**Decision168 Operating Procedure**

1. ***Sign-Up***
   1. Click on the website ofhttp://azohaa.com/client/decision168/login.login.
   2. Click on the sign up button. Here you have to fill first name, last name, email address, passwords and retype password .After filling all the required fields click on the register button, after clicking on that button you will see the notification message verification link has been sent on your registered email address.
   3. Open your registered email id and you can see the account verification mail in your mailbox. Open it and click on verify your account button it will redirect you to the login page.

***2) Log-In***

2.1) Fill in the registered email ID and password.

2.2) Tick on I’m not a robot (recaptcha) and click on log in.

2.3) The Dashboard of Decision168 will be logged in successfully.

***3) Forgot Password***

* 1. Click on the forgot password.
  2. Notification appears Enter your email and instructions will be sent to you.
  3. Fill in the email id and click reset.
  4. Reset link will be sent to registered email id.
  5. Open registered email id and click on reset password which is received on the mailbox.
  6. It will redirect on the Decision 168 page.
  7. Fill in the new password and confirm the password.
  8. Notification appears Password changed successfully.
  9. Re-login with a new password and follow steps mentioned on **(2)**.

***4) Dashboard***

4.1) On the dashboard you can see the navigation bar. On navigation can see dashboard, Portfolio, Projects, task, Contacts, Trash

4.2) Header contains Profile bell icon. If you click the profile can update the profile.

4.3) Bell icon indicated the notifications of project

4.4) Total no of projects

5.5) Total no of task

5.6) My Day

5.7) My Next 168

5.8) my alerts

***5)Dashboard Navigation Bar***

**5.1) Portfolio-**

1) Click on the portfolio from the dashboard page. Where you can see multiple option like all, individual, not assigned portfolio

2) Click on create new after that select portfolio type individual or company

3)Select individual fill in the required field after saving this can see the created portfolio under individual on dashboard.

4)Select company fill in the required field after saving this can see the created portfolio under the company on the dashboard.

5) Click on the portfolio to see all individual or company based portfolios. Also, the other project owner's created portfolio can be seen in which you are as a team member. Also you can see the portfolio in which you are not a project member but you can see the portfolio because you are the project member of other project under same portfolio

6)Click on the portfolio and you can see three dropdown options: my portfolio, company, and individual.

7) Click on my portfolio to see both types of portfolio: individual based portfolio or company based portfolio which is created by the owner. Can also see the portfolio which you add from project create option here you can edit, delete, view the portfolio

8) Click on company and you can see the company based portfolio which is created by the owner or other project owner created portfolio in which you are as a team member.

9) Click on company and you can see the dropdown of my company in the navigation bar. If we click on it, my company can see the company based portfolio which is created by the owner.

10) Click on individual and you can see individual based portfolio which is created by the owner or other project owner created portfolio in which you as a team member.

11) Click on individual can see the dropdown of my individual in navigation bar. If we click on my individual can see the individual based portfolio which is created by only you as an owner.

**5.2) Project-**

1) Click on project you can see the multiple option create new, created projects, accepted projects, pending projects, more project requests. Also in the dropdown of projects can see the option of my created projects, my accepted projects, pending projects request and more project requests.

2) Click on create new project page will open, here you can create the new project. Fill the required field project name, description, portfolio, team members, and attached files after filling all these information click on create project button project will be created.

3) While assigning a portfolio you can select from drop down. Here you can see the portfolio which the user has created and also the portfolio where the project owner has assigned the portfolio to the user. If you want to add some other portfolio click on add portfolio then type the preferred portfolio name in the modal popup which has been opened. Click on add.

4)While assigning team members, users should click on team members to see the drop down list. You can select team members from here. Members who are registered can be seen in the drop down list. If you want to add some other member can click on the invite more member button here enter their email id. After entering all the team member id those whom the user wanted as a project team member can click on create project button. Project requests will be sent to those email id which are entered by the user while creating the project.

5) After clicking on the project create button,that project is grown under the created project list.

6)The member to whom the user has added accepts the request; it will redirect the added member on the login page. After that follow the steps 1.2, 1.3, 2.2, 2.3

7**) Click on my project** and see all the projects that you created. To open any project the user can click on the name of the project where the user can see the overview of the project. In overview can see project name, portfolio name can see the created by created date edit project, add task, view history, can see the team member option here you can suggest team member .Attached file option

8) On the project overview page you can see the list of accepted by members and also the request sent to members. In the invited members list you can see the members who have not accepted the request yet.in the suggested member list you can see the members who have been suggested by the member who has already been registered. In the suggested invited member list you can see the email id of the person who is completely new to the project. If you send a mail to a suggested invited member it will come under invited members.

9) As a project owner a user has a right to remove or invite team members, accepted team members, suggested members, suggested invited members.

10) Click on add task and can assign the task to a project member who has accepted the project.

11) On the project overview page you can see the all assigned to project members.

12) Click on view all task .Here can see the whole detail of particular project like task code, task name assignee, priority, status, due date or review as a project owner user can see the task status or edit or view any task

13) As a project owner the user can deny or accept the task which has been completed by the project member to whom the task was assigned. If the owner approves the task the task status is shown as done and if the owner denies the task is shown as in progress.

14) On the overview page of all tasks you can see task code, name, assignee, priority, status, and review or due date. All these options are with filters. If you want to see any particular task you can apply a filter. Can see the back button on this page if you click on that you can go on the same particular project.

15**) Click on my accepted project**. Can see all the accepted project.To open any project the user can click on the name of the project where the user can see the overview of the project. In overview can see project name, portfolio name can see the created by created date edit project, add task, can see the team member option here you can suggest team member or Attached file option

16)On the project overview page you can see the list of accepted by members and also the request sent to members. In the invited members list you can see the members who have not accepted the request yet.in the suggested member list you can see the members who have been suggested by the project member who has already been registered. In the suggested invited member list you can see the email id of the person who is completely new to the project.

17) If the project owner adds the suggested member or the suggested invited member id then it will go undergo a request sent to or invited members list.

18) User as a project member can assigned the task Click on add task fill the required field or assign to the any project member .The member who has accepted the project

19) Click on view and see all tasks which are assigned by the project owner or project members. Here users can see the status of all tasks. Users can edit the task only which was created by itself or the task which has been assigned by the project owner.

20) If the user wants to change the status of the task into done Click on edit task user can see the whole task here can see the option of status click on that in dropdown user can see the done or in progress option select done. The user can see the status done but in review can see the status sent. It means the request sent to the project owner to review the task project member user can see the notification message task sent to the project owner for review. If the project owner approves the task the task status is done. If the owner denies the task that task will show the status in progress and in review you can see it as denied.

21**) Click on Pending projects request.** Users can see all the pending projects which are not accepted by the user. If the user wants to open it, clicking on the link of the project name overview page is open here and can see the accept request or project more request button. If a user wants to accept this project, click on the accept button it will undergo an accepted project list. If the user wants more information about the project click on more project requests it will submit more projects request lists.

22) **Click on more project requests.** Users can see all the projects where the user needs more information about the projects.If user wants to open it click on the link of the project name overview page is open here can see the accept request or project more request button. If a user wants to accept this project, click on the accept button it will undergo an accepted project list. If the user doesn’t want to accept the project click on back the project still there only .In future if the user wants to accept can accept the project.

**5.3) Tasks**

**1**)Click on tasks can see the total number of tasks in the navigation bar or in the dropdown can see the today, tomorrow, this week, overdue task or task list. On interface can see create new button if the user wants to create the task can create from here also it will go under to do.

2) Users can see all the tasks which are assigned by the project owner or project member. Users can see the status of all tasks. If owner or any project member assign the task it will be seen under to do status if the user worked on that it will undergo in progress if project member user done the task it will go under done list but if project owner deny the request again that task undergo in to do list.

3) User can open the task, click on the name of the task, can see edit, delete, or add a task button or the user can change the status.

4) If the user wants to change the assignee of the task click on the edit button fill the required field or change the assignee click on edit button the task assignee has changed.

3**) Click on today –** Here the user can see all tasks assigned by the user as a project owner or project member. Also can see all tasks that have a current due date. To edit tasks, add tasks, delete tasks and to change the status of the task the user needs to open the task by clicking on the name of the task. Users as a project member can change the task status into done but if the project owner denies the task request then the status of the task changes again as“to do ''. If the user as a project owner approves the task request the status of the task is changes as “done”

4) **Click on tomorrow- –** Here the user can see all tasks assigned by the user as a project owner or project members.Tasks that are having tomorrow’s due date. To edit tasks, add tasks, delete tasks and to change the status of the task the user needs to open the task by clicking on the name of the task. Users as a project member can change the task status into done but if the project owner denies the task request then the status of the task changes again as “to do”. If the user as a project owner approves the task request the status of the task is changes as “done”

5) **Click on this week- –** Here you can see all the task assign by the user as a project owner or project members.Whole current week’s task is seen.To edit task, add task, delete task and to change the status of the task the user needs to open the task by clicking on the name of task. Users as a project member can change the task status into done but if the project owner denies the task request then the status of the task changes again as “to do”. If the user as a project owner approves the task request the status of the task is changes as “done”

6**) Click on Overdue task-**Here user can see the tasks assigned by the user as a project owner or project member. Can see those tasks whose due dates have already been passed. These tasks are assigned by the user as a project owner or project team members. To edit tasks, add tasks, delete tasks and to change the status of the task the user needs to open the task by clicking on the name of the task. Users as a project member can change the task status into done but if the project owner denies the task request then the status of the task changes again as “to do ''. If the user as a project owner approves the task request the status of the task is changes as “done”

7**) Click on Tasks list-** Here the user can see all tasks assigned by the user as a project owner or project members. Here the user can also see the task name, task code, assignee, priority, and status or due date with the filter. If a user wants to search a particular task can apply filters with the help of the task code and task name, and can apply filters on the assignee name as well. User can edit delete or view the task also change the status.User as a project member can change the task status into done but if project

Owner denies the task request then the status of the task changes again as “to do”. If the user as a project owner approves the task request the status of the task is changes as “done”

**5.4) Contacts-** Here users can see all portfolio names. Email id, portfolio name and the number of projects under company or individual.

**5.5) Trash-** Every deleted projects, tasks and portfolio can be seen under trash. Deleted projects, tasks and portfolios can also be restored.