

## Contents

1. Project.....	2
1a. Overview.....	2
1b. Edit.....	4
1c. Stake Holder.....	5
1d. Documents .....	6
1e. Hierarchy .....	7
2. Planning .....	8
2a. Capacity Plan .....	8
2b. Task Plan.....	11
3. Financials .....	11
3a. Contract Documents.....	11
3b. Revenue Forecast .....	12
3c. Expenses.....	12
4. Monitoring.....	14
4a. Accomplishments .....	14
4b. Milestones .....	14
4c. Risks .....	15
4d. Dependencies .....	16
4e. Issues .....	17
4f. Defects.....	18
4g. Baselines .....	20
4h. Events .....	20
5. Compliance .....	21
5a. QCR .....	21

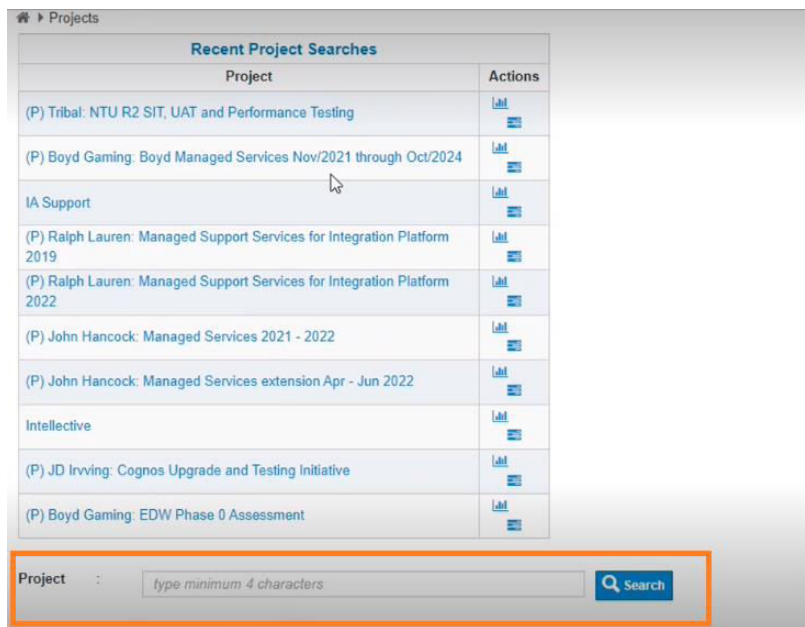
## Open Project

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.

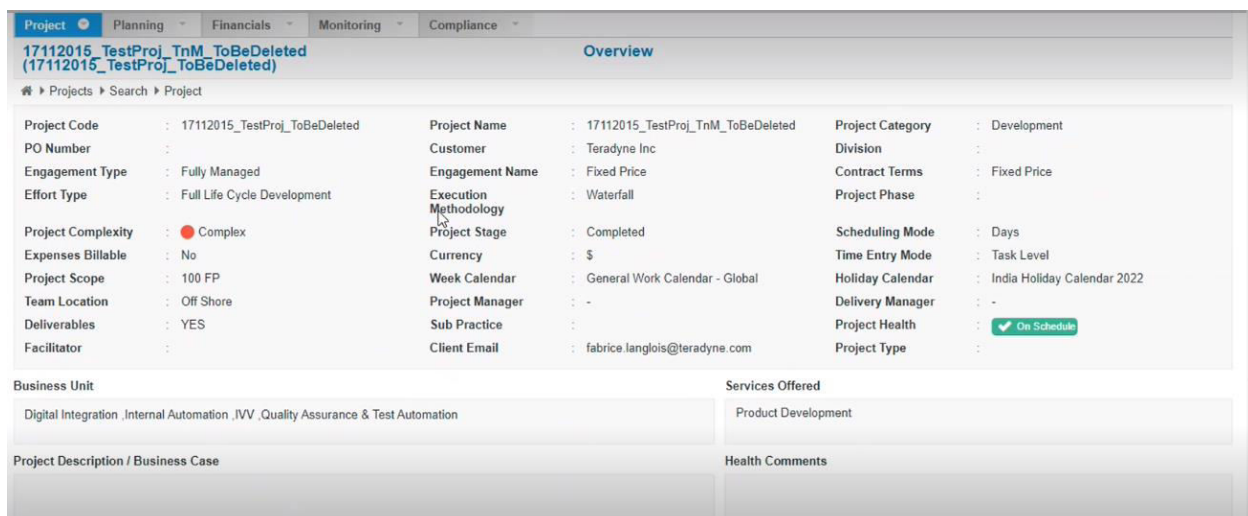
### 1. Project

#### 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					Risk Factor Characteristics	
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	Technical Complexity	: High Risk
Duration (Days)	272	272	272	291	Domain Specific Challenges	: High Risk
FTE	0	0.00	0.21	0.13	Skilled Resources Availability	: High Risk
Effort (Hrs)	0	0	454	300	Dependencies On Third Party Systems	: High Risk
Revenue	\$ 0	\$ 0	\$ 0	\$ 0	Development Environment Availability	: High Risk
Resource Direct Cost	\$ 0	\$ 0	\$ 0	\$ 0	Dependencies on customer/Customer Environment	: High Risk
Other Cost	\$ 0	\$ 0	\$ 0	\$ 0	Margin/Profitability	: High Risk
Gross Margin	\$ 0	\$ 0	\$ 0	\$ 0		
CM %	0.00	0.00	N/A	N/A		

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.

Project Planning Financials Monitoring Compliance

Project Overview **TnM\_ToBeDeleted ToBeDeleted** Overview

Edit Stakeholders

Documents : 17112015\_TestProj\_ToBeDeleted

Hierarchy

Engagement Type : Fully Managed

Effort Type : Full Life Cycle Development

Project Complexity : ● Complex

Expenses Billable : No

Project Scope : 100 FP

Team Location : Off Shore

Deliverables : YES

Facilitator :

Project Name : 17112015\_TestProj\_TnM\_ToBeDeleted

Customer : Teradyne Inc

Engagement Name

Execution Methodology : Waterfall

Project Stage : Completed

Currency : \$

Week Calendar : General Work Calendar - Global

Project Manager

Sub Practice

Client Email : fabrice.langlois@teradyne.com

Project Category : Development

Division

Contract Terms : Fixed Price

Project Phase

Scheduling Mode : Days

Time Entry Mode : Task Level

Holiday Calendar : India Holiday Calendar 2022

Delivery Manager

Project Health : ✔ On Schedule

Project Type

Project Planning Financials Monitoring Compliance

PPM Development and Implementation Edit

Projects Open Project

Project Code \* : InternalAutomation\_PPM\_201920

Project Name \* : PPM Development and Implementation

Business Unit \* : Internal Automation

Customer \* : Prolifics

Division \* : XXX-PROLIFICS Division

Sub Practice

Engagement Name \* : Prolifics IP

Engagement Type \* : Project Bases

Contract Terms \* : Non-billable: Client Prep

Execution Methodology : Agile

Effort Type : Development and Test

Currency \* : Indian Rupee(INR)

Scheduling Mode \* : Hours

Time Entry Mode \* : Task Level

Team Location \* : Client Site

Project Scope : 0

Unit of Measurement : << Please Select >>

Expenses Billable : ☐ Yes ☒ No

Week Calendar \* : General Work Calendar - Glob

Holiday Calendar \* : India Holiday Calendar 2022

Project Category \* : Development

Project Stage \* : In Progress

Project Phase \* : Design

Project Health \* : On Schedule

Deliverables \* : No

PO Number : << Please Select >>

Project Description / Business Case \* : ok

Project Health Comments \* : good

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

Project Planning Financials Monitoring Compliance

PPM Development and Implementation (InternalAutomation\_PPM\_20192020) Stakeholders

Projects Open Project

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	

Page 1 of 7 View 1 - 10 of 66

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.

Project
Planning
Financials
Monitoring
Compliance

PPM Development and Implementation  
(InternalAutomation\_PPM\_20192020)

Documents

Projects
Open
Project

Document Folders

Create Folder Under PPM Development
New

PPM Development and Implementation
Expense
Design Review

Search Filters

Note: Search will be applied for complete project documents...

Document Name
Search

Document Repository

Column visibility
Show 10 entries
Search:

	File Name	File Size	Version	File Type	Created On	Created By	Updated On	Updated By	Action
<input type="checkbox"/>	PMO Overview Responsibilities v1	1,001 KB	0.1		04-May-2020 01:25:03 PM	Balarama Revanthn Gali	04-May-2020 01:25:03 PM	NA	

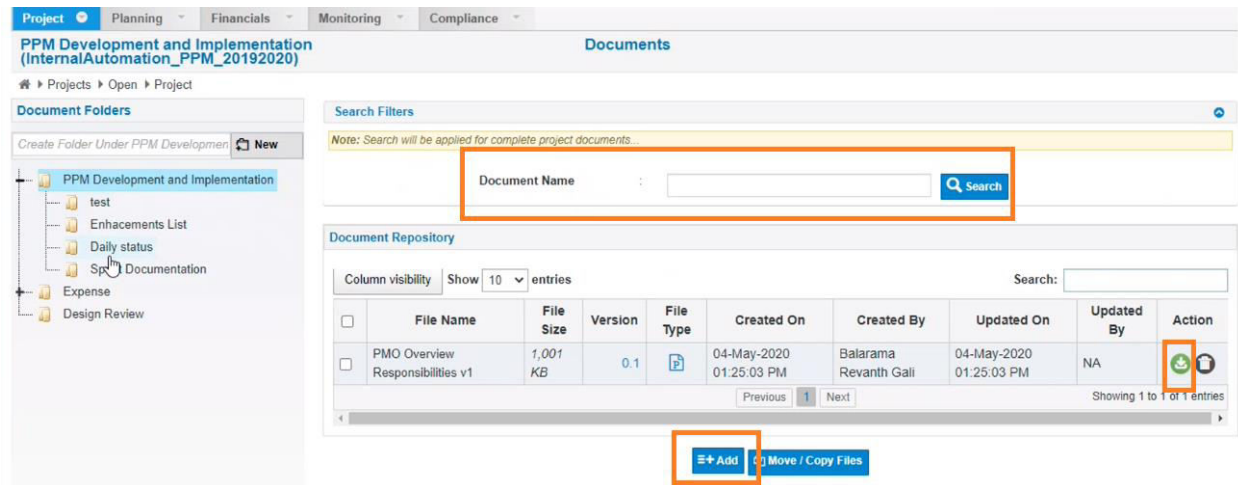
Previous
1
Next

Showing 1 to 1 of 1 entries

Add
Move / Copy Files

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



Project Planning Financials Monitoring Compliance

PPM Development and Implementation (InternalAutomation\_PPM\_20192020) Project Hierarchy

Projects Open Project

Project Hierarchy Edit All

- PPM Development and Implementation
  - Amit Mehta (Project Manager)
  - Bala Siddeswar Peddi (Project Manager)
 

From Date : 16 Dec 2019  
 To Date : 31 Dec 2022
  - Balarama Revanth Gali (Project Manager)
  - Balarama Revanth Gali (Team Lead)
  - Balarama Revanth Gali (Software Engineer)
  - Balarama Revanth Gali (Senior Developer)
  - Balarama Revanth Gali (Sprint Testing PM)
  - Balarama Revanth Gali (Software Quality Assurer(SQA))
  - Rajeshwar Rao Akinapelli (Primary Project Manager)
  - Rajeshwar Rao Akinapelli (Project Requestor)
  - Rajeshwar Rao Akinapelli (Project Approver)
  - Rajeshwar Rao Akinapelli (Project Creator)
  - Rajeshwar Rao Akinapelli (Delivery Manager)
  - Rajeshwar Rao Akinapelli (Sprint Testing PM)
  - Rajeshwar Rao Akinapelli (Sales Executive)
  - Laxmi Salukooti (Senior Developer)

## 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.

Project Planning Financials Monitoring Compliance

PPM Development and Implementation (InternalAutomation\_PPM\_20192020) Capacity Plan

Projects Open Planning

Total No. Of Resources : 9 Total No. Of Roles : 5

ISMS Certified ISMS Not Certified

Project Role List Type/Press Space to search for Resc Active

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				

View 1 - 5 of 5

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.

**Project** ▾ **Planning** ● Financials ▾ Monitoring ▾ Compliance ▾

## Capacity Plan

**PPM Development and Implementation  
(InternalAutomation\_PPM\_20192020)**

🏠 ▶ Projects ▶ Open ▶ Planning

Total No. Of Resources : 9      Total No. Of Roles : 5      ● ISMS Certified ● ISMS Not Certified

**Project Role List** Type/Press Space to search for Resc Active ▾

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				
								<b>7,644.00</b>	<b>34,515.00</b>				

View 1 - 5 of 5

Project

Planning

Financials

Monitoring

Compliance

PPM Development and Implementation  
(InternalAutomation\_PPM\_20192020)

Capacity Plan

🏠 ProjectsOpenPlanning

Total No. Of Resources : 9

Total No. Of Roles : 5

● ISMS Certified ● ISMS Not Certified

Project Role List

Type/Press Space to search for Resc

Active

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				
▶ Account Director	<< ... >>			0.00	0.00	16-Dec-2019	31-Dec-2022	0.00	0.00				
+	<div>&lt;&lt; Please Select &gt;&gt;</div> <div>UK</div> <div>US</div> <div>India</div> <div>Germany</div> <div>Canada</div> <div>UAE</div> <div>London</div>							7,644.00	34,515.00				View 1 - 6 of

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.

Project ▾ Planning ● Financials ▾ Monitoring ▾ Compliance ▾

## Capacity Plan

PPM Development and Implementation  
(InternalAutomation\_PPM\_20192020)

🏠 ▶ Projects ▶ Open ▶ Planning

Total No. Of Resources : 9      Total No. Of Roles : 5      ● ISMS Certified ● ISMS Not Certified

**Project Role List**

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				
▶ Account Director	<< ... ▾			0.00	0.00	16-Dec-2019	31-Dec-2022	0.00	0.00				
								7,644.00	34,515.00				

+

View 1 - 6 of 9



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

Total No. Of Resources : 9      Total No. Of Roles : 5      ● ISMS Certified ● ISMS Not Certified

**Project Role List** Type/Press Space to search for Resc Active

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				
								<b>7,644.00</b>	<b>34,515.00</b>				

View 1 - 5 of 5

**Search Resource - Test Engineer (2)**

☒ Resource Search ☐ Skill Search

Resource \* :  Search

▶ 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				
								<b>7,644.00</b>	<b>34,515.00</b>				

View 1 - 5 of 5

**Search Resource - Test Engineer (2)**

☒ Resource Search ☐ Skill Search

Resource \* :  Search

Designation	Business Unit	Location	From Date	To Date	Available %	Available Hrs	Hourly Rate	Hourly Cost	Daily Allocation Hrs	Allocation Hrs	Allocation Type
Engineer	Internal Automation	India	16-Dec-2019	31-Dec-2022	-52.3	-3326	0	0	<input type="text" value="0"/>	0	Non Billable Utilized

Save
Cancel

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



[illegible]

### 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,

The screenshot shows the 'Expenses' screen with the 'Financials' tab selected. The 'My Approval Requests' tab is active. The table displays three expense requests. The first request (ES16750) is for Balarama Revanth Gali, submitted on 28-Mar-2022, with an incurred amount of ₹ 470.00 and a disbursed amount of ₹ 470.00. The second request (ES16527) is for Balarama Revanth Gali, submitted on 27-Jan-2022, with an incurred amount of ₹ 1,178.00 and a disbursed amount of ₹ 1,178.00. The third request (ES15572) is for Rajeswari Kanupuru, submitted on 01-Apr-2021, with an incurred amount of ₹ 1.00 and a disbursed amount of ₹ 1.00. The table includes columns for Stack, Resource, Approval Status, Payment Status, Incurred, Disbursed, Client, Created On, and Actions. A 'Loading...' indicator is visible in the middle of the table.

Stack	Resource	Approval Status	Payment Status	Incurred	Disbursed	Client	Created On	Actions
ES16750	Balarama Revanth Gali	Submitted		₹ 470.00	₹ 470.00	₹ 470.00	28-Mar-2022	
ES16527	Balarama Revanth Gali	Submitted		₹ 1,178.00	₹ 1,178.00	₹ 1,178.00	27-Jan-2022	
ES15572	Rajeswari Kanupuru	Submitted		₹ 1.00	₹ 1.00	₹ 1.00	01-Apr-2021	

**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.

The screenshot shows the 'Expenses' screen with the 'Financials' tab selected. The 'My Requests' tab is active. The table displays three expense requests. The first request (ES16750) is for Balarama Revanth Gali, submitted on 28-Mar-2022, with an incurred amount of ₹ 470.00 and a disbursed amount of ₹ 470.00. The second request (ES16527) is for Balarama Revanth Gali, submitted on 27-Jan-2022, with an incurred amount of ₹ 1,178.00 and a disbursed amount of ₹ 1,178.00. The third request (ES15572) is for Rajeswari Kanupuru, submitted on 01-Apr-2021, with an incurred amount of ₹ 1.00 and a disbursed amount of ₹ 1.00. The table includes columns for Stack, Resource, Approval Status, Payment Status, Incurred, Disbursed, Client, Created On, and Actions. A 'Loading...' indicator is visible in the middle of the table.

Stack	Resource	Approval Status	Payment Status	Incurred	Disbursed	Client	Created On	Actions
ES16750	Balarama Revanth Gali	Submitted		₹ 470.00	₹ 470.00	₹ 470.00	28-Mar-2022	
ES16527	Balarama Revanth Gali	Submitted		₹ 1,178.00	₹ 1,178.00	₹ 1,178.00	27-Jan-2022	
ES15572	Rajeswari Kanupuru	Submitted		₹ 1.00	₹ 1.00	₹ 1.00	01-Apr-2021	

**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.

Project

Planning

Financials

Monitoring

Compliance

PPM Development and Implementation  
(InternalAutomation\_PPM\_20192020)

Expenses

Financials

My Requests

Team Requests

My Approval Requests

Note : If you want to edit/create expenses, please navigate to screen Expenses -> Open/Create.

Expense	Expense Date	Modified Date	Due Amount	Status
ES15572	29-Mar-2021	01-Apr-2021	₹ 1.00	Submitted

Expense Type	Date	Payee	Billable	Incurred	Disbursed	Client	Approval	Payment	Comments	View
Mobile & Internet	29-Mar-2021	Self	No	₹ 1.00	₹ 1.00	₹ 1.00	Submitted			

Page 1 of 1

View 1 - 1 of 1

**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.

Project

Planning

Financials

Monitoring

Compliance

PPM Development and Implementation  
(InternalAutomation\_PPM\_20192020)

Expenses

Financials

My Requests

Team Requests

My Approval Requests

	Expense	Created By	Expense Date	Modified Date	Due Amount	Status
	ES16750	Balarama Revanth Gali	21-Mar-2022	28-Mar-2022	₹ 470.00	Submitted
	ES16676	Balarama Revanth Gali	07-Mar-2022	07-Mar-2022	₹ 1.00	Drafted
	ES16527	Balarama Revanth Gali	19-Jan-2022	27-Jan-2022	₹ 1,178.00	Submitted
	ES16405	Balarama Revanth Gali	01-Dec-2021	19-Jan-2022	₹ 470.00	PM Rejected
	ES15572	Rajeswari Kanupuru	29-Mar-2021	01-Apr-2021	₹ 1.00	Submitted
	ES14574	Abhishek kumar	09-Mar-2020	02-Dec-2020	₹ 1.00	PM Rejected

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Page 1

of 1

View 1 - 6 of 6

## 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

**Prolifics Website Redesign (PWR)** Defect Details

My Workspace > My Dashboard > Monitoring

**Search Filters**

Add Filter

<< Phase Select >>

☒ Defect Title

Phase Injected  
Requirement ID  
Review/Testing Method  
Priority  
Assigned To  
Defect Description

Defect ID  
Defect Title  
Phase  
Severity  
Status  
Reported By

Apply

**Search Results**

Defect ID	Defect Title	Phase	Severity	Status	Reported By	Defect Age	Action
1932101	test1	Requirement-GRD	Blocker	In-Progress	Raghuveer Rao Akkapalli	0 Days 0 Hrs	

Page 1 of 1 View 1 - 1 of 1

Create Defect

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.

**Prolifics Website Redesign** Create Defect

My Workspace > My Dashboard

Project: Prolifics Website Redesign

Defect Title: Defect1

Phase: Requirement-GRD

Phase Injected: Requirement-GRD

Requirement ID: Requirement

Review/Testing Method: Manual Testing

Severity: Blocker

Priority: High

Status: Open

Assigned To: Ralarama Ravalanth G

Defect Description

Normal

Defects

Attachments

Browse Document

Add

Create Create and Continue Cancel

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



✓ Defect Id 1532102 saved successfully

Project - Planning - Financials - Monitoring -

**Prolifics Website Redesign** Defect Details

My Workspace > My Dashboard

Defect Id 1532102	Defect Title Defect1	Project Prolifics Website Redesign	Phase Requirement BRD	Phase Injected Requirement BRD
Requirement Id	Review/Testing Method Manual Testing	Severity Blocker	Priority High	Status Open
Assigned To Rutarama Ravarath Gali	Reported By Rajeshwar Rao Akkappalli	Reported Date 01 May 2017 12:04:39		

Defect Description

Normal

Defects

Attachments

New Issues (0/0)

Browse Document

ADD

Comments

Update Cancel

#### 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

Quality Compliance Review - PPM Development and Implementation  
(InternalAutomation\_PPM\_20192020)

Projects > Open > Compliance

Search Filters

Audit Month \* : Apr-2022 [Search]

Audit Details can be updated between 5 to 27 dates of every month

Save Submit

Date of Review \* : Project Manager \* : Type/Press space to get the list

Review Done By \* : Type/Press space to get the list Effort spent for Review (person hours) \* :

Type	Compliance
State	<< Please Select >>
Fully Implemented	0
Partially Implemented	0
Not Implemented	0

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

Quality Compliance Review - PPM Development and Implementation  
(InternalAutomation\_PPM\_20192020)

Projects > Open > Compliance

Search Filters

Audit Month \* : Apr-2022 [Search]

Audit Details can be updated between 5 to 27 dates of every month

Save Submit

Date of Review \* : Project Manager \* : Type/Press space to get the list

Review Done By \* : Type/Press space to get the list Effort spent for Review (person hours) \* :

Type	Compliance
State	<< Please Select >>
Fully Implemented	0
Partially Implemented	0
Not Implemented	0

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 Profiflcs 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.

Date of Review \*

Project Manager \*

Type/Press space to get the l

Review Done By \*

Type/Press space to get the l

Effort spent for Review (person hours) \*

Copy From Previous Results

Save

Submit

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%

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.