

Charge Code Management

User Guide

MAR 2018
Version 1.0

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1. Overview

About this guide

CCM(Charge Code Management) is an application through which we can create Project codes which will flow into the system once approved by the management.

Conventions used in this guide

This guide uses the following conventions:

- Bold & underlined indicates menu/links/Noticeable items and other items that you select on the screen.
- Step-by-step directions with screen shots are provided to guide users in easy way.

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Acknowledgments

Thanks to **Kumar Gaurav**, author of this user guide & FAQs which can be used as a reference to easily deal with Charge Code Management application.

Modifications and updates

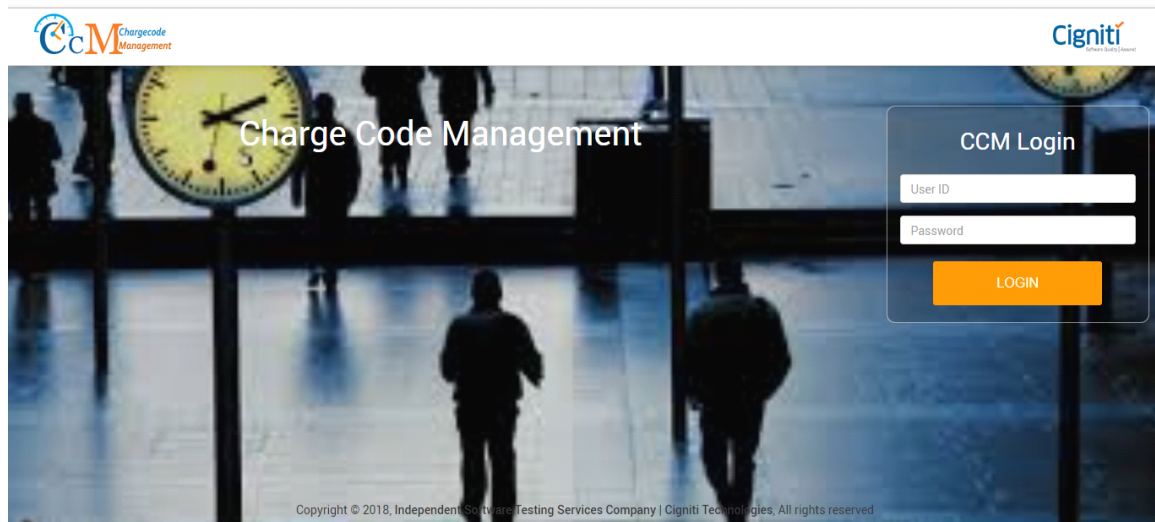
Version	Date	Description of Change
1.0	18/03/2018(dd/mm/yyyy)	Initial version issued as User Guide

2. Login Process

We have role based login for CCM application. A ChargeCodeAdmin will be able to create a Charge Code, Charge Code is nothing but Project code.

2.1 Login by ChargeCodeAdmin

When the CCM app is successfully deployed in system and prerequisite data setup is completed, then after requesting to given URL, we will receive the below screen for Logging into application.



2.2 Charge Code Details

Once we place the correct username and password then through LDAP Authentication user verification will be completed then authenticated user will be able to Login. After Login, an employee or Charge Code Admin can see the below screen in which **Charge Code Details & Sponsor List** menu will be available by default.

Charge Code Management

Kasi Viswanath Kurva
(ChargeCodeAdmin)
Last Login date: 3/20/2018, 2:01 PM

Charge Code Details Sponsor List

Show 5 entries Search: Refresh + New

Charge Code	Charge Code Description	Owner	Sponsor	Validity Period	Status	Action
ATS18A1000001	testsss	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 31 Mar 2018	Active	
CPS18A1000001	sdfsd	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 15 Mar 2018	Active	
ESG18A1000001	ESG18A1000001	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	
ESG18A1000002	ESG18A1000002	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	
HRD18G1000001	HRD18G1000001	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	

Showing 1 to 5 of 13 entries Previous 1 2 3 Next

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2.2.1 Charge Code Details Search

A Charge Code admin can use Search feature to search for a specific Charge Code by name or by it's description, by owner, by sponsor e.t.c. We have pagination option in the details list.

Charge Code Management

Kasi Viswanath Kurva
(ChargeCodeAdmin)
Last Login date: 3/20/2018, 2:17 PM

Charge Code Details Sponsor List

Show 5 entries Search: LND18G1000001 Refresh + New

Charge Code	Charge Code Description	Owner	Sponsor	Validity Period	Status	Action
LND18G1000001	LND18G1000001	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	

Showing 1 to 1 of 1 entries (filtered from 13 total entries) Previous 1 Next

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result.csv Show all

2.2.2 Charge Code Creation

A Charge Code Admin can create a Charge Code by clicking on New button. Once he will click on New button then he will receive below screen.

Create Charge Code

Region: * -- Select Region -- Division: * -- Select division --

Function Group: * -- Select Function Group -- Sub Function: * -- Select Sub Function --

Parent Charge Code: -- Select Charge Code Type -- Parent Charge Code Description: -- Select Charge Code Ty --

Charge Code Type: -- Select Charge Code Type -- Year: * 2018

Charge Code Description: * Charge Code Owner: -- Select Owner -- Valid From and To Date: * Daterangepicker

Chargeable Hours: (Optional)

Status: * ☒ Active ☐ In Active

* mandatory

Generate

Cancel Save

After filling all the required/mandatory filled, we need to click on Generate button to populate Charge Code defined by system, then once user will click on save button then Charge code will get created.

Create Charge Code

Region: * North America Division: * NA West

Function Group: * Delivery Sub Function: * Practices

Parent Charge Code: Operations Parent Charge Code Description: Internal

Charge Code Type: Service Delivery Year: * 2018

Charge Code Description: * PRAService Delivery Sponsor: * E003623 - Gaurav Kumar

Charge Code Owner: Rajesh Sarangapani Valid From and To Date: * 4/1/2018 - 4/15/2018

Chargeable Hours: 240 Charge Code: * PRA18E1000001

Status: * ☒ Active ☐ In Active

* mandatory

Generate Generated

Cancel Save

2.3 Sponsor List

Charge Code Admin will also be able to see Sponsor list. A sponsor is one who funds for

the Charge Code. By default only five sponsor will be shown in the list.

The screenshot displays the 'Charge Code Management' application. At the top, the user is logged in as 'Kasi Viswanath Kurva (ChargeCodeAdmin)' with a last login date of '3/20/2018, 2:01 PM'. The main interface has two tabs: 'Charge Code Details' and 'Sponsor List', with the latter being active. Below the tabs, there is a 'Show' dropdown set to '5' and a 'Search' input field. To the right are 'Refresh' and 'Add Sponsor' buttons. A table lists the sponsor information with columns: Employee Id, Employee Name, Designation, Region, Division Name, Function Group, Sub Function, and Action. One entry is visible: Employee Id 'E003623', Employee Name 'Gaurav Kumar', Designation 'Lead, Development', Region 'North America', Division Name 'NA West', Function Group 'Delivery', and Sub Function 'ESG'. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom right of the table are 'Previous', '1', and 'Next' navigation links. The footer contains the copyright notice 'Copyright © 2018, Independent Software Testing Services Company | Cigniti Technologies, All rights reserved' and the 'Cigniti' logo.

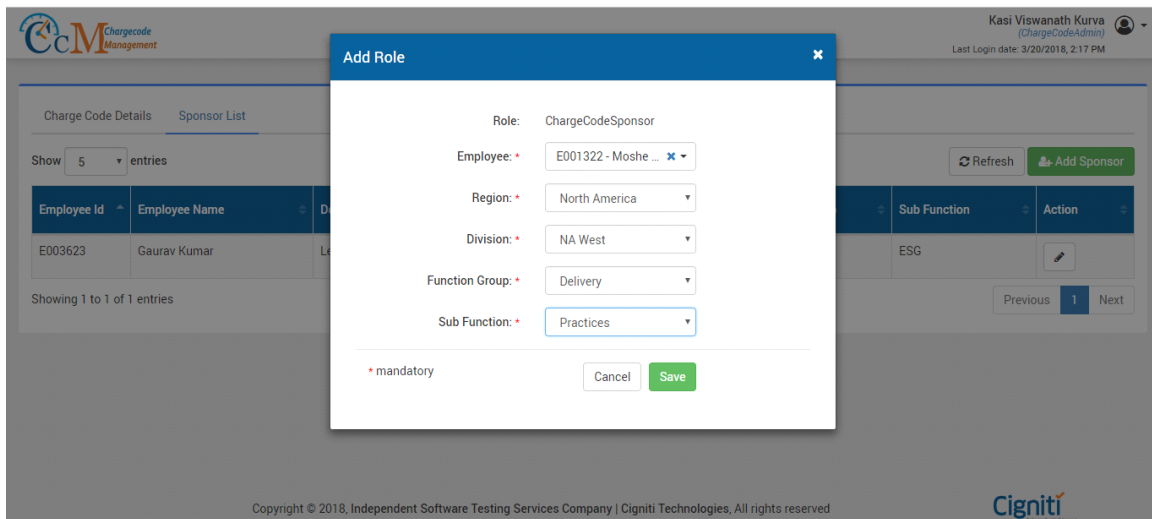
Employee Id	Employee Name	Designation	Region	Division Name	Function Group	Sub Function	Action
E003623	Gaurav Kumar	Lead, Development	North America	NA West	Delivery	ESG	

2.4 Add Sponsor

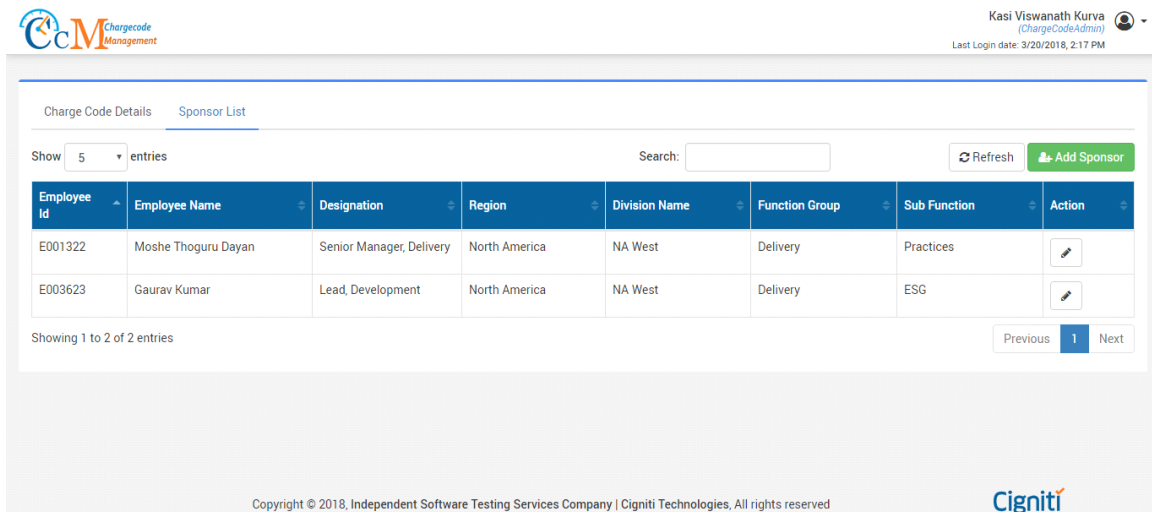
A Charge Code Admin will get option to Add Sponsor. Once he will click on the Add Sponsor button then he will receive below screen to create Charge Code Sponsor.

The screenshot shows the 'Add Role' dialog box overlaid on the 'Sponsor List' page. The dialog has a title bar 'Add Role' with a close button. Inside, the 'Role' is set to 'ChargeCodeSponsor'. There are five mandatory fields, each marked with a red asterisk: 'Employee' (dropdown with '-- Select --'), 'Region' (dropdown with '-- Select Region --'), 'Division' (dropdown with '-- Select division --'), 'Function Group' (dropdown with '-- Select Function Gr'), and 'Sub Function' (dropdown with '-- Select Sub Functio'). At the bottom left of the dialog is a legend '* mandatory'. At the bottom right are 'Cancel' and 'Save' buttons. The background shows the same 'Sponsor List' page as the previous screenshot, but it is dimmed.

For adding charge code sponsor, he needs to fill Region, Division, Function Group, Sub Function.




After adding Charge Code Sponsor, the Sponsor list screen will get refreshed and will be shown like below.



2.5 Sponsor Search

A Charge Code admin can use Search feature to search for a specific Charge Code Sponsor by name, by Employee Id or by any field like Designation, Region




Kasi Viswanath Kurva
(ChargeCodeAdmin)
Last Login date: 3/20/2018, 2:17 PM

Charge Code Details
Sponsor List

Show 5 entries
Search: Lead
Refresh Add Sponsor

Employee Id	Employee Name	Designation	Region	Division Name	Function Group	Sub Function	Action
E003623	Gaurav Kumar	Lead, Development	North America	NA West	Delivery	ESG	


Showing 1 to 1 of 1 entries (filtered from 2 total entries)
Previous 1 Next

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3. Login as Charge Code Sponsor

3.1 Charge Code Details for Sponsor

Once an employee whose role is placed as Charge Code Sponsor is logged into the system then we will be able to see the below screen with menus like **Charge Code Details, Task List**.




Gaurav Kumar
(ChargeCodeSponsor)
Last Login date: 3/20/2018, 3:28 PM

Charge Code Details
Task List
Charge Code Tree

Show 5 entries
Search:
Refresh

Charge Code	Charge Code Description	Owner	Sponsor	Validity Period	Status	Action
ATS18A1000002	ATSRoot	Venkata Manoj Kumar Annam More	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	
ESG18A1000001	ESG18A1000001	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	
ESG18A1000002	ESG18A1000002	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	
HRD18G1000001	HRD18G1000001	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	
HRD18H1000001	HRD18H1000001	Gaurav Kumar	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	

Showing 1 to 5 of 14 entries
Previous 1 2 3 Next

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3.2 Task List

A Charge Code Sponsor is able to see the created Charge Code list and he can use Assign option to assign Charge Code to corresponding users.

The screenshot shows the 'Task List' tab in the Charge Code Management application. The page header includes the CCM logo, user name 'Gaurav Kumar (ChargeCodeSponsor)', and last login date '3/20/2018, 3:28 PM'. The main content area has tabs for 'Charge Code Details', 'Task List', and 'Charge Code Tree'. Below the tabs, there's a search bar, a 'Refresh' button, and '+ Assign' and '+ Create Task' buttons. A table displays the task list with columns: Task Id, Task Name, Charge Code, Charge Code Description, Sponsor, Validity Period, Status, and Action. The table shows 5 entries, with the first five rows visible. The bottom of the page shows 'Showing 1 to 5 of 14 entries' and pagination controls (Previous, 1, 2, 3, Next). The footer includes the copyright notice 'Copyright © 2018, Independent Software Testing Services Company | Cigniti Technologies, All rights reserved' and the Cigniti logo.

Task Id	Task Name	Charge Code	Charge Code Description	Sponsor	Validity Period	Status	Action
ATS18A1000001A	testsss	ATS18A1000001	testsss	Gaurav Kumar	1 Mar 2018 - 31 Mar 2018	Active	
ATS18A1000002B	ATSRoot	ATS18A1000002	ATSRoot	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	
CPS18A1000001A	sdfsdf	CPS18A1000001	sdfsdf	Gaurav Kumar	1 Mar 2018 - 15 Mar 2018	Active	
ESG18A1000001A	ESG18A1000001	ESG18A1000001	ESG18A1000001	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	
ESG18A1000002A	LND18G1000001	ESG18A1000002	ESG18A1000002	Gaurav Kumar	1 Mar 2018 - 30 Apr 2018	Active	

3.3 Assign Charge Code

After selecting a Charge Code from the task list a Charge Code sponsor assign a charge to corresponding users once he will click on Assign button.

The screenshot shows the 'Assign Charge Code' page in the Charge Code Management application. The page header includes the CCM logo, user name 'Gaurav Kumar (ChargeCodeSponsor)', and last login date '3/20/2018, 3:28 PM'. The main content area has tabs for 'Charge Code Details', 'Task List', and 'Charge Code Tree'. Below the tabs, there's a search bar, a '+ Add User' button, and a table displaying the assigned users. The table shows 1 entry, with the first row visible. The bottom of the page shows 'Showing 1 to 1 of 1 entries' and pagination controls (Previous, 1, Next). The footer includes the copyright notice 'Copyright © 2018, Independent Software Testing Services Company | Cigniti Technologies, All rights reserved' and the Cigniti logo.

User Id	User Name	Task Code Description	Time Period	Action
E002518	Venkata Manoj Kumar Annam	ESG18A1000001	1 Mar 2018 - 30 Apr 2018	

3.4 Add User

Once Charge Code Sponsor can assign a Charge Code to corresponding user then if he want he can add multiple users to single Charge Code.

The screenshot shows the 'Add User' modal in the Charge Code Management system. The modal is titled 'Add User' and contains a 'Users' dropdown menu with 'Sankar Kurakula' selected. Below the dropdown is a 'Time period' input field with the value '3/16/2018 - 4/15/2018'. There are 'Close' and 'Assign' buttons at the bottom right of the modal. The background shows the 'Assign Charge Code' page with a table of users and a 'Back' button.

User Id	User Name	Task Code Description	Time Period	Action
E002518	Venkata Manoj Kumar Annam	ESG18A1000001	1 Mar 2018 - 30 Apr 2018	

3.5 Assign Charge Code Search

A Charge Code Sponsor can use search option under Assign Charge Code.

The screenshot shows the 'Assign Charge Code' page in the Charge Code Management system. The page has a search bar with the value 'E003623' and an 'Add User' button. Below the search bar is a table with columns: User Id, User Name, Task Code Description, Time Period, and Action. The table is empty, and a message 'No matching records found' is displayed. The background shows the 'Assign Charge Code' page with a 'Back' button.

User Id	User Name	Task Code Description	Time Period	Action
---------	-----------	-----------------------	-------------	--------

No matching records found

4. Frequently asked questions

1. Question:- Can every employee login in this system?

Answer:- No, every employee would not be able to Login into the CCM application. A person/ employee whose role is Charge Code Admin is authorized to log into this application.

2. Question:- Will every employee get an assignment in Assignment tab?

Answer:- Yes, even though an employee is newly joined he will get general assigned project like Vacation, Leave, Bench e.t.c. Where he can fill his clocked hours. Once an employee is mapped with any project then he will also get those assigned projects.

3. Question:-

Answer:-

4. Question:-

Answer:-

5. Question:-

Answer:-

6. Question:-

Answer:-

7. Question:-

Answer:-

8. Questions:-

Answer:-

9. Question:-

Answer:-

10. Question:-

Answer:-