

ProTrack



Project Management Tool by
Deloitte Digital SEA

*previously known as TrackerSEA

Release Guide

MAY 2022

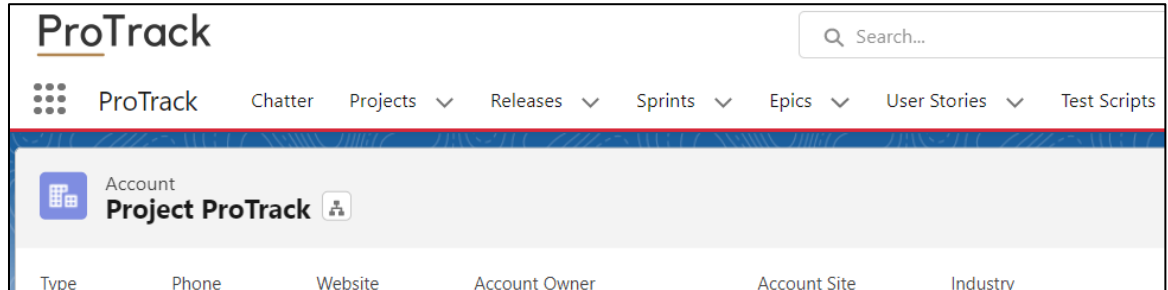
Contents

1. Creation of ProTrack Community Users.....	3
2. Accessing ProTrack Experience Cloud	5
3. Personalized List Views	7
4. Test Execution	8
5. Tickets	8
6. Branded Email Communications.....	9
7. Streamlined Branding across Platforms	10

1. Creation of ProTrack Community Users

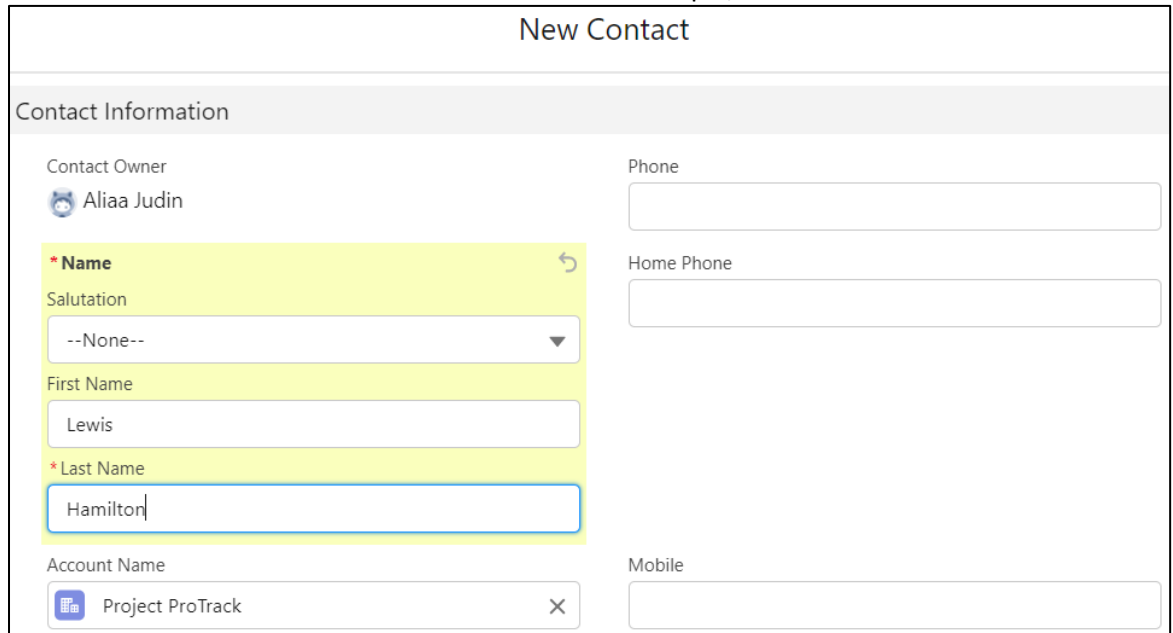
Creating community users are different to creating internal Salesforce users. Here are the steps to create a Community User:

- I. **Create an Account record** in the internal ProTrack platform. This Account record would store all Community Users (Contacts). Example, an Account name “Project ProTrack” has been created:



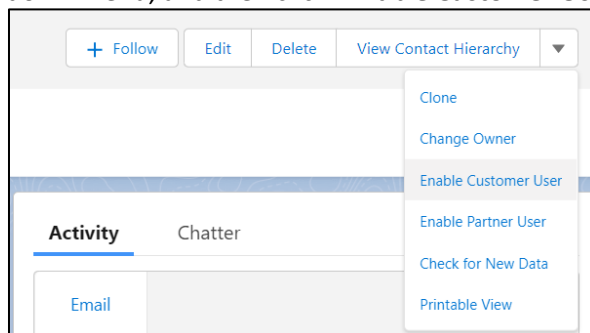
The screenshot shows the ProTrack interface. At the top, there's a search bar and navigation tabs: ProTrack, Chatter, Projects, Releases, Sprints, Epics, User Stories, and Test Scripts. Below this, the 'Account' section for 'Project ProTrack' is displayed. It includes a grid of fields: Type, Phone, Website, Account Owner, Account Site, and Industry.

- II. **Create a Contact** under the Account record created in step 1, and save



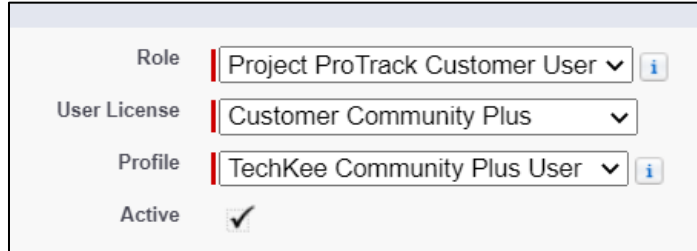
The 'New Contact' form is shown. It has a 'Contact Information' section. Fields include: Contact Owner (Aliaa Judin), Phone, Home Phone, Mobile, Salutation (dropdown), First Name (Lewis), Last Name (Hamilton), and Account Name (Project ProTrack). The 'Name' section is highlighted in yellow.

- III. Navigate to the Contact record and on the right-most section of the page, click on the drop-down menu, and then click “**Enable Customer User**”



The screenshot shows the right-hand side of a Contact record. It includes buttons for '+ Follow', 'Edit', 'Delete', and 'View Contact Hierarchy'. A dropdown menu is open, showing options: Clone, Change Owner, Enable Customer User (highlighted), Enable Partner User, Check for New Data, and Printable View. Below this, there's an 'Activity' section with a 'Chatter' tab and an 'Email' button.

- IV. Once you have clicked the “Enable Customer User” button, you will be directed to the User Setup page. Here, you will key in the following details:
- i. Email
 - ii. Username
 - iii. **User License:** Customer Community Plus
 - iv. **Profile:** ProTrack Community Plus User
 - v. **Role:** Project ProTrack Customer User



The screenshot shows a form with four fields: 'Role' set to 'Project ProTrack Customer User', 'User License' set to 'Customer Community Plus', 'Profile' set to 'TechKee Community Plus User', and 'Active' checked with a checkbox.

*Screenshot shows Profile: Techkee Community Plus User, upon deployment the Profile name will reflect ProTrack instead of Techkee

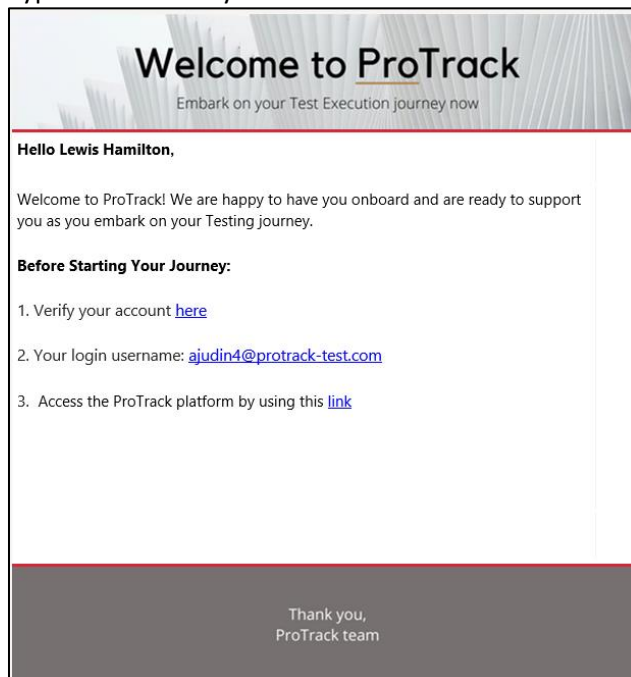
- V. Upon clicking Save, assign the User with the **Permission Set:** ProTrack Community Testing PS



The screenshot shows two panels: 'Available Permission Sets' on the left and 'Enabled Permission Sets' on the right. The 'Available' panel lists 'Service Cloud User', 'Shopper', 'Slack Service User', 'Standard Einstein Activity Capture', and 'Survey Creator'. The 'Enabled' panel shows 'TechKee Community Testing PS'. An 'Add' button with a right-pointing arrow is between the panels.

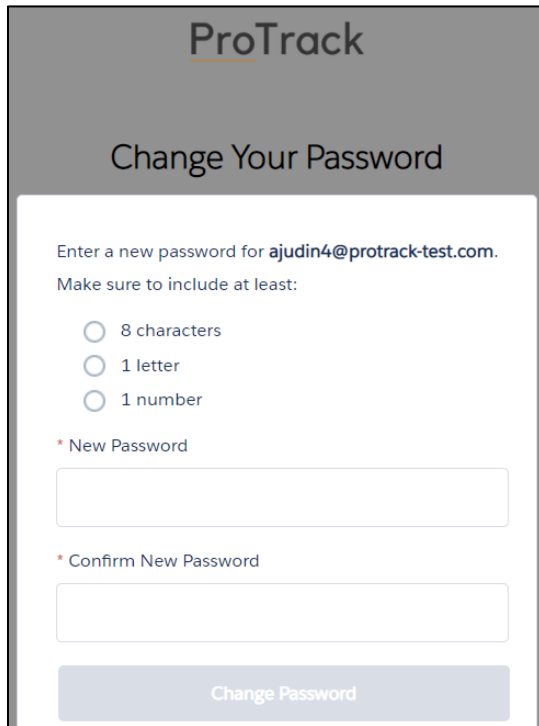
*Upon deployment, Permission Set name will reflect ProTrack instead of Techkee

- VI. After executing steps I to V the Community User Setup has complete. The Community User will receive a **Welcome to ProTrack email** which consists of all the details needed and hyperlinks to verify their account



2. Accessing ProTrack Experience Cloud

- I. Community Users will receive a “Welcome to ProTrack” email upon completion of user setup. From the Welcome email, the user would firstly need to **verify their account** through the first hyperlink populated in the email. Clicking the link will prompt them to set up their account password:



The screenshot shows a web form titled "Change Your Password" for the user "ajudin4@protrack-test.com". It includes instructions to include at least 8 characters, 1 letter, and 1 number. There are input fields for "New Password" and "Confirm New Password", and a "Change Password" button at the bottom.

ProTrack

Change Your Password

Enter a new password for **ajudin4@protrack-test.com**.
Make sure to include at least:

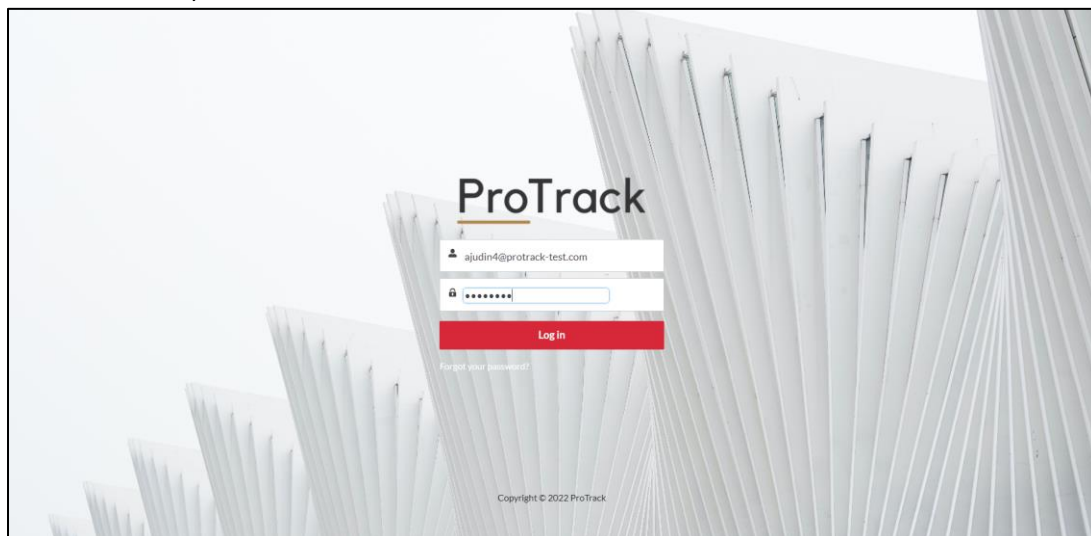
- ☐ 8 characters
- ☐ 1 letter
- ☐ 1 number

* New Password

* Confirm New Password

Change Password

- II. Upon setting up the password, the user would directly be navigated to the ProTrack homepage. If they would like to **log into ProTrack** again, they will visit the ProTrack link (also found in the Welcome email) and will see this interface:



The screenshot shows the ProTrack login page. It features the ProTrack logo at the top, followed by input fields for the email address "ajudin4@protrack-test.com" and a password field with masked characters. A red "Log In" button is positioned below the password field. A link for "Forgot your password?" is located below the "Log In" button. The footer contains the text "Copyright © 2022 ProTrack".

ProTrack

ajudin4@protrack-test.com

Log In

Forgot your password?

Copyright © 2022 ProTrack

- III. The **ProTrack homepage** would look like this, where the user will be able to automatically view the count of their pending task (My Pending Task) and the list of tasks needed to be done (My Tests & Tickets)

ProTrack

Home

Test Executions

Tickets

Q Search...

🔔

⚙

Welcome!

Execute Tests

The ProTrack Way

Start Here

My Pending Tasks

8 Test Execution to Complete

4 Tickets to Retest

My Tests & Tickets

My Reports

My Pending Test Executions

My Tickets to Retest

	Test Executio...	Test Title	Status	Deadline	Execute Now
1	TE-000025	[KMC] CRUD Lea...	Not Started		Execute Now
2	TE-000026	CRUD Showroom...	Not Started		Execute Now
3	TE-000027	CRUD Lead Object	Not Started		Execute Now
4	TE-000028	[KMC] Dashboar...	Not Started		Execute Now
5	TE-000029	[KMC] Dashboar...	Not Started		Execute Now
6	TE-000030	[KMC] Lead Dash...	Not Started		Execute Now
7	TE-000031	[KMC] Dashboar...	Not Started		Execute Now
8	TE-000032	[KMC] Pending Le...	Not Started		Execute Now

Chatter Feed

Post

Poll

Share an update...

Share

Sort by:

Most Recent Activity

Q Search this feed...

▼

🔄

3. Personalized List Views

- I. The homepage provides two personalized list for the Community User. First is the “My Pending Test Executions” and second, “My Tickets to Retest”.

My Tests & Tickets				
My Pending Test Executions My Tickets to Retest				
	Test Executio...	Test Title	Status	Deadline
1	TE-000025	[KMC] CRUD Lea...	Not Started	Execute Now
2	TE-000026	CRUD Showroom...	Not Started	Execute Now
3	TE-000027	CRUD Lead Object	Not Started	Execute Now
4	TE-000028	[KMC] Dashboar...	Not Started	Execute Now
5	TE-000029	[KMC] Dashboar...	Not Started	Execute Now
6	TE-000030	[KMC] Lead Dash...	Not Started	Execute Now
7	TE-000031	[KMC] Dashboar...	Not Started	Execute Now
8	TE-000032	[KMC] Pending Le...	Not Started	Execute Now

- II. The personalized list view will also be shown when the Community user clicks “Test Execution” on the navigation pane:

ProTrack

Home

Test Executions

Tickets

Search...

Test Execution

My Test Executions

8 items • Sorted by Test Execution Number • Filtered by All test execution - My Test Execution as Tester • Updated a minute ago

Search this list...

	<div><div></div><div>Test Execution N...</div><div></div></div>	<div>Test Title</div>	<div>Test Outcome</div>	<div>Tester</div>	
1	<div><div></div><div>TE-000025</div></div>	[KMC] CRUD Lead Object	Not Executed	Lewis Hamilton	<div></div>
2	<div><div></div><div>TE-000026</div></div>	CRUD Showroom Object	Not Executed	Lewis Hamilton	<div></div>
3	<div><div></div><div>TE-000027</div></div>	CRUD Lead Object	Not Executed	Lewis Hamilton	<div></div>
4	<div><div></div><div>TE-000028</div></div>	[KMC] Dashboard Report Extract_KMC Marketer	Not Executed	Lewis Hamilton	<div></div>
5	<div><div></div><div>TE-000029</div></div>	[KMC] Dashboard Report Extract_KMC Marketer	Not Executed	Lewis Hamilton	<div></div>
6	<div><div></div><div>TE-000030</div></div>	[KMC] Lead Dashboard Management	Not Executed	Lewis Hamilton	<div></div>
7	<div><div></div><div>TE-000031</div></div>	[KMC] Dashboard Report Extract_KMC Marketer	Not Executed	Lewis Hamilton	<div></div>
8	<div><div></div><div>TE-000032</div></div>	[KMC] Pending Lead Notification_ Contents : Lead Name, Account, Mobile, Email, Lead Type, Source Channel , Lead Owner	Not Executed	Lewis Hamilton	<div></div>

- III. The personalized list view will also be shown when the Community user clicks “Tickets” on the navigation pane:

ProTrack

Home

Test Executions

Tickets

Q Search...

Tickets

My Tickets - Ready For Testing

New

4 Items • Sorted by Ref • Filtered by All tickets - Status, My Tickets as Tester • Updated a few seconds ago

Q Search this list...

<input type="checkbox"/>	Ref	Problem	Tick...	Logged by	Tester	Last Modified Date	Created Date	
1	<input type="checkbox"/> TKT-000000	The chatter notification should be able to be changed in Korean		JennySy	T-0453	4/27/2022, 9:44 AM	4/4/2022, 5:38 PM	
2	<input type="checkbox"/> TKT-000006	missed field in page layout			T-0455	4/27/2022, 9:45 AM	4/4/2022, 5:38 PM	
3	<input type="checkbox"/> TKT-000008	Remove obsolete field Lead.Test_Drive_Center_Code_c			T-0456	4/27/2022, 9:45 AM	4/4/2022, 5:38 PM	
4	<input type="checkbox"/> TKT-000023	TES-002336 - Current 'System Error' validation error should be considered as 'Human Error'			T-0454	4/27/2022, 9:45 AM	4/4/2022, 5:38 PM	

4. Test Execution

- I. When the Community User clicks “Execute Now” on the homepage or “Execute Test” button on the Test Execution record, this will be interface that follows:

ProTrack

HomeTest ExecutionsTickets

Search...

Test Execution: TE-000025

Test Details

User Story

US-1051

Test Phase

Sprint Testing

Test Title

[KMC] CRUD Lead Object

Tester

Lewis Hamilton

Outcome

Outcome Summary

Status

Not Started

Test Outcome

Not Executed

Overall Test Comments

Attachment

Upload Files

Or drop files

Submit File

Update Test Execution

Test Steps

Ref	Action	Expected Results	Test Outcome	Test Comments	Add Ticket
TES-000095	Navigate to App Launcher search for "Lead" and Click on "Leads"	Lead page is opened	Choose Outcome		Add Ticket
TES-000096	Click on "New" button	"New Lead" pop-up will appear.	Choose Outcome		Add Ticket

Users are able to:

- i. Update Test Outcomes
- ii. Raise Tickets
- iii. Update Overall Test Outcome under “Outcome Summary”
- iv. Upload file attachments

5. Tickets

- I. When the Community User clicks the Ready for Testing Ticket records, this will be the interface that follows:

ProTrack

HomeTest ExecutionsTickets

Search...

Ticket

TKT-000000

+ Follow

Edit

DETAILS

RELATED

Ref

TKT-000000

User Story

US-1680

Project

KMC

Template

Sprint

Sprint 7 KMC Phase 1

Status

Ready for Testing

Status/Severity

Major/Ready for Testing

Test Execution

Ticket Type

Enhancement

Ticket Description

Post

Poll

Share an update...

Share

Sort by:

Most Recent Activity

Search this feed...

User1649047386312249985 (tracker-experience-test) updated this record.

April 22, 2022 at 1:18 AM

Status

In Development to Ready for Testing

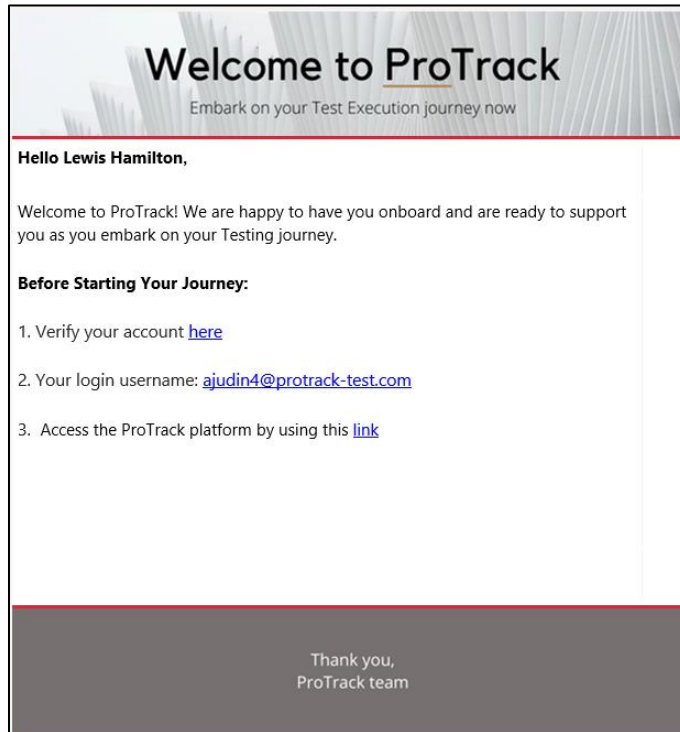
Users are able to execute the test and update the test outcomes, collaborate with Deloitte through Chatter.

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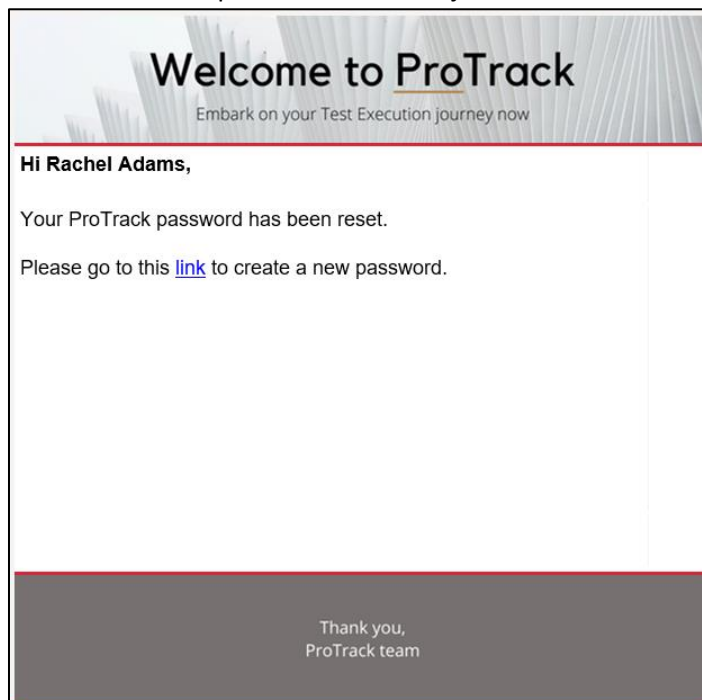
6. Branded Email Communications

Two Email templates have been defined as part of the release.

- I. First, the “Welcome to ProTrack” email with Email Subject: Welcome to ProTrack

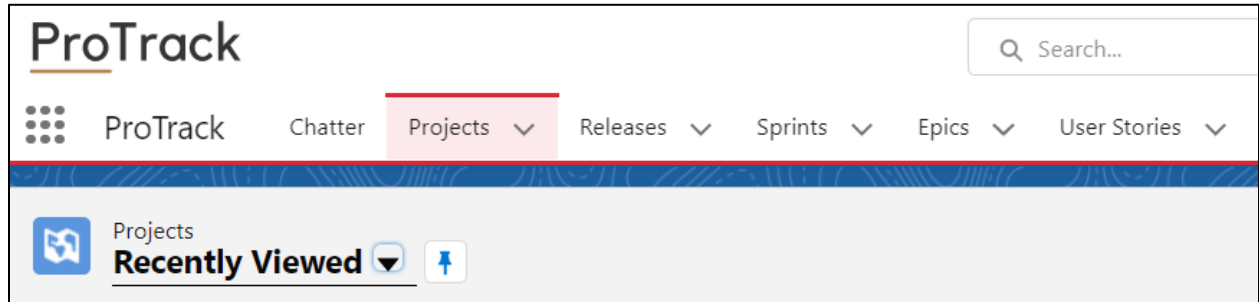


- II. Second, the Reset Password email when System Admins trigger Password Reset from the internal ProTrack platform. Email Subject: Your New ProTrack Password



7. Streamlined Branding across Platforms

With defining a new name and color scheme for our Project Management tool, we have decided to streamline our branding across both platforms – internal and external. For the internal ProTrack platform, we have tweaked the interface to include the logo as well as color scheme.



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