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Create Project

In this screen we can create a new project by adding all the required details.

1. Create Project Details

1a. Project Details

The screenshot shows a web form titled "Create Project" with a breadcrumb "Projects". The form is divided into a "Project Details" section and a "Project Financials" section. The "Project Details" section includes fields for Project Code, Project Name, Project Category, Business Unit, Customer, Division, Engagement Name, Engagement Type, Contract Terms, Effort Type, Execution Methodology, and Project Phase. The "Project Financials" section includes fields for Project Scope, Unit of Measurement, Currency, Revenue, Deliverables, Team Location, and PO Number. All fields are marked with an asterisk (*) indicating they are required.

Project Details			
Project Code *	Project Name *	Project Category *	
<input type="text"/>	<input type="text"/>	<< Please Select >>	
Business Unit *	Customer *	Division *	
<< Please Select >>	<< Please Select >>	<< Please Select >>	
Engagement Name *	Engagement Type *	Contract Terms *	
<< Please Select >>	<< Please Select >>	<< Please Select >>	
Effort Type	Execution Methodology *	Project Phase *	
<< Please Select >>	<< Please Select >>	<< Please Select >>	
Project Scope	Unit of Measurement	Currency *	Revenue
0	<< Please Select >>	<< Please Select >>	0.00
Deliverables *	Team Location *	PO Number	
<< Please Select >>	<< Please Select >>	<< Please Select >>	

Project Code: It is a unique value for the Project. Can be any alphanumeric character.

Project Name: It is a unique value for the Project. Can be any alphanumeric character.

Customer: Customer for which the project will be executed

Project category: Here we can see the type of project it is i.e., Development / Test Only / Maintenance & Support

Team Location: Here we can see the location from where the team is working from i.e., Blended Offshore/Client Site/Off Shore/Onsite

Contract terms: Terms agreed upon during signing of SOW i.e., Billable: Managed Services / Billable: Not to Exceed / Billable: Staff Aug/ Billable: Time and Materials/ Fixed Price/ Non-billable: Client Prep/ Non-billable: Enablement/ Non-billable: Non-Utilized/ Non-billable: Shadow/ Non-billable: Utilized.

Engagement Mode: Fully Managed/Partially Managed/Staffed

Effort Type: Kind of project being executed such as Application/Product Support L2, Automation Testing, CR/ Enhancements, Development and Test, Development Only, Full Life Cycle Development, Full Life Cycle Testing, Implementation,

Performance Testing, Product Support (L2, L3)/Managed Services, Production Support, Production Support testing Only,

Execution Methodology: Here we can see the type of method used for executing the project i.e., Agile/waterfall/Iterative/other

Project Scope: Depends on Unit of Measurement and accepts numerical value

Unit of Measurement: It can be either FP or UCP

Currency: EURO/British Pound/USD/Indian Rupee/Canadian Dollar

Revenue: Amount allocated from the project.

1b. Schedule

Schedule		
Preliminary Start Date *	Preliminary End Date *	Time Entry Mode *
<input type="text" value="Preliminary Start Date"/>	<input type="text" value="Preliminary End Date"/>	<< Please Select >> ▼
Scheduling Mode *	Holiday Calendar *	Week Calendar *
<< Please Select >> ▼	<< Please Select >> ▼	<< Please Select >> ▼

Time Entry Mode: Project Level / Task Level. Currently in PPM the time entry is done against Task.

Holiday calendar: Holiday calendar required in the Project schedule

Scheduling mode: Days / Hours / Weeks.

Preliminary Start Date: Start date of the Project to be created. It can be in “DD Month Year” format e.g., 01 Jan 2015

Preliminary End Date: End date of the Project to be created. It can be in “DD Month Year” format e.g., 01 Jan 2015

Week Calendar: Calendar that is followed while execution of project. The below mentioned are the calendar types:

1. Dubai Projects work week
2. General Work Calendar-Global
3. General Work Calendar-US Window
4. General Work Calendar- UK Window
5. IT Support 1

6. Special Work Calendar

1c. Key Contact

The screenshot shows two side-by-side form sections. The 'Key Contact' section on the left has four rows, each with a label followed by an asterisk and a text input field: 'Delivery Manager *', 'Primary Manager *', 'Project Requestor *', and 'Project Approver *'. The input fields for 'Delivery Manager' and 'Primary Manager' contain placeholder text: 'Type minimum 3 characters to get the'. The 'Services Offered' section on the right features a list box on the left containing 'Product Development', 'Support', 'Data Validation', 'Selenium Testing', 'Performance Testing', 'Product Development & Sol', and 'Project Maintenance'. To the right of the list box are two arrow buttons (right-pointing and left-pointing) and an empty rectangular area.

Delivery Manager: Delivery Manager is a mandatory field to be provided while a project is created and is a stakeholder of the project

Primary Manager: Primary Manager is a mandatory field to be provided while a project is created and is a stakeholder of the project.

Project Requestor: Name of the project Requestor

Project Approver: Project Approver is the supervisor of Primary manager.

Services Offered: Displays the services offered as a part of project execution such as support, Project Maintenance, Migration etc.

1d. Documents

The screenshot shows a form titled 'Documents'. It contains a dropdown menu labeled 'Contract Document Type' with the text '<< Please Select >>'. To the right of the dropdown is a section titled 'Upload Contract Document' which includes a 'Choose File' button and the text 'No file chosen'. Below these elements is a blue '+ Add' button. At the bottom of the form, there is a timestamp '09:20' and two buttons: 'Save' and 'Cancel'.

Contract Document Type: Should display the type of Contract Document such as SOW, PO, Email, Others.

Upload Contract Document: Contract document can be uploaded here.

Clicking on Save creates a project and cancel reverts the changes made.

Once the project is created the project stage is in New.

PM, DM can change the status to the below mentioned values:

In Progress: Project is in Execution.

Withdrawn: Project is not being executed.

On hold: Project execution is stopped on temporary basis.

Completed: Execution of project is completed.