Service Readiness Portal

User Guide

V 1.0

Revision History

Version	Date	Revision Notes	Prepared By / Title	Approved By / Title
1.0	Aug 23, 2011	Initial Draft	Gifty M / Sr. Technical Writer	xxxxxxx / Sr. Project Manager
2.0	Apr 17, 2014	• Updated screenshots • Modified section 5.3 - Create Meeting Plan	Gifty M / Sr. Technical Writer	xxxxxxx / Sr. Project Manager

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1. Introduction

Service Readiness is an online project planning portal that is developed to help you save time on planning, processing, scheduling, tracking and completing your projects. This easy-to-use project management software makes project planning easy and helps you to monitor the progress of all the projects in the Enterprise Support Services division.

The SR Portal helps you create detailed project plans, schedule tasks, allocate resources and boosts effective team collaboration even when team members are separated by vast distances and time zones. You can share all your project related information with stakeholders and clients. Your project planning and management is now more effective as updated information is distributed among team members quickly and easily. As the team members enter the progress of their tasks, you can view the planned progress of the project. An email is triggered to all the resources mapped in the project when a new project is initiated and tasks are assigned. It also gives you a heads-up by providing email alerts to the resources for tasks that are late.

Service Readiness Portal helps you to:

- Manage any number of projects online in one workspace
- Share your project details with stakeholders and clients
- Create and update detailed plans for your project
- Schedule start and end dates of tasks
- Assign resources to tasks
- Schedule meetings and upload the minutes of meeting
- Upload project related documents
- View the actual project progress against planned

2. Service Readiness Portal

2.1. System Requirements

Item	Description
System Processor	Intel Pentium IV or latest
System Memory	2 GB or more
Hard Disk Capacity	40 GB or more
Operating System Supported	Windows XP/7
Browsers Supported	IE 6 & above, Firefox 3 & above, Google Chrome
Web Server	IIS 6
Database	MySQL 5

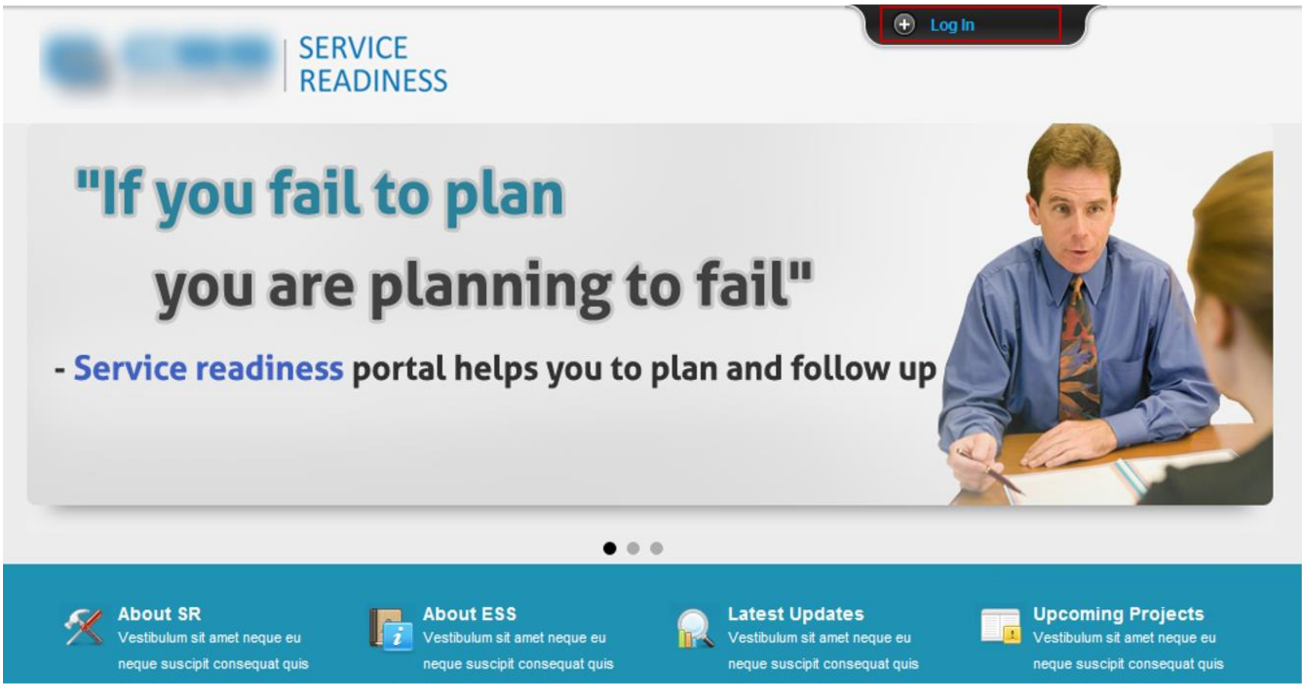
2.2. User Roles

- **Administrator**
  - Provided with rights to view all projects
  - Create projects
  - Add users
  - Create project plans
  - Assign resources to projects & projects to clients
  - Assign tasks to users
  - Upload meeting schedules and MOM
  - Upload project related documents
- **Employees & Clients**
  - Provided with rights to view only assigned projects
  - Update and modify assigned tasks
  - View tasks related to assigned projects

3. Login

1. Enter the URL http://xxx.com in the address bar of a browser such as Internet Explorer or Mozilla Firefox. The page opens as shown below:

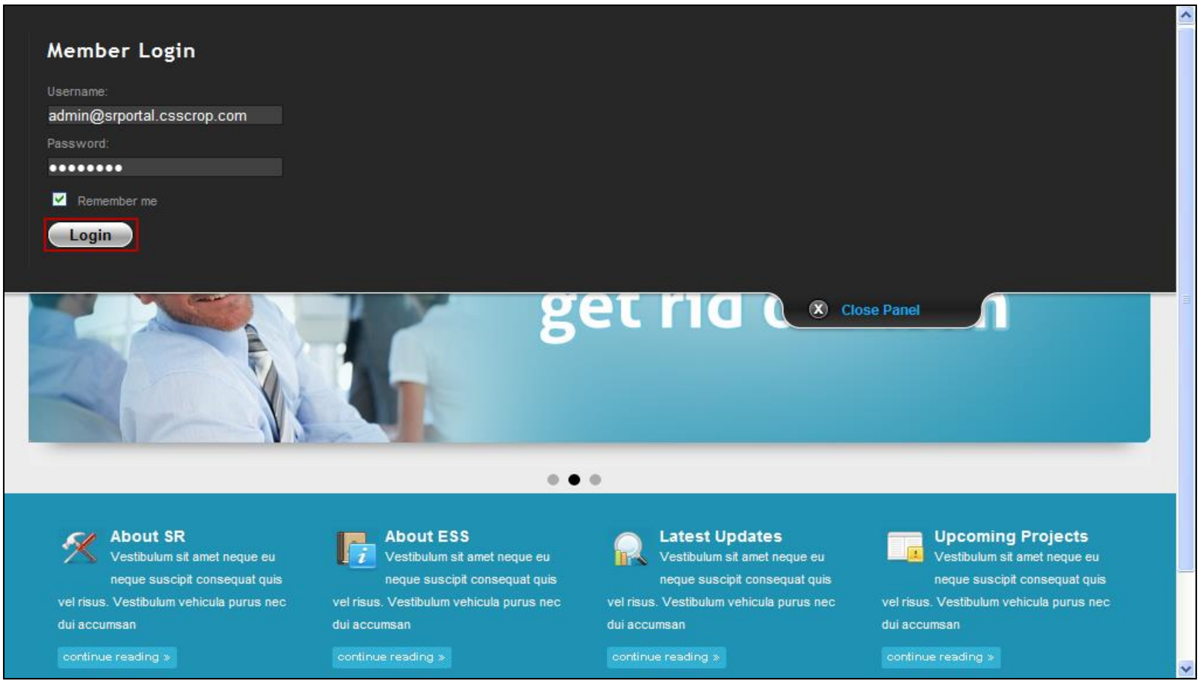
Figure 1: Service Readiness Portal Home Page



2. Click **Login**. The **Member Login** panel opens as shown below.

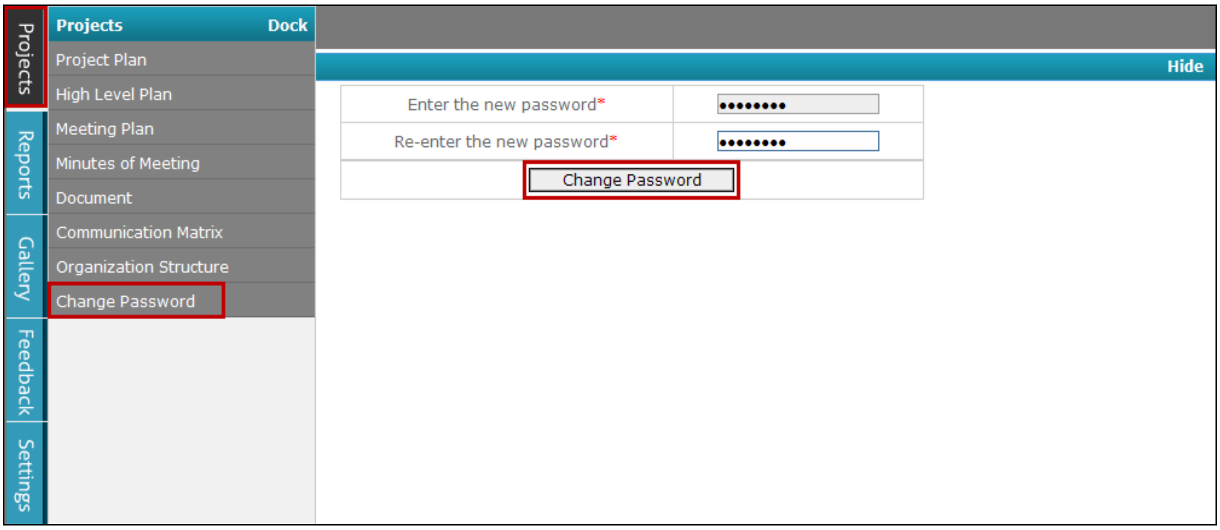
3. Enter your Username and password. Click the **Login** button. The SR Portal Home page opens.

Figure 2: Member Login Panel



3.1. Change Password

1. Select **Projects > Change Password**.



2. Enter your new password in the **Enter the new password** field.

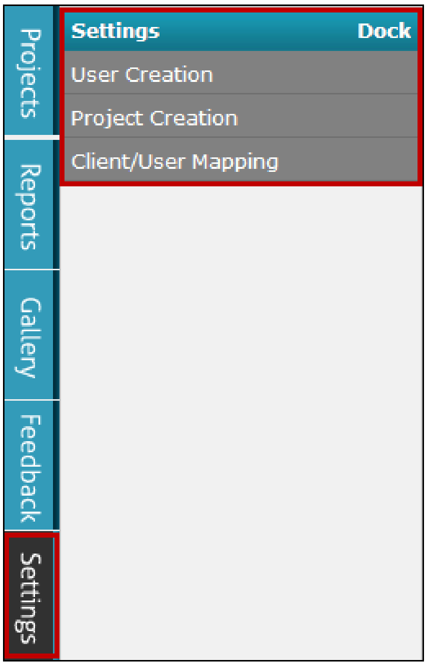
3. Reenter the same in the **Reenter the new password** field to confirm the change.

4. Click the **Change Password** button. You can now login with your new password.

4. Project Setup

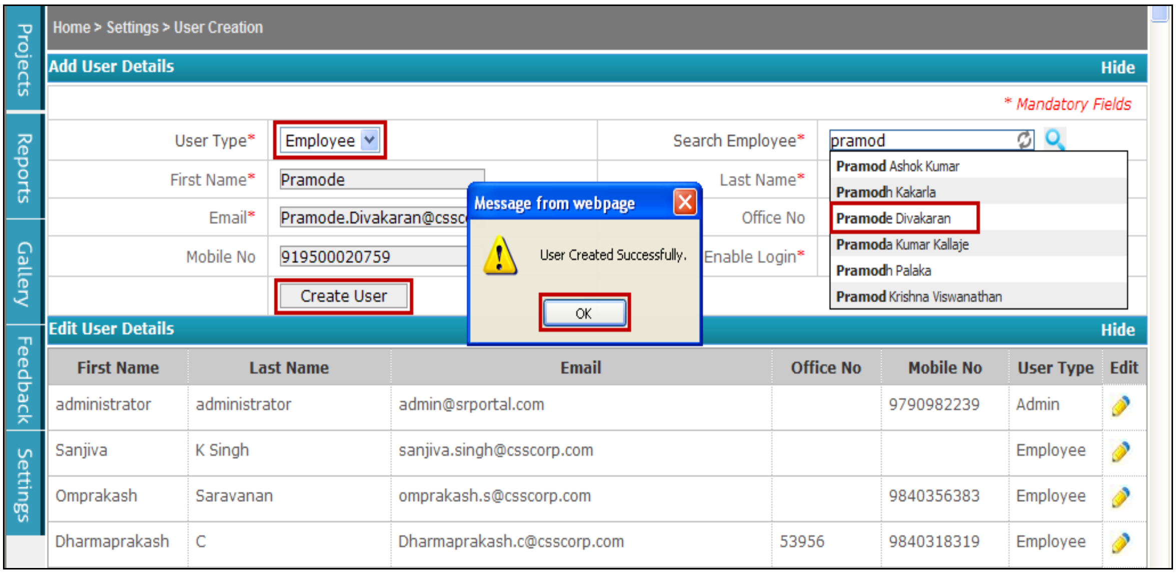
In the **Settings** tab, you can add projects and users. This tab also allows you to map the projects to the respective clients and also assign resources to projects. All the settings that you do for a project in this tab are made available under **Projects > Communication Matrix**.

Note: The menu options in this **Settings** tab are available for the Administrator.



4.1. Add Users

1. Select **Settings > User Creation**.
2. On the top **Add User Details** panel, in the **User Type** field, select the user type from the following options:
    - **Employee**
    - **Client**
    - **Admin**
3. If you want to add an Employee, in the **Search Employee** field, enter the first few characters of the employee's name. Select the user that you want to add from the matching results displayed. The selected employee's details are now auto-populated in the other fields. You can modify only the mobile number.

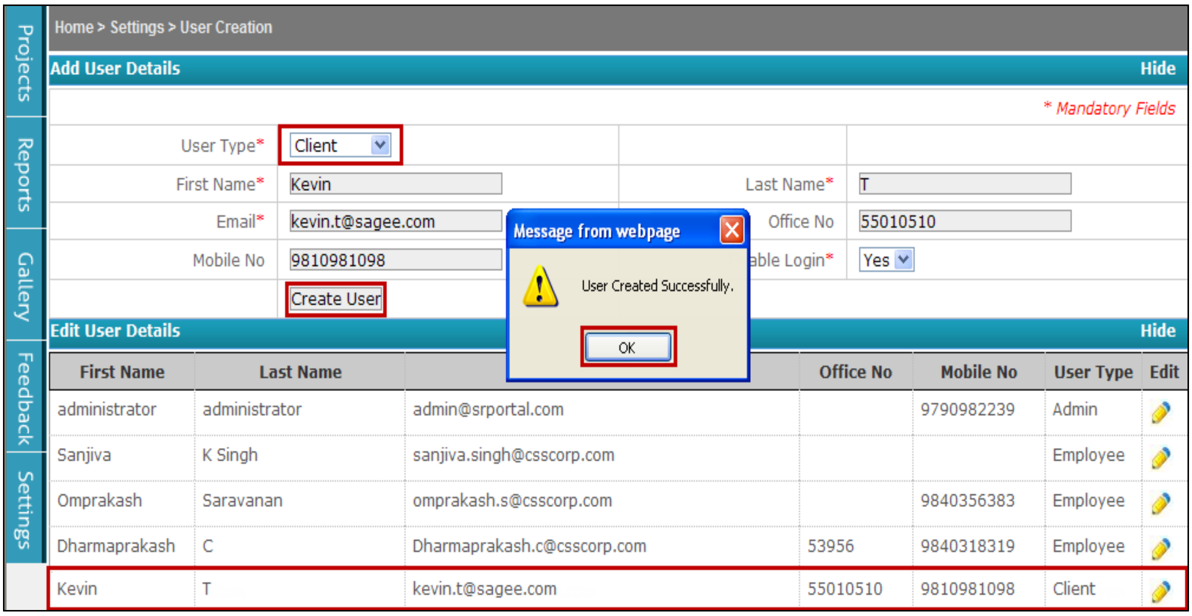


4. If you want to add a Client or an Administrator, enter the following fields:

- **First Name:** Enter the first name of the user.
- **Last Name:** Enter the last name of the user.
- **Email:** Enter the email address of the user.
- **Office No:** Enter the office number of the user.
- **Mobile No:** Enter the mobile number of the user.

5. In the **Enable Login** field, specify **Yes** or **No**.

6. Click the **Create User** button. Click **OK** in the confirmation message appears upon successful creation of the new user. The user's details are now displayed at the bottom panel of the page:



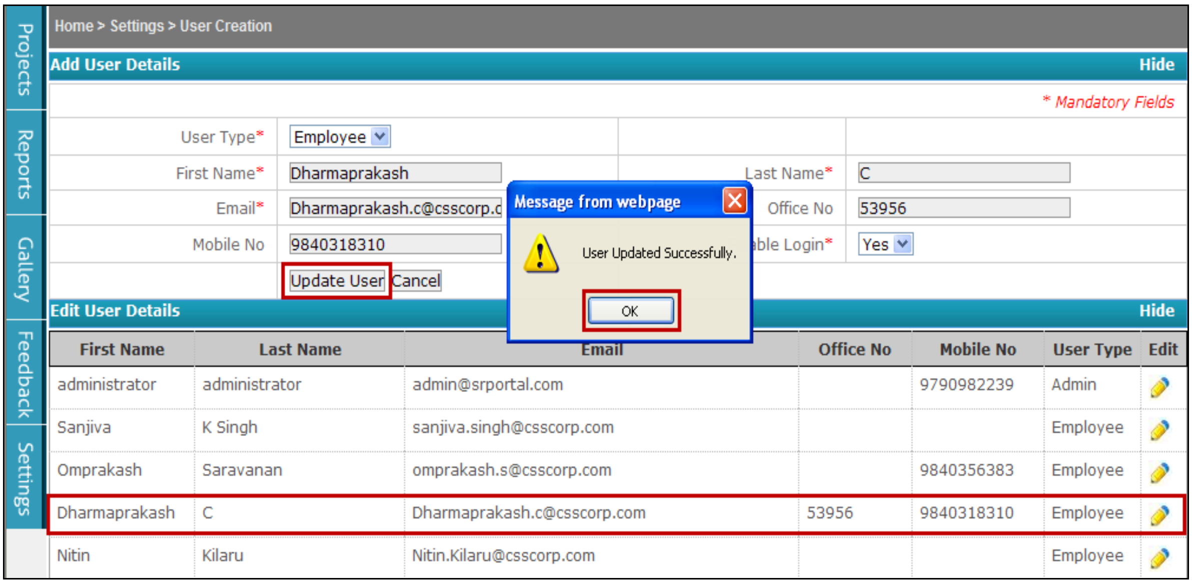
4.1.1. Modify User Details

1. On the **Edit User Details** panel, click the **Edit** icon corresponding to the user that you want to modify.

2. The selected user details are now displayed in the top panel of the page.

3. Modify the necessary details.

4. Click the **Update User** button. The user's details are now updated and displayed at the bottom panel of the page.



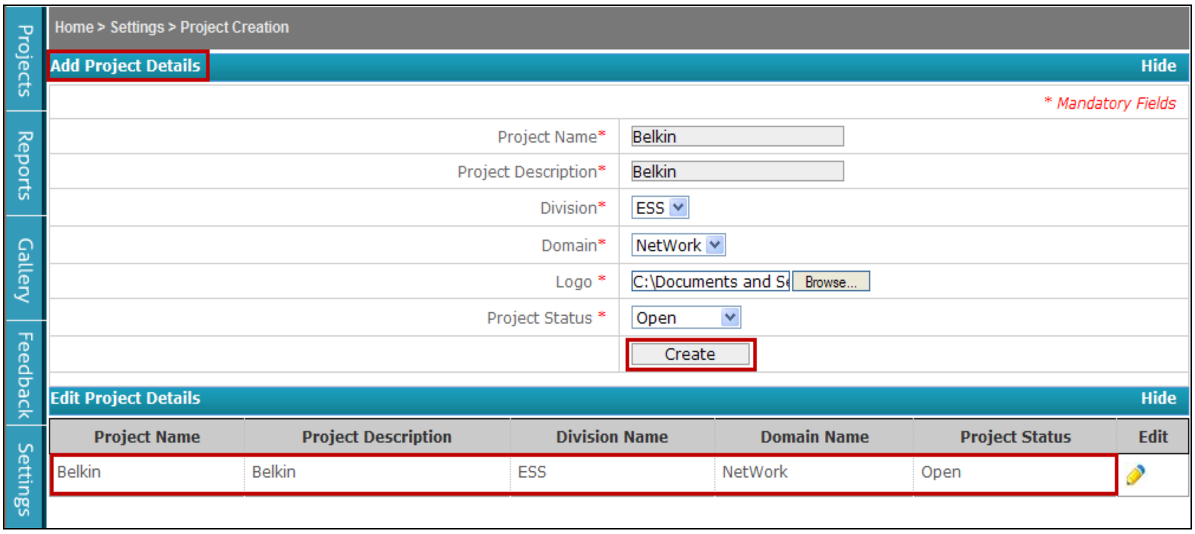
4.2. Add Projects

1. Select **Settings > Project Creation**.

2. On the top **Add Project Details** panel, enter the following fields:

   - **Project Name:** Enter the name of the project.
   - **Project Description:** Enter a short description of the project.
   - **Division:** Enter the name of the project.
   - **Domain:** Enter the domain name.
   - **Logo:** Click the **Browse** button to upload the logo.
   - **Project Status:** Select from the following options to specify the status of the project:
     - **Open**
     - **Ongoing**
     - **Completed**

3. Click the **Create** button. The new project is now added. You are now redirected to the Client User Mapping page, where you can assign resources for the project.



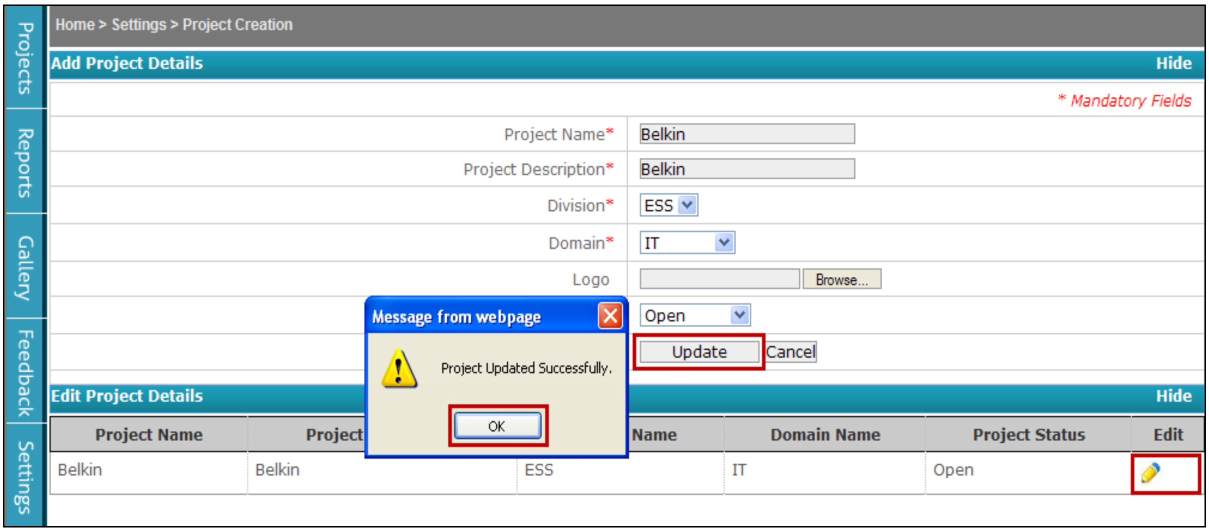
4.2.1. Modify Project Details

1. In the **Edit Project Details** panel, click the **Edit**  icon corresponding to the project that you want to modify.

2. The selected project details are now displayed in the top panel of the page.

3. Modify the necessary details.

4. Click the **Update** button. The project details are now updated and displayed at the bottom panel of the page.

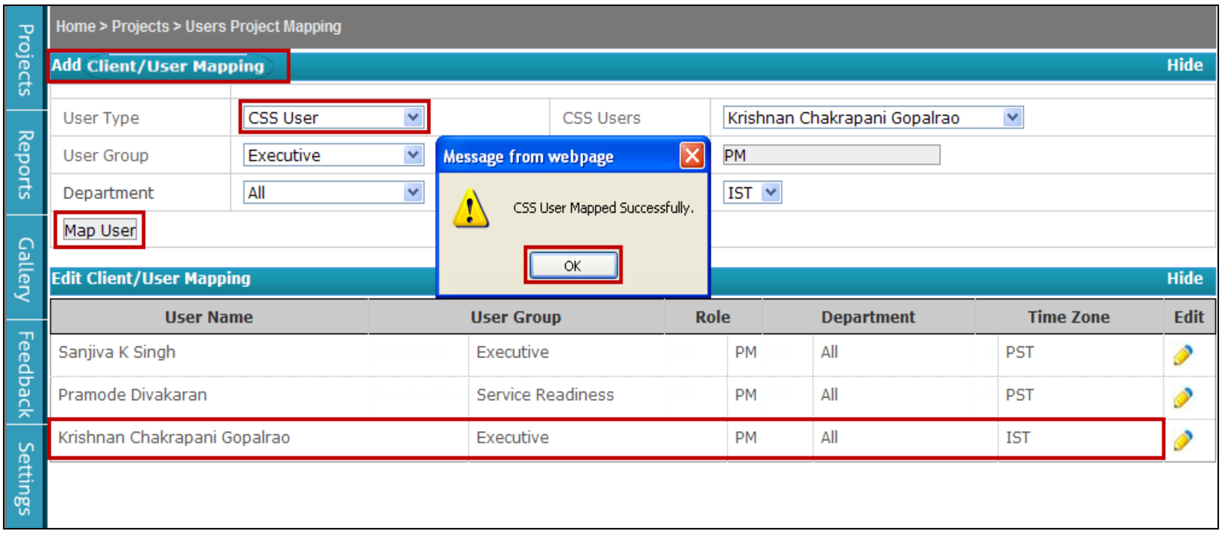


4.3. Map Users to Clients

On this page, you can assign resources for a project and also set up their roles in the project.

1. Select **Settings > Client/User Mapping**.

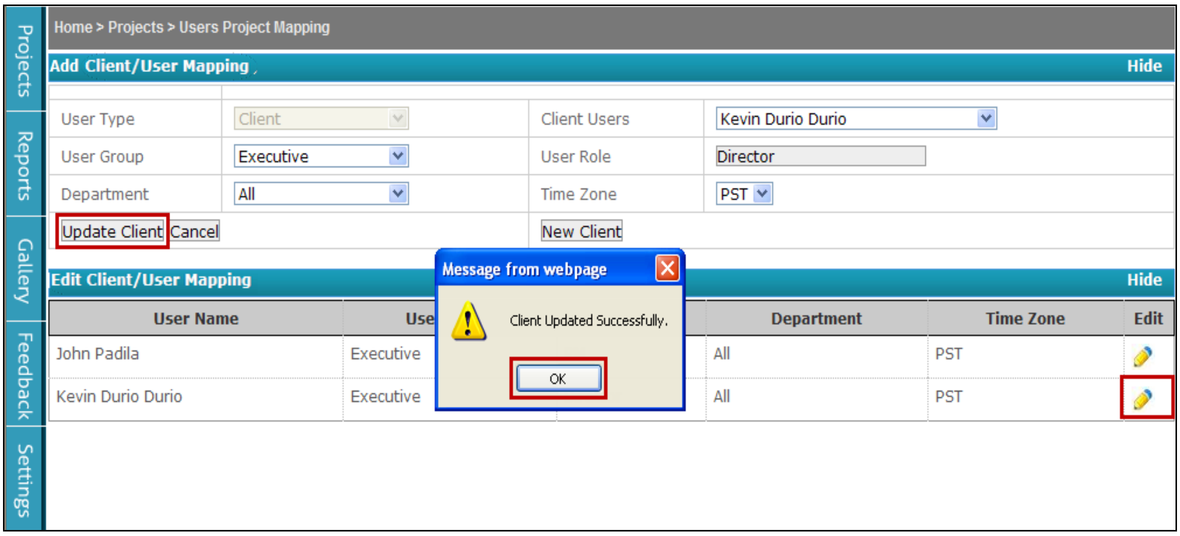
2. In the **User Type** field, select **CSS User** or **Client** based on which the page displays different fields.
3. In the **User Group** field, select the group to which the user belongs to.
4. In the **Department** field, select the department of the user.
5. In the **CSS Users** or **Client Users** field, select the name of the user or the client.
6. In the **User Role** field, enter the role of the user.
7. In the **Time Zone** field, enter the time zone in which the user works.
8. Click the **Map User** or **Map Client** button. The selected user or client is now mapped to the project.



9. If the user or the client that you wanted to map is not already added in the project settings, click the **New User** or the **New Client** button. You will be redirected to the Settings page, where you can add the user or client details, after which you can do the mapping.

4.3.1. Modify User/Client Mapping

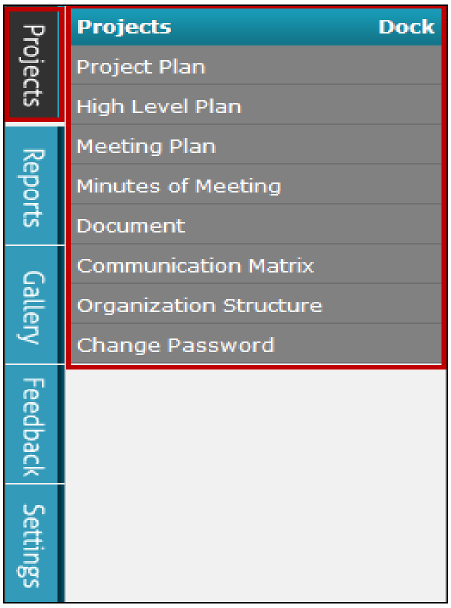
1. In the **Edit Client/User Mapping** panel, click the **Edit** icon corresponding to the user/client mapping that you want to modify.
2. The selected mapping details are now displayed in the top panel of the page.
3. Modify the necessary details.
4. Click the **Update User** or **Update Client** button. The mapping details are now updated and displayed at the bottom panel of the page.



5. Project Planning

As an Administrator, once you add a project and assign resources in the **Settings** tab, the **Projects** tab allows you to create project plans, assign tasks, schedule meetings, upload minutes of meeting, etc.

Note: Employees and Clients can only modify the assigned tasks and upload project related documents.

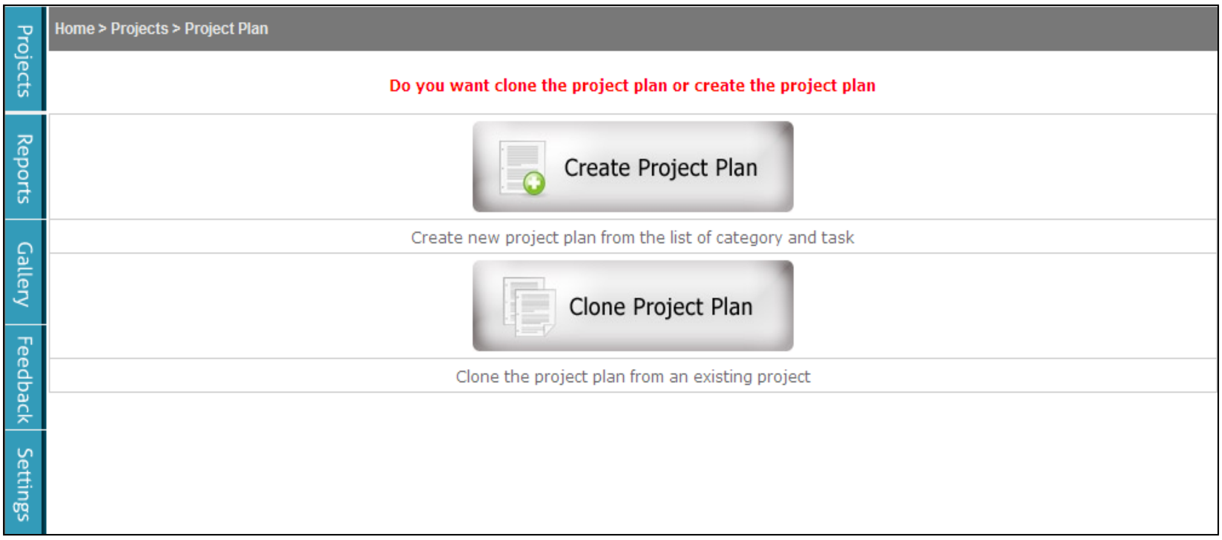


5.1. Create Project Plan

You can create a project plan by either cloning an existing project plan or create a plan on your own.

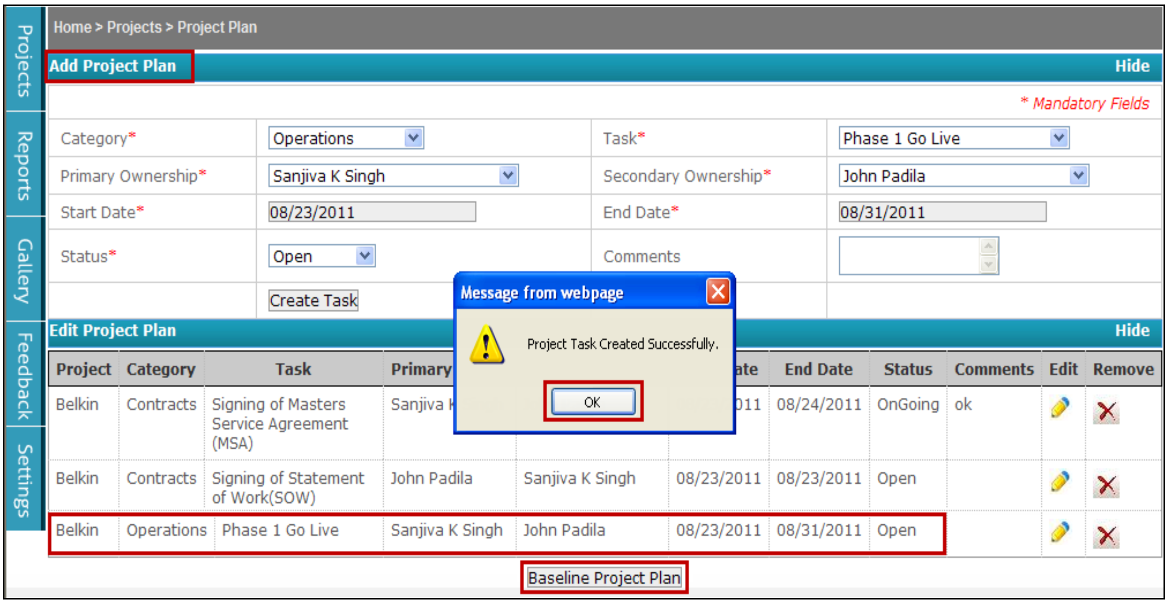
Note: Only administrators can create project plans, while employees and clients can modify only the tasks assigned to them.

1. Select **Projects > Project Plan**. The page opens as shown below:



➢ **<u>Create a Project Plan</u>:**

- Click the **Create Project Plan** button. The page opens as shown below:



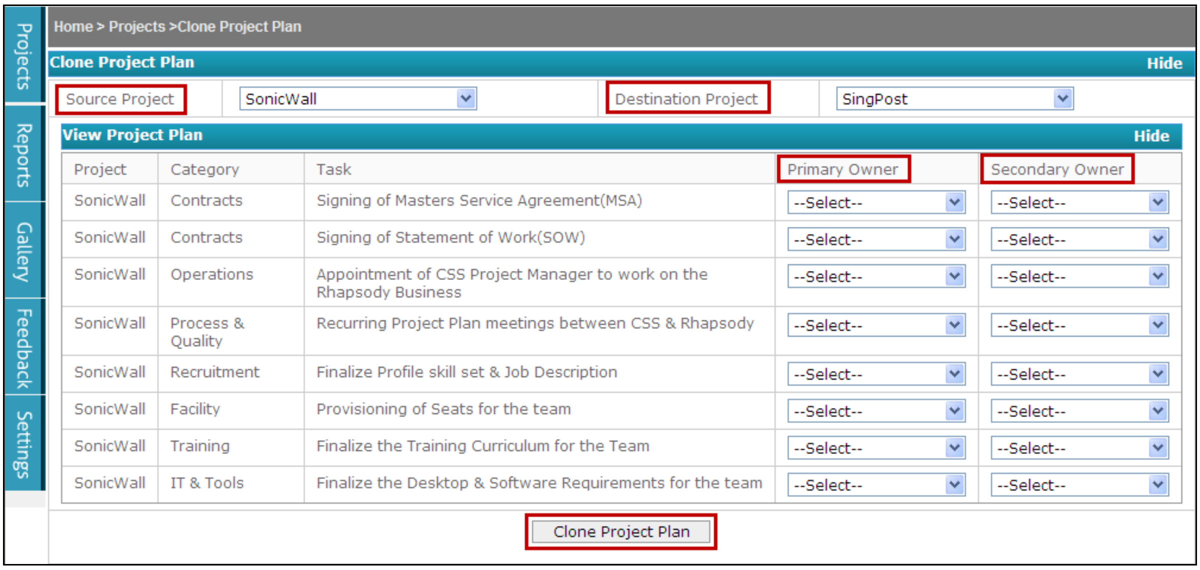
- In the **Add Project Plan** panel, in the **Category** field, select the project category.
- In the **Task** field, select the task that you want to assign to the user.
- In the **Primary Ownership** and **Secondary Ownership** fields, specify the primary and secondary owners for the project.
- Specify the **Start Date** and **End Date** for the task.
- Select from the following options to specify the status of the project:
  - **Open**
  - **Ongoing**

- **Completed**

- Click the **Create Task** button. You can now view the task in the **Edit Project Plan** panel.
- Similarly, you can create the other tasks for the project.

➢ **Clone a Project Plan:**

- Click the **Clone Project Plan** button. The page opens as shown below:



Project	Category	Task	Primary Owner	Secondary Owner
SonicWall	Contracts	Signing of Masters Service Agreement(MSA)	--Select--	--Select--
SonicWall	Contracts	Signing of Statement of Work(SOW)	--Select--	--Select--
SonicWall	Operations	Appointment of CSS Project Manager to work on the Rhapsody Business	--Select--	--Select--
SonicWall	Process & Quality	Recurring Project Plan meetings between CSS & Rhapsody	--Select--	--Select--
SonicWall	Recruitment	Finalize Profile skill set & Job Description	--Select--	--Select--
SonicWall	Facility	Provisioning of Seats for the team	--Select--	--Select--
SonicWall	Training	Finalize the Training Curriculum for the Team	--Select--	--Select--
SonicWall	IT & Tools	Finalize the Desktop & Software Requirements for the team	--Select--	--Select--

- In the **Clone Project Plan** panel, in the **Source Project** field, select the project that you want to clone.
- In the **Destination Project** field, select the project for which you creating the plan.
- The **View Project Plan** panel displays all the plan of the project that you are cloning.
- Specify the **Primary Owner** and **Secondary Owner** for all the tasks.
- Click the **Clone Project Plan** button. The page now displays all the tasks.
- Click the **Edit** button to specify the **Start Date**, **End Date**, and the **Status** for the tasks. You can remove the tasks that you do not want.

2. Once you finish creating all the tasks for the project, click the **Baseline Project Plan** button.
3. A confirmation message appears. Click **OK**. Mails are sent to all the users about the tasks that they are assigned to.

5.1.1. Modify Project Plan

1. In the **Edit Project Plan** panel, click the **Edit** icon corresponding to the plan that you want to modify.
2. The selected project plan details are now displayed in the top panel of the page.

3. Modify the necessary details.

4. Click the **Update Task** button. The plan details are now updated and displayed at the bottom panel of the page.

5.1.2. Delete Project Plan

Note: Only administrators can delete project plans.

1. In the **Edit Project Plan** panel, click the **Remove** ✗ icon corresponding to the plan that you want to remove.

2. Click **OK** in the confirmation message that appears. The project plan is now removed.

5.2. Create High Level Plan

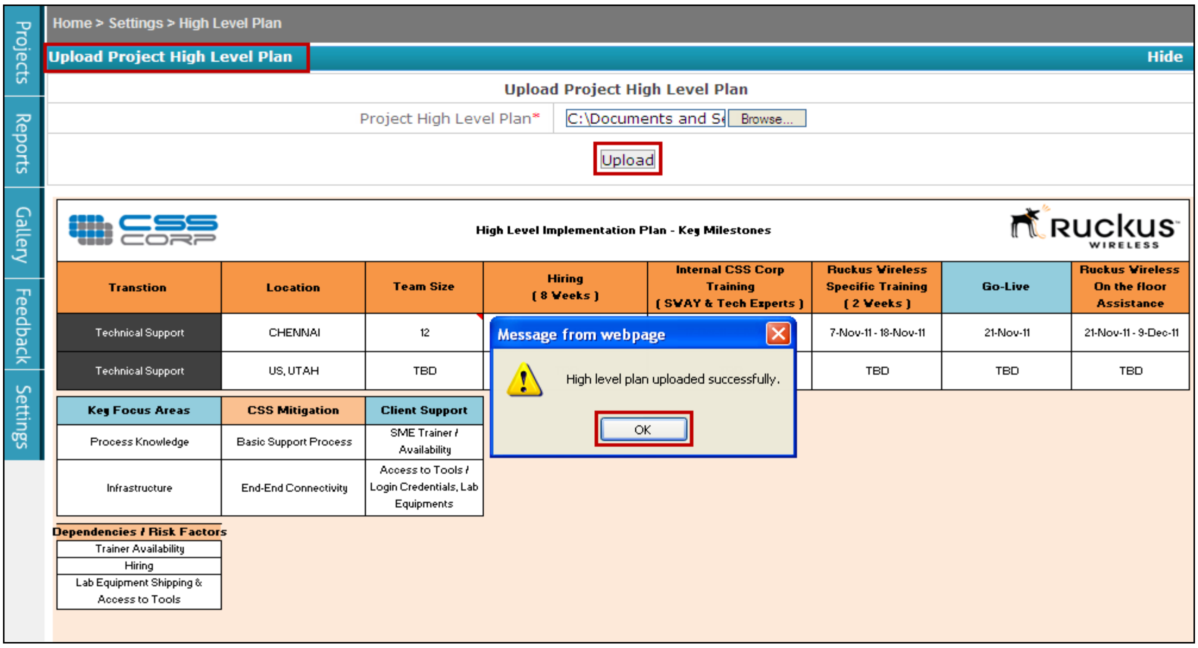
Note: Only administrators can create high level project plans.

1. Select **Projects > High Level Plan**.

2. In the **Project High Level Plan** field, click the **Browse** button and select the file to upload.

   Note: You can only upload files of jpg, jpeg, png, and gif formats.

3. Click the **Upload** button. The plan that you uploaded is now displayed at the bottom section of the page.



5.3. Create Meeting Plan

Note: Only administrators can create and upload meeting plans.

1. Select **Projects > Meeting Plan**.

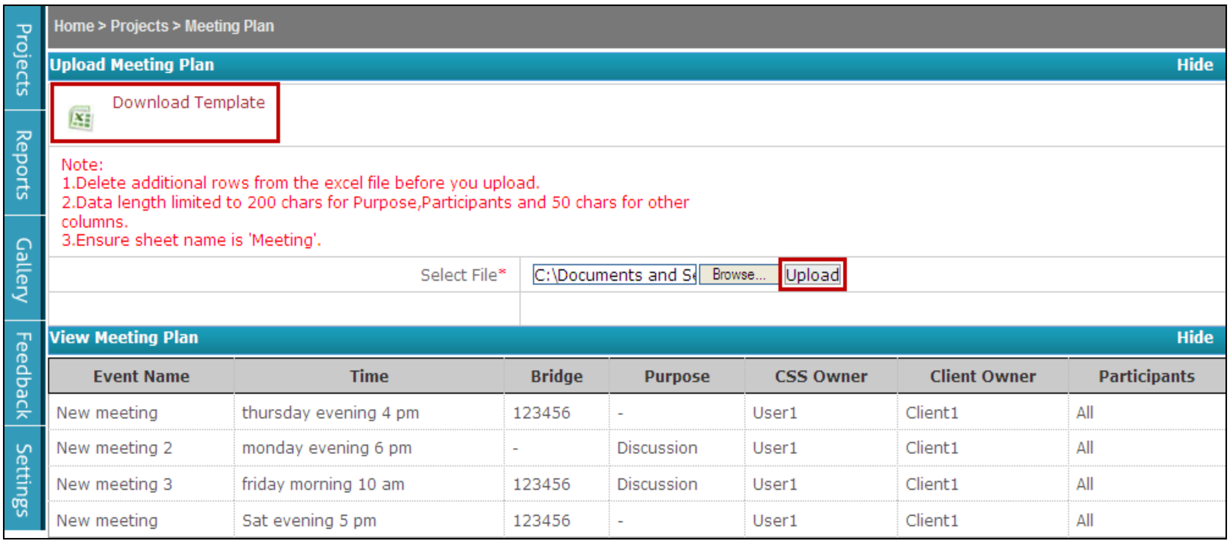
2. In the **Upload Meeting Plan** panel, click the **Download Template** link and save the meeting template in your local drive. Enter the fields in the excel file and save.

   Note: Before you upload the excel file

   - delete the empty rows in the excel file
   - ensure that the sheet name is 'meeting'
   - Data length is limited to 50 characters for all columns except 'Purpose' & 'Participants' (200 characters)

3. In the **Select File** field, click **Browse** and locate the meeting template that you saved.

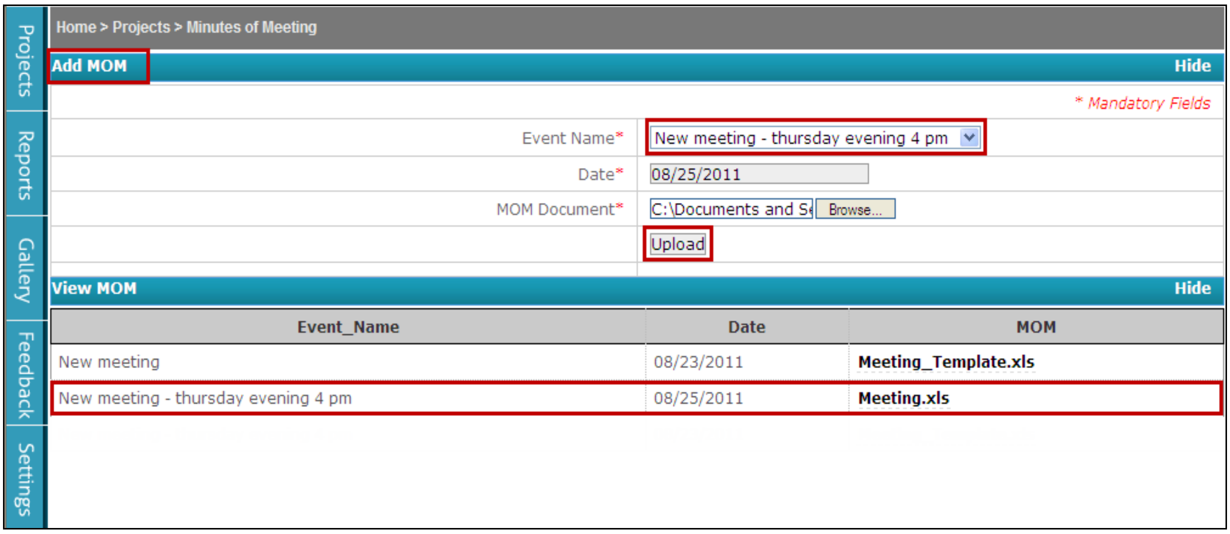
4. Click the **Upload** button. You can now view the details of the meeting in the **View Meeting Plan** panel.



5.4. Upload Minutes of Meeting

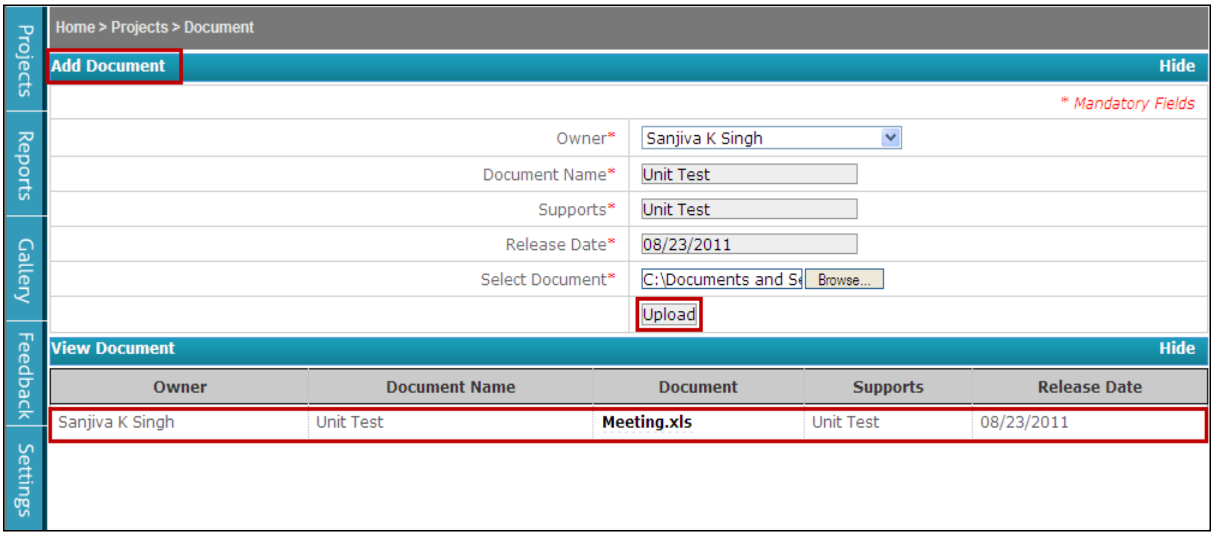
Note: Only administrators can upload the minutes of meeting.

1. Select **Projects > Minutes of Meeting**.
2. In the **Event Name** field, select the name of the event.
3. In the **Date** field, click to open the calendar and select the meeting date.
4. In the **MOM Document** field, click **Browse** and select the minutes of meeting document.
5. Click the **Upload** button. You can now view the meeting plan in the **View MOM** panel.



5.5. Upload Documents

1. Select **Projects > Document**.
2. In the **Owner** field, select your name.
3. In the **Document Name** field, enter the name of the document.
4. In the **Supports** field, enter the project related information to which the document is related to.
5. In the **Release Date** field, enter the date in which the document was prepared.
6. In the **Select Document** field, click **Browse** and select the document.
6. Click the **Upload** button. You can now view the document in the **View Document** panel.



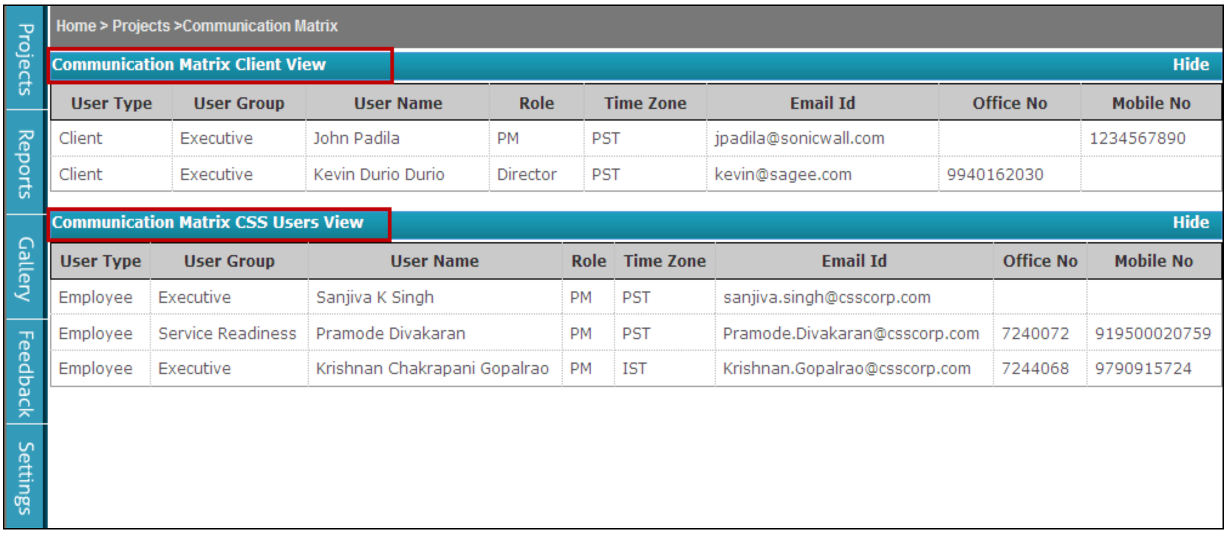
5.6. Communication Matrix

1. Select **Projects > Communication Matrix**.

2. On the top right side of the page, select the project for which you want to view the communication matrix.

3. The **Communication Matrix Client View** panel displays a list of all the clients along with their contact information.

4. The **Communication Matrix CSS Users View** panel displays a list of all the CSS Users and their contact information.



User Type	User Group	User Name	Role	Time Zone	Email Id	Office No	Mobile No
Client	Executive	John Padila	PM	PST	jpadila@sonicwall.com		1234567890
Client	Executive	Kevin Durio Durio	Director	PST	kevin@sagee.com	9940162030	

User Type	User Group	User Name	Role	Time Zone	Email Id	Office No	Mobile No
Employee	Executive	Sanjiva K Singh	PM	PST	sanjiva.singh@csscorp.com		
Employee	Service Readiness	Pramode Divakaran	PM	PST	Pramode.Divakaran@csscorp.com	7240072	919500020759
Employee	Executive	Krishnan Chakrapani Gopalrao	PM	IST	Krishnan.Gopalrao@csscorp.com	7244068	9790915724

5.7. Organization Structure

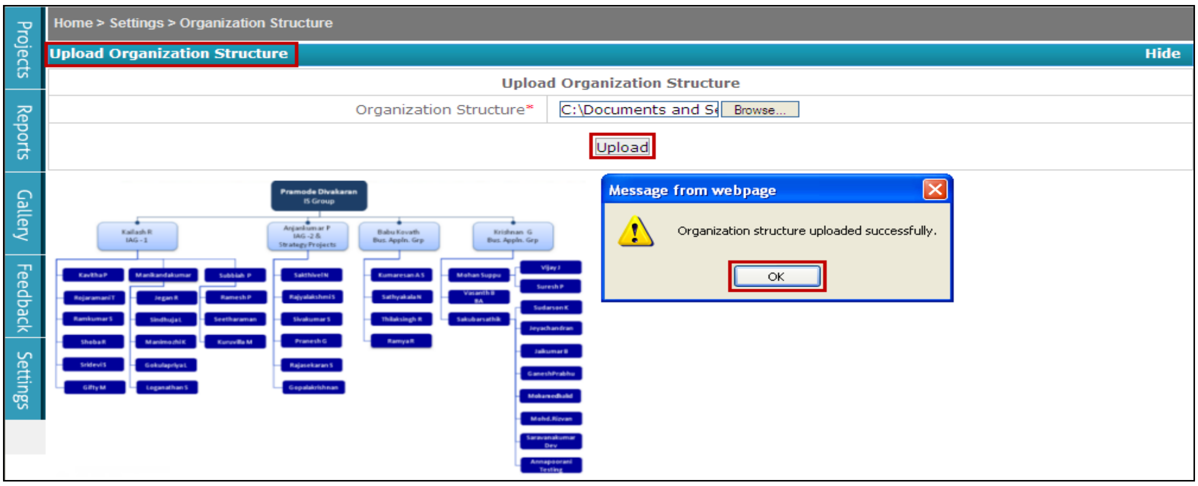
Note: Only administrators can upload the organization structure.

1. Select **Projects > Communication Matrix**.

2. In the **Organization Structure** field, click **Browse** and select the file.

   Note: You can only upload files of jpg, jpeg, png, and gif formats.

3. Click the **Upload** button. A confirmation message appears. You can now view the meeting plan in the bottom section of the page.



6. Reports

The **Reports** tab helps you to generate various reports.

- xxxxxxxx report

- xxxxxxxx report

- xxxxxxxx report

7. Help

Click the **Help** tab to view the Release Notes and Help Documents for Service Readiness Portal.