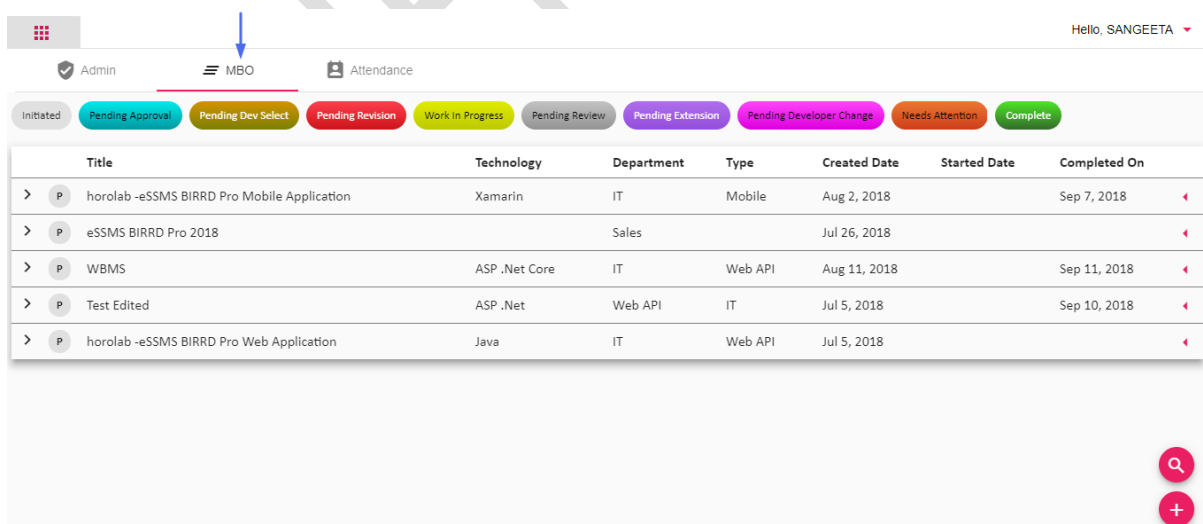


## 4 MBO (MANAGE BY OBJECTIVE)

### Requirements

- ✓ The User must be registered in the BMS application.
- ✓ The User must have MBO role provided.

MBO (Manage by objective), Managing new requirements and managing the Issues.



MBO is a module where all the projects and activities are managed.  
MBO has following Hierarchical levels:





Here any of the level can be categorized in any of the following levels for example, A sub-module can be created directly under Project and Module alike. Similarly, Milestone can be created directly under Project or Module or sub-module alike. Once the work distribution is done, then Objectives can be created at any level and tracked accordingly.

### Objective Status Legends

Initiated

Pending Approval

Pending Dev Select

Pending Revision

Work In Progress

Pending Review

Pending Extension

Pending Developer Change

Needs Attention

Complete

Title	Technology	Department	Type	Created Date	Started Date	Completed On
> P horolab eSSMS BIRRD Pro Mobile Application	Xamarin	IT	Mobile	Aug 2, 2018		Sep 7, 2018
> P eSSMS BIRRD Pro 2018		Sales		Jul 26, 2018		

Table Header (sorts the table values on click for project level)

Status Meter: Shows overview of all the objectives.

Expander: Expands and collapses the level to show and hide its direct descendants.

Level Legend: P (Project), M (Module), SM (Sub Module), MS (Milestone), O (Objective) and Analysis part

Title: The title of the level. Its tooltip shows the description.

Custom Properties: These are the custom properties add for each level.

Options: Shows all the available options for the level on mouse hover or touch

Initiated								Pending Approval	Pending Dev Select	Pending Revision	Work In Progress	Pending Review	Pending Extension	Pending Developer Change	Needs Attention	Complete
Title		Technology		Department	Type	Created Date	Started Date	Completed On								
>	P	horolab -eSSMS BIRRD Pro Mobile Application		Xamarin	IT	Mobile	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>									

Edit

Delete

Create Module

Create Sub Module \_\_\_\_\_  
 Create Milestone \_\_\_\_\_  
 Create Objective \_\_\_\_\_  
 Requirement (Goes to requirement Page) \_\_\_\_\_  
 Issue (Goes to Issues page) \_\_\_\_\_  
 Manage Access (Opens Access window) \_\_\_\_\_  
 Refresh \_\_\_\_\_  
 Timelines (Shows changes over time) \_\_\_\_\_

Search



New Project



In MBO, user can manage Projects under him. He can create objectives for himself or other project members. He can search for anything in the page related to any hierarchy levels or objectives belonging to any user and status.

Here is the User Story for creating objective under any hierarchical level:

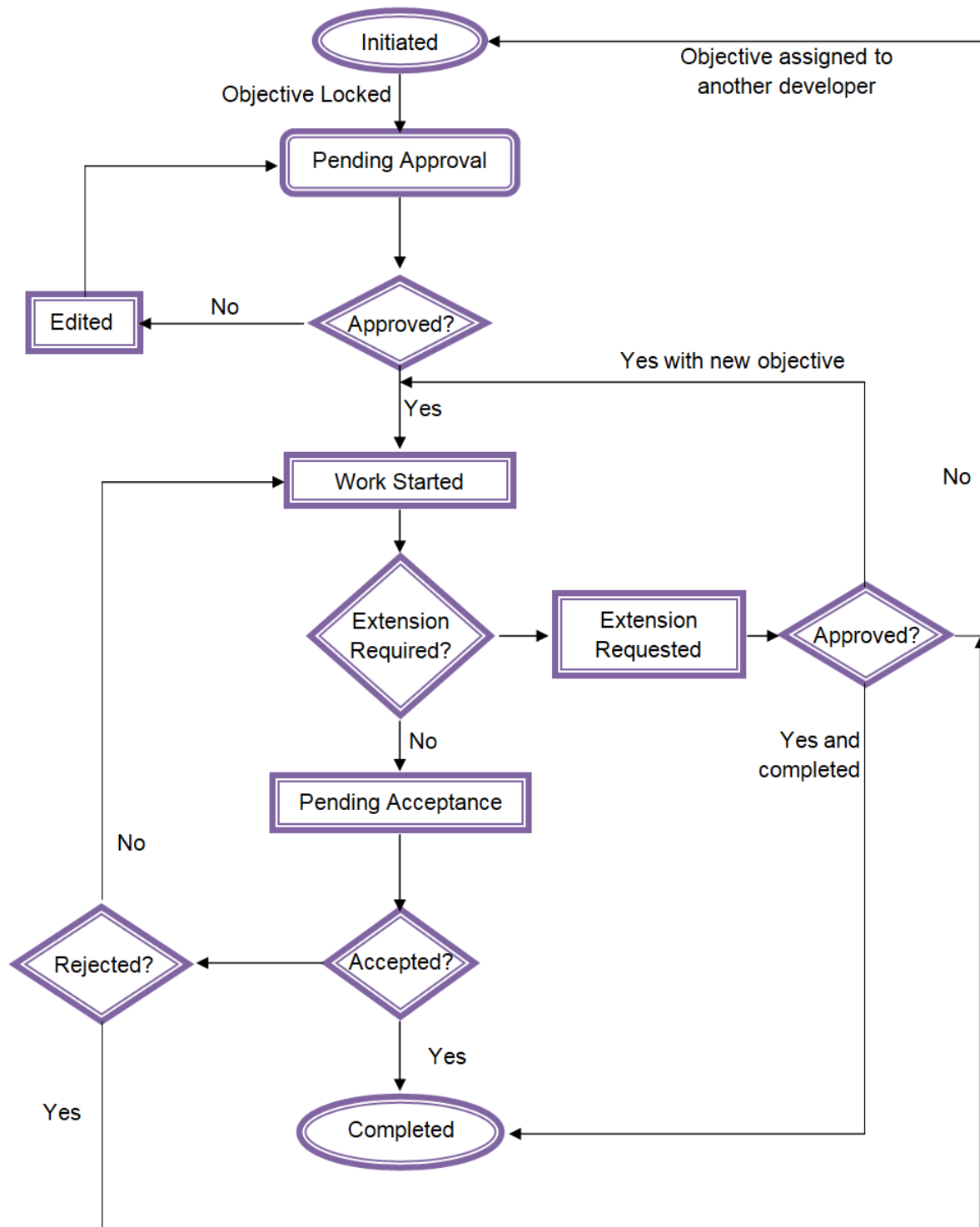
- 1) Go to the hierarchical level and click on create objective.
- 2) Select the process based on which objective needs to be created on.
- 3) Select the user to whom this objective needs to be assigned to.
- 4) Enter Objective title, description and priority.
- 5) Select any dependency objective (optional).
- 6) Click save to create the objective.

Once the objective is created the developer will get the email notification.  
 Following are the stages of objective life cycle.

- 1) Once the objective is created, Developer needs to review and lock it. Approver will receive a notification for this.
- 2) Approver can either Approve the objective or Deny it. Developer will receive notification in both cases. If approved, the objective will get its due date.
- 3) If denied, developer can edit objective and lock it again. If approved, the developer can start working.
- 4) Once Work is complete, developer can submit it for review. Approver gets a notification.
- 5) If the developer cannot complete the work within the prescribed time limit, he can request for an extension based on a process. Approver gets a notification.
- 6) If Extension is requested, the approver can either approve it or deny it.

- 7) If the extension is approved, then this objective gets completed and a new objective with same name is created again with status as approved
- 8) If extension is denied then approver can edit the objective to reassign it to some other developer and status turns to initiated.
- 9) If the objective is submitted to review, the approver can Mark it as completed or Needs attention.
- 10) In case of Needs attention, the developer can ask for extension.
- 11) In case of unacceptable, approver can edit and change the developer to start over again.

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## Create Project interface:

Admin MBO Attendance Hello, SANGEETA

### Create Project

Title \* Description \* Technology

Title is Required Description is Required

Department Type

Single Selection

Save Project Cancel

Initiated Pending Approval Pending Dev Select Pending Revision Work In Progress Pending Review Pending Extension Pending Developer Change Needs Attention Complete

Title	Technology	Department	Type	Created Date	Started Date	Completed On
> P horolab -eSSMS BIRRD Pro Mobile Application	Xamarin	IT	Mobile	Aug 2, 2018		Sep 7, 2018
> P eSSMS BIRRD Pro 2018		Sales		Jul 26, 2018		

## Create Module interface:

Admin MBO Attendance Hello, SANGEETA

Initiated Pending Approval Pending Dev Select Pending Revision Work In Progress Pending Review Pending Extension Pending Developer Change Needs Attention Complete

> P horolab -eSSMS BIRRD Pro Mobile Application

> P eSSMS BIRRD Pro 2018

Sales Jul 26, 2018

### Create Module

Description \*

Description of the project and it's working


Title \*

Title is Required Description is Required

Save Cancel

> P WBMS	ASP .Net Core	IT	Web API	Aug 11, 2018	Sep 11, 2018
> P Test Edited	ASP .Net	Web API	IT	Jul 5, 2018	Sep 10, 2018
> P horolab -eSSMS BIRRD Pro Web Application	Java	IT	Web API	Jul 5, 2018	

Create submodule interface:


Hello, SANGEETA ▾

Admin
MBO
Attendance

Initiated
Pending Approval
Pending Dev Select
Pending Revision
Work In Progress
Pending Review
Pending Extension
Pending Developer Change
Needs Attention
Complete

Title	Technology	Department	Type	Created Date	Started Date	Completed On
> <span>P</span> horolab -eSSMS BIRRD Pro Mobile Application	Xamarin	IT	Mobile	Aug 2, 2018		Sep 7, 2018

Create Sub Module

Description \*

Description of the project and it's working


Title \*

Title is Required

Save Cancel

> <span>P</span> eSSMS BIRRD Pro 2018		Sales		Jul 26, 2018		
> <span>P</span> WBMS	ASP .Net Core	IT	Web API	Aug 11, 2018		Sep 11, 2018

Create Milestone interface


Hello, SANGEETA ▾

Admin
MBO
Attendance

Initiated
Pending Approval
Pending Dev Select
Pending Revision
Work In Progress
Pending Review
Pending Extension
Pending Developer Change
Needs Attention
Complete

Title	Technology	Department	Type	Created Date	Started Date	Completed On
> <span>P</span> horolab -eSSMS BIRRD Pro Mobile Application	Xamarin	IT	Mobile	Aug 2, 2018		Sep 7, 2018

Create Milestone

Description \*

Description of the project and it's working

Title \*

Title is Required

Save Cancel

☐ Module

> <span>P</span> eSSMS BIRRD Pro 2018		Sales		Jul 26, 2018		
> <span>P</span> WBMS	ASP .Net Core	IT	Web API	Aug 11, 2018		Sep 11, 2018
> <span>P</span> Test Edited	ASP .Net	Web API	IT	Jul 5, 2018		Sep 10, 2018

Create Objective interface:

○	New Dependency test	Kumar Gaurav	High	180 Minutes	Jul 31, 2018	Aug 1, 2018	
○	Create a table	ANUP SHARMA	High	160 Minutes	Jul 13, 2018		
○	review test	SANGEETA	Low	180 Minutes	Jul 11, 2018	Jul 11, 2018	Jul 11, 2018

Objective title  
Assigned to  
Priority  
Time required  
Created date  
Started date  
Completed date  
Due date  
Options

## Requirements & Issues

Issues and requirements are very similar in looks. Both follow the same procedure. Anyone can raise an issue or Requirement. Once an issue/requirement is raised, the business analyst checks it and either forwards it to technical team or closes it with a message. If it is forwarded to technical team then the technical head reviews it and can accept it or rejects it with a message.

If Technical team accepts it, it becomes a milestone in the selected area. If it was rejected, then Business analyst can close it or again forwards it to technical team by making appropriate changes.

*\*Note: Business Analyst and technical Head both are a role and can be assigned to any user.*

## Requirement:

Admin MBO Attendance Hello, SANGEETA

Initiated Pending Approval Pending Dev Select Pending Revision Work In Progress Pending Review Pending Extension Pending Developer Change Needs Attention Complete

Title	Technology	Department	Type	Created Date	Started Date	Completed On
> P horolab -eSSMS BIRRD Pro Mobile Application	Xamarin	IT	Mobile	Aug 2, 2018		Sep 7, 2018
> P eSSMS BIRRD Pro 2018		Sales		Jul 26, 2018		
▼ P testing project				Oct 26, 2018		

Create New Requirement

Description \*

Title \*

Title is Required

Attachments

Multiple .pdf, .jpg, .pptx, .docx, .xlsx, .xls, .ppt, .doc, .png files allowed

Raise Requirement Cancel

> M testing module

Oct 26, 2018

## Issues:

Admin MBO Attendance Hello, SANGEETA

Initiated Pending Approval Pending Dev Select Pending Revision Work In Progress Pending Review Pending Extension Pending Developer Change Needs Attention Complete

Title	Technology	Department	Type	Created Date	Started Date	Completed On
> P horolab -eSSMS BIRRD Pro Mobile Application	Xamarin	IT	Mobile	Aug 2, 2018		Sep 7, 2018
> P eSSMS BIRRD Pro 2018		Sales		Jul 26, 2018		
> P testing project				Oct 26, 2018		

Create New Issue

Description \*

Title \*

Title is Required

Description is Required

Attachments

Multiple .pdf, .jpg, .pptx, .docx, .xlsx, .xls, .ppt, .doc, .png files allowed

Raise Issue Cancel

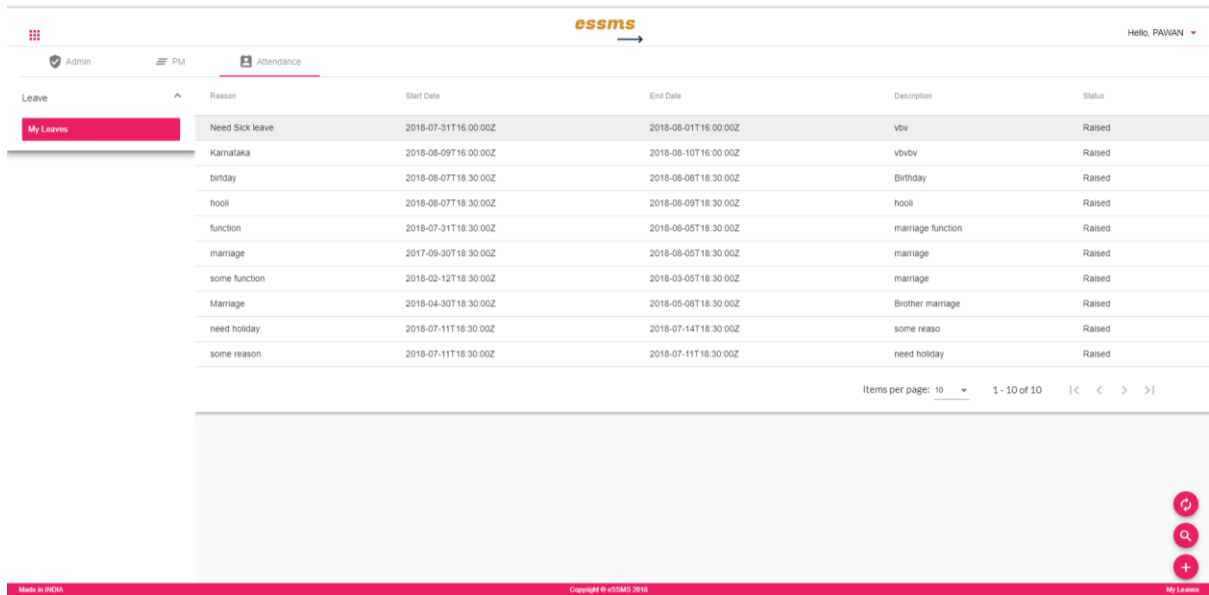
> P WBMS

ASP .Net Core IT Web API Aug 11, 2018 Sep 11, 2018



## 5 ATTENDANCE

User can manage his leaves in in this module.



The screenshot shows the ESSMS Attendance module interface. At the top, there's a navigation bar with 'Admin', 'PM', and 'Attendance' tabs. The 'Attendance' tab is active. Below the navigation bar, there's a table titled 'Leave' with columns: Reason, Start Date, End Date, Description, and Status. The table lists various leave types such as 'Need Sick leave', 'Karnataka', 'birthday', 'hooli', 'function', 'marriage', 'some function', 'Marriage', 'need holiday', and 'some reason'. Each row shows the corresponding start and end dates, descriptions, and status (all are 'Raised'). At the bottom right of the table, there's a pagination control showing 'Items per page: 10' and '1 - 10 of 10'. On the far right, there are three circular icons: a refresh icon, a search icon, and a plus icon. The footer of the page includes 'Made in INDIA', 'Copyright © eSSMS 2018', and 'My Leaves'.

Reason	Start Date	End Date	Description	Status
Need Sick leave	2018-07-31T16:00:00Z	2018-08-01T16:00:00Z	vov	Raised
Karnataka	2018-08-09T16:00:00Z	2018-08-10T16:00:00Z	vovvov	Raised
birthday	2018-08-07T18:30:00Z	2018-08-08T18:30:00Z	Birthday	Raised
hooli	2018-08-07T18:30:00Z	2018-08-09T18:30:00Z	hooli	Raised
function	2018-07-31T18:30:00Z	2018-08-05T18:30:00Z	marriage function	Raised
marriage	2017-09-30T18:30:00Z	2018-08-05T18:30:00Z	marriage	Raised
some function	2018-02-12T18:30:00Z	2018-03-05T18:30:00Z	marriage	Raised
Marriage	2018-04-30T18:30:00Z	2018-05-08T18:30:00Z	Brother marriage	Raised
need holiday	2018-07-11T18:30:00Z	2018-07-14T18:30:00Z	some reason	Raised
some reason	2018-07-11T18:30:00Z	2018-07-11T18:30:00Z	need holiday	Raised

### Contact details

Phone Number: +919986382371,+919535474009

Email id : [service@whitebirrd.com](mailto:service@whitebirrd.com)

Website Link : [www.whitebirrd.com](http://www.whitebirrd.com)