Contents

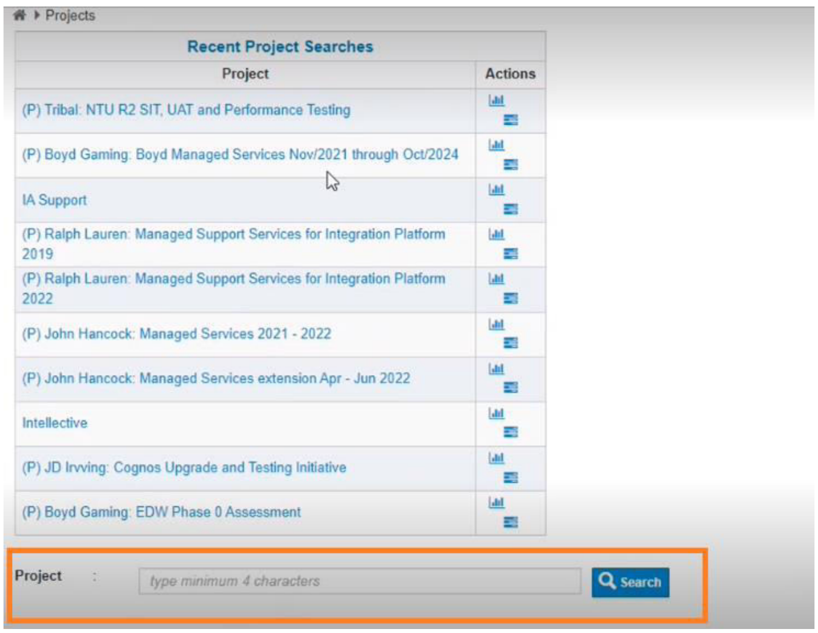
Open Project

Here we can view the complete project details and resource details available in the project and can also find the documents related to the project.

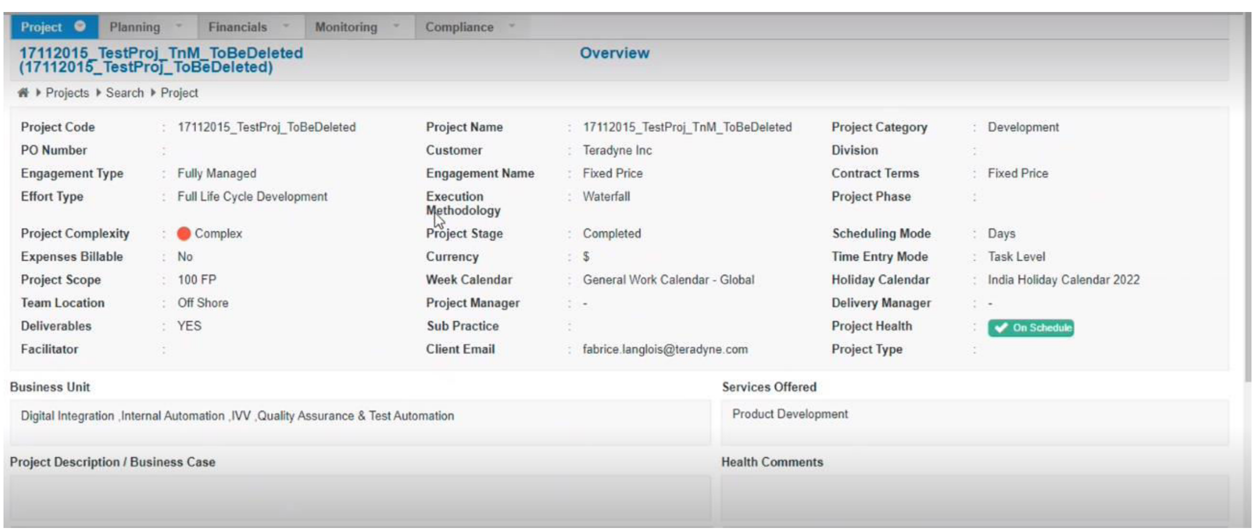
1. Project

1a. Overview

Here we can search for the project by entering the name of the project and can search for those projects.



Once clicking on the project name, the complete overview of the project will be displayed.



Project KPI's

KPI	Preliminary	Contracted	Planned	Actual
Schedule	01-Nov-2015 to 30-Nov-2016	01-Nov-2015 to 30-Nov-2016	01-Nov-2015 to 30-Nov-2016	17-Nov-2015 to 10-Jan-2017
Duration (Days)	272	272	272	291
FTE	0	0.00	0.21	0.13
Effort (Hrs)	0	0	454	300
Revenue	$ 0	$ 0	$ 0	$ 0
Resource Direct Cost	$ 0	$ 0	$ 0	$ 0
Other Cost	$ 0	$ 0	$ 0	$ 0
Gross Margin	$ 0	$ 0	$ 0	$ 0
GM %	0.00	0.00	NA	NA

Risk Factor Characteristics

Technical Complexity	: High Risk
Domain Specific Challenges	: High Risk
Skilled Resources Availability	: High Risk
Dependencies On Third Party Systems	: High Risk
Development Environment Availability	: High Risk
Dependencies on customer/Customer Environment	: High Risk
Margin/Profitability	: High Risk

Project overview displays the overall status of the project along with project KPIs

Project KPIs contain the preliminary, contracted, planned, and actual values. Preliminary date is derived from the initial stage of discussions of the project. Contracted date is when the actual SOW is signed on.

Risk Factor characteristics define the below based on the magnitude of the risk measured in High, Moderate and Low

Technical Complexity

Domain Specific Challenges

Skilled Resources Availability

Dependencies on Third Party Systems

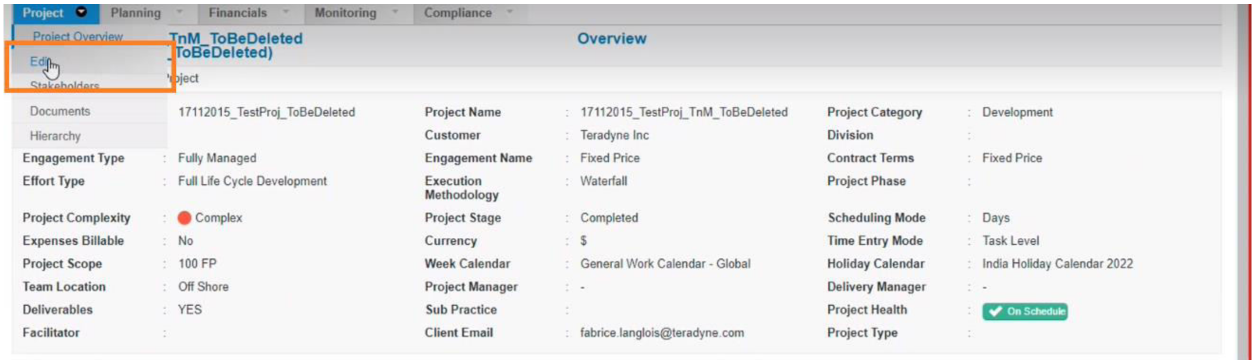
Development Environment Availability

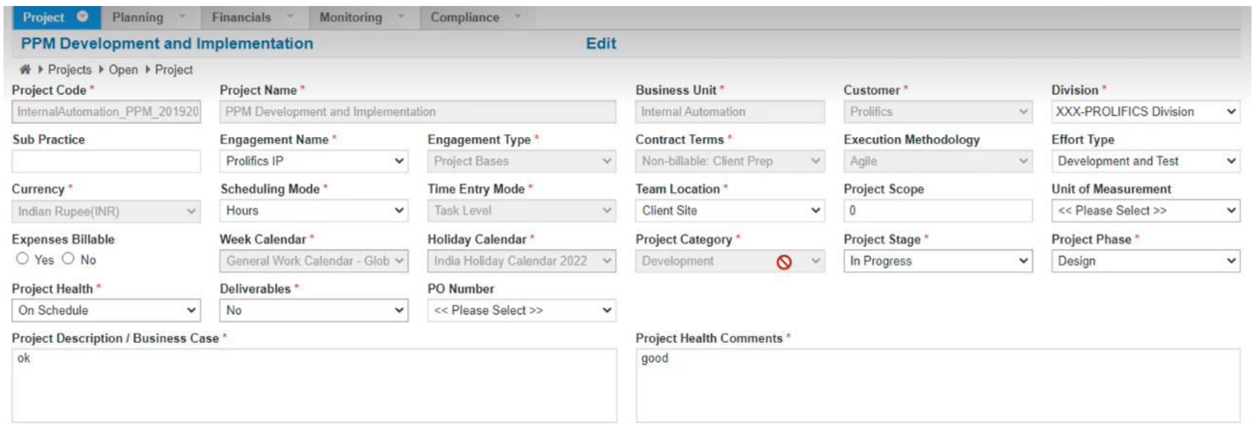
Dependencies on customer/Customer Environment

Margin/Profitability

1b. Edit

Here by clicking on the project and an option of edit once clicking on the Edit we have option of editing some of the details to update the current details of the project.

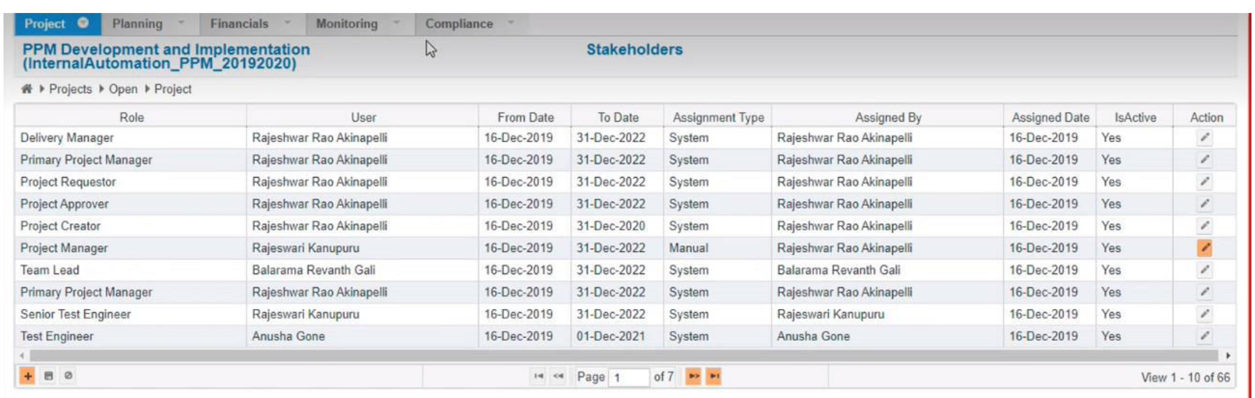




Here the project Manager can edit those details and update those details and save those details.

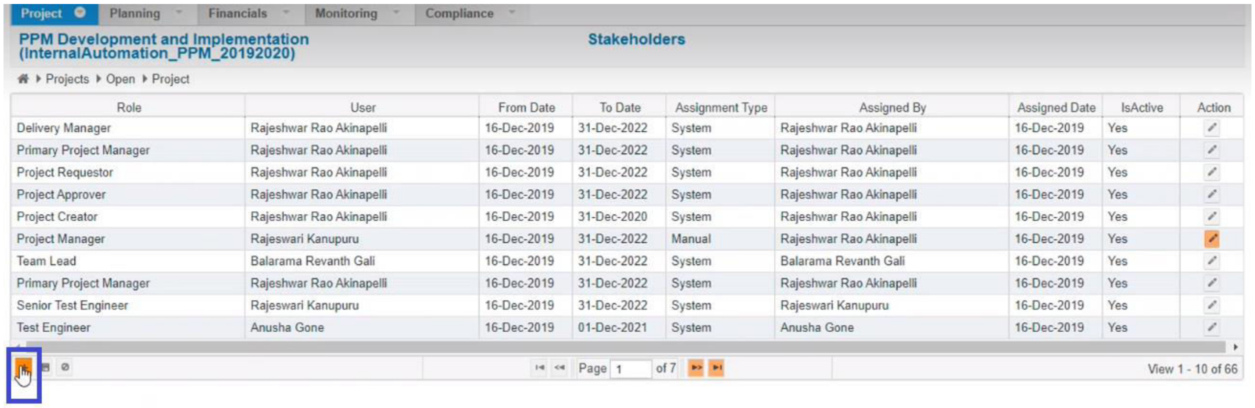
1c. Stake Holder

Here we can add the New Role type and can add those resources into the project for as the stake holder

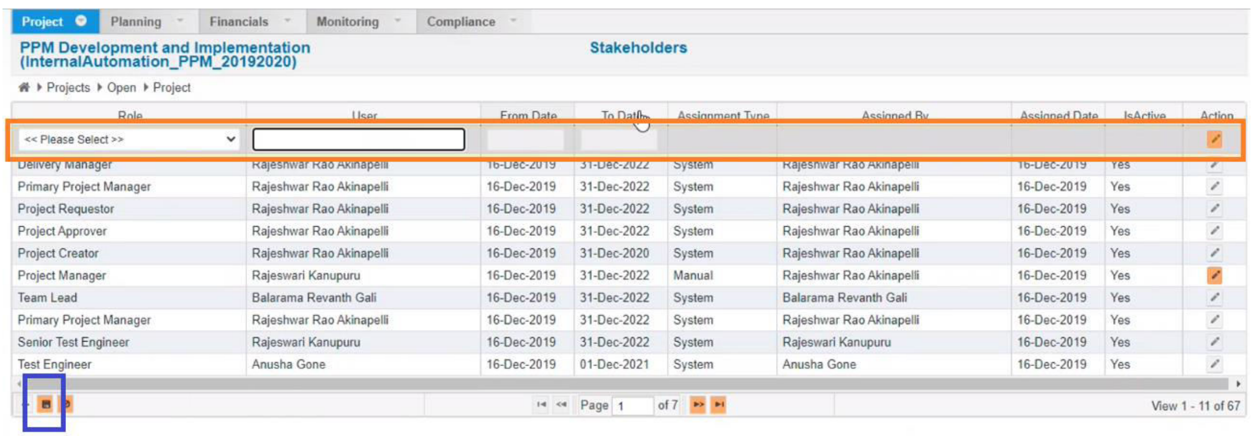


Role	User	From Date	To Date	Assignment Type	Assigned By	Assigned Date	IsActive	Action
Delivery Manager	Rajeshwar Rao Akinapelli	16-Dec-2019	31-Dec-2022	System	Rajeshwar Rao Akinapelli	16-Dec-2019	Yes	
Primary Project Manager	Rajeshwar Rao Akinapelli	16-Dec-2019	31-Dec-2022	System	Rajeshwar Rao Akinapelli	16-Dec-2019	Yes	
Project Requestor	Rajeshwar Rao Akinapelli	16-Dec-2019	31-Dec-2022	System	Rajeshwar Rao Akinapelli	16-Dec-2019	Yes	
Project Approver	Rajeshwar Rao Akinapelli	16-Dec-2019	31-Dec-2022	System	Rajeshwar Rao Akinapelli	16-Dec-2019	Yes	
Project Creator	Rajeshwar Rao Akinapelli	16-Dec-2019	31-Dec-2020	System	Rajeshwar Rao Akinapelli	16-Dec-2019	Yes	
Project Manager	Rajeswari Kanupuru	16-Dec-2019	31-Dec-2022	Manual	Rajeshwar Rao Akinapelli	16-Dec-2019	Yes	
Team Lead	Balarama Revanth Gali	16-Dec-2019	31-Dec-2022	System	Balarama Revanth Gali	16-Dec-2019	Yes	
Primary Project Manager	Rajeshwar Rao Akinapelli	16-Dec-2019	31-Dec-2022	System	Rajeshwar Rao Akinapelli	16-Dec-2019	Yes	
Senior Test Engineer	Rajeswari Kanupuru	16-Dec-2019	31-Dec-2022	System	Rajeswari Kanupuru	16-Dec-2019	Yes	
Test Engineer	Anusha Gone	16-Dec-2019	01-Dec-2021	System	Anusha Gone	16-Dec-2019	Yes	

By clicking on the Add button is a new row populates and can add then by the action

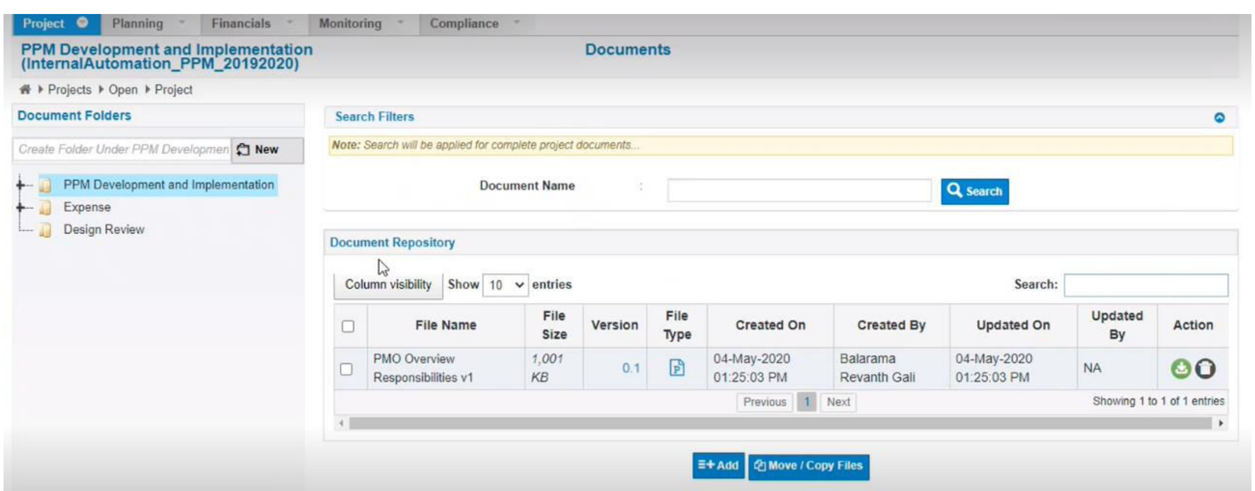


Here we can add the details such as selecting the Role and adding the User to that Role with the assignment type and saving that details.



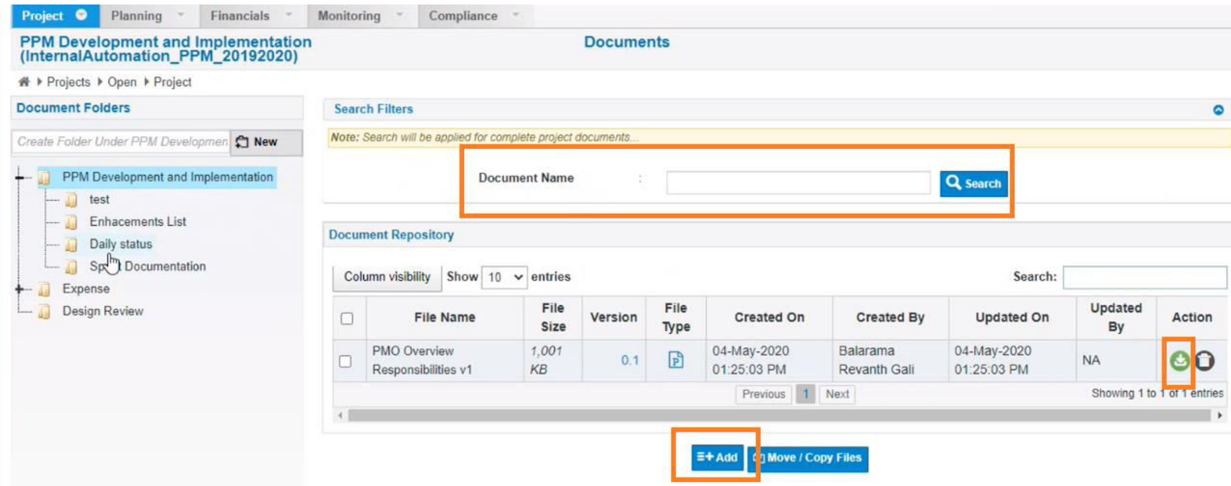
1d. Documents

Here we can view all the documents available in that project and can download those Documents available in that project.



Here we can also search for those projects by searching the file name, and here can also add documents.

Clicking on Version triggers a popup with previous versions and info of the last person who has updated the document

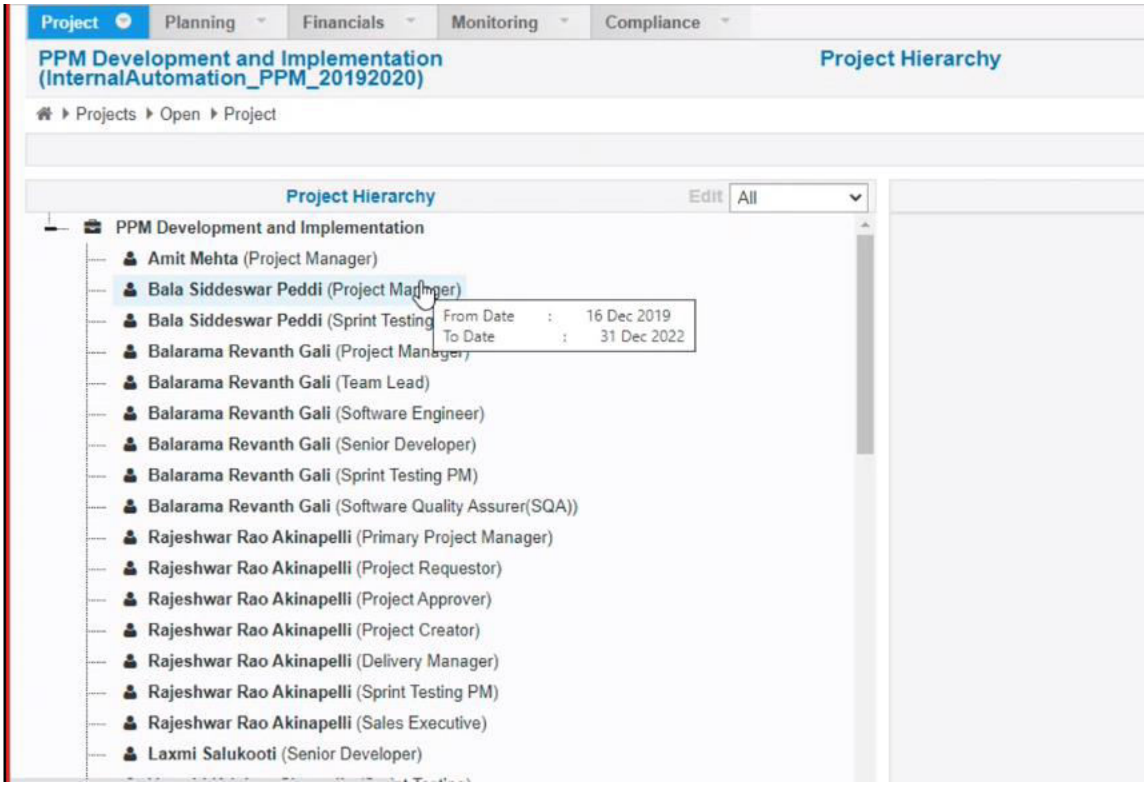


Clicking on the parent folder and creating a folder by clicking on new will create a folder under the selected parent folder. Add button helps in adding documents to the created folder.

Selecting a folder and clicking on Move/Copy Files will move or copy folder to the selected folder.

1e. Hierarchy

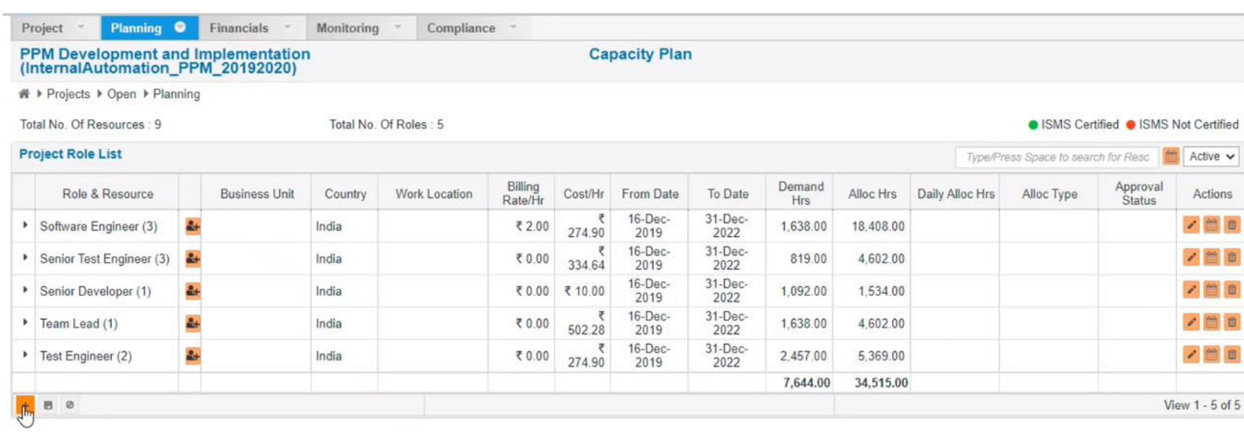
Here we can view the Hierarchy of the resources in the project



2. Planning

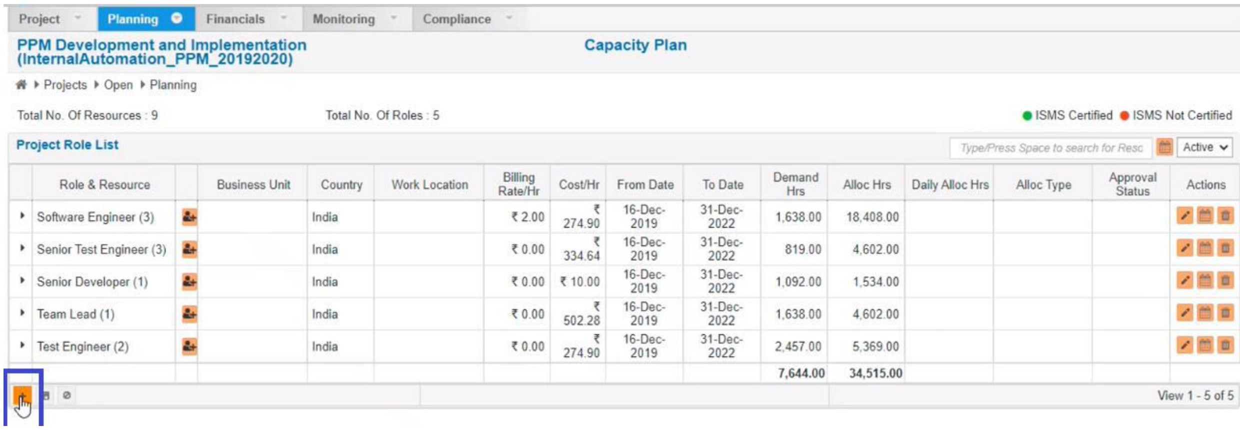
2a. Capacity Plan

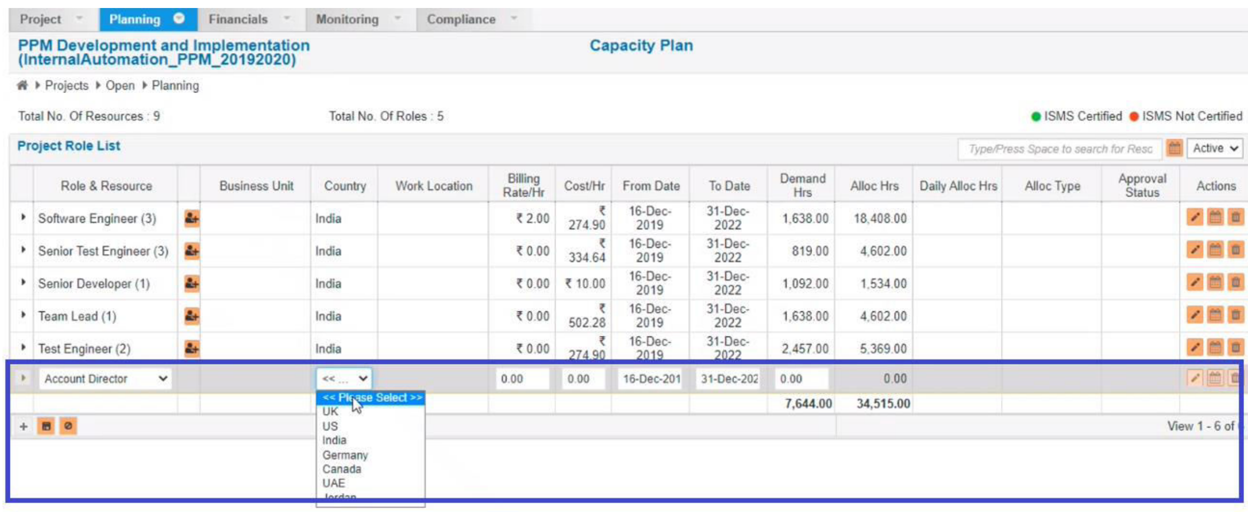
Navigate to Capacity Plan Clicking on Planning in Project Overview Page. Project Manager and Delivery Manager have privileges to add a capacity plan to a project. Project Manager would be the primary user to define capacity Plan and can create roles for the project. Skill rating is mandatory in order to add in capacity plan.



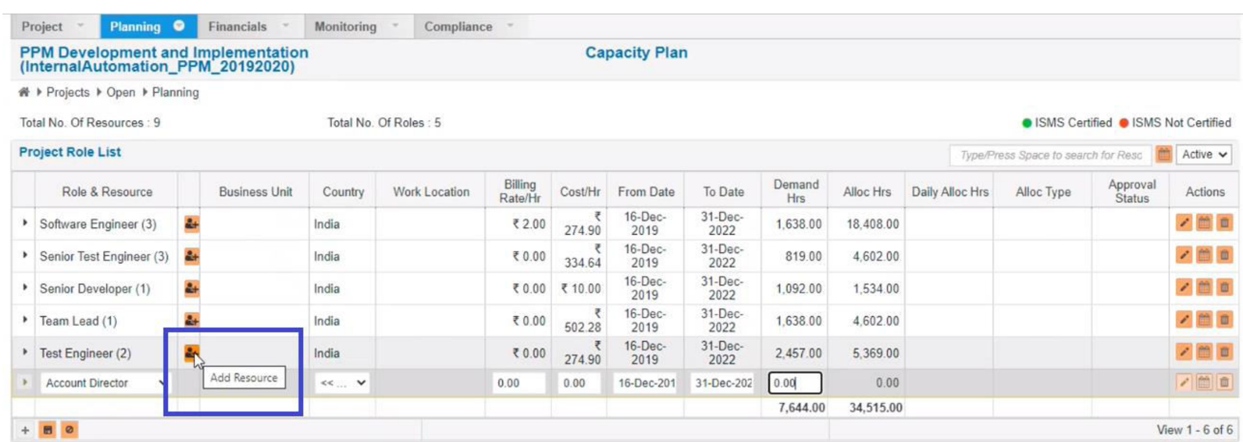
Role & Resource		Business Unit	Country	Work Location	Billing Rate/Hr	Cost/Hr	From Date	To Date	Demand Hrs	Alloc Hrs	Daily Alloc Hrs	Alloc Type	Approval Status	Actions
Software Engineer (3)			India		₹ 2.00	₹ 274.90	16-Dec-2019	31-Dec-2022	1,638.00	18,408.00				
Senior Test Engineer (3)			India		₹ 0.00	₹ 334.64	16-Dec-2019	31-Dec-2022	819.00	4,602.00				
Senior Developer (1)			India		₹ 0.00	₹ 10.00	16-Dec-2019	31-Dec-2022	1,092.00	1,534.00				
Team Lead (1)			India		₹ 0.00	₹ 502.28	16-Dec-2019	31-Dec-2022	1,638.00	4,602.00				
Test Engineer (2)			India		₹ 0.00	₹ 274.90	16-Dec-2019	31-Dec-2022	2,457.00	5,369.00				
									7,644.00	34,515.00				

Here we can click on the add button a new row populates where in we need to add the role type we are adding by entering the details required.

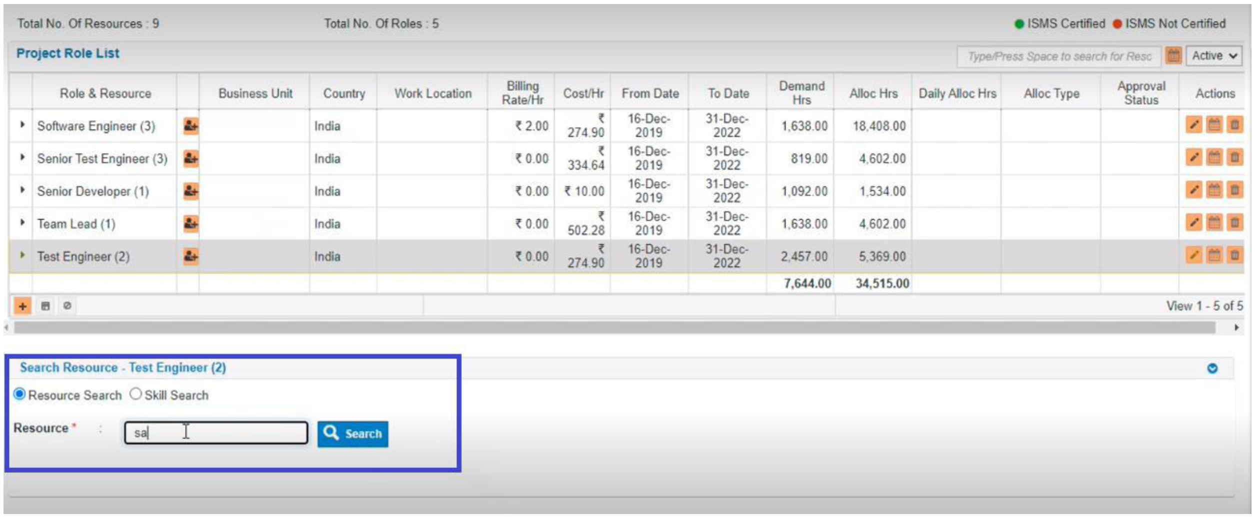


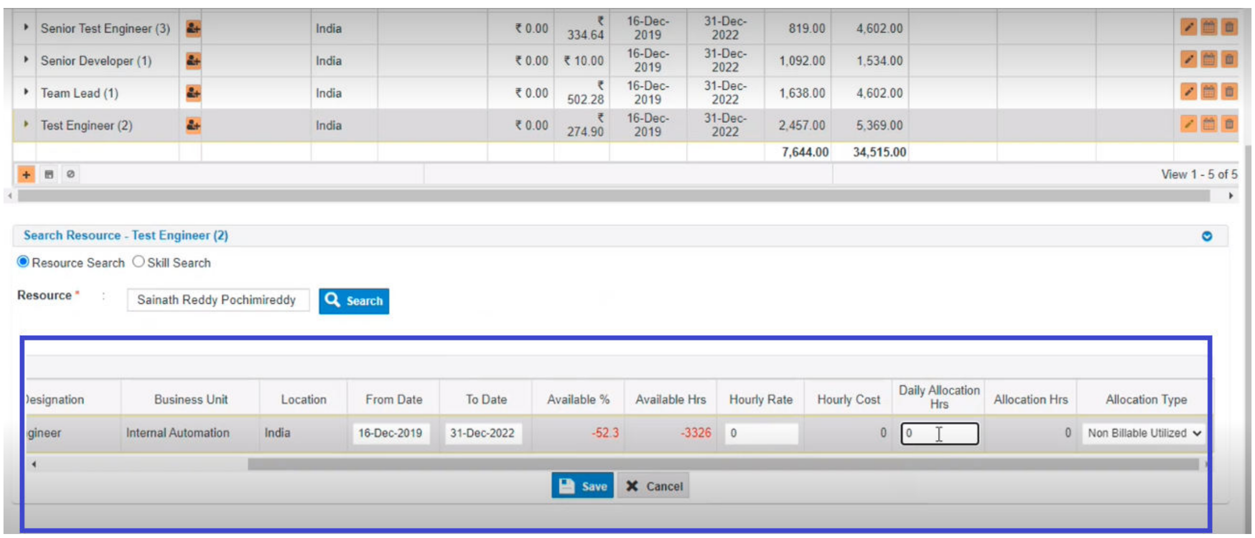


Now we need to save the name of the resource and by clicking on the add icon a new data populates in the bottom and here we need to add the resource.

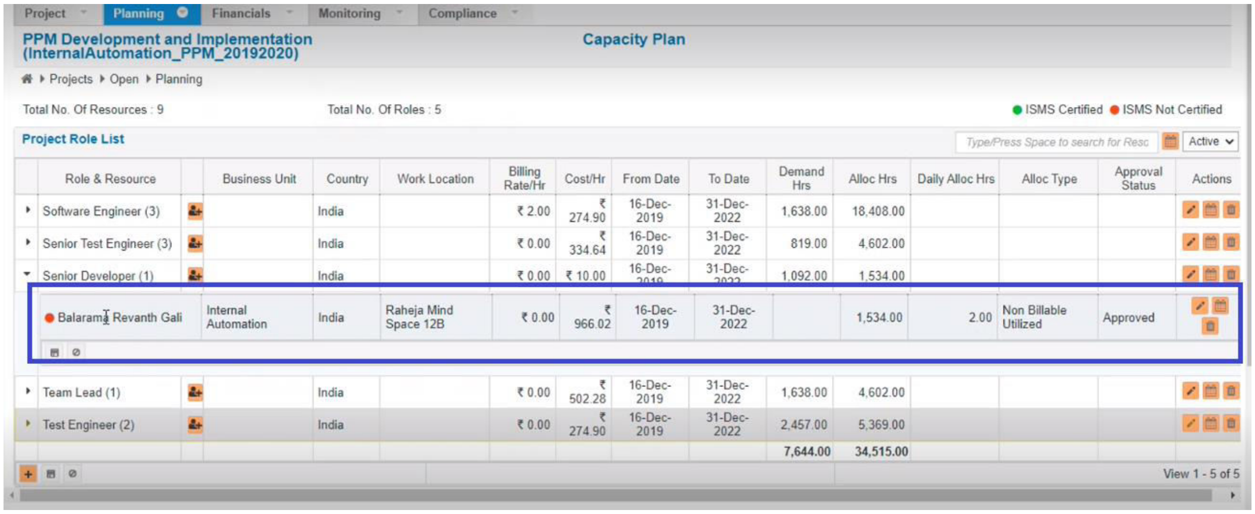


We need to search for the name of the resource and those name populates in the table





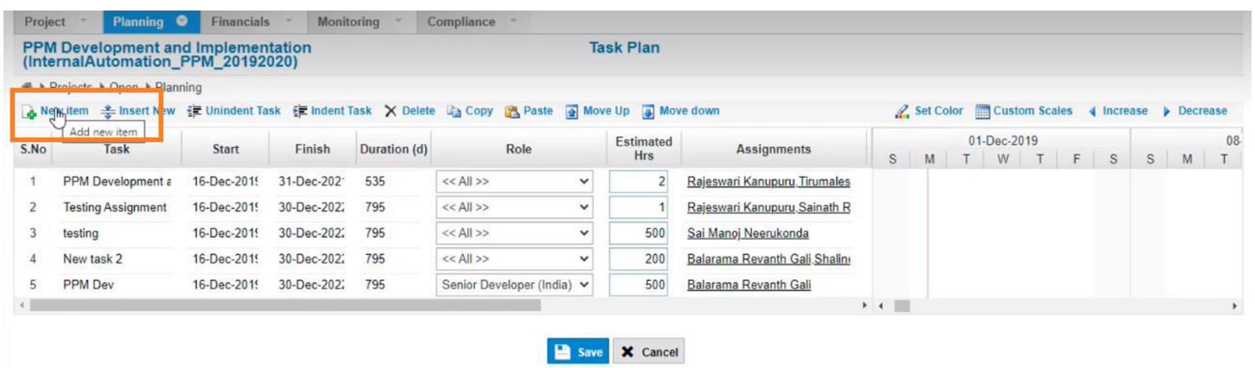
Now by clicking on Save those resource details will be added to that role

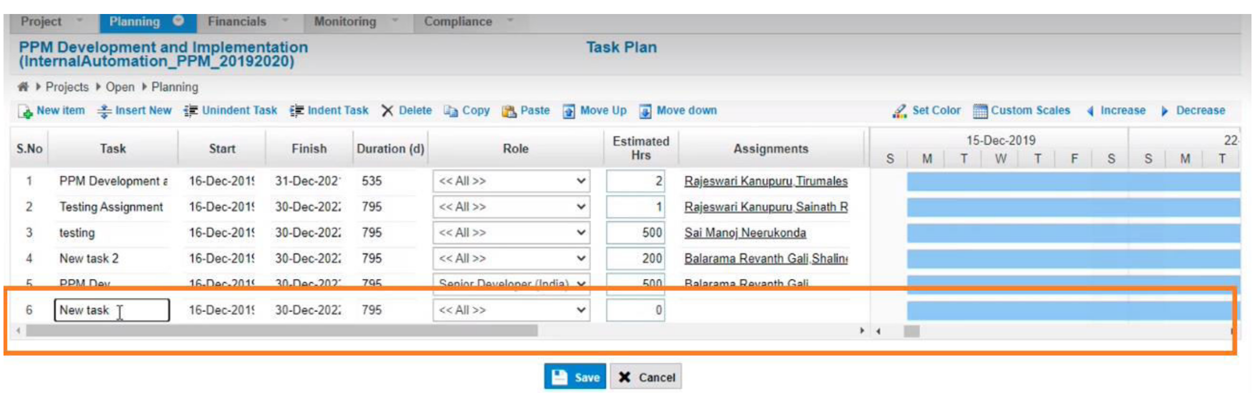


2b. Task Plan

Here we can add the tasks to the resource once those tasks are added to that resource those details will be displayed in the My Workspace of the resource.

Here by clicking on the New Item a new row populates to add the task an by adding all the required details



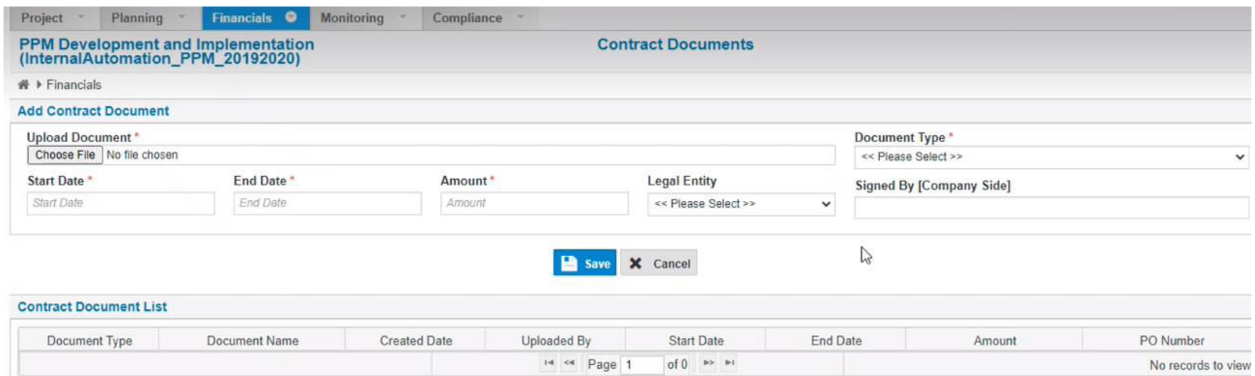


Here by giving the details and assigning the assignment such as resource and saving those details will be displayed.

3. Financials

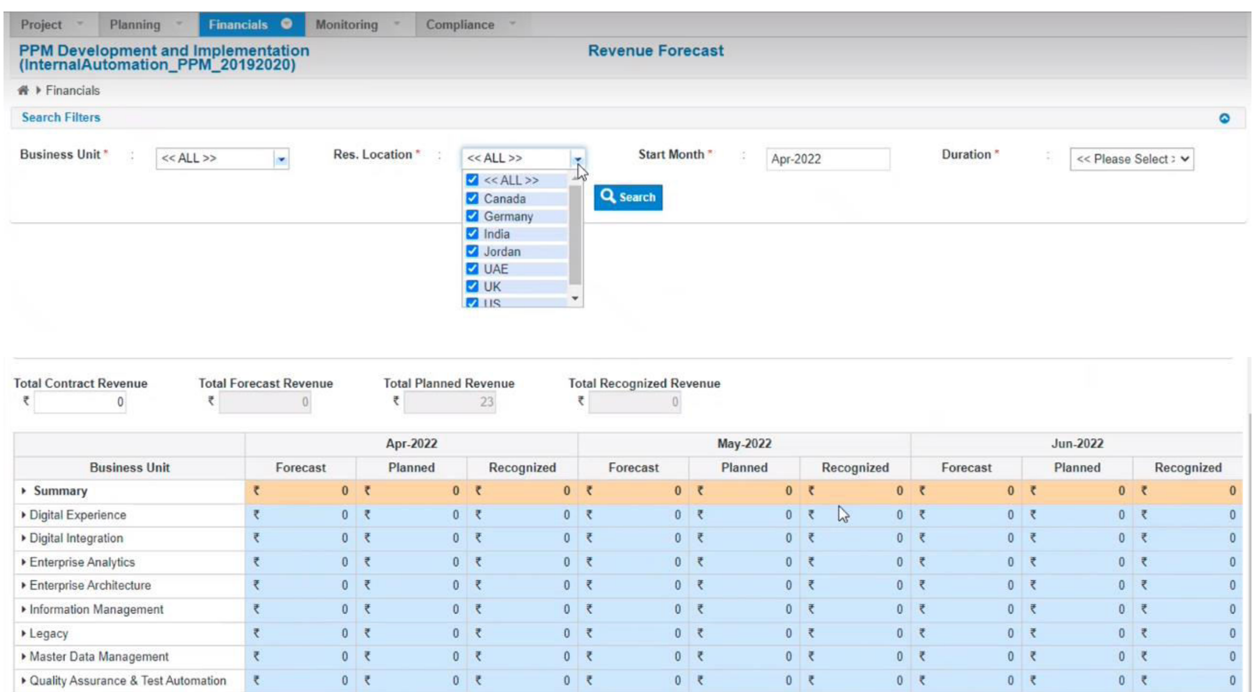
3a. Contract Documents

Here we can add the contract documents of the project and can also see the old contract details of the projects.



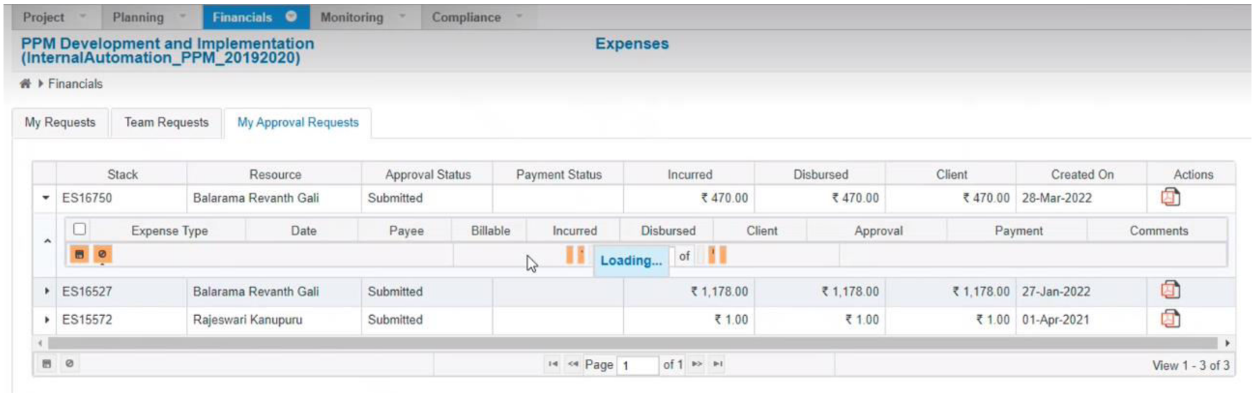
3b. Revenue Forecast

Here we can find the revenue forecast of the project by selecting those details in the filters

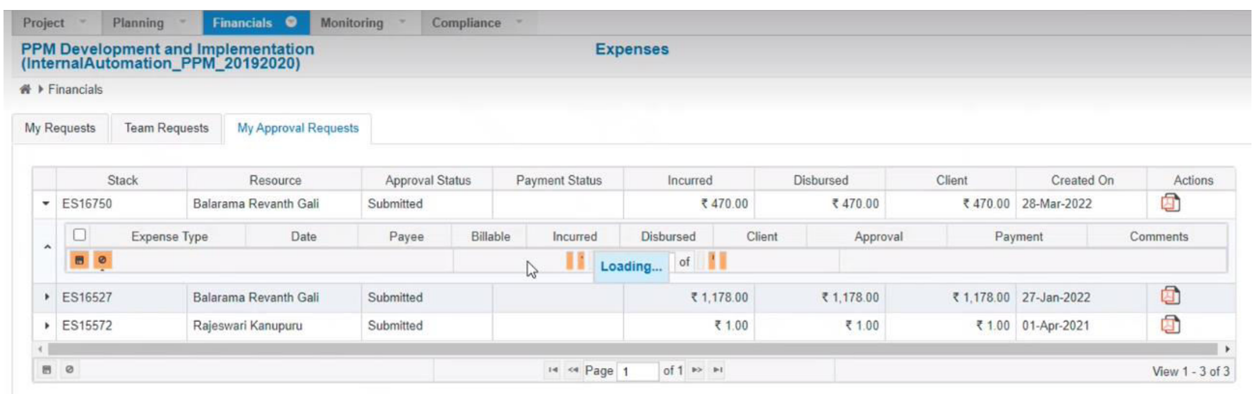


3c. Expenses

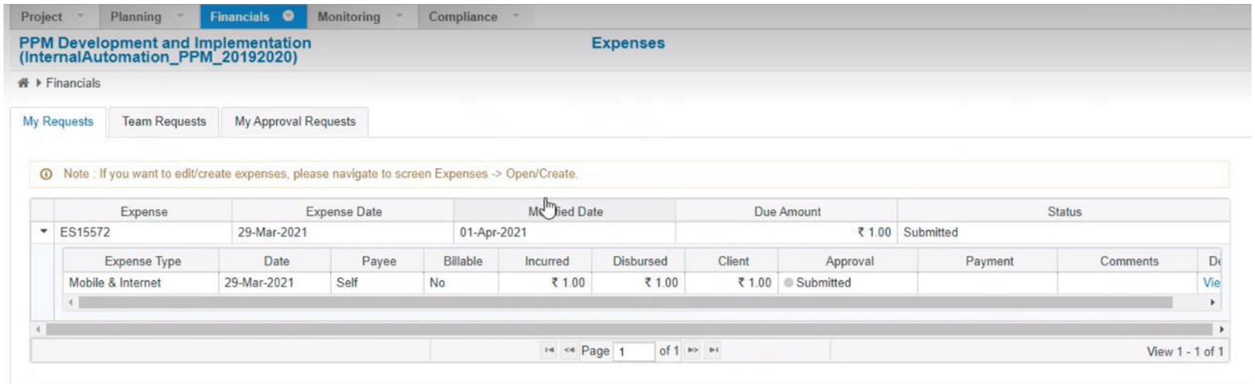
In this screen we can view the details of the expenses in three different tables, those details of the tables are as follows,



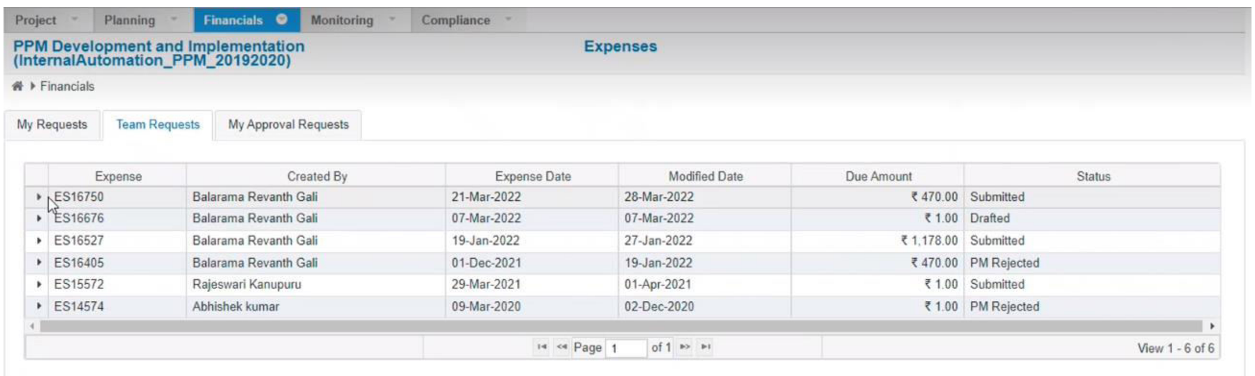
My Approval Requests: Here we can see the expense requests created by the resources those needs to be approved by the particular project manager will be displayed here the manager who needs to approve can either approve, Reject or can edit the request created and can add the comments.



My Requests: Here we can see the requests created by the particular person who has logged in and those details and details of those expenses.



Team Requests: This table specifies the details of all the requests created by the Team members and can the details and status of the expense requests.



4. Monitoring

4a. Accomplishments

Accomplishments for Project are displayed here. A search box is available to search for a particular accomplishment. Pagination is available at the bottom. User can define the number of entries to be displayed in page by select a value in Show Entries drop down. Accomplishments are created which are targeted within a particular period. User can traverse between the weeks and find out the accomplishments. User can add accomplishments to the previous dates.

4b. Milestones

Milestone is used to add or create milestones for the project. Below mentioned are the field available in Milestones. Clicking on add button helps in creating a milestone.

Milestone: Name or Summary of the milestone

Due Date: ETA for the milestone to be completed

Status: Status define the current state of milestone whether the mile stone is in progress, Hold or Completed

Completed Date: Date on which the milestone was actually completed.

Comments: Comments for the milestone. These can be added during editing a mile stone as well.

Actions: Mile stone can be saved and also, we can cancel editing here

Milestone can be searched by providing the name of the milestone, Due date status and completed date. Milestones can be created for Previous as well as future dates.

4c. Risks

This section contains the identified Risks of the project with below mentioned columns: • Risk Name: Name of the Risk is to be defined by the user.

Risk Type: This column displays the type of Risk such as Budget, Scope, Infrastructure, Resource, Quality, Communication

Risk Source: Source of the risk defines the point of origination of Risk which can be Business Requirements, development, Testing, Operations, Infrastructure, approval.

Risk Impact: Defines the impact of the risk that could be Critical, High, medium, low, least Impact.

Probability of Occurrence: Chances of occurrence of the risk is defined with value as Very High, High, medium, low, least.

Risk Value: Risk Impact* Probability of Occurrence displays Risk Value

Assigned To: Resource to whom the risk was assigned to.

Risk Occurred: Risk occurred defines whether the risk has been encountered or not and denoted with Yes or No. If it is planned risk and it has not occurred, then it is No.

Risk Status: Status of the risk is classified as Identified- When risk is found, Accepted- Accepted by concerned team, Mitigated- Necessary steps taken to avoid the risk, Invalid- Not a valid risk and there could be no impact.

Occurred Date: Date on which the Risk was identified

Created By: Name of the resource who actually created the Risk

A Search box is provided to search for a particular risk. Pagination is available at the bottom. User can define the number of entries to be displayed in page by select a value in Show Entries drop down.

Issues: This section contains the identified Risks of the project with below mentioned columns:

Issue Name: Name given to issue found

Criticality: Defines the severity of the issue with values like Urgent, High, Medium, Low

Status: Denotes the stage of issue in terms of New, Assigned, in progress, withdrawn, deferred, Resolved and closed.

Due Date: Due date is the ETA for the issue to be closed.

Issue Source: Source is retrieved from Marketing, End Users, Partners, Competitors, Audit, Others, Infrastructure, Approval

Assigned To: Name of Resource to whom the issue is assigned to

RCA Done: whether Root cause analysis is done for the issue is done or not is denoted by yes or No here.

Created By: Name of the resource who raised the issue.

Comments: Comments can be added here by resource working on this issue

4d. Dependencies

Dependencies are created to show the factors on which the project execution is dependent on. Below mentioned are the fields in Dependencies page:

Dependency / Constraint: Summary or name of the dependency

Type: Dependency type can be Finance /Resource /Infrastructure /Training /Travel /Approvals/Customer/Contractor/Intellectual Property and others

Priority: Depicts the priority in terms of Low/Medium/High/Critical

Raised By: Resource who has raised the dependency.

Raised Date: Date on which the dependency was raised.

Target Date: Target closure date.

Assigned To: Resource to whom the dependency is assigned to.

Phase/Area affected:

Status: State of the dependency (New/On hold/Completed/InProgress)

Action: Used to edit/ save /Cancel editing the row

Dependency can be searched by providing the name of the Dependency, Due date status and completed date. Dependency can be created for Previous as well as future dates.

4e. Issues

Issues are the one which causes delay or hindrance to the project execution. Issues are different from the defects. These issues can be raised by any stakeholder of the project. Issues have two section. One is Search filter and the other is Add issue section.

Search Filters have the following fields:

Criticality: Criticality of the issue is defined in terms of Urgent/High/Medium/Low

Issue Source: Source of the issue is where exactly the issue has originated from:

Status: Stage of the issue as of now defined in terms of New/Assigned/InProgress/Withdrawn/Deferred/Resolved/Closed

Issue Name: Name of the issue

RCA Done: Whether Root Cause Analysis for the issue has been provided or not.

Assigned To: Resource to whom the issue is assigned to.

Created By: Issue raised by.

Issue can be created by clicking on add button which displays a popup with below mentioned fields:

Project: Name of the project

Criticality: Criticality of the issue is defined in terms of Urgent/High/Medium/Low

Issue Source: Source of the issue is where exactly the issue has originated from:

Status: Stage of the issue as of now defined in terms of New/Assigned/InProgress/Withdrawn/Deferred/Resolved/Closed

Issue Name: Name of the issue

RCA Done: Whether Root Cause Analysis for the issue has been provided or not.

User can update the issue by clicking on Update button under action. Status button in popup becomes editable and status can be changed.

4f. Defects

By clicking on the "Defects" link from Project Dashboard menu, user can navigate to the Defect Listing screen. All the resources of a Project can be able to create defects. Resources can only access the Defect functionality for Projects they have access to.

Following are the Defect Management features which are available to project members

Create Defect

Edit Defect

Update Defect

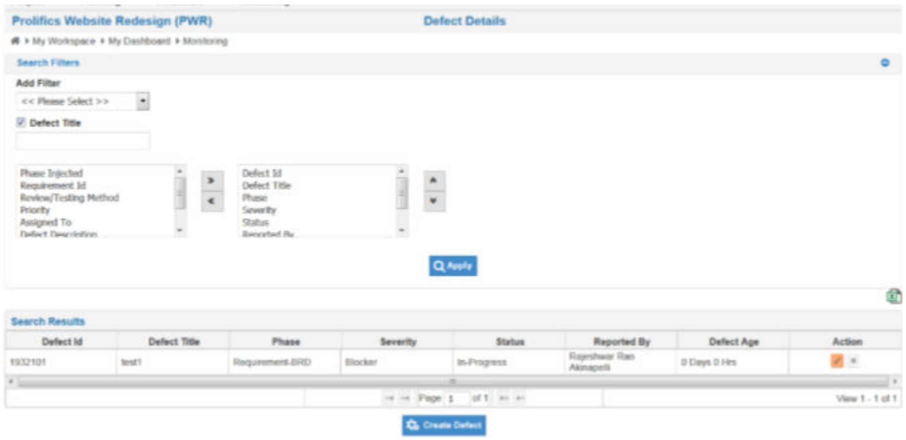
Delete Defect

Filter Defects

Create Defect

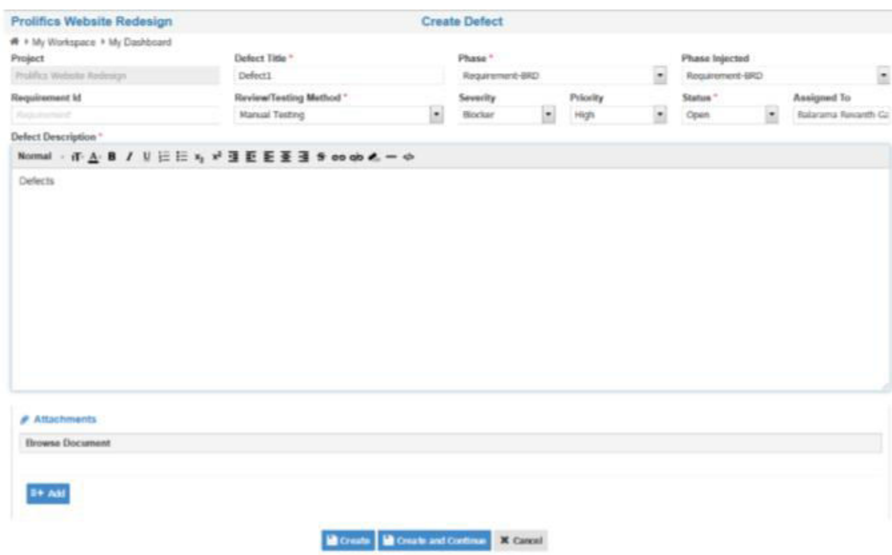
When user clicks on "Defects" link from project menu system redirects user to the Defect Listing Screen.

On clicking Create Defect button in the Defect Listing screen "Create Defect" screen will be displayed as shown in the below image

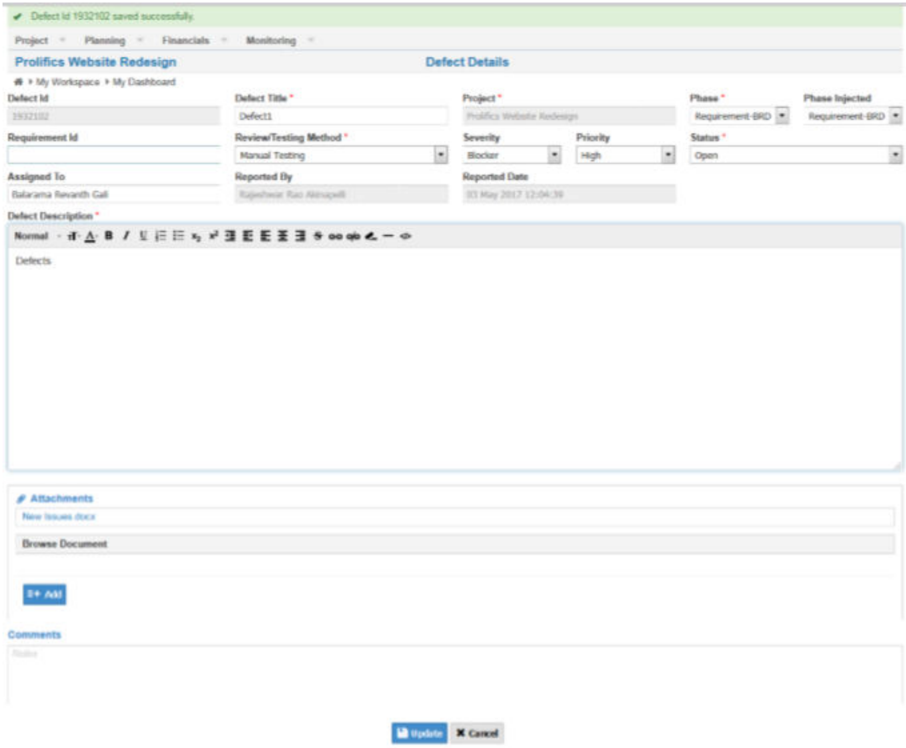


Users have an option to upload attachment in Create Defect screen by clicking on Add icon.

User needs to enter all the mandatory fields and needs to click on "Create" or "Create and continue" button to create a defect.



After submitting all the details, Defect will be created successfully with successfully created message will be displayed on the header.



4g. Baselines

Baselines Can be accessed from Monitoring in Project Overview Page. Baseline is to be done once the task plan in project are completed. Roles, Resources, Tasks are baselined after clicking on create baseline.

Baselining is used to finalize the changes made to the project.

A message should be displayed indicating that baseline is completed upon clicking on create baseline

Two or more records of Baselines can be compared for a project.

4h. Events

Events occurred during the execution of the project are displayed here e.g. Go live dates, Major deliverables provide to customer etc. Below mentioned are the fields available in Events

Event: Name of the event

Date: Date on Which the event has happened.

Comments: Comments against the created event.

Actions: Used to edit/ save /Cancel editing the row

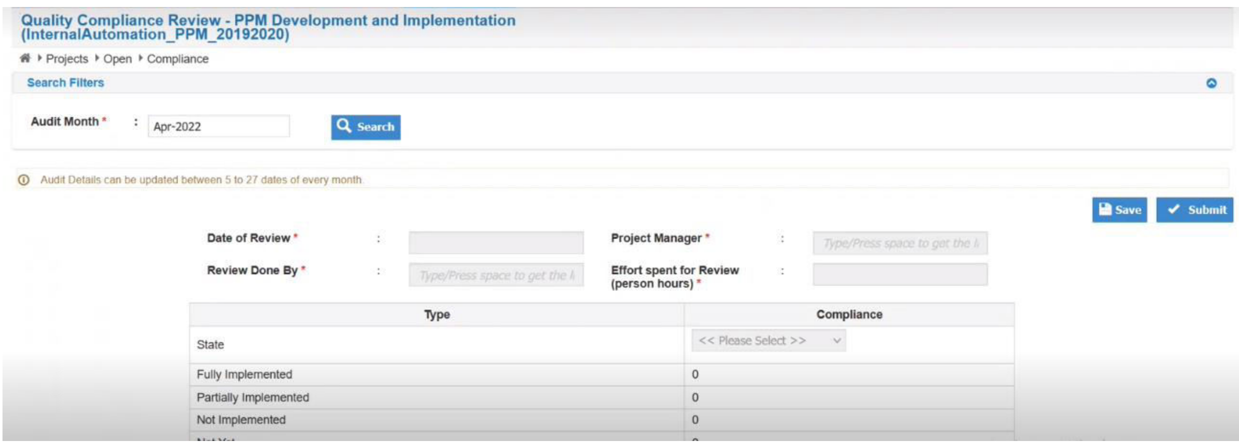
Event can be created for Previous date as well.

5. Compliance

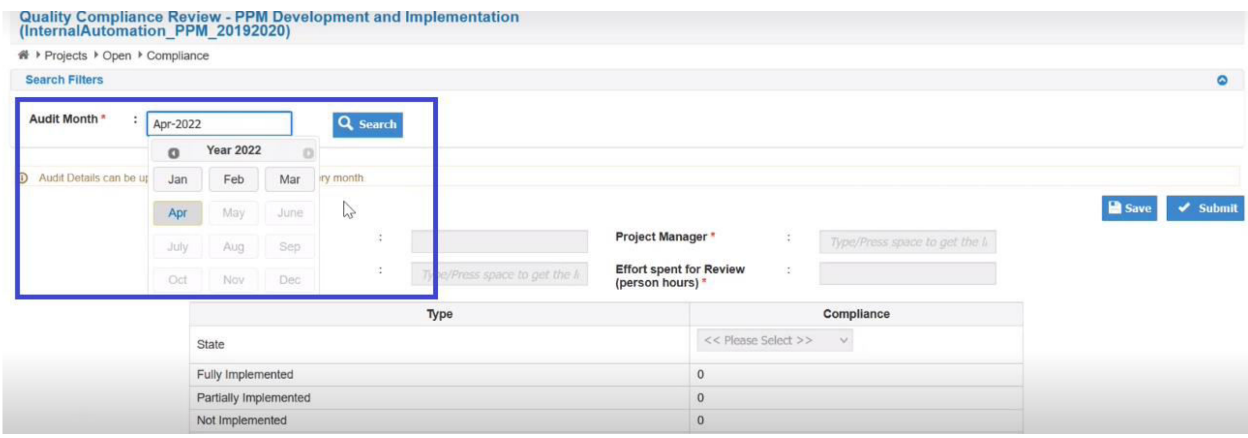
5a. QCR

Here we can find the Review details of the Project.

Here we can add all the details of the review and can submit those details for further process

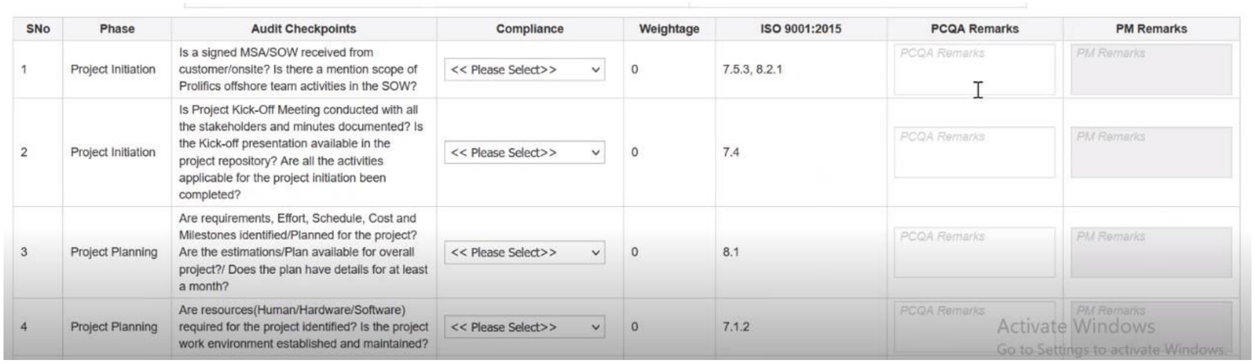


First need to select the month of which the review needs to be done and by selecting the month and entering all the details below



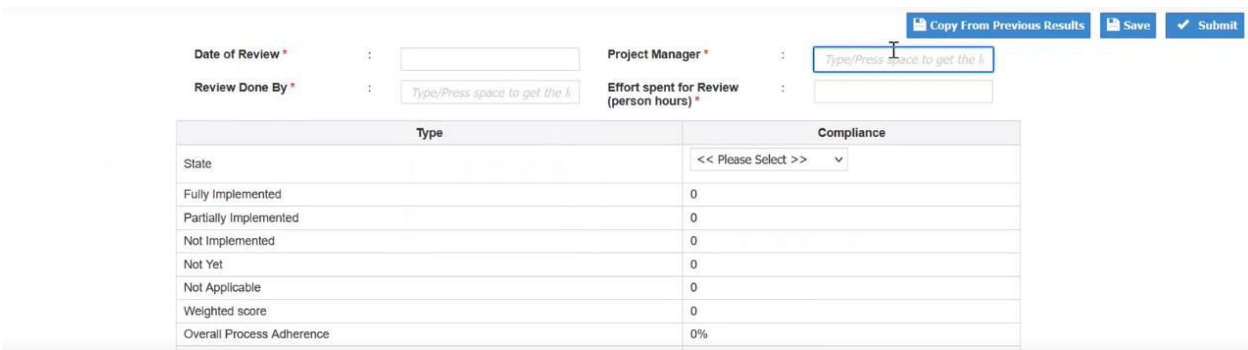
Once all the details were entered need the reviewer gives the selection for each question and will add the comments to those questions.

And after that Project Manager can add their comments for what reviewer has added to.



SNo	Phase	Audit Checkpoints	Compliance	Weightage	ISO 9001:2015	PCQA Remarks	PM Remarks
1	Project Initiation	Is a signed MSA/SOW received from customer/onsite? Is there a mention scope of Prolifics offshore team activities in the SOW?	<< Please Select>>	0	7.5.3, 8.2.1	PCQA Remarks	PM Remarks
2	Project Initiation	Is Project Kick-Off Meeting conducted with all the stakeholders and minutes documented? Is the Kick-off presentation available in the project repository? Are all the activities applicable for the project initiation been completed?	<< Please Select>>	0	7.4	PCQA Remarks	PM Remarks
3	Project Planning	Are requirements, Effort, Schedule, Cost and Milestones identified/Planned for the project? Are the estimations/Plan available for overall project?/ Does the plan have details for at least a month?	<< Please Select>>	0	8.1	PCQA Remarks	PM Remarks
4	Project Planning	Are resources(Human/Hardware/Software) required for the project identified? Is the project work environment established and maintained?	<< Please Select>>	0	7.1.2	PCQA Remarks	PM Remarks

Once all those compliance details were entered they can save those details and same score will be calculated in the table above.



Copy From Previous Results | Save | Submit

Date of Review * :
Project Manager * : Type/Press space to get the li
Review Done By * : Type/Press space to get the li
Effort spent for Review (person hours) * :

Type	Compliance
State	<< Please Select >>
Fully Implemented	0
Partially Implemented	0
Not Implemented	0
Not Yet	0
Not Applicable	0
Weighted score	0
Overall Process Adherence	0%
Status	

Here first the reviewer can save those details those details will be saved as drafts and once submitted those will be displayed with all the compliance details.