Testing Developers Module

Login to Admin Control using the following credentials:

Company ID: admincontrol
Login ID: bvpp
Login Email: brijesh@ceis.com
Password: qwerty123

Create Company:

Company name: COMPANY_ABC

Create Database:

Copy database ID from the newly created company.
Login to the server, using your credentials.
Create database using the copied database ID as database name.

Initializing Database:

Select database, select “Import Dump”, then choose the “defaultdb.sql.zip” file.

Activate Company:

Set company status to “Active”
Create license for the company, then copy license key.
Add licence to company.
Add modules depending on the license the company has.
Create company admin name “ACCOUNT_Z”.

Login:

Login to ACCOUNT_Z.

Create Departments:

Back-End Developers
Front-End Developers

Create Positions:

Software Engineer > Back-End Developers
Web Developer > Back-End Developers
Digital Designer >Front-End Developers
3D Modeling >Front-End Developers

Create Accounts:

ACCOUNT_X (user) -> ACCOUNT_Z(supervisor) -> Pro-flow (Module Access)
ACCOUNT_C (user) -> ACCOUNT_X(supervisor) -> Pro-flow (Module Access)

Login as ACCOUNT_C in another browser

Create Projects:

ACCOUNT_C creates a new project named PROJECT_A
Fills required and technical fields in the “Build” section. Then SAVE.

Assign ACCOUNT_Z as the project manager

Note: ACCOUNT_Z can now give scores to the technical portion.

Note: ACCOUNT_Z, ACCOUNT_X, ACCOUNT_C can now update technical and schedule portion of the Request and can choose to lock the request.

Build Schedule:

Build schedule using any account
Add a new document named DOC_1
Add TASK_1 and TASK_2 to DOC_1
Add temporary accounts: TEMP_ACC_1, TEMP_ACC_2, TEMP_ACC_3
Add Temporary supplier: TEMP_SUP_1, TEMP_SUP_2
Add resource to TASK_1:
- Hourly > TEMP_ACC_1
- Supplier > TEMP_SUP_1

Add resource to TASK_2:
- Hourly > TEMP_ACC_2
- T&M > TEMP_SUP_2

Add resource to TASK_3:
- Hourly > TEMP_ACC_3
- T&M > TEMP_SUP_2

Lock the Request, Change something in technical portion. Refresh Data in another Browser. View REVIEW Tab

Note: Sending project request, response should be error since the Project is Locked. Unlock it now and Delete all Logs.

Create Project Request (ACCOUNT_C):

Add ACCOUNT_X and ACCOUNT_Z as directors
(ACCOUNT_X and ACCOUNT_Z): View project request as viewer from incoming request, make sure the information is not editable

Project Request Testing:

(ACCOUNT_X) Approve request
(ACCOUNT_Z) Reject request, Refresh Data to see project request status
Note: ACCOUNT_Z and ACCOUNT_C can resend the request on technical stage.
(ACCOUNT_Z) Resend project request, Approve request
(ACCOUNT_X) Approve request
(ACCOUNT_Z) Refresh Data, send project request to financial stage
Note: State of the Project is now in Financial: Only Project Managers can view Budget & Financial TAB

Project Budgeting:

Add following information:
- Budgeting Dashboard - Add Item Category: CAT_1, CAT_2
- Budgeting Dashboard - Add Items in CAT_1: ITEM_1, ITEM_2
- Budgeting Dashboard - Add Items in CAT_2: ITEM_3,
- Budgeting Dashboard - Add rows: CAT_1 for type="internal", Cat_1 for type="tm", CAT_2 type=” supplier” then
  - upload file to CAT_1 > Internal: UPL_1, UPL_2

upload file to CAT_1 > T&M: UPL_3.
upload file to CAT_2 > Supplier: UPL_4.
update costing for CAT_1 > T&M
update costing for CAT_2 > Supplier

OPEX Dashboard: Fill Role & Rate

OPEX Forecast: Fill up Months by Monthly, SAVE. Update Data by Quarterly, SAVE.

Note: Saving data in Quarterly will distribute/divide the amount by 3 months.

CAPEX Forecast: Fill up Months by Monthly, Save. Update Data by Quarterly. Save. View the difference.

Note: Saving data in Quarterly will distribute/divide the amount by 3 months.

Project Financial:

Add Prerequisite Forms.

Add Project Connects

Activate Project

(ACCOUNT_Z) Approve Request
(ACCOUNT_X) Reject Request
ACCOUNT_Z) Refresh Data to see project request status, resend request

Note: Only ACCOUNT_Z should be able to resend financial request

(ACCOUNT_Z) Approve Request
(ACCOUNT_X) Approve Request
(ACCOUNT_Z) Activate Project

Note: Only ACCOUNT_Z should be able to activate the project
Note: Only ACCOUNT_Z should be able to view PROJECT_A under active project

Project Launch

(ACCOUNT_Z) Add Minutes, set ACCOUNT_X as responsible on type “Action”
(ACCOUNT_Z) Set ACCOUNT_X as supervisor of ACCOUNT_Z

Note: ACCOUNT_X should now have access to the PROJECT_A under Active Project

(ACCOUNT_Z) Distribute
Refresh page on other accounts to see changes

Note: ACCOUNT_X should now be able to see the minute created by ACCOUNT_Z

(ACCOUNT_X) check schedule board for new task assignment
(ACCOUNT_Z) Add Register, Refresh Page.
(ACCOUNT_Z) Add Notes, Refresh Page.
(ACCOUNT_Z) Update data of Technical Request. Refresh page
(ACCOUNT_Z) Update score of Technical Request. Refresh Page.
Note: Request Financial Only for Viewing

Mapping

Map accounts
Double check on schedule if its saved
Create suppliers (Finance Spending > CAPEX Spend OR Schedule Board)
Map suppliers
Double check on schedule if its saved
Refresh Page to confirm saved changes

Testing Developers Module

(ACCOUNT_X and ACCOUNT_C) You may view newly assigned tasks on alert *fn*

Schedule

Add a new document named DOC_2
Set DOC_1 as DOC_2's predecessor on a stage
Note: Unable to change date of the chosen DOC_2 stage
Note: Chosen DOC_2 stage is indicated with a marker
Link DOC_1 and DOC_2 on a stage
Note: Unable to change date of the chosen stage
Note: Chosen stage is indicated with a marker

Task Board

Use ACCOUNT_Z on PM task board
Use ACCOUNT_X on user task board (Make sure ACCOUNT_X has some tasks)
Use ACCOUNT_C on user task board (Make sure ACCOUNT_C has some tasks)
Note: ACCOUNT_X and ACCOUNT_C should have a common task
(ACCOUNT_X) send message to PM *fn*
(ACCOUNT_Z) Refresh Data to view message
(ACCOUNT_Z) Send a reply to the task owner
(ACCOUNT_X and ACCOUNT_C) Refresh Data to view message
(ACCOUNT_X and ACCOUNT_C) You may view/mark as read on alert *fn*
(ACCOUNT_X) suggest a new end date to PM *fn*
(ACCOUNT_Z) Refresh Data to view dispute
(ACCOUNT_Z) You may view/approve/reject on alert *fn*
(ACCOUNT_Z) Reject the suggested date
(ACCOUNT_X) Refresh Data to see data has not been changed
(ACCOUNT_Z) Create a new account ACCOUNT_V > user level *user*> Supervisor *ACCOUNT_Z,*
Provide Pro-Flow module access, then connect ACCOUNT_V to the project.
(ACCOUNT_X) suggest a new task owner (ACCOUNT_V) to PM *fn*
(ACCOUNT_Z) Refresh Data to view suggested assignment
(ACCOUNT_Z) Approve suggest assignment
Login to ACCOUNT_V
View your new task through Alert *fn*
(ACCOUNT_X) Refresh Data to see task ownership has been changed

Time Sheet

(ACCOUNT_C) Stat task, input hours in timesheet
Note: Inputting hours in a time sheet will start the task
(ACCOUNT_Z) See the ACCOUNT_C's actual hours under Resource Board
(ACCOUNT_Z) Task Board, view task confirm ACCOUNT_C has started working on the task
Note: Started tasks should have green colour
(ACCOUNT_C) Set task as totally done
(ACCOUNT_Z) Task Board, view task confirm ACCOUNT_C has been totally done
Note: Task status "Done" means the owner of the task has finished his part
Note: Task status "Totally Done" means all task owner have finished their part

Note: Task status colours:

- Grey: Not Started
- Green: Started
- Yellow: 1 day before due
- Red: Past due
- Blue: Done

Document board only for viewing

Finance > Budgeting (ACCOUNT_Z)

Able to update account rates and view allotted and actual hours

Finance > Tracking (ACCOUNT_Z)

Able to view allotted and actual budget of accounts
Check weekly view of actual budget

Finance > Spending (ACCOUNT_Z)

Tracking Dashboard
- able to upload files on the budget items

OPEX Spend
- Only for viewing

CAPEX Spend
- Adding Invoices and connecting to budget items
- Uploading file
- Update costing

CAPEX Forecast
- Update budget items CAPEX monthly

Tracking Dashboard
- View uploads to confirm all the files uploaded within the budget item are shown

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