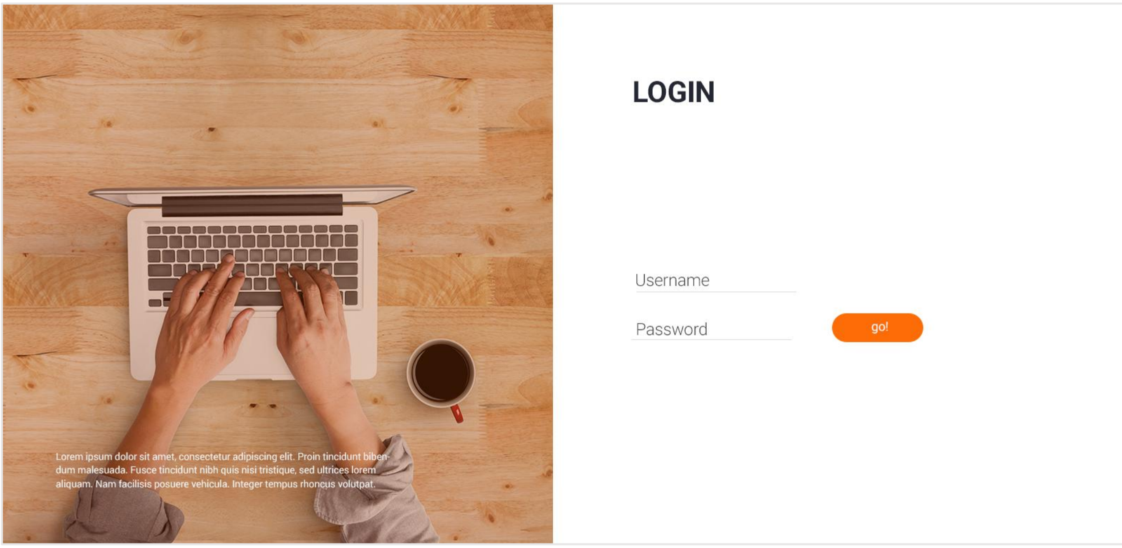
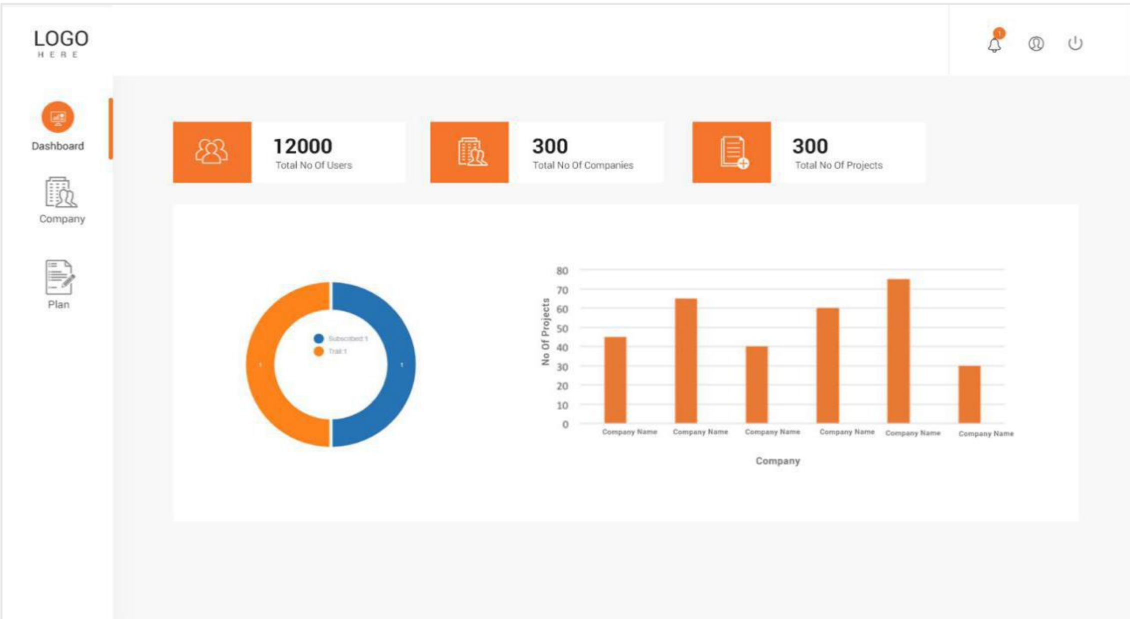
# I. Super Admin

## 1. Login




## 2. Dashboard



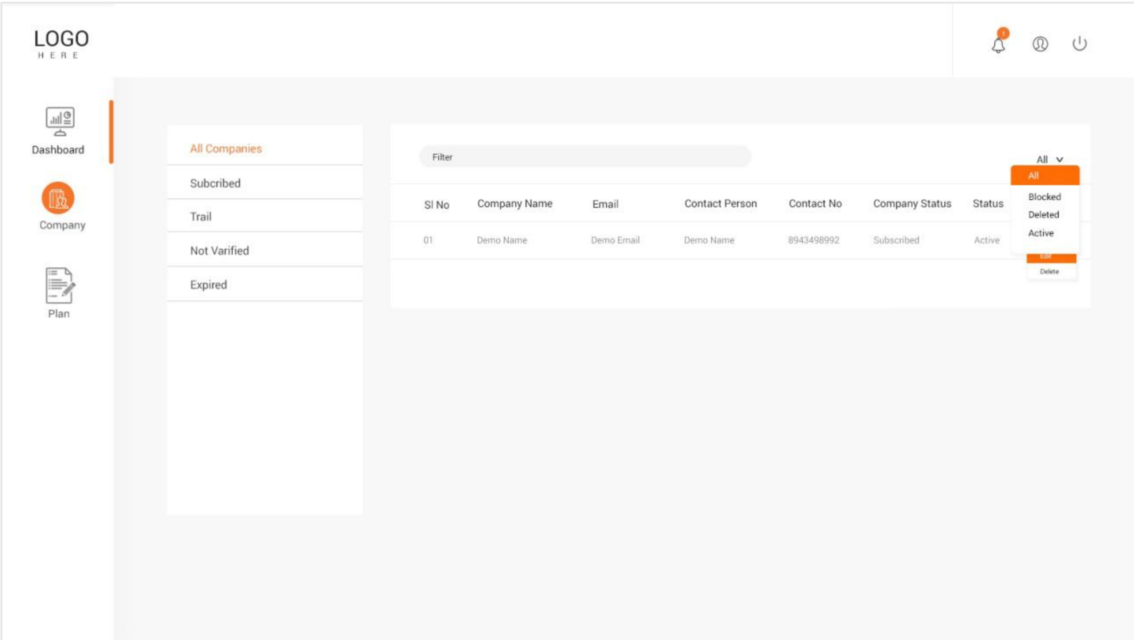

Super admin dashboard contain two graphs which are company vs no of projects and company vs status

Company vs no of projects is a bar graph which shows no of projects added by each company. And the other one is a pie graph which helps to analyse company status

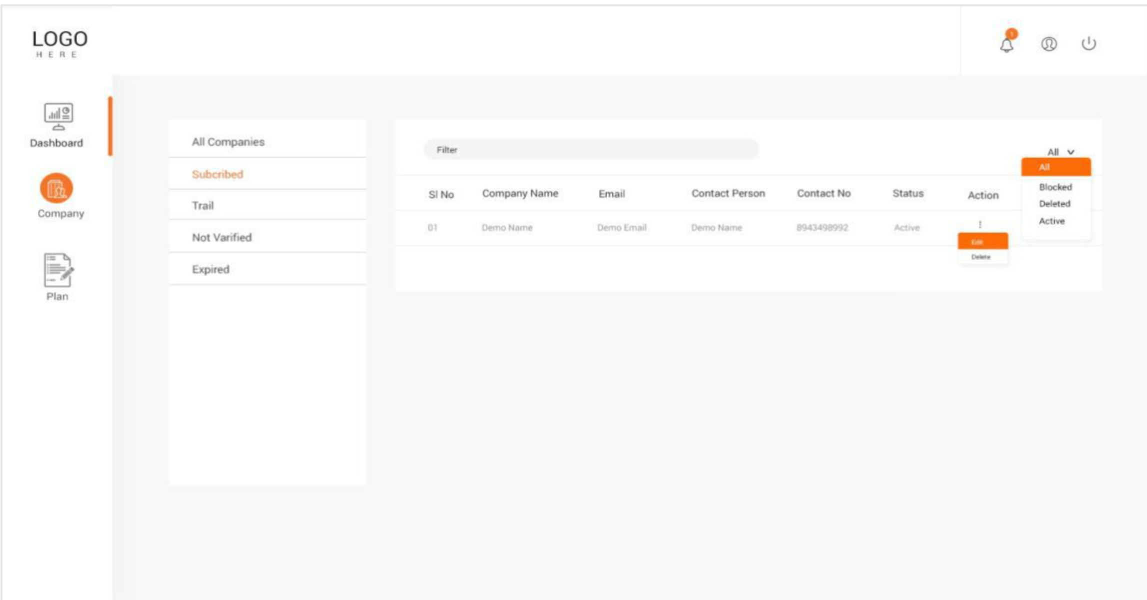
## 3. Manage Companies

It display list of companies with subscribed, trial, not verified, block and deleted status. The Status filter is used to filter data from the company list. The table contains actions for Block/unblock and delete.

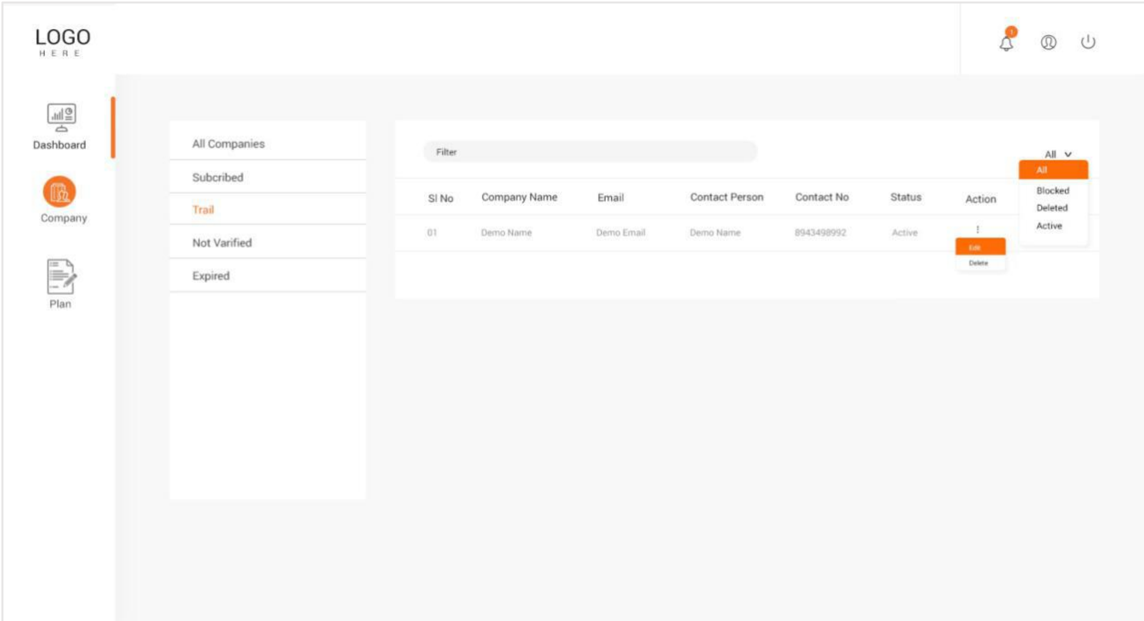
- All Companies:



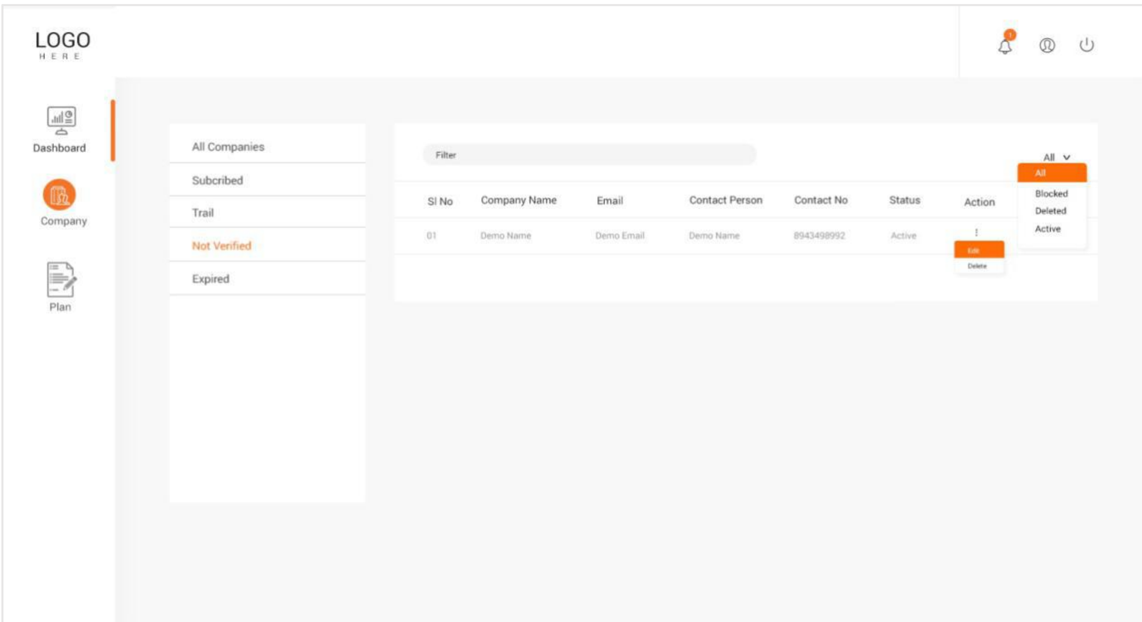

- Subscribed Companies:



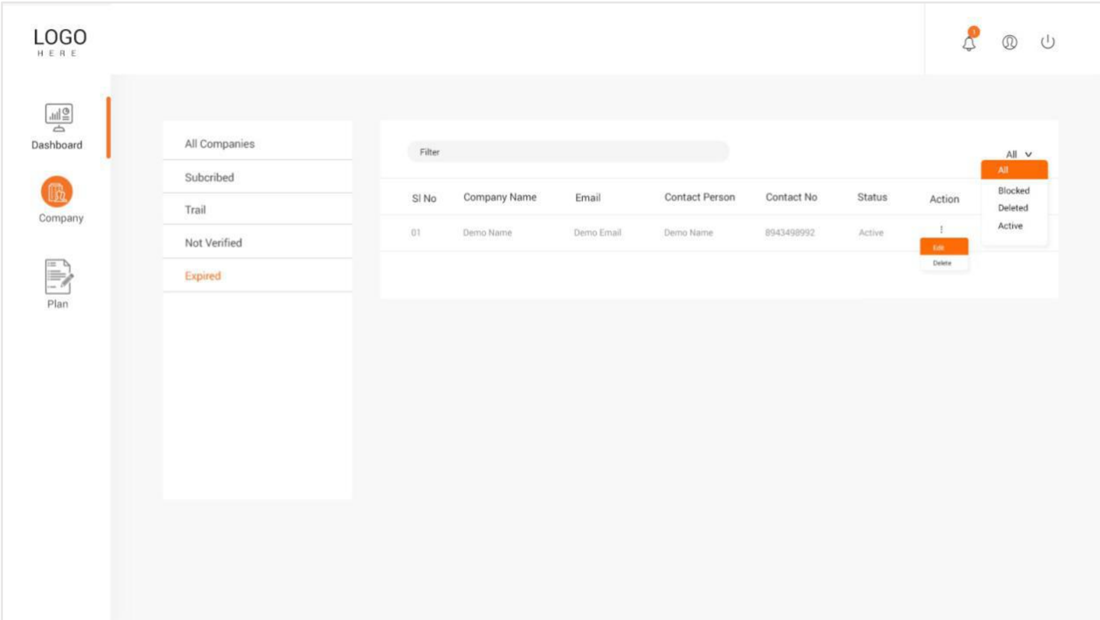
- Trail Companies:




- Not verified Companies:

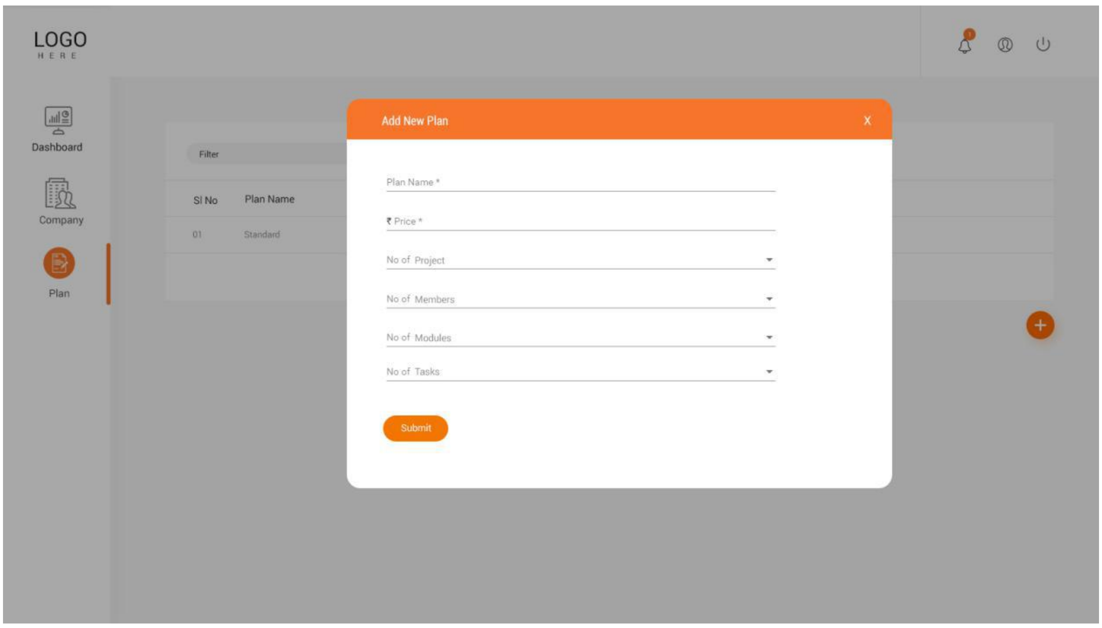


■ Expired Companies:



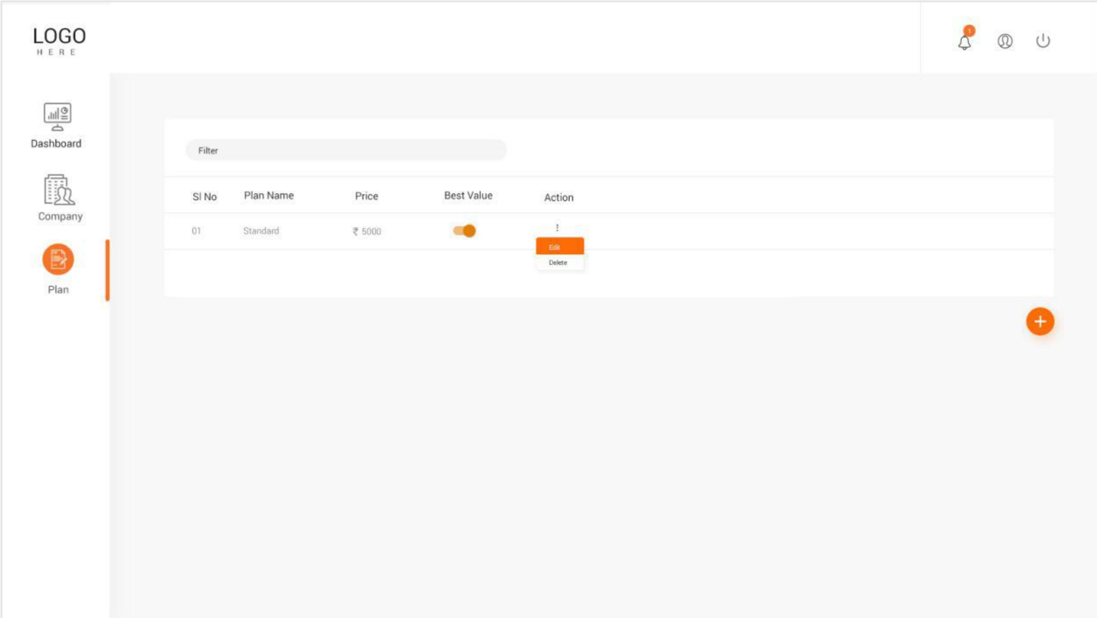

## 4. <u>Plan</u>

Add Plan:




Super admin can add a new plan and pricing. Here, he can set how many projects, members, modules and tasks can add when the user is login with this plan

Manage :




This table list all saved plans, its price, sa toggle bar to set whether it is a best value or not and an action with edit and delete.

## 5. Notification

Super admin get notification when a new company registered

# II. Company

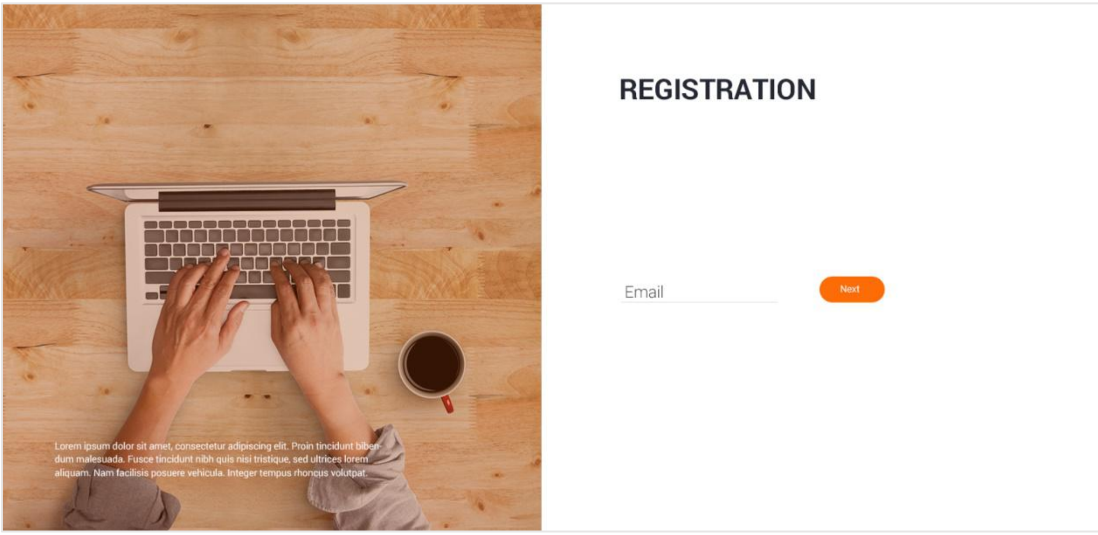
## 1. Home page

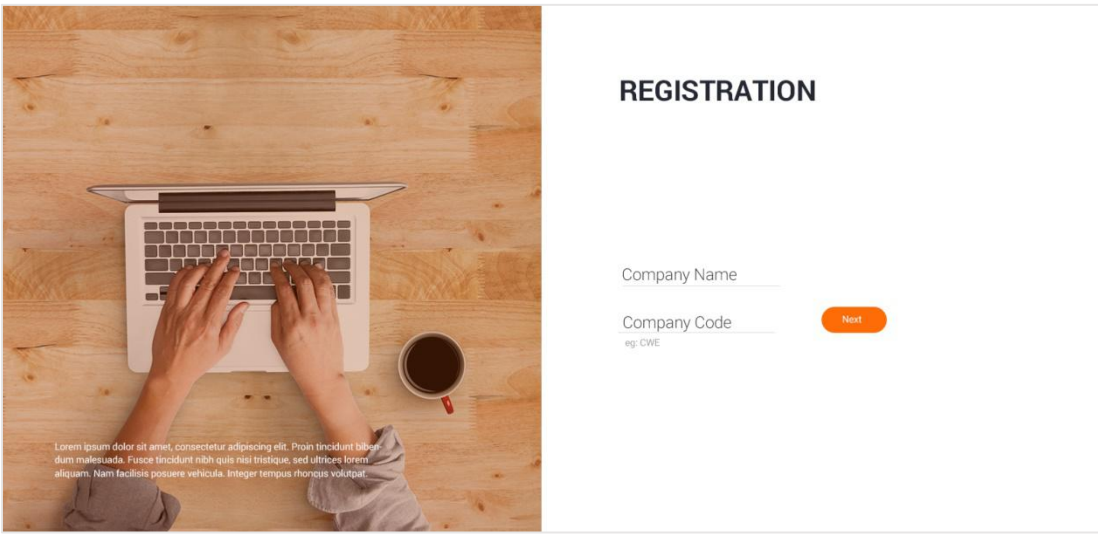
## 2. <u>Sign Up</u>

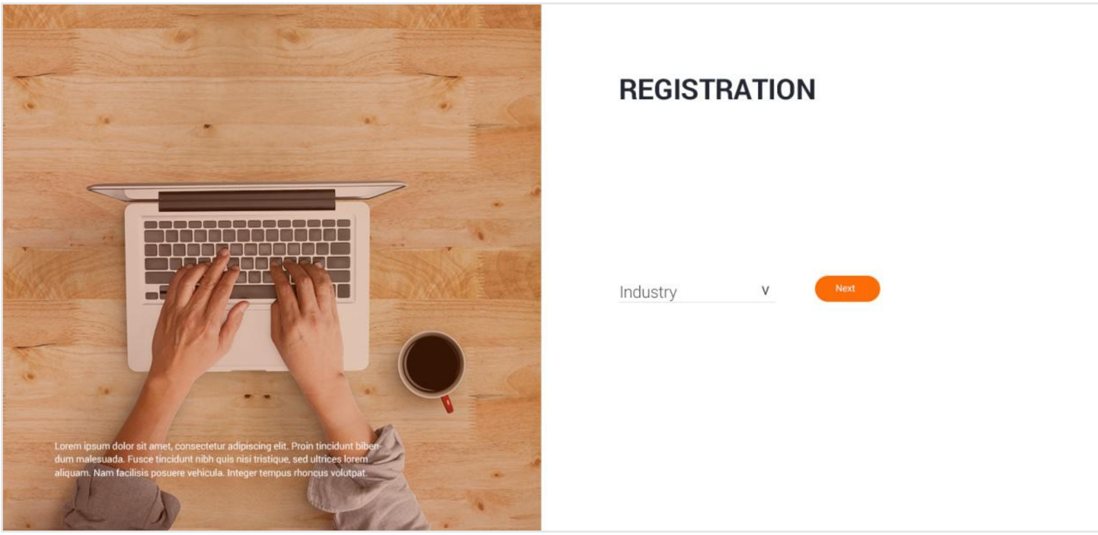
To open a trail account, find the sign up form on top of the home page and fill it up. Company need a valid email to open an account. Company code is limited to 3 letters.

After sign up, the applications send a conformation email which the company need to open and act upon before being able to log in.

The trial version is limited to 2 projects and 3 members. It last for one month.

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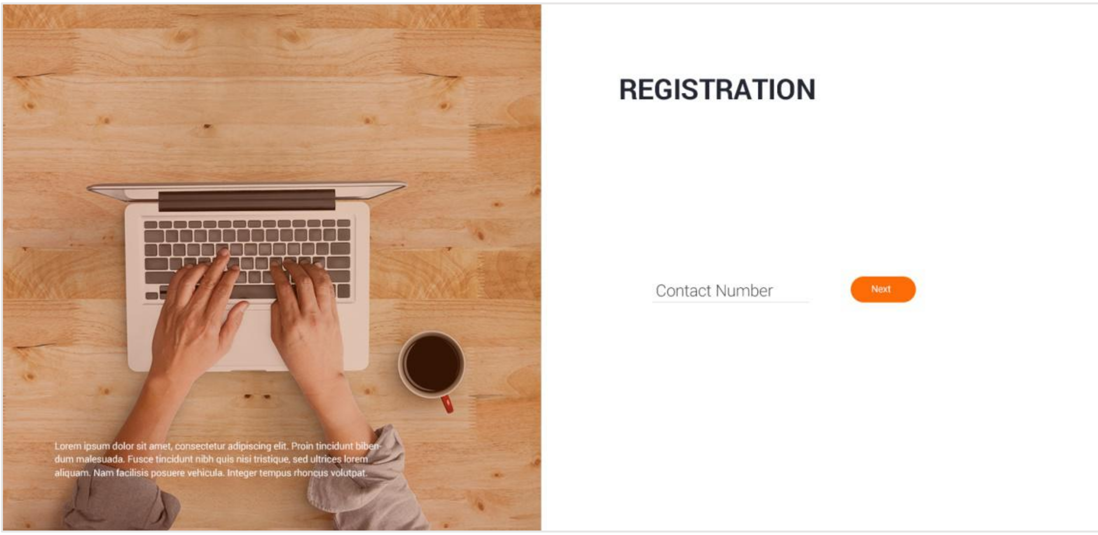
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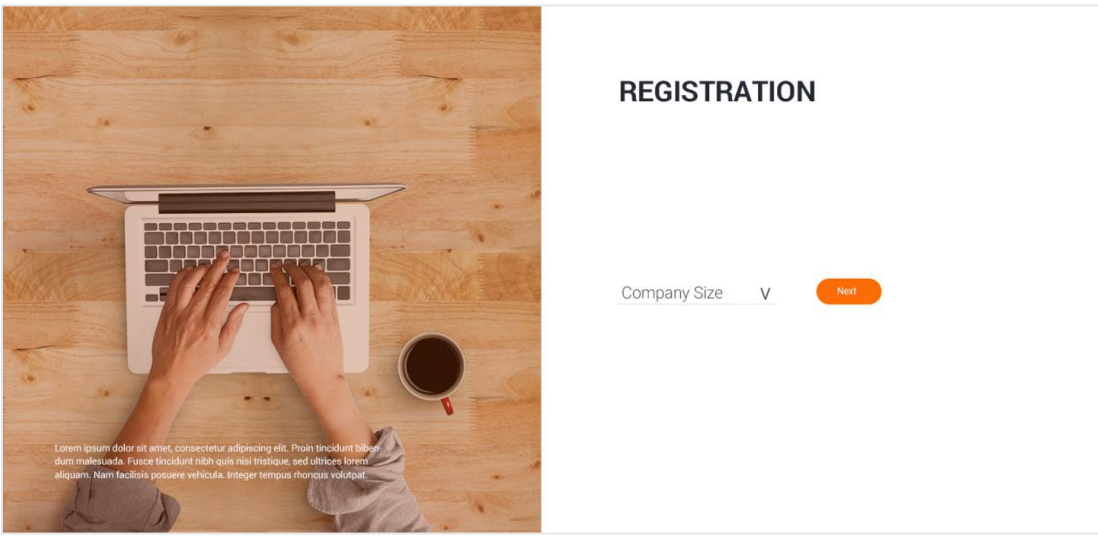
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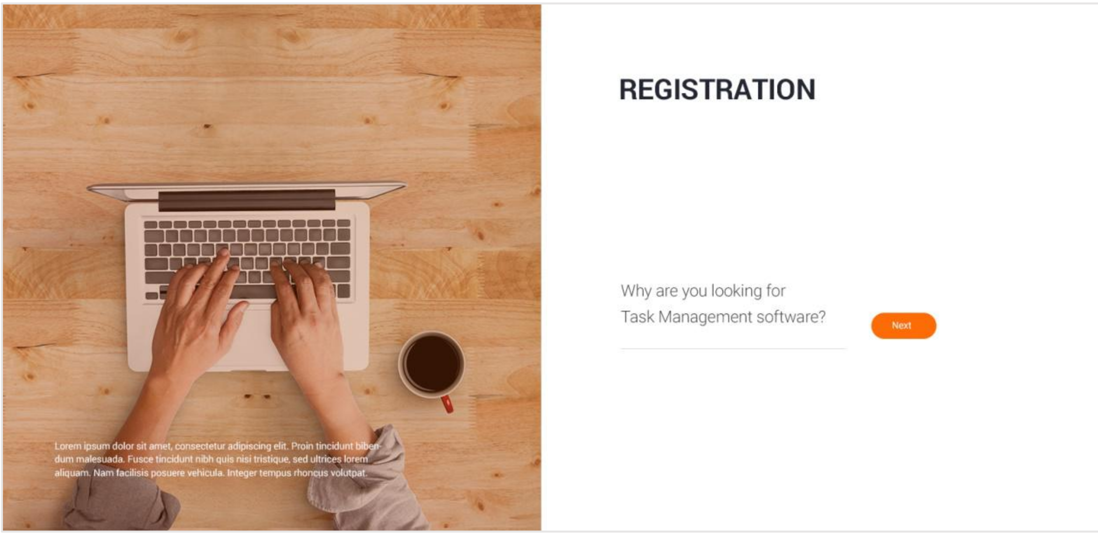
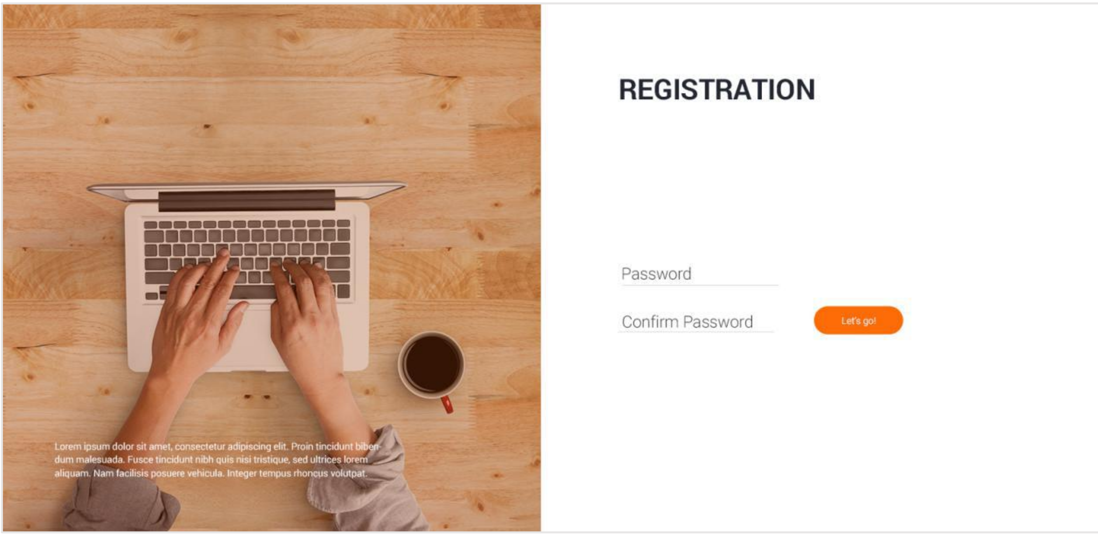
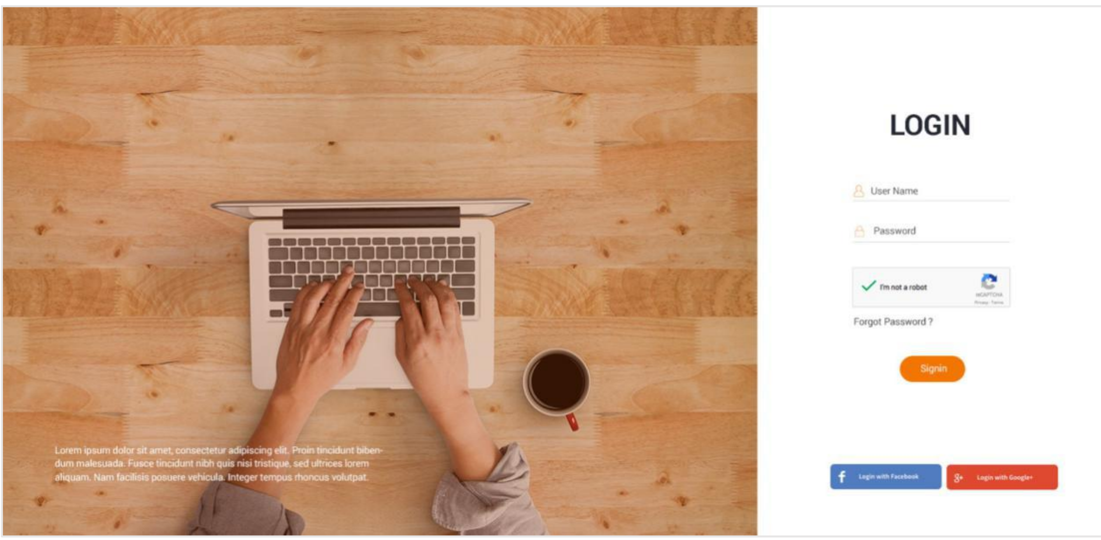


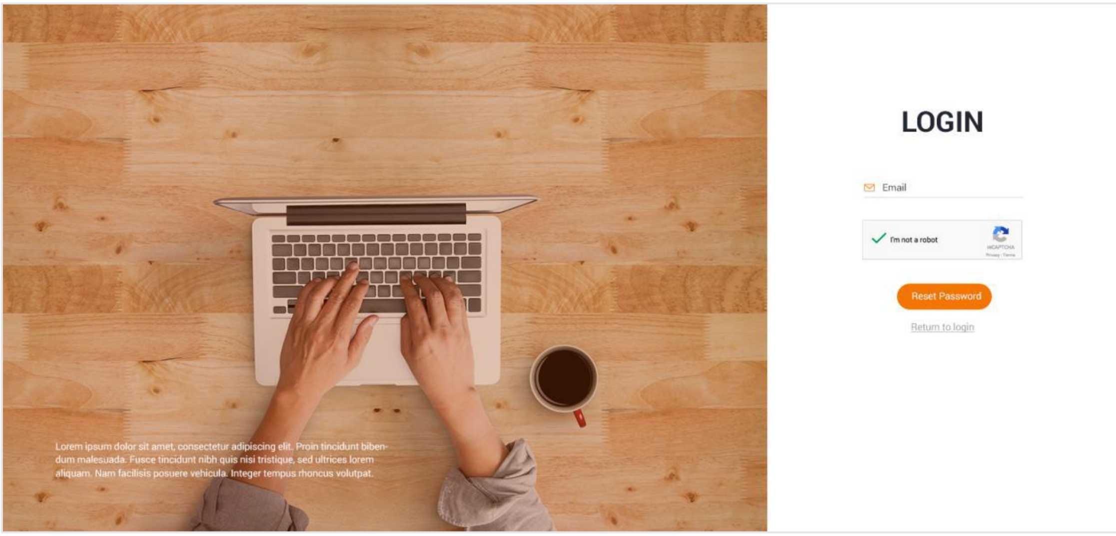




## 3. Login



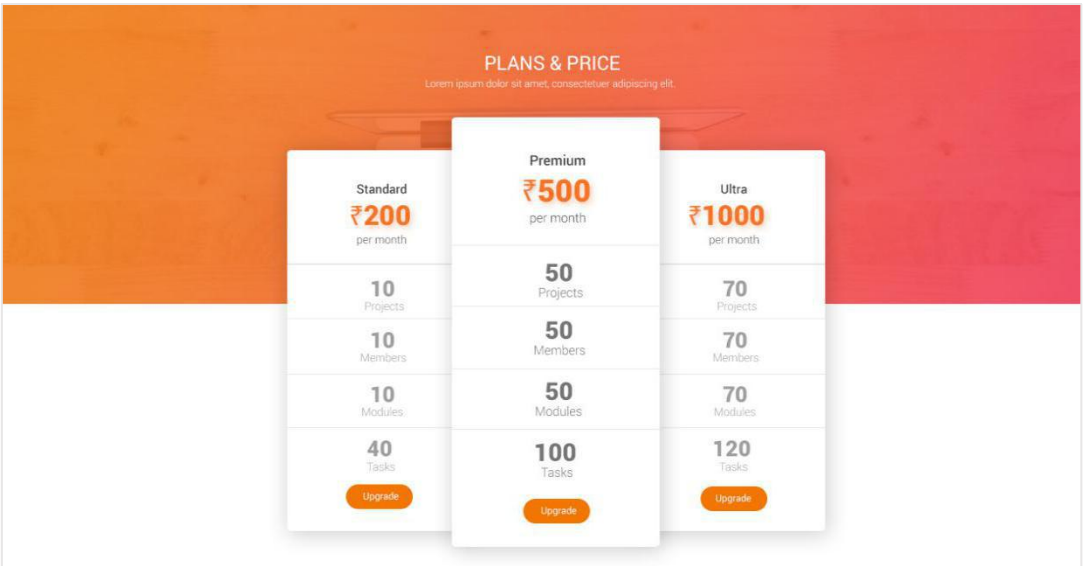

The company can login to the application by direct entering user name and password, or by using Facebook or by Google sign in.

When the company forgotten the password, visit forget password link. Enter the email address and fill the captcha. A new password for the application will be emailed to the address on file.




## 4. Plan Upgrade Page

If the company need a plan with more projects and members, they need to upgrade the plan by clicking the Upgrade tab.



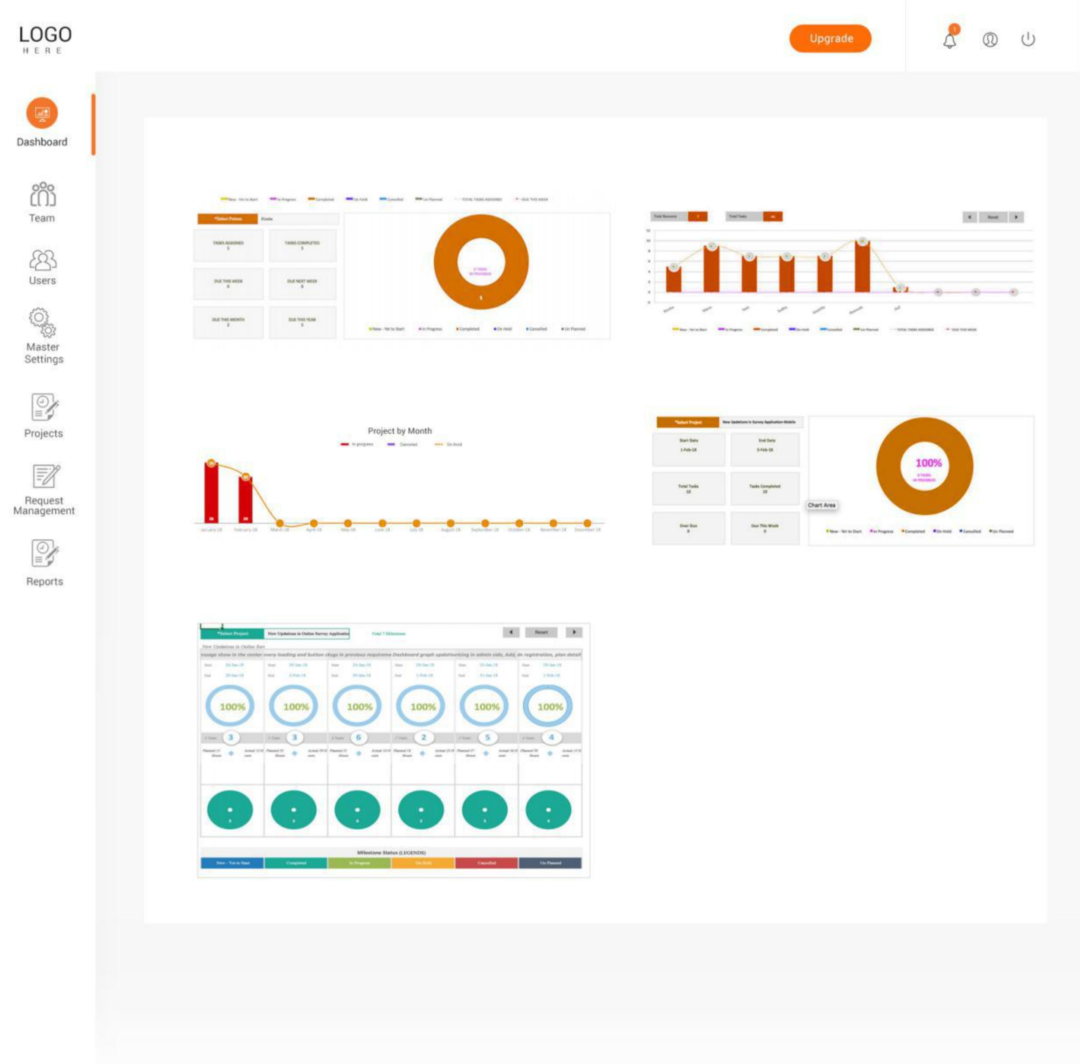

To open a paid account, click on the Upgrade button at the top of the application and select the plan that fits their requirements.

After the 30 days trial period ends, company need to upgrade plan to be able to continue using the application. If the company don't upgrade the application, the login is disabled and company won't be able to use the application until upgrade.

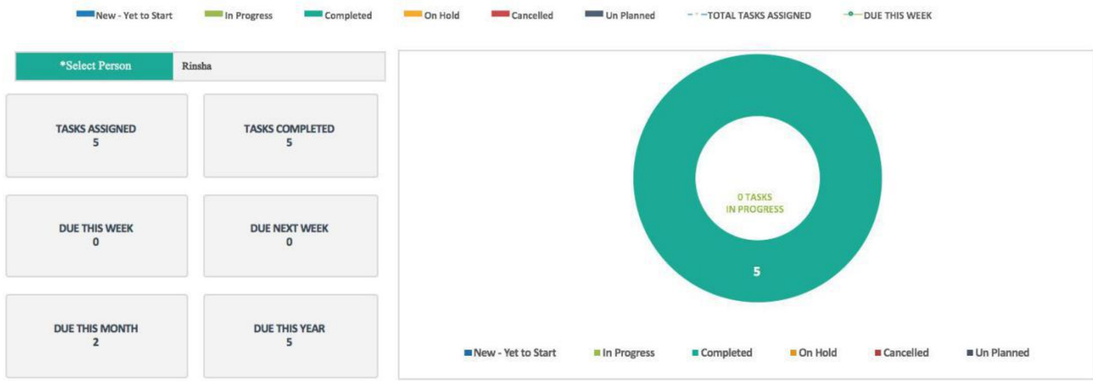
After selecting plan, a form opens which lets enter name, email address and payment details.

# 5. Dashboard

Company dashboard contains the following graphs



■ **Task vs status of each team member**




It is a pie graph which shows no.of task vs status of team member

- Admin can view every project as well as every team members graph. He can select the project as well as the user he needed. If he select a particular project and team member, then he can view task vs status of the selected project.
- Project manager can only view the projects that he belongs in it and team members under him. If he select a project and team member that he needed, then he can view the team member vs status of graph.

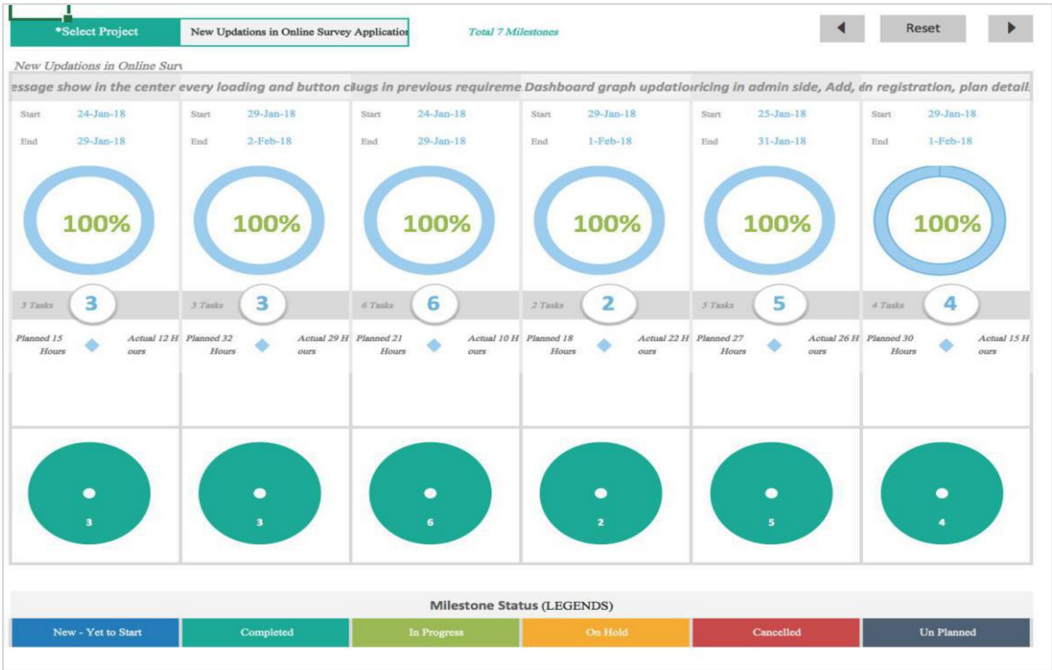
■ **Resources vs task hours**


It is a bar graph which shows resources vs total task hours

This graph helps to analyse total hours assigned to each resources. And it also shows status of assigned tasks of each team member. So that the admin can easily analyse how many of their tasks are completed, in progress, hold etc.

- Admin can view graph of every projects. If he select a project, then he can view resources vs total task hours of the selected project.
- Project manager can view projects only if he belongs in it. If he select a project, then he can view resource vs no of tasks of selected project.

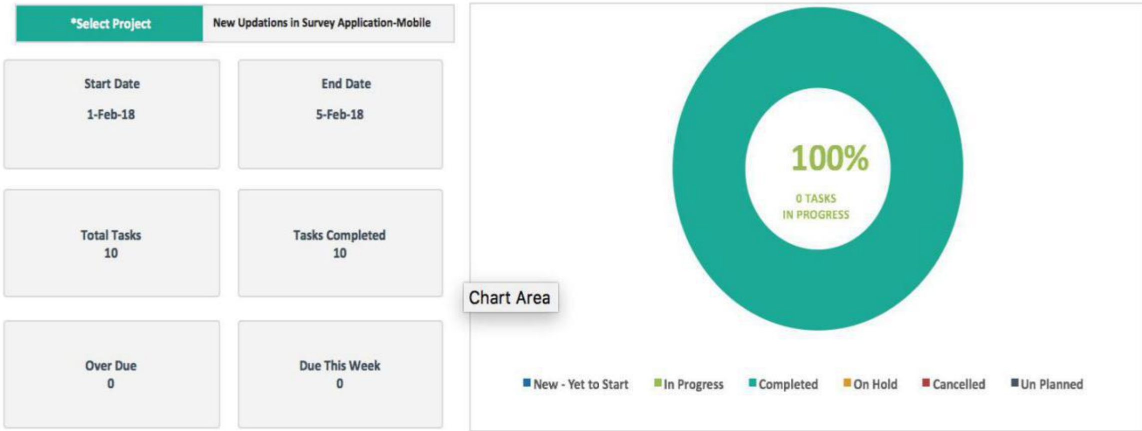
## Modules and tasks




It represents graph of modules and tasks

- Admin can view graph of every projects. If he select a particular project then he can view start date, end date, tasks, planned and actual hours of tasks and under each modules of the project
- But Project manager can view projects only if he belongs in it. If he select a project, then he can view details of modules under the selected project

■ **Status vs no of task of each project**

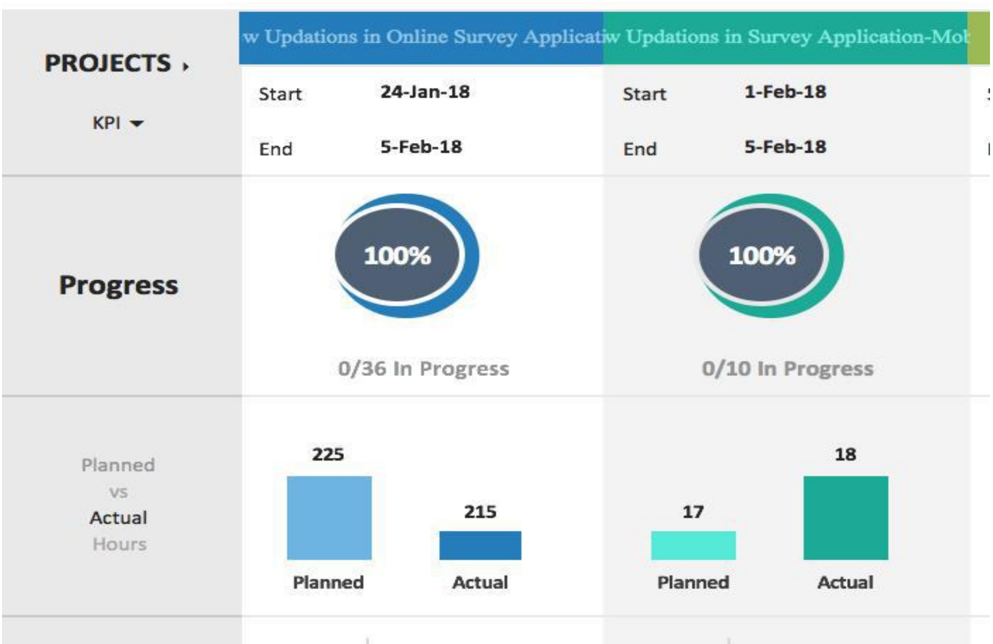



It is a pie graph which shows status of tasks based on project

- Admin can view graph of every projects. If he select a project, then he can view the no.of task for each status.

- Project manager can view projects only if he belongs in it. If he select a project, then he can status details of task under that selected project.

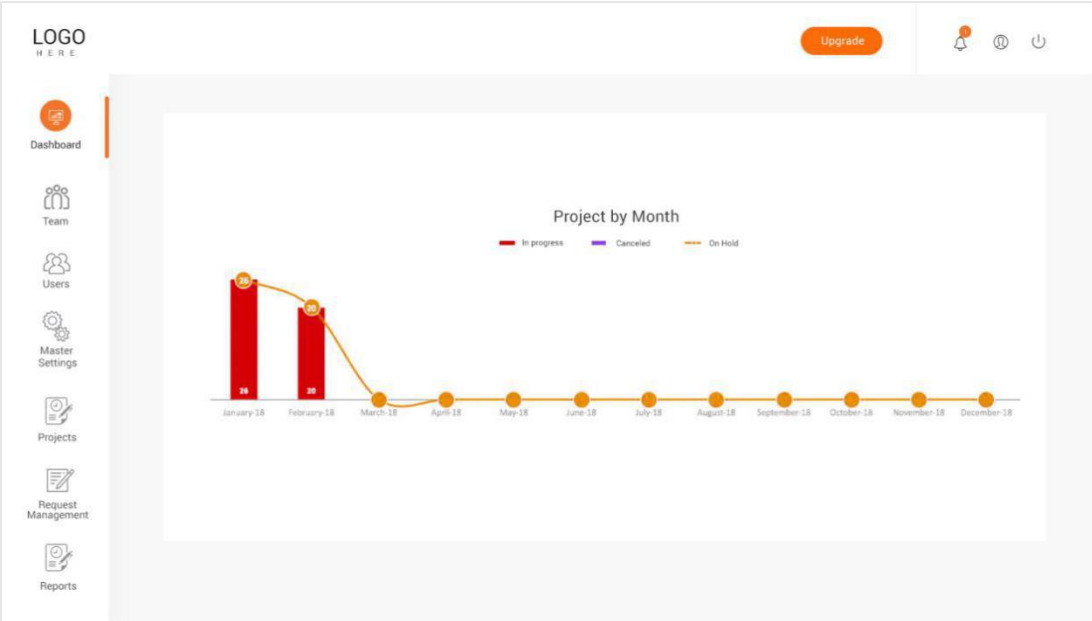
■ **Planned vs actual hours**




It is the graph which shows total planned vs total actual hours of task in a project.

If admin select any project, then he can view the total planned vs actual hours of tasks of the corresponding project.

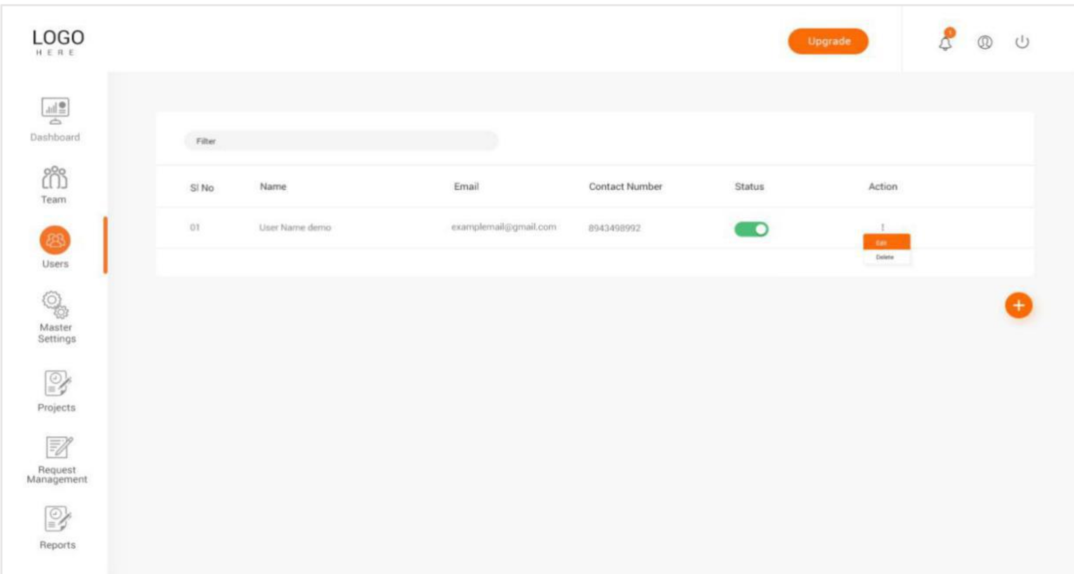
- **Project by month**




It is the graph which shows project by month

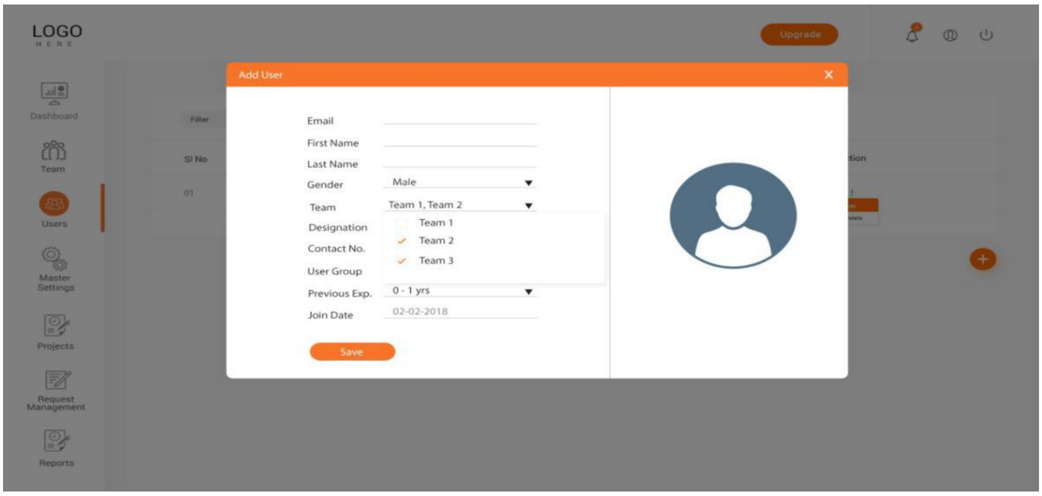
Admin can view every month wise graph of every projects. But project manager can view the month wise graph of projects only if he belongs in it.

## 6. User




To add members to your company, click on the User tab in the left navigational menu.

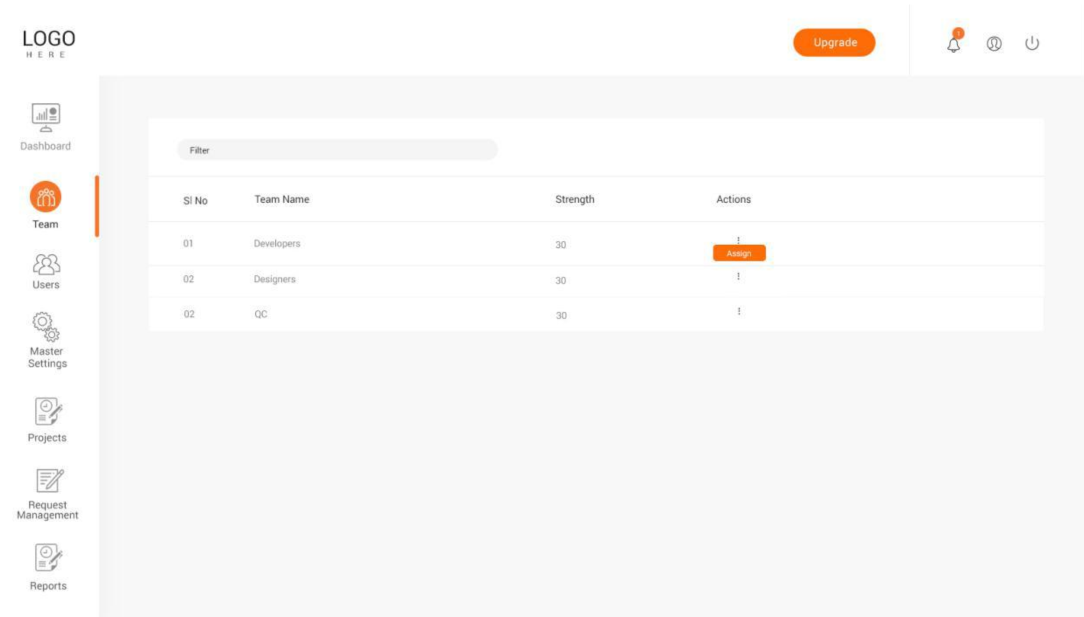
The company can see the list of existing user (which contain name, email, contact number and status) and add user button. Company can edit and delete the users.




Here company can invite members by their email. When company invite people, an email is sent to them to confirm their email address, which also include username and random generated password. When they do confirm, they can access the application as a team member.

When the company reach the limit of members in their plan and try to add members, they are asked to upgrade the account.

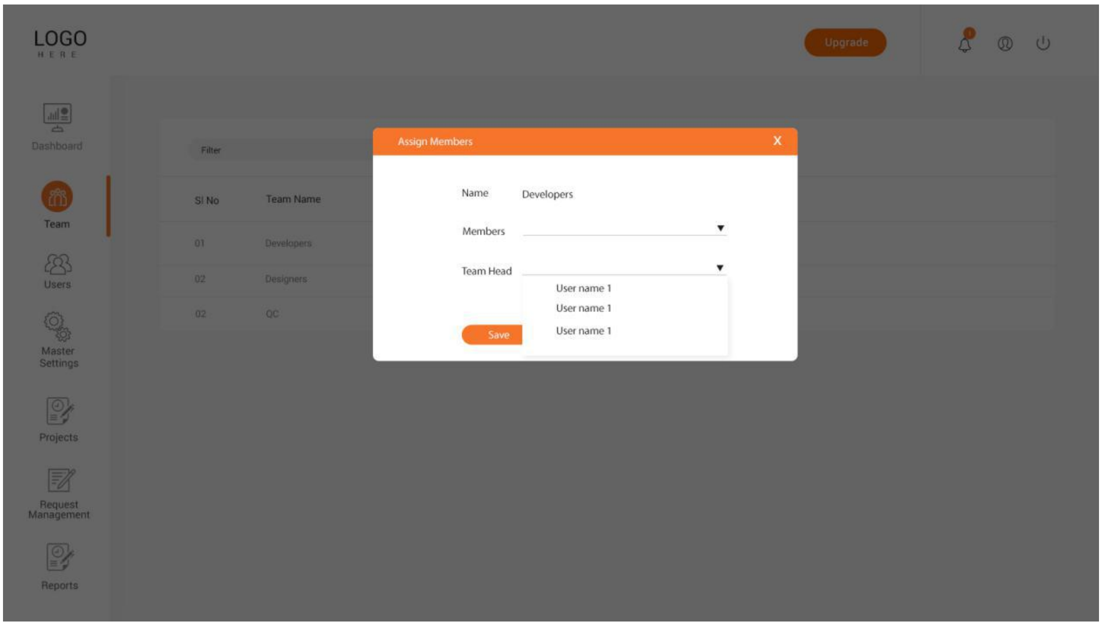
## 7. Team




Company can group the users as a team. We have three default teams; Designer team, Developer team and QC team.

List contain teams and their strength and Edit button.

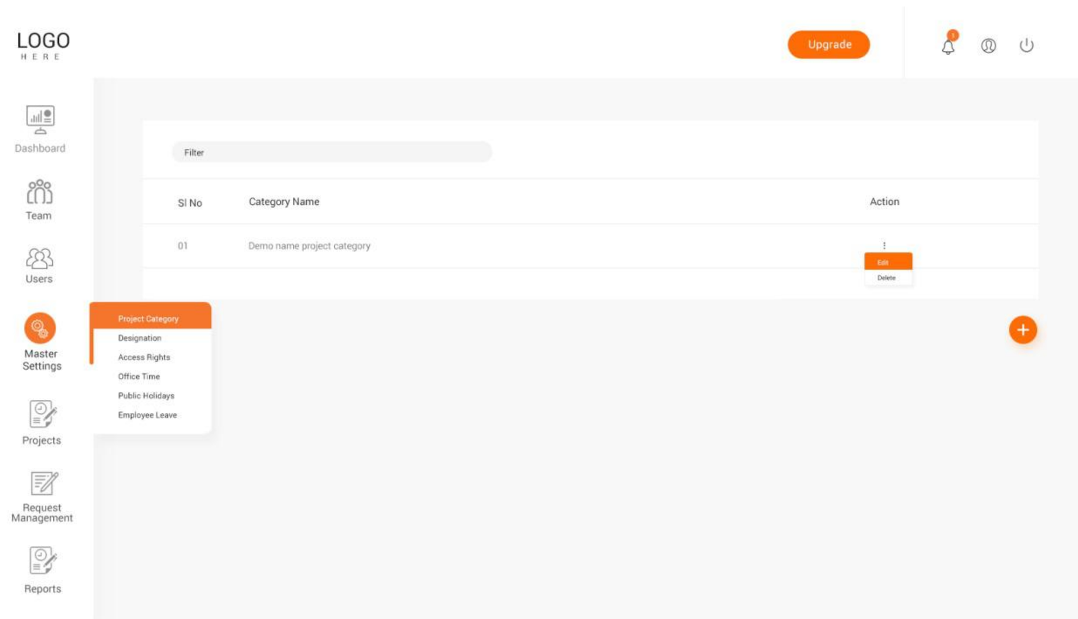
It contain a button to add team members to existing team and a table with list of teams.




## 8. <u>Master settings</u>

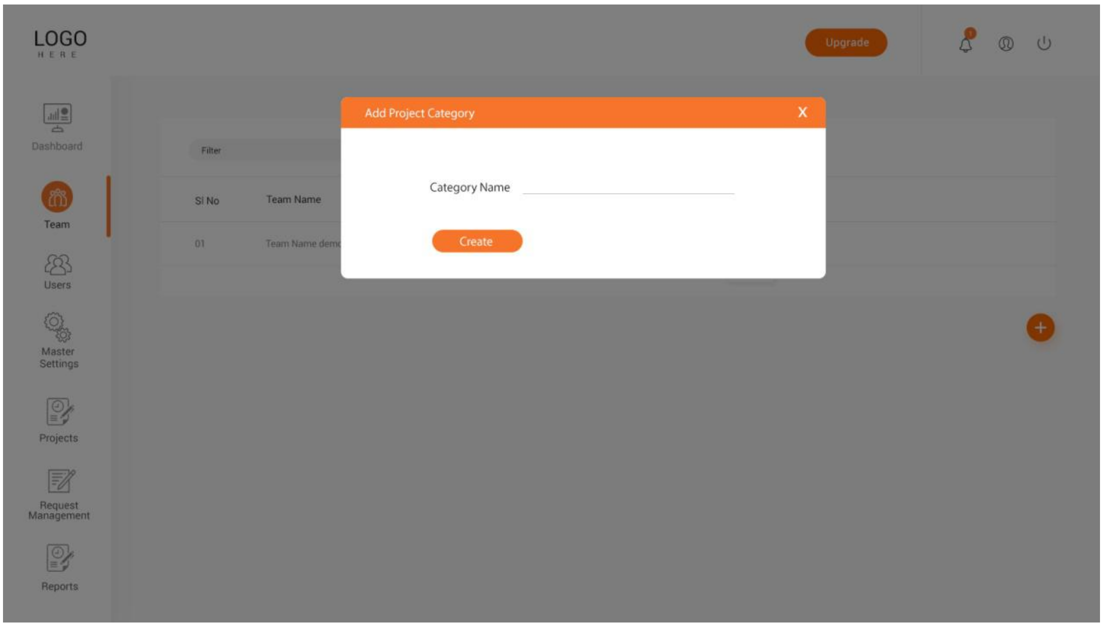
- **Project category**

Company admin can add and manage project categories.



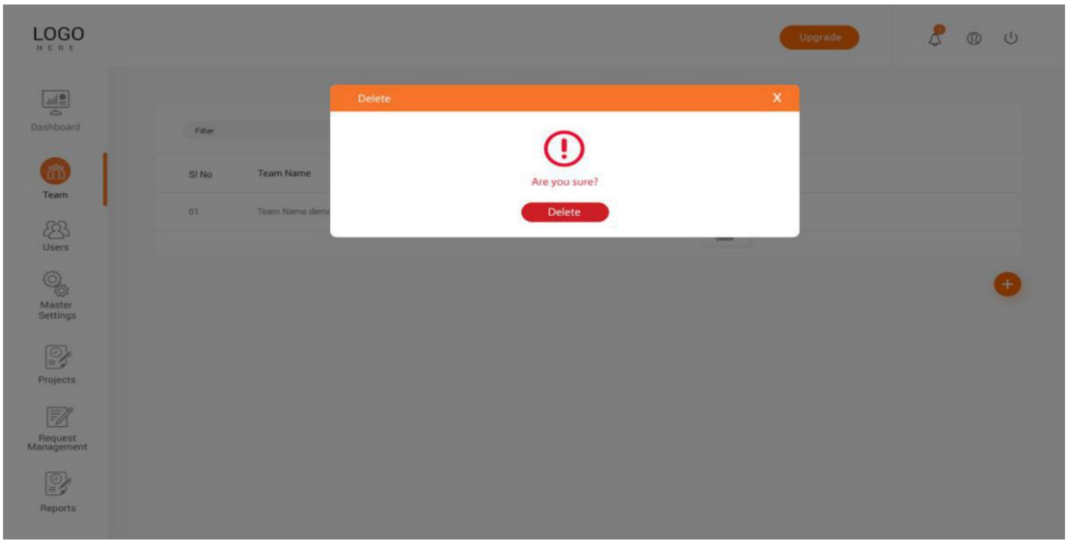

The table contains all saved project categories and edit ,delete actions. Admin can't delete a category if it is already used in a project.

Add new:

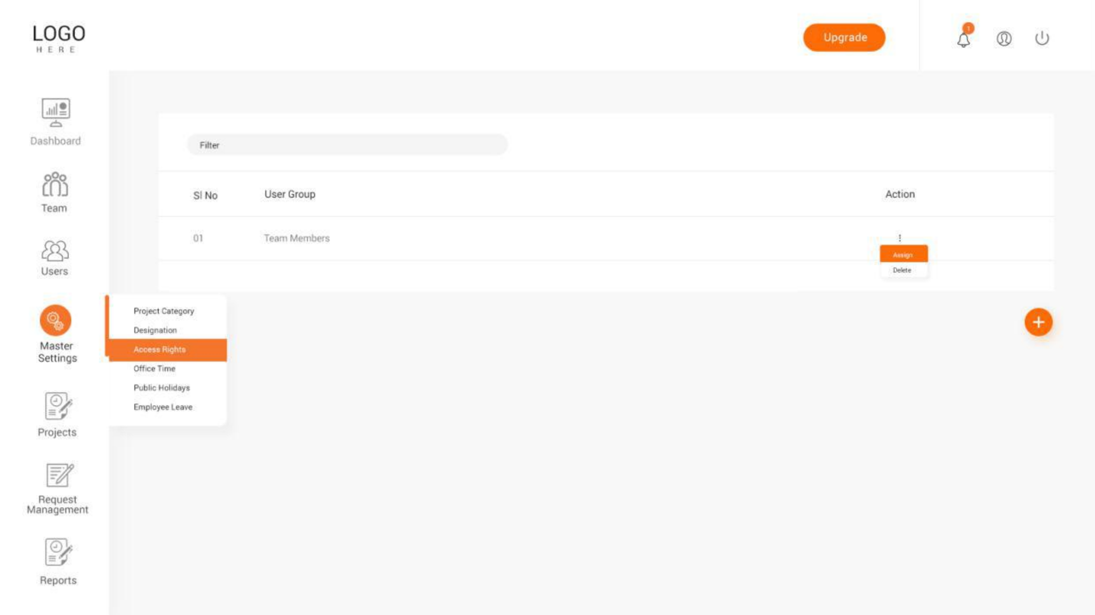



Here, company admin can add a new project category by filling the input field.

If he click the delete button, then a confirmation box will display

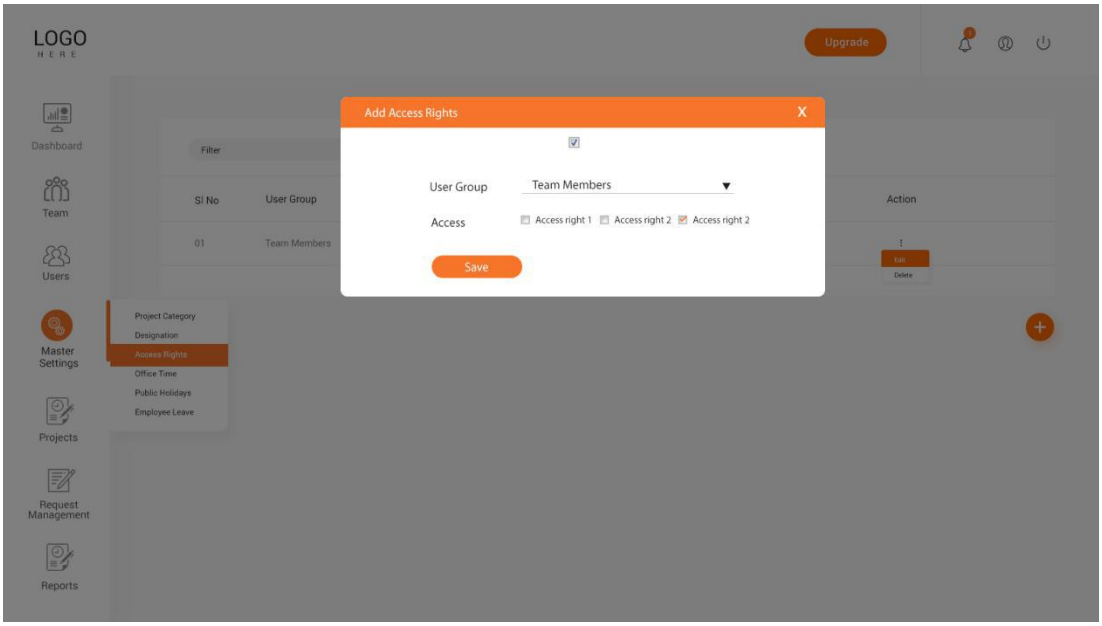


## ■ Access rights



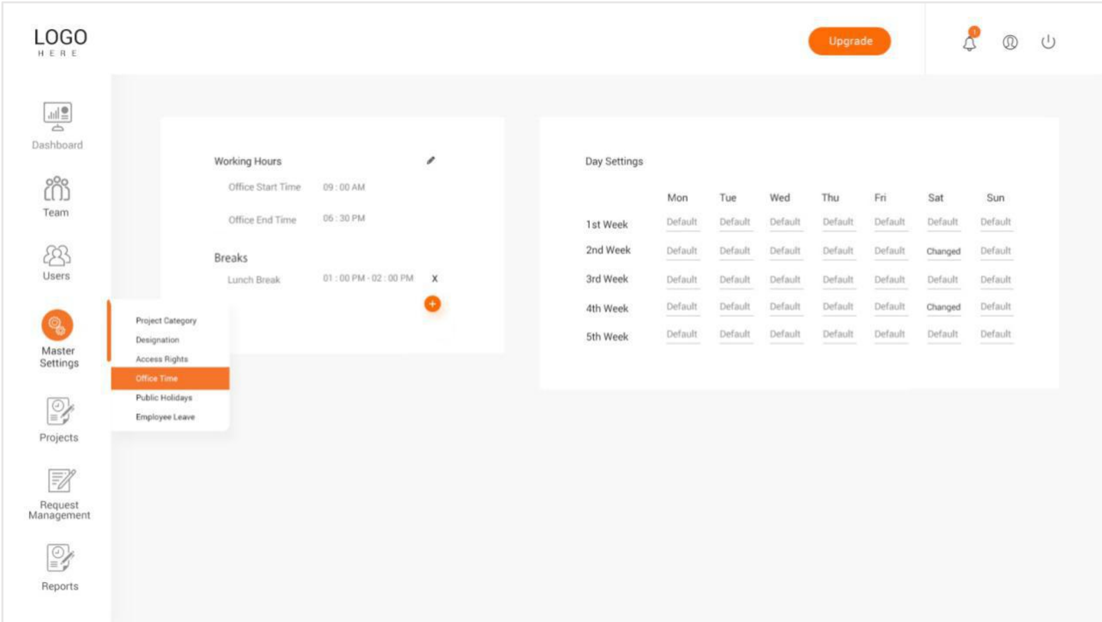

Here the table contain list of all saved access rights of each user groups and edit,delete actions.

Add new:

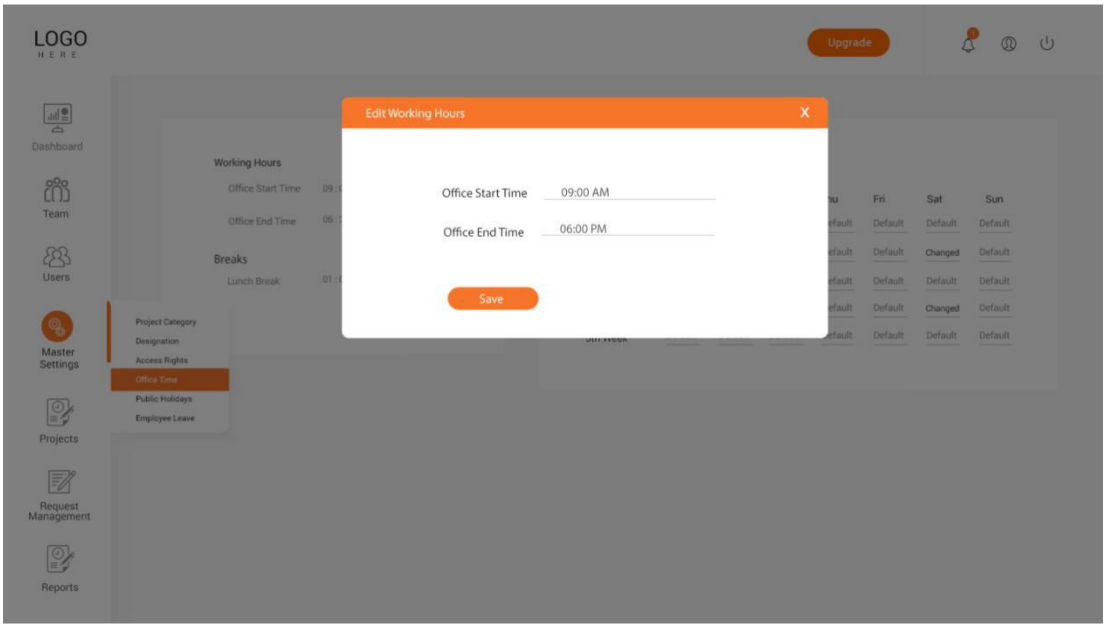



All the access privileges are listed in this page and admin can add a new access rights for a particular user group by ticking the privileges.

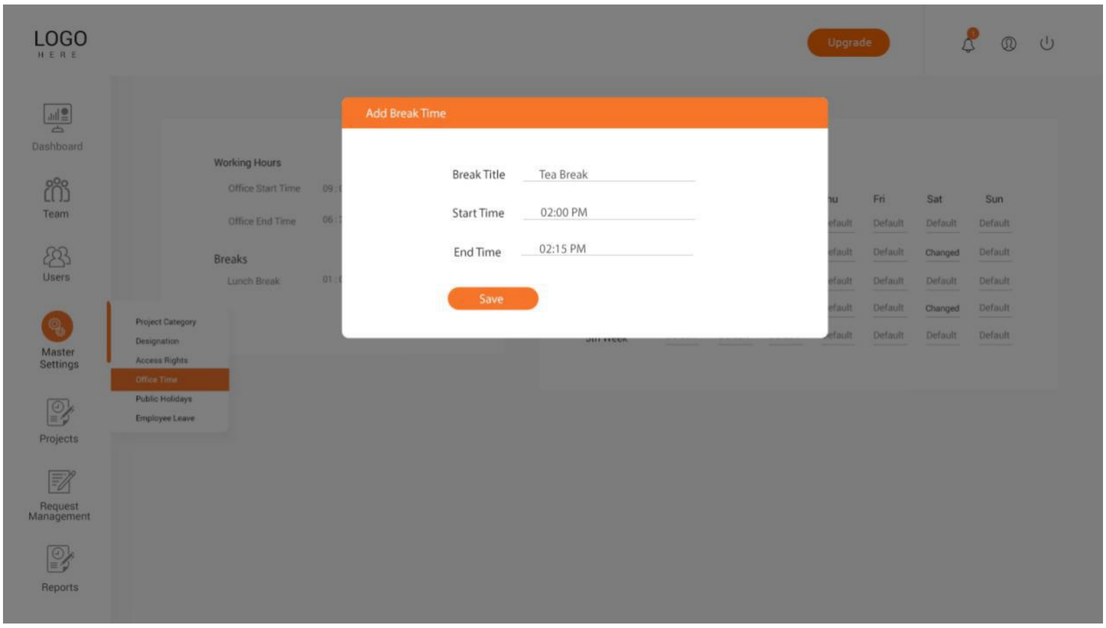
### ■ Company working time




Here admin can view default office start time and end time that he set on the time of registration.currently there is no break time as default, if he need to change the working hours then can use the edit icon.

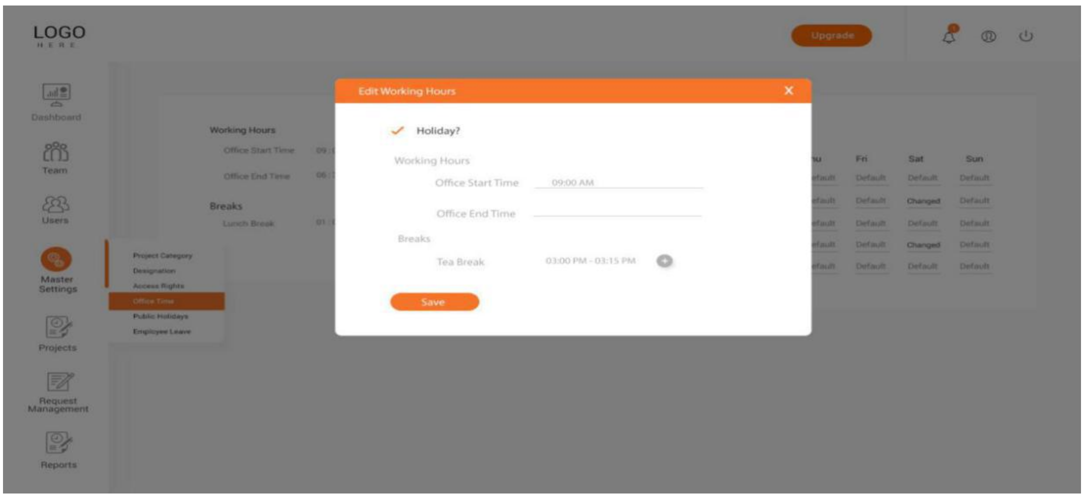



Company can add their break times by clicking the add icon

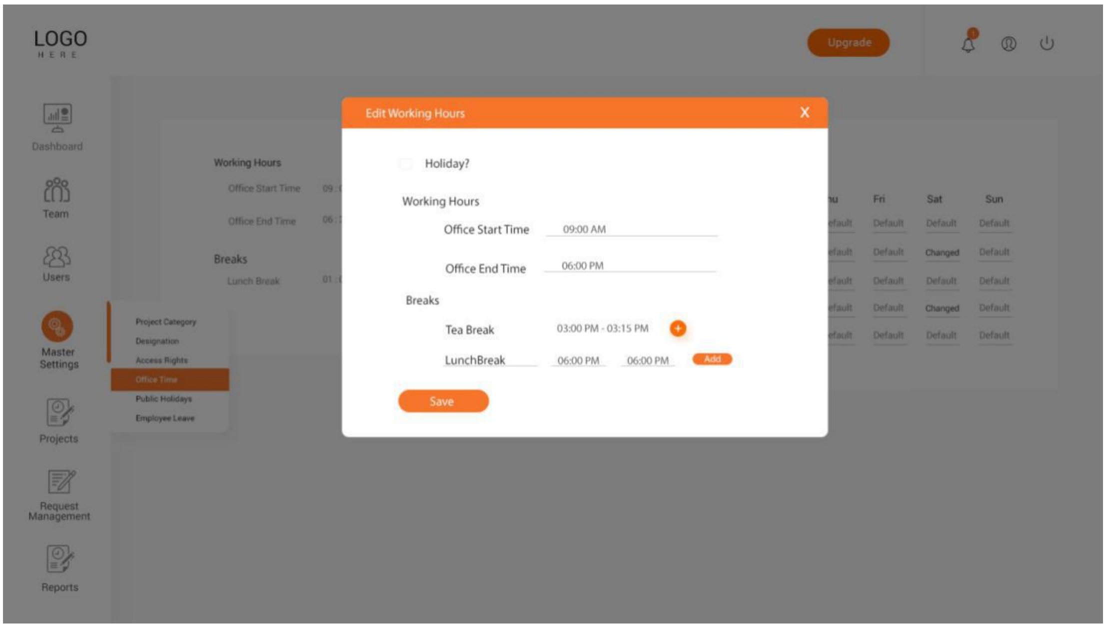



He can add more than one break time. By adding this, all days are set with this working hours and break time . If the need to change any details of a particular day, then he can click the corresponding date. Then a pop up will display.

In this pop up, admin have the rights to set whether the day is holiday or not, as well as to change working time details such as office start time,office end time, break time and working hours. If he tick checkbox to set the particular day is holiday, then all other fields will be disable as shown in figure

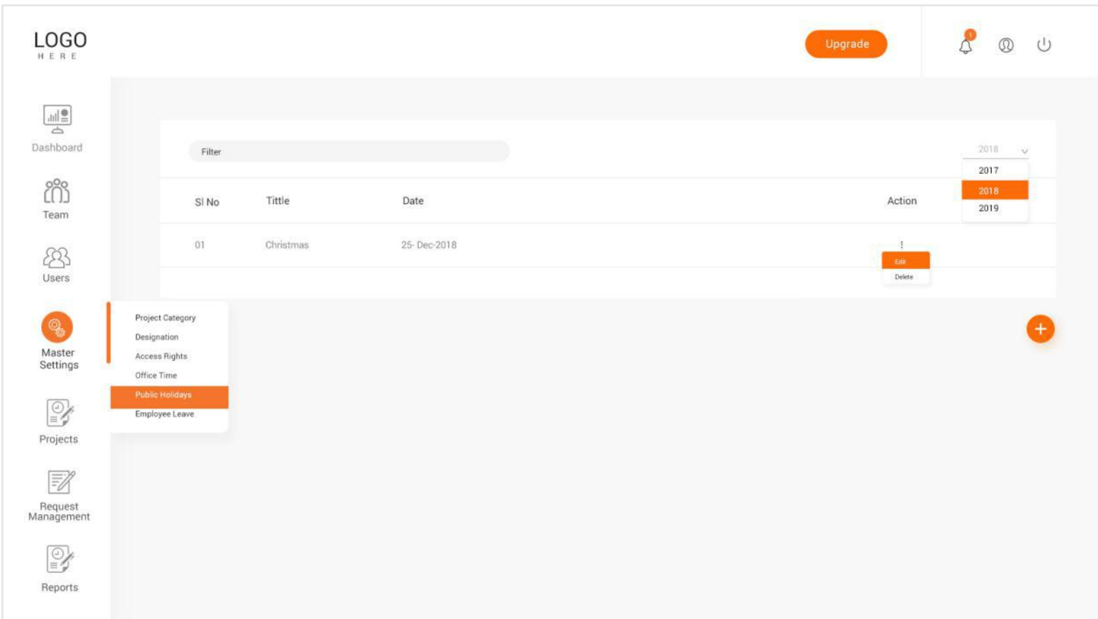



other wise he can edit working time details such as start time, end time etc




If the admin change office working hours, then the system will check is there any project is pending (completed up to planning stage); if yes, then a alert will be display and it shows the changed time does not effects to already planned projects.

- **Public holidays**



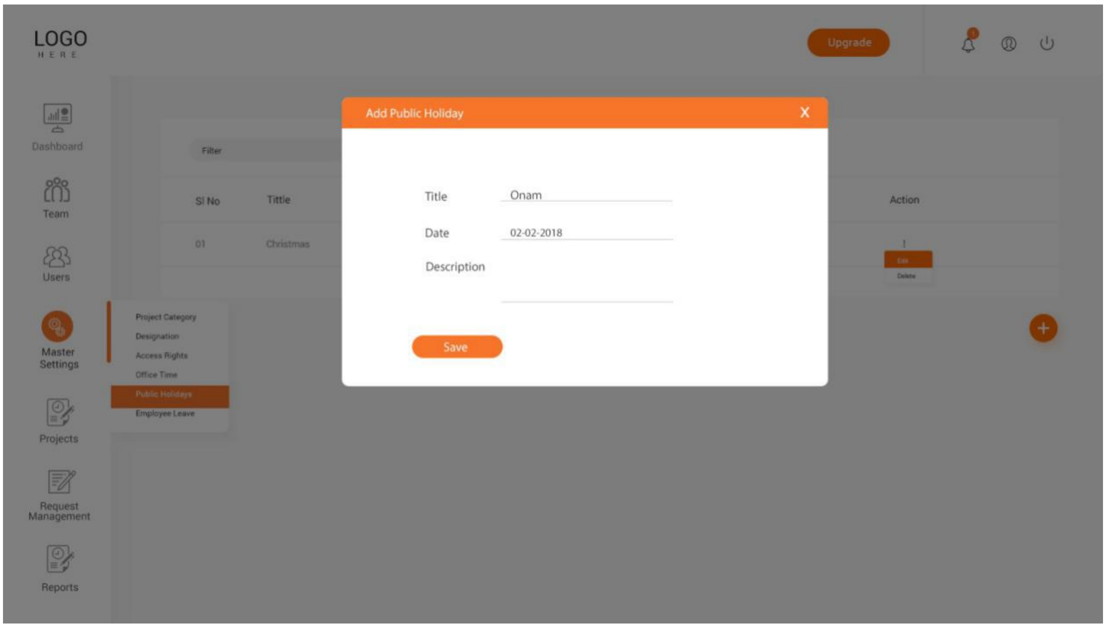

Here, admin can add and manage public holidays of a company.

The table contains list of all saved public holidays of current year and a delete action.

If the admin needs to view holidays of previous and next year then he can use the filter button.

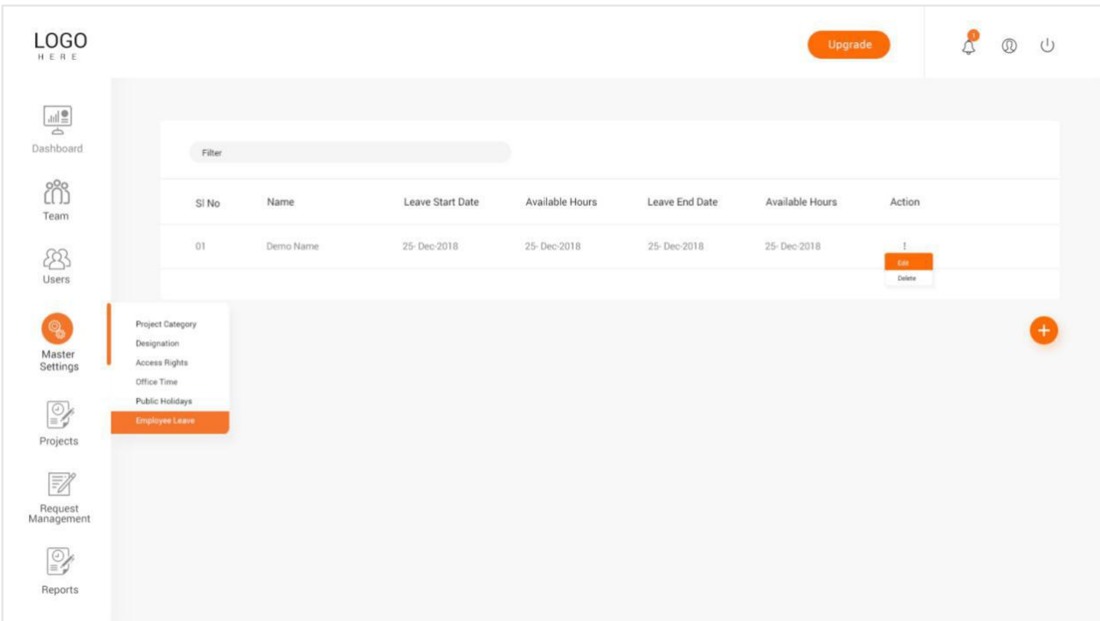
Add new:

Here admin can add a new public holiday .




If admin add or delete a public holiday, then the system will check is there any project is pending (completed up to planning stage); if yes, then a alert will be display and it shows the changed time does not effects to already planned projects.

- **Employee leaves**

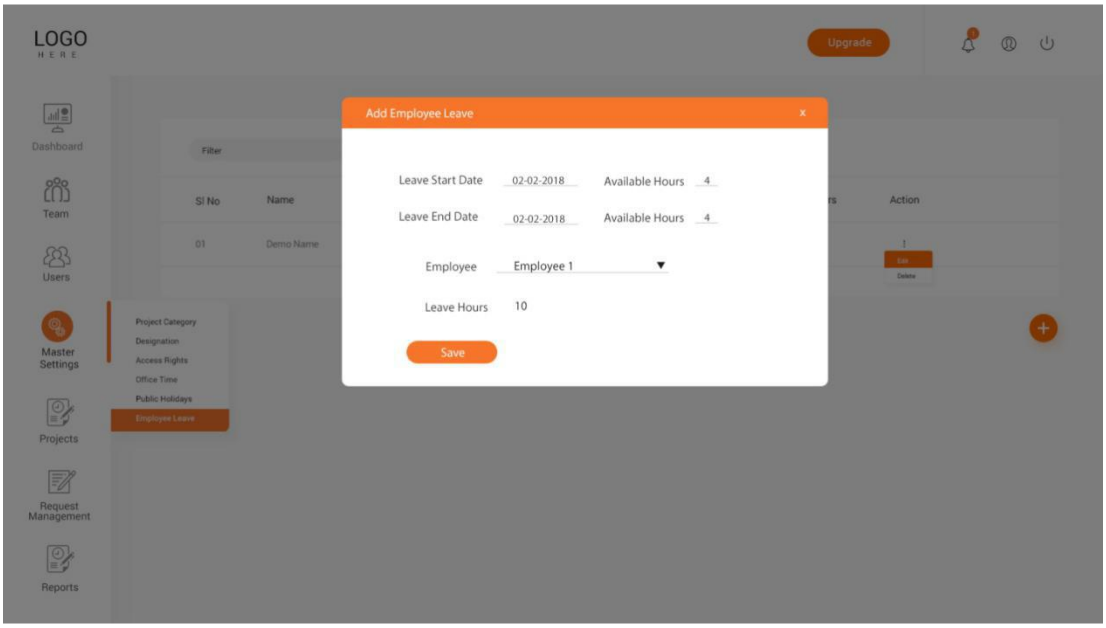



Here admin can add and manage employee leaves.

The table list saved employee leaves and a delete button.

Add new:

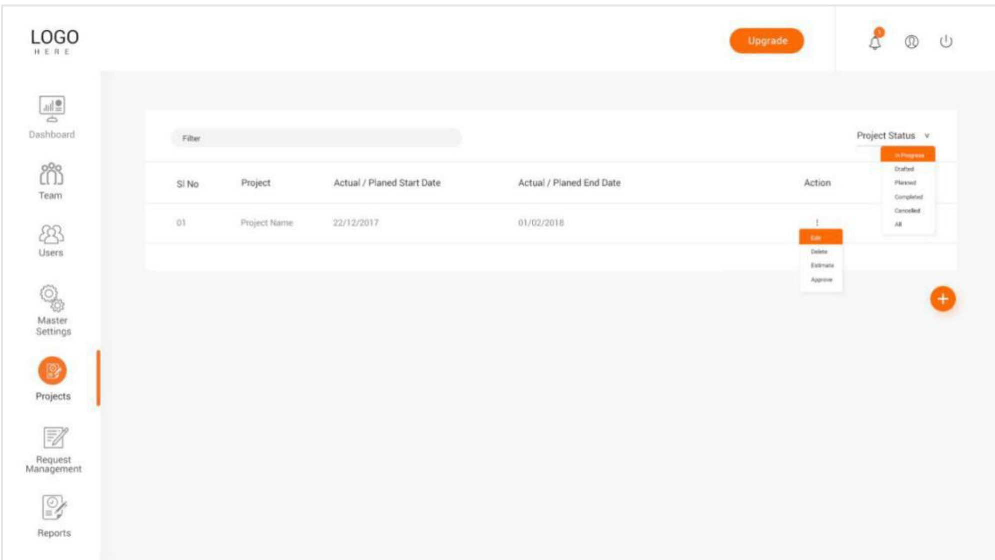
Here company admin can add each employee leaves.




If admin add a employee leave then a pop up will display which shows current task details of that particular employee

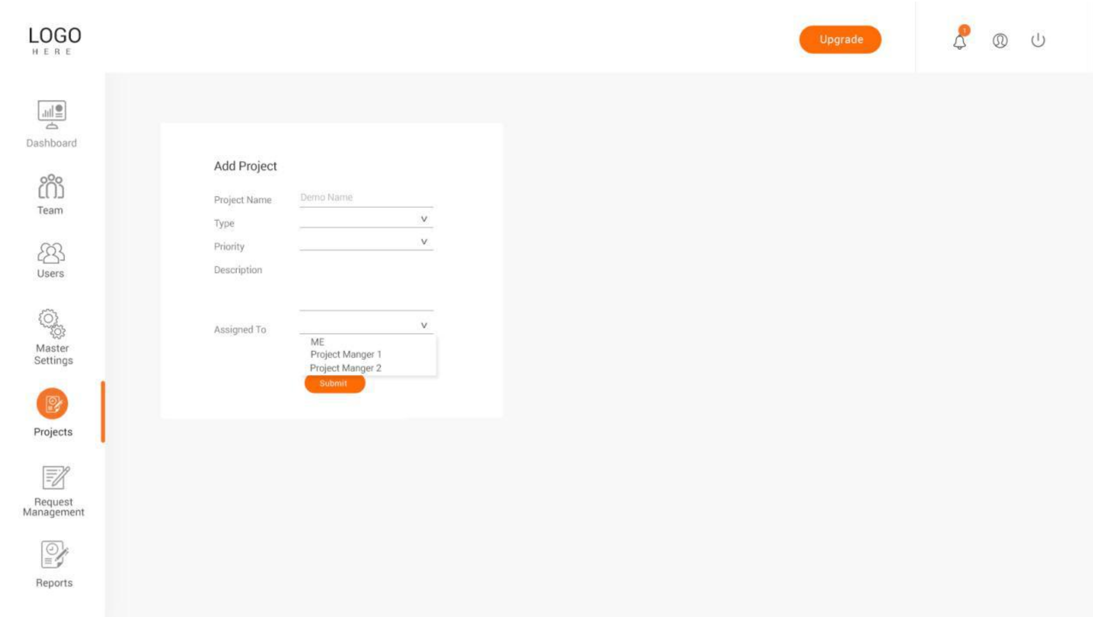
## 9. <u>Project</u>

Here the company can create new projects and can view the list of all projects under the company.



The table shows all saved projects and an action with edit, delete, estimate and approve action. If he needs to change assigned employee of the particular task, then he can use this edit button, If he assigned task to a new employee, then that employee get the assigned task in their panel

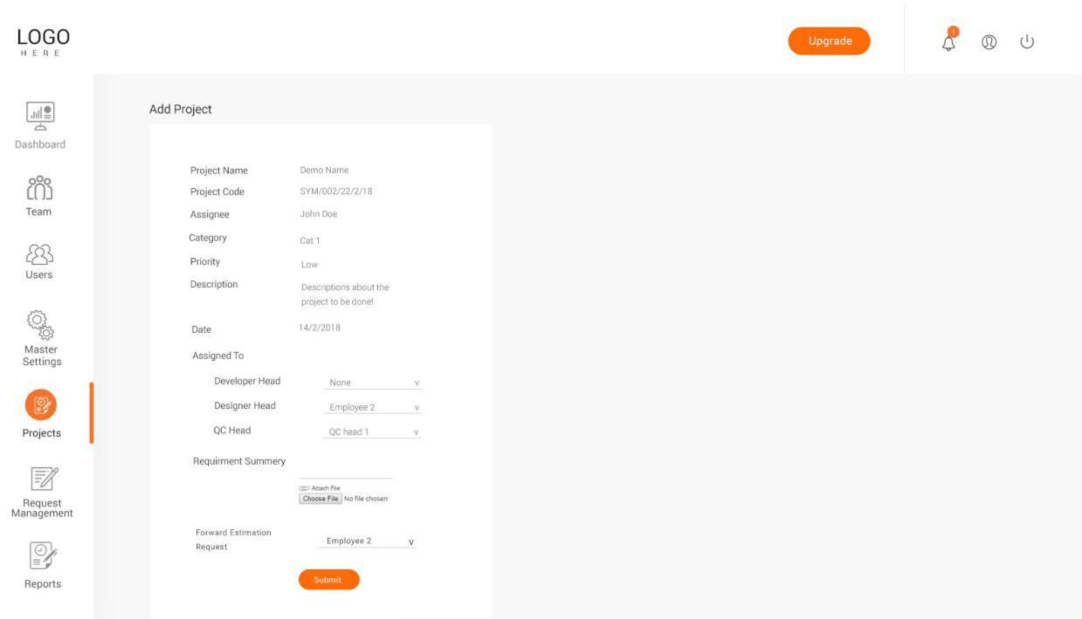
- **Create Project:**




The project type refers whether the project is billable or not. Company also can select the priority of the project which may be low, medium or high.

The project can be assigned to a Project Manager at the time of project creation.

- If the admin create the project, and admin does not select a project manager, a confirmation pop up is displayed to ensure that the admin select himself as a project manager for the project.
- If the admin select a project manager, a notification is sent to project manager to select the team heads of the project.
- If the project manager creates a project, there is no option to select the project managers. In that case, the project manager set as himself.




After the project saved, a project code is generated which contain the company code, number of project that the company create and date of project creation.

Eg.: if the company code is 'sym',

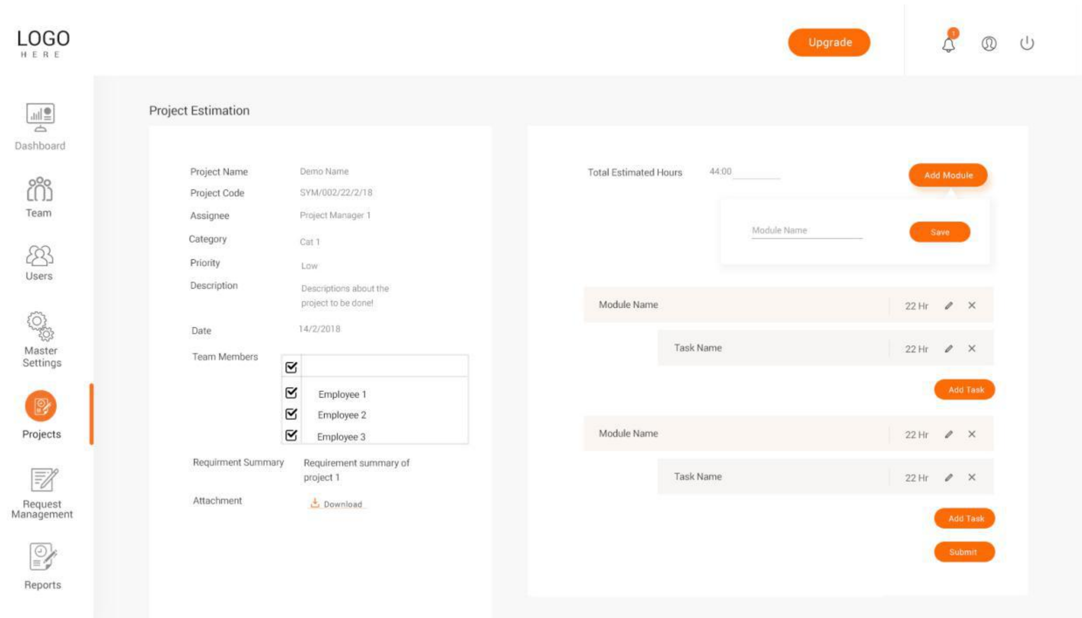
then the project code is SYMPR/002/01/02/2018

At the time of project creation, project status is 'Drafted'. At that time, a notification will be send to next selected team head for estimation.

In later the project have statuses like Planned, In Progress, Completed and Canceled.

The next stage is project Estimation.

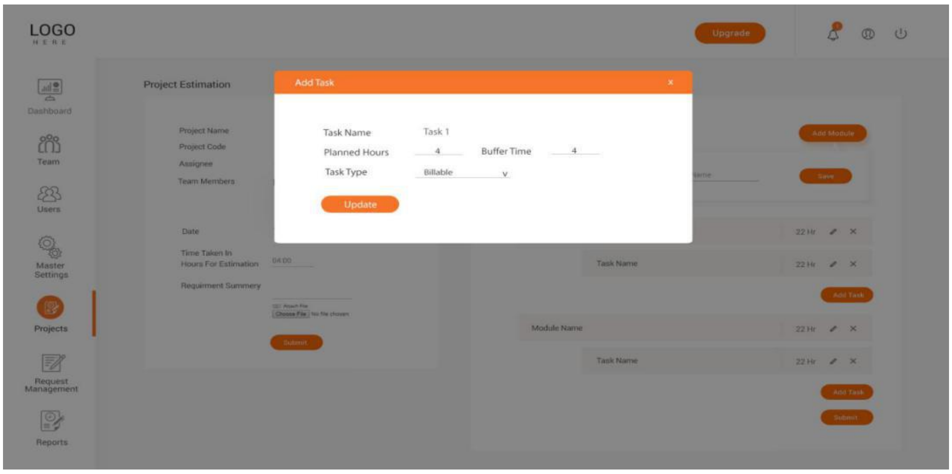
- **Project Estimation**:



The project estimation will be prepared by team heads. Team head can select the team members of the respective team to create the estimation.

Team head can view all the details added by project manager and can download the attachment.

Here team head can create task under a module. Each module is identified by name.



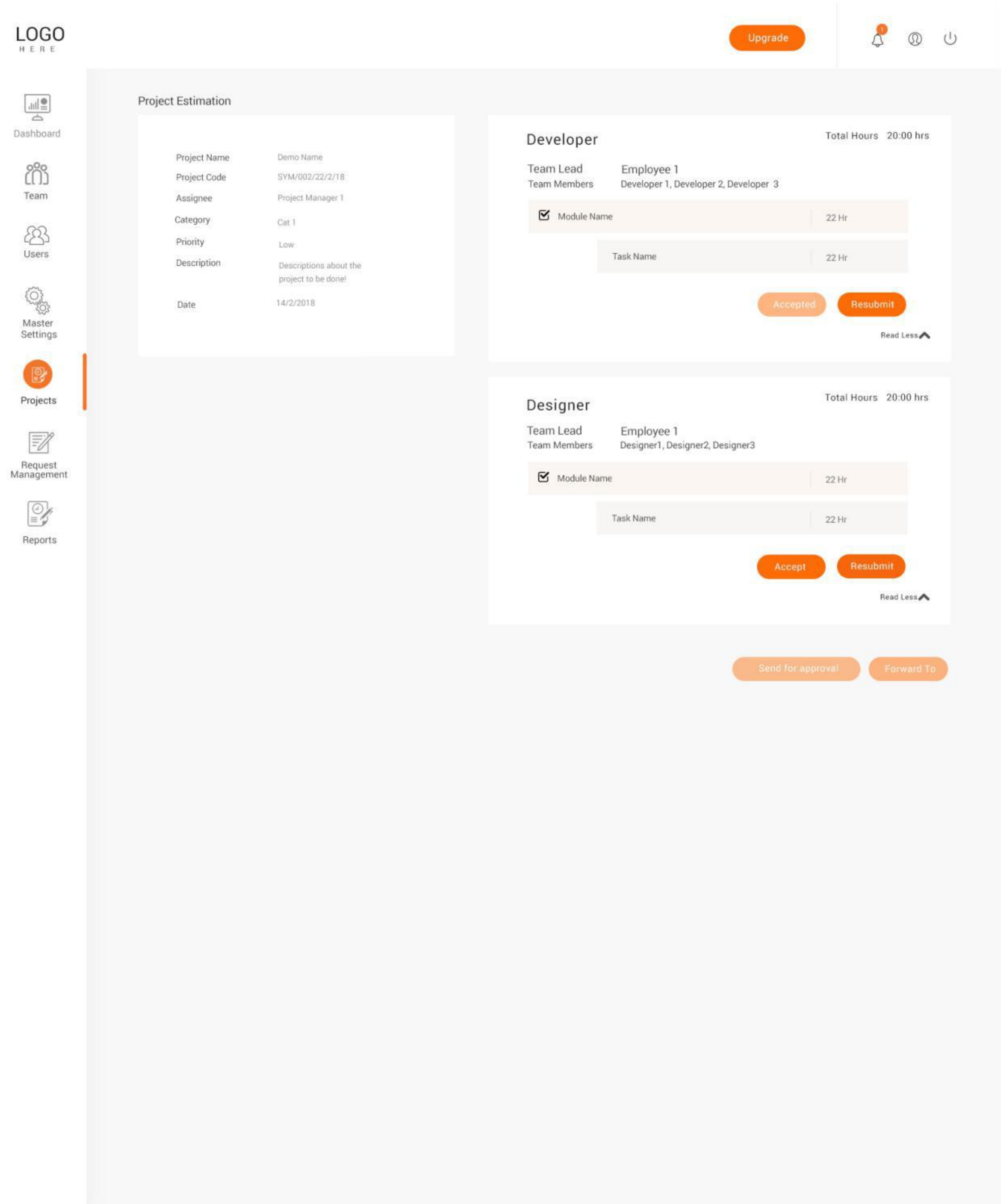

Task can be created by adding task name, description, planned hour and buffer hour.

A task completion time is the total of planned task time and buffer time.

Planned completion time of each module is displayed on the right side which is the sum of each task's completion time under that module.

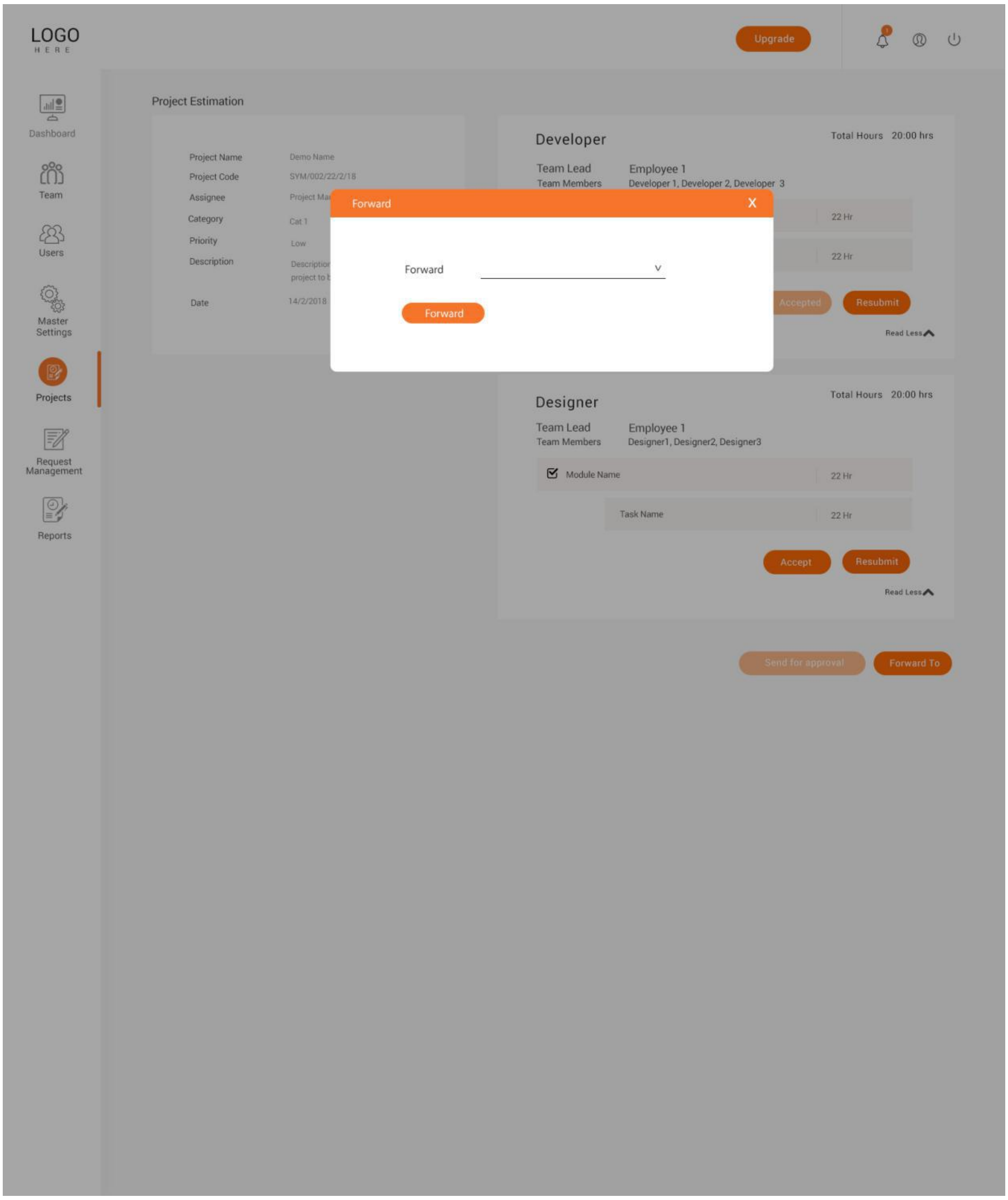
If developer team head complete the estimation, a notification will be send to project manager.

Project manager can view the estimation and can Accept, ask for Resubmit and Forward the estimation. The ‘Send for approval’ button is disabled until all possible estimations are accepted.

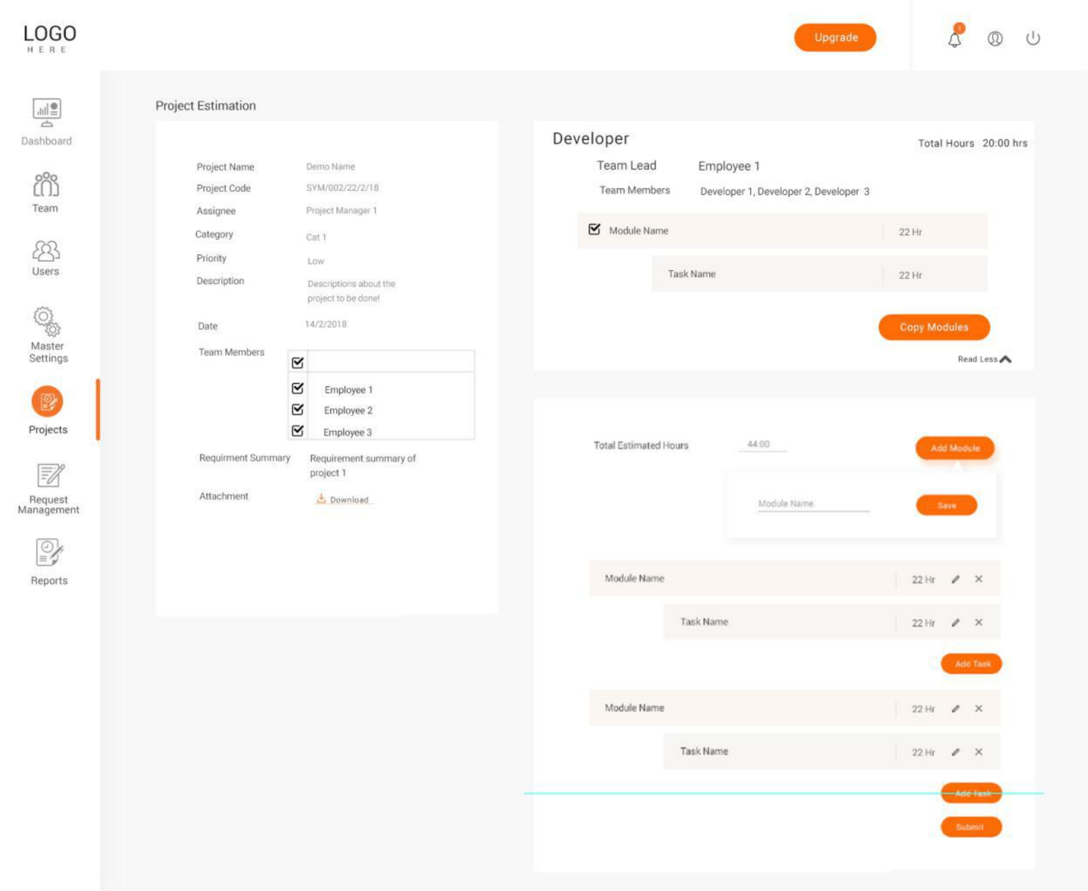


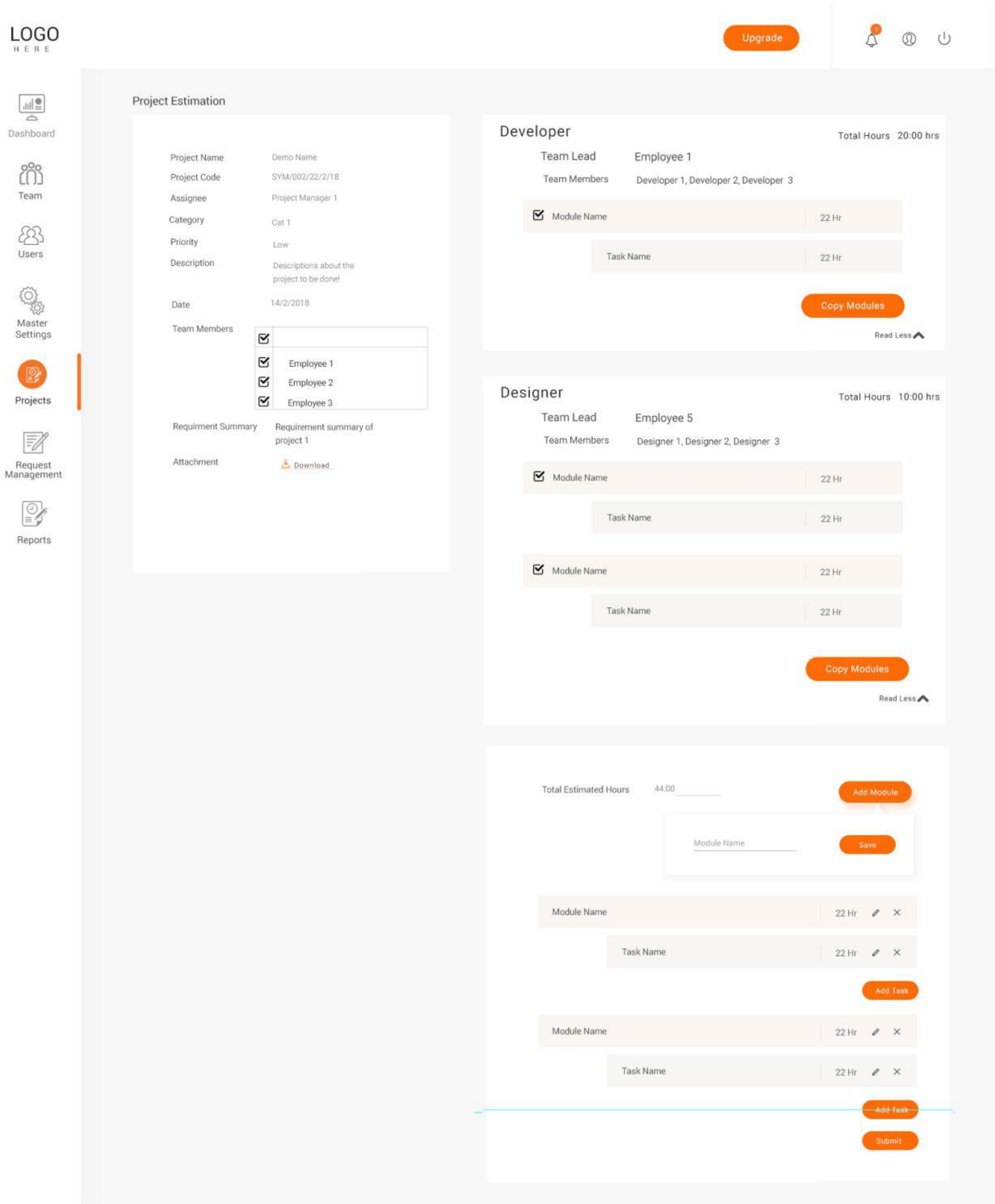

If project manager ask to resubmit, a notification will be send to team head and he can edit the estimation. In that case project manager can't see the estimation until the team head resubmit the current estimation.

Once the project manager accept the estimation, he can forward estimation request into next team head.


LOGO
HERE
Upgrade
Dashboard
Team
Users
Master Settings
Projects
Request Management
Reports
Project Estimation
Project Name
Demo Name
Project Code
SYM/002/22/2/18
Assignee
Category
Cat 1
Priority
Low
Description
Date
14/2/2018
Developer
Total Hours 20:00 hrs
Team Lead
Employee 1
Team Members
Developer 1, Developer 2, Developer 3
22 Hr
22 Hr
Accepted
Resubmit
Read Less
Forward
X
Forward
Forward
Designer
Total Hours 20:00 hrs
Team Lead
Employee 1
Team Members
Designer1, Designer2, Designer3
Module Name
22 Hr
Task Name
22 Hr
Accept
Resubmit
Read Less
Send for approval
Forward To

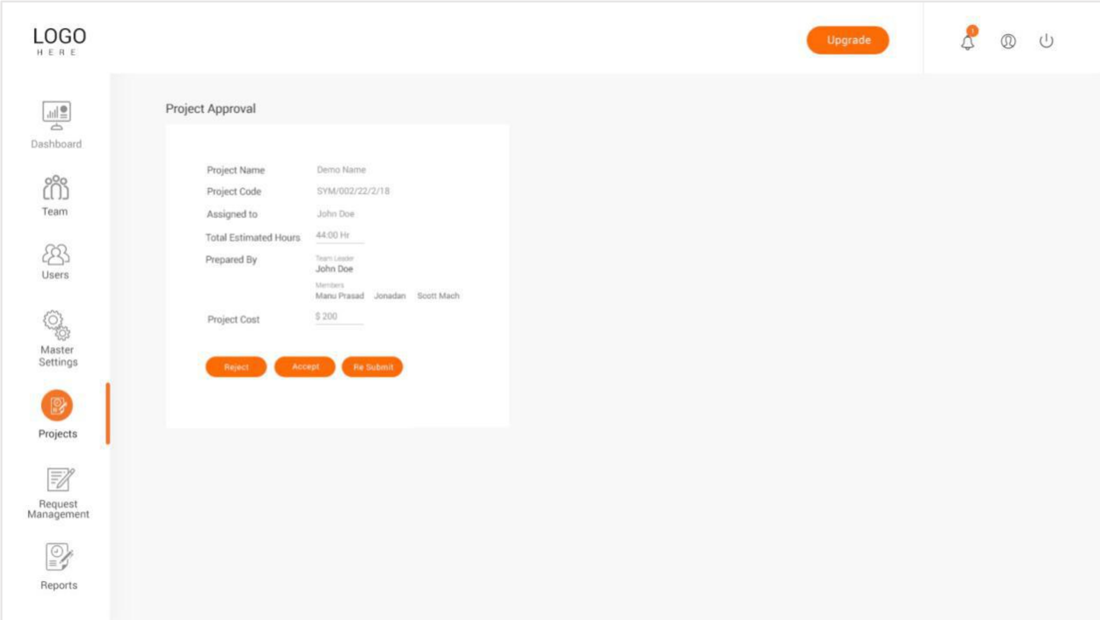
Then the remaining team can done the estimations,






If all estimations are listed, then there is no forward button. When project manager accept all the estimations, he can send the estimation to Admin for final approval. The next stage is project approval

## ■ Project Approval by Admin :




If the project is created by project manager a notification will be sent to company admin for project approval.

Here, the admin can view the total estimation hour and also the estimation in detail.

The admin can enter the project cost.

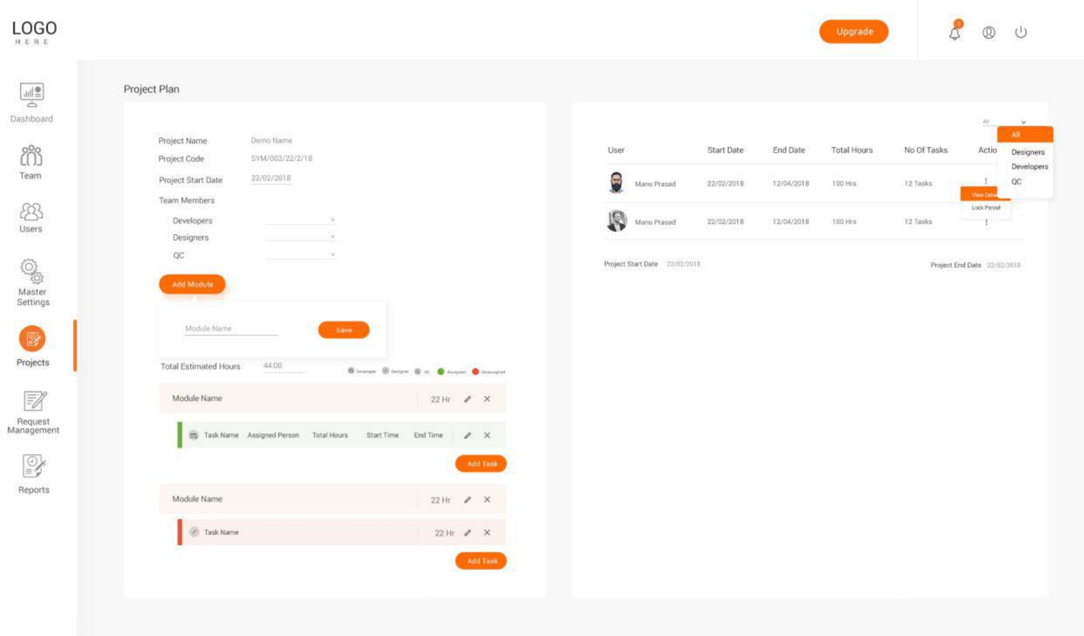
Here the admin have actions like Accept, Reject and Resubmit.

- If the admin accept the estimation, a notification will be sent to project manager.
- The admin can reject estimation and the project by clicking the Reject button and adding a reason. Then the project status will be changed to 'Canceled'.
- If the admin is unsatisfied with the project estimation, then the admin can ask the project manager to resubmit the estimation by adding the reason. In that case, project manager get a notification to resubmit the estimation.
- If admin is the project manager , then there is an Edit button instead of Resubmit. In that case, admin can edit the estimation.

  This process continue until the company admin reject or accept the estimation.

The next stage is project planning stage.

## ■ Project Planning Stage:




Here the project manager can plan the project.

Here he can decide the team members for each team of the project.

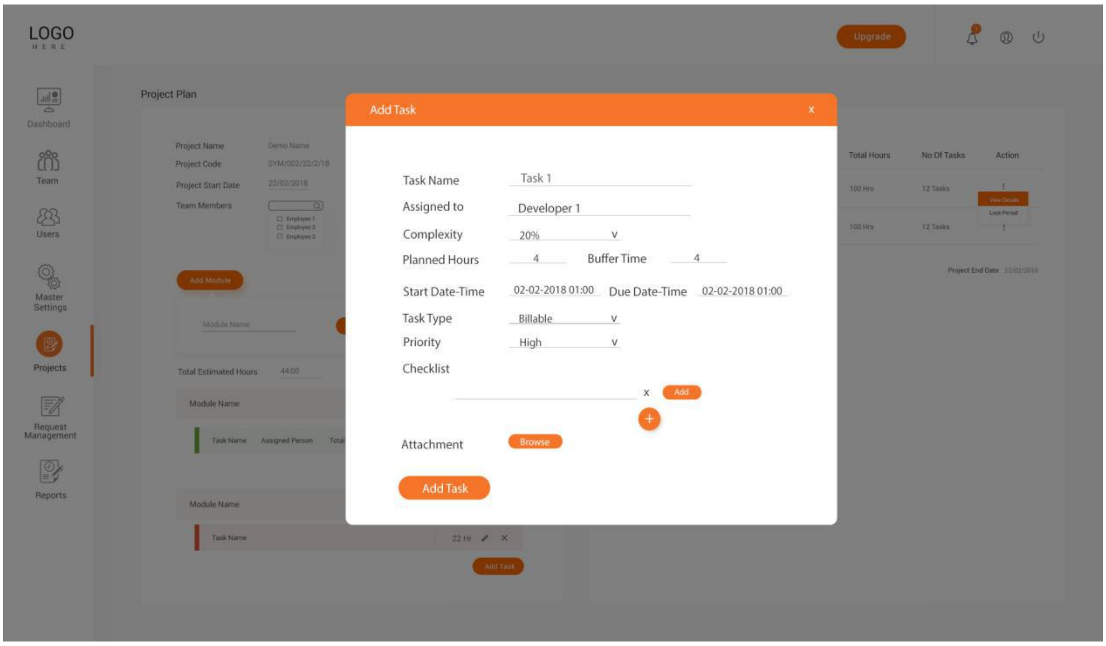
Modules and tasks from each team head can be differentiated via icons.

Here, all the modules and tasks from the estimation phase is listed.

Project manager can edit and delete old modules & tasks and also can add new modules and tasks.

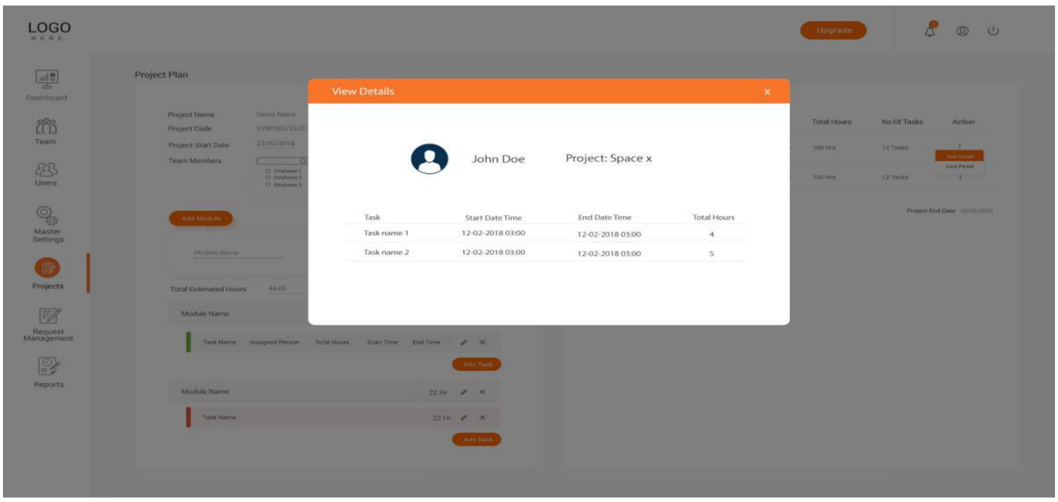
Modules are listed with module name, total hours and edit delete button.

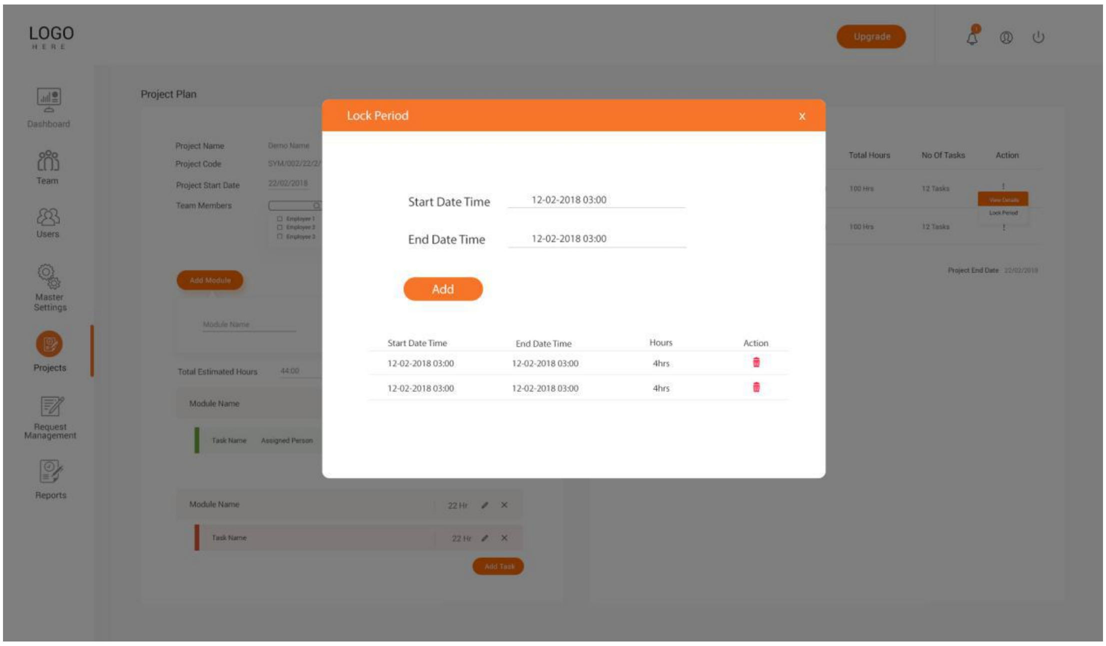
Tasks are listed under the corresponding module with assigned persons, total hours, start and end date time and edit, delete button. There is also an ‘Add Task’ button. If he click this button, then a pop up will display as shown in figure




Each time a person assigned to a task, the team member is listed in right side with profile picture, start date, end date, total hours, number of tasks and Actions like view details and lock period. When an already assigned team member is assigned to another task, the list is updated in end date, total hours and number of tasks. The available hours of each team member depends on the employee leaves, lock period, company work time, company off days, public holidays etc. The start date time and end date time of each task is calculated using the application. Order of the task in a module can be adjusted by dragging the tasks along the module.

The view detail page contain list of task, leave, holiday and lock period with start date, end date and total hours of selected employee.






The lock period of employee can be set by clicking the Lock Period button.

When a task is added, the status is 'New' in default.

The project start date and end date can be calculated from this table.

When the project planning stage completes, the status of the project changes from 'Drafted' to 'Planned'. At that time, a notification will be sent to all the assigned members.

During the planned start date of project, the status of the project changes from 'Planned' to 'In Progress' and a notification will be sent to all the assigned team members.

A list of project is displayed in the Project menu which contain running projects in default. It also contain a filter to filter the projects on the basis of status. It contain fields like project name, start date and end date and action.

If the project status is completed, list displays the actual start and end date. In the other cases, list shows the planned start and actual date.

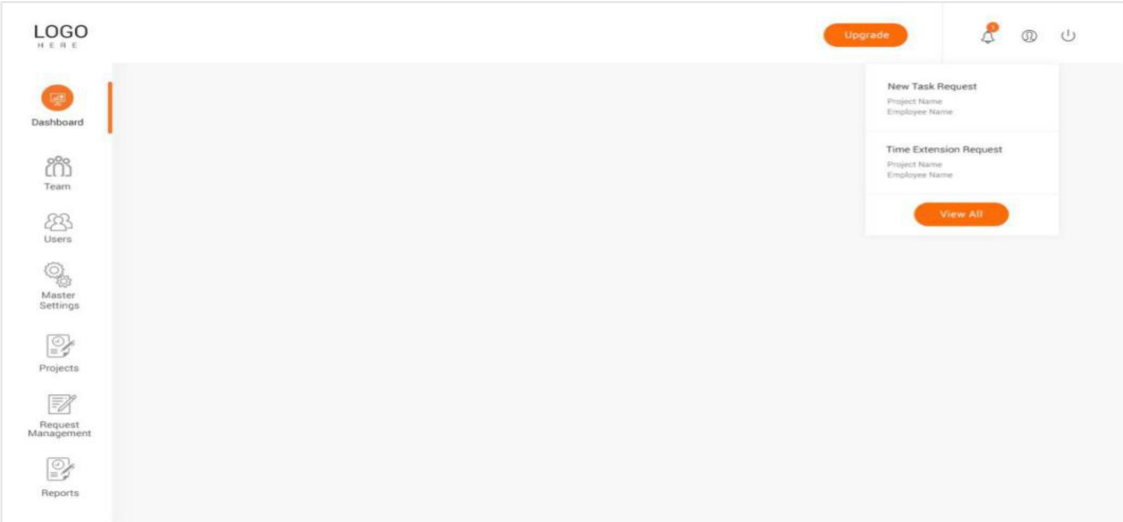
If the project is in running stage,completed stage or canceled stage, it does not contain any actions.

Otherwise it contain actions like Edit, Delete etc.

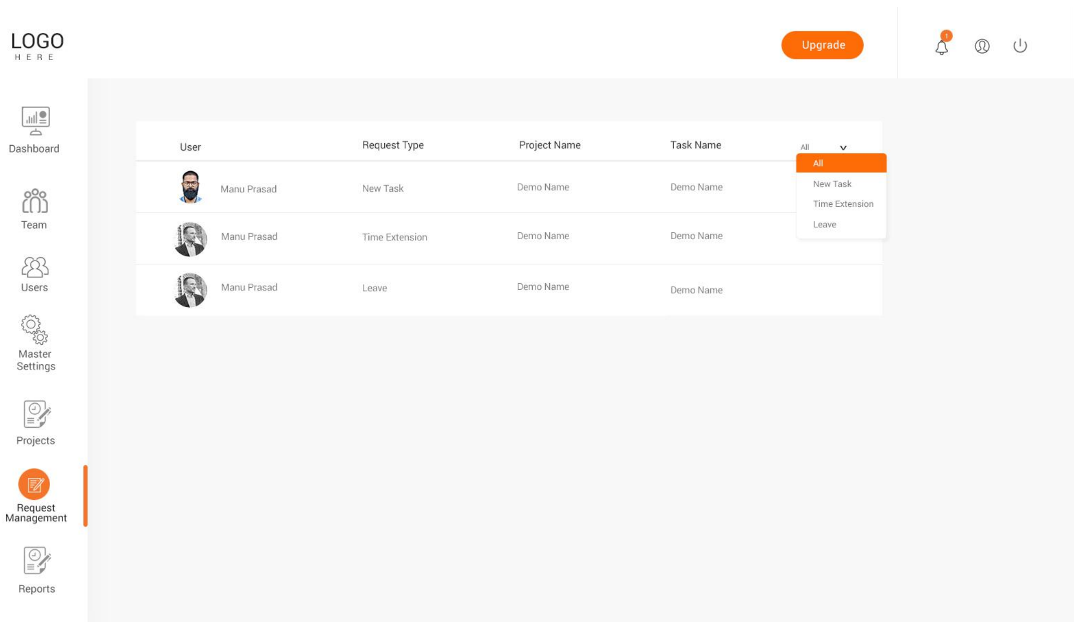
If the estimation phase of a project is pending, team head can do the estimation by clicking the 'Estimate' button from the action list.

If the Approval of the project is pending, admin can approve the project by clicking the 'Approve' button in action list.

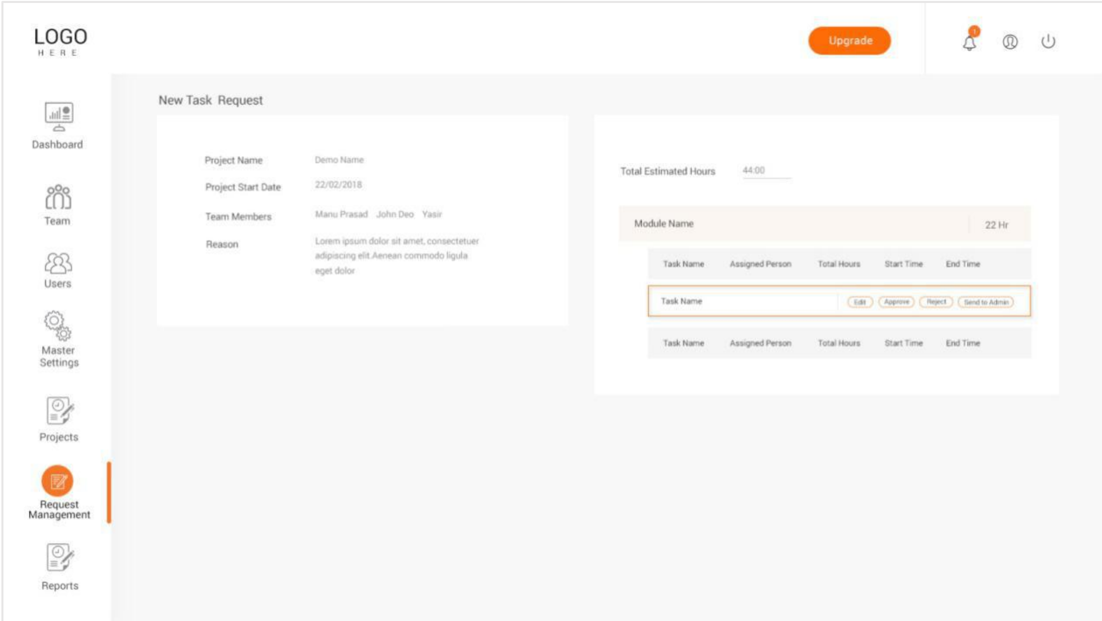
## 10. Request management



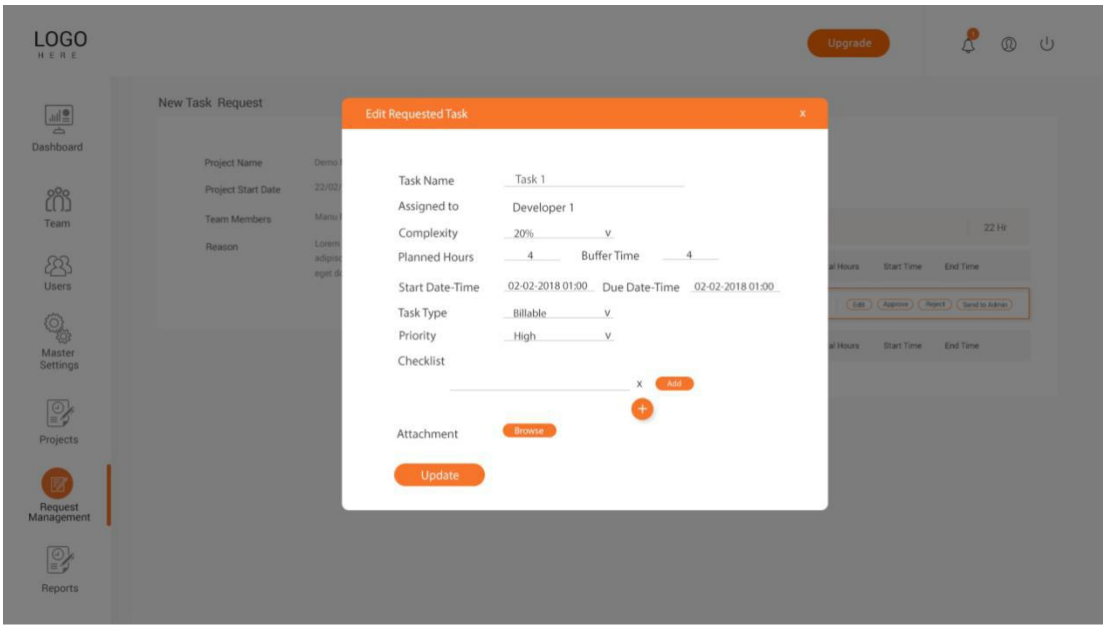

- Request for additional task




Project manager can manage request for an additional task from team members. When a team member request for an additional task, then admin get a notification with the project name and employee name. If admin click on the notification then he will be redirected to the following page.




If admin click the edit button , then a pop up will display as shown in figure

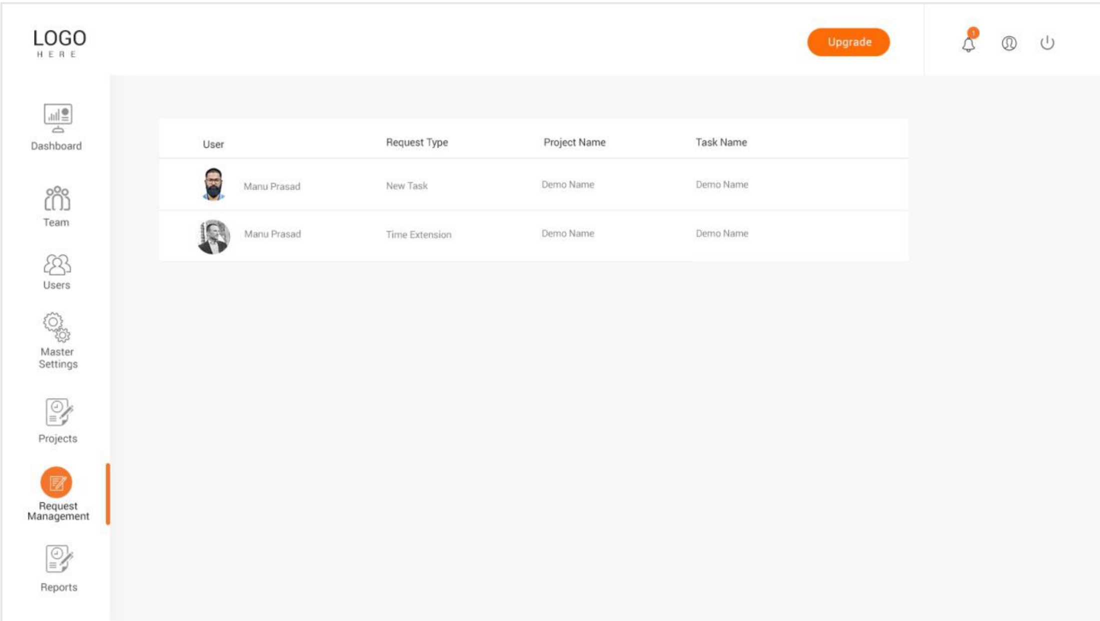



In this page admin can view the requested task as well as old tasks. The requested task are highlighted as shown in the figure. Here admin can approve or reject the request or edit the details by use the edit button.

If admin accept a request, then the requested task will be a part of the project task.

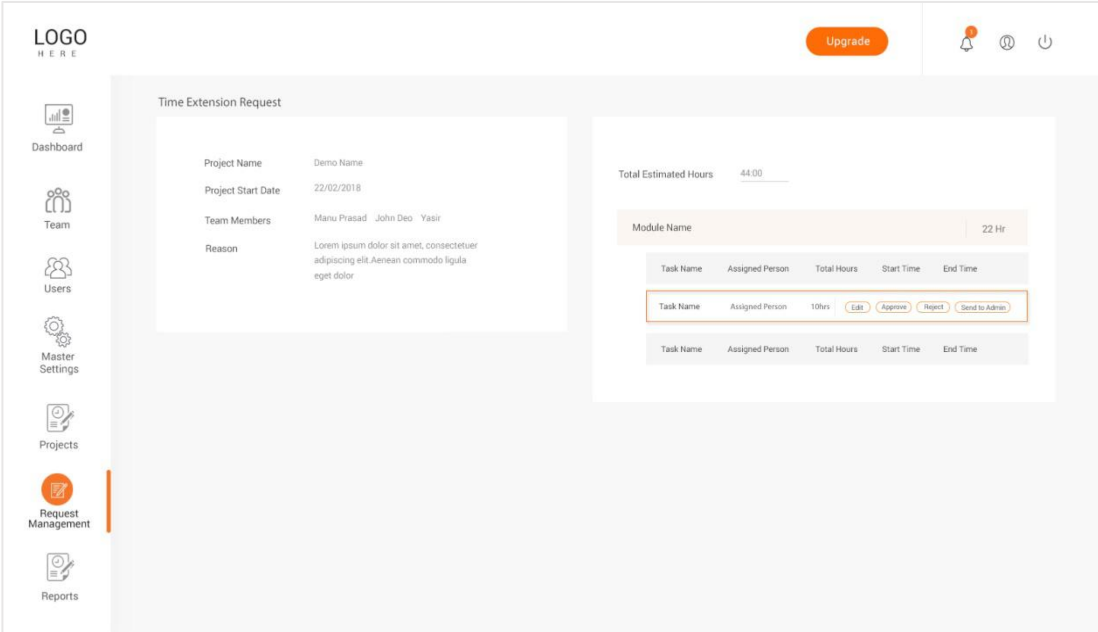
If project manager can't take an action, he can send it to admin, then admin can approve or reject the request.

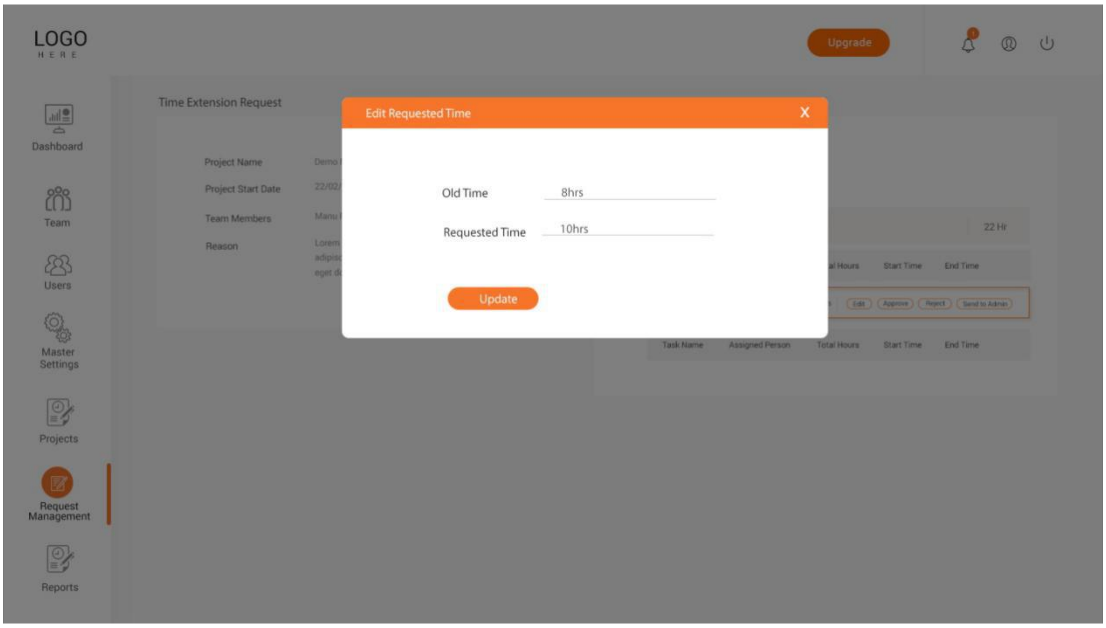
- Request for time extension
  - Project manager can manage the request for time extension of task from team members. When he click on the notification, then he will be redirected into the following page.




Here the project manager can view the requested task and all other tasks. He can approve or reject the request. If he need to edit the request details, then he can use the edit button. If he approve the request, then the time will be change based on the request.

If project manager click 'Send to admin' button, then admin get a notification with the request and he can approve or reject the request.

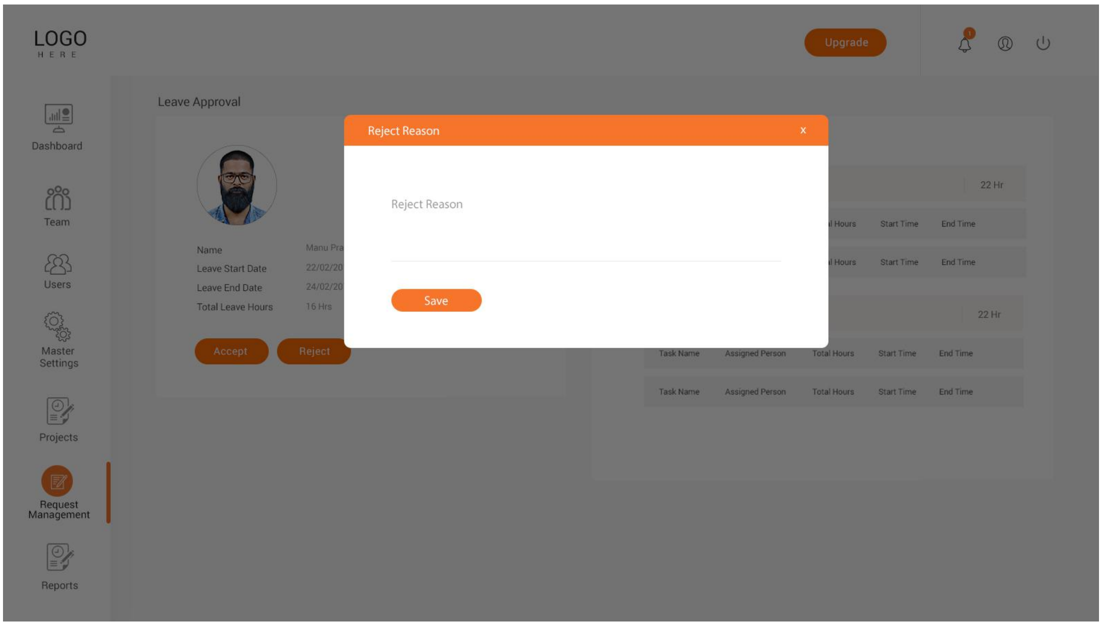



■ Leave request

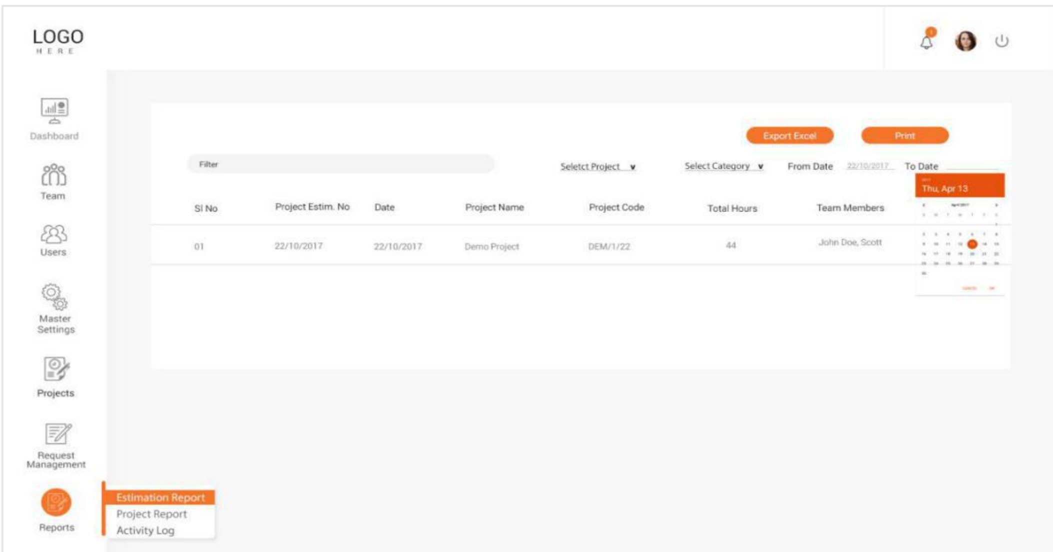
If a team member applied for a leave, then admin get a notification. If he clicks on the notification , then he will be redirected into the following page

Here, he can view the currents tasks and time of the particular employee. He can approve or reject the leave




## 11. <u>Reports</u>

### ■ Estimation report

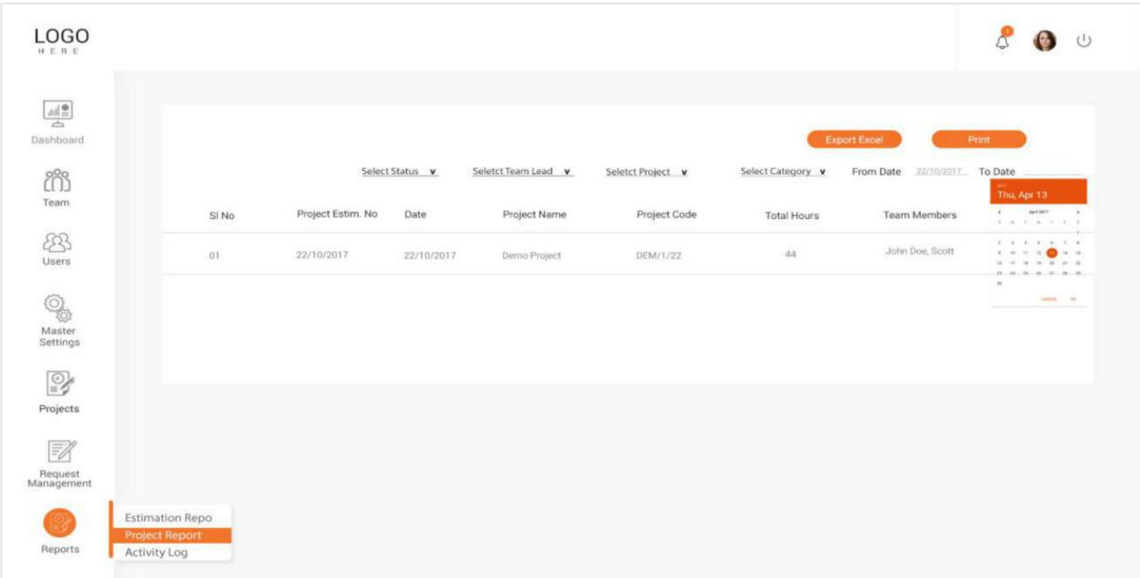



Admin can view estimation reports created by every project managers and can filter based on, date range, project wise, project category wise, project manager wise.

And project manager can view estimation reports created by themself. And can filter based on

- ✓ Date range wise
- ✓ Project wise
- ✓ Project category wise

■ **Project report**

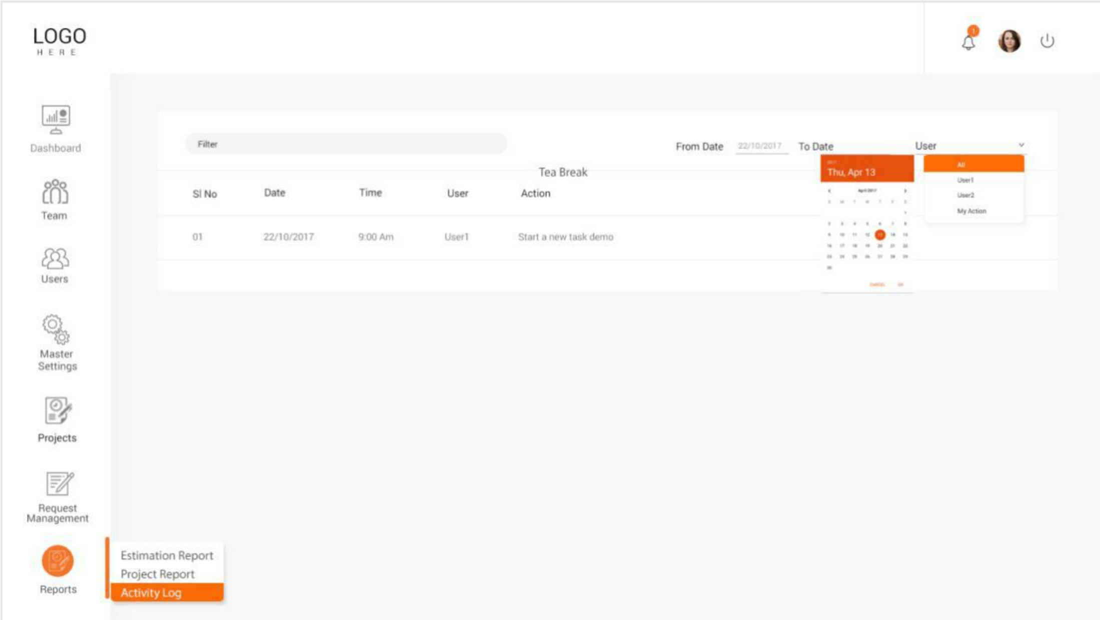



admin can view reports of every project and can filter based on,

- ✓ Date range wise
- ✓ Project wise
- ✓ Project category wise
- ✓ Project manager wise
- ✓ Status wise

Project manager can view the projects only if he belongs in it

## ■ Activity log



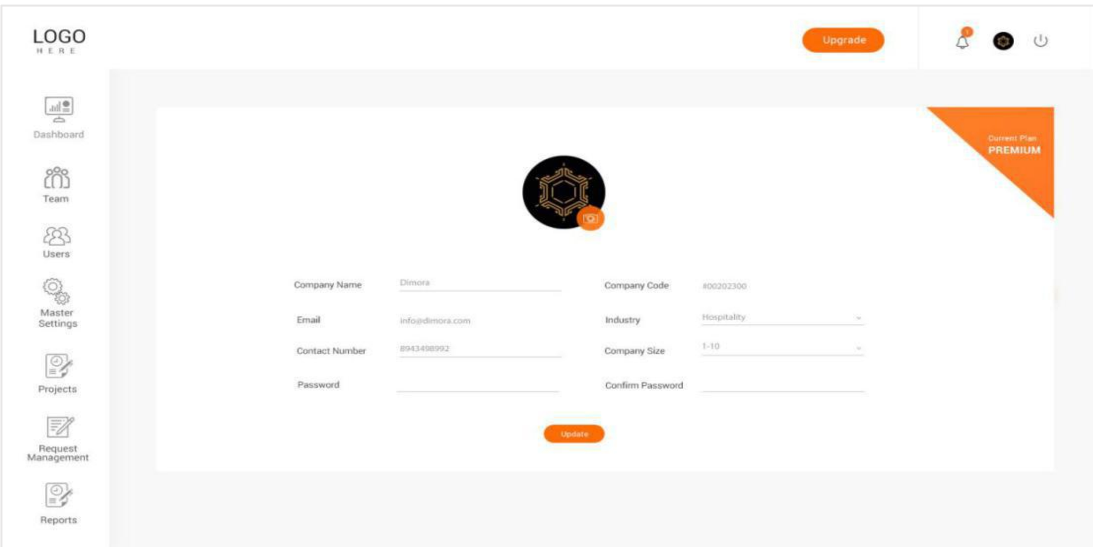

admin can view every users log details and can filter based on

- ✓ users wise
- ✓ date range wise
- ✓ My action

Project manager can view his actions as well as team members under him.

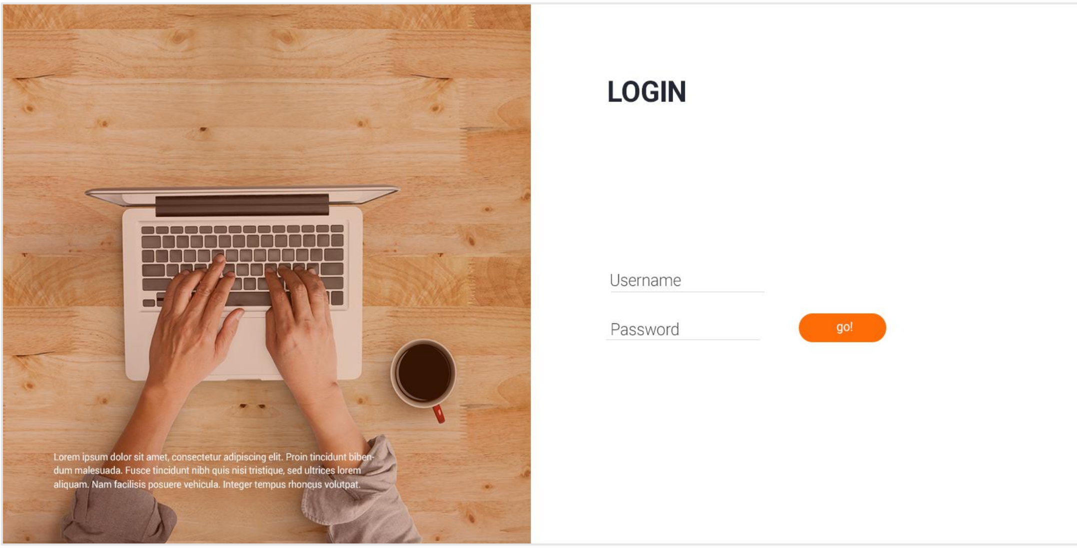
## 12. Company profile

Here, Company admin can view and update his profile details. He can view his selected plan details also from here.



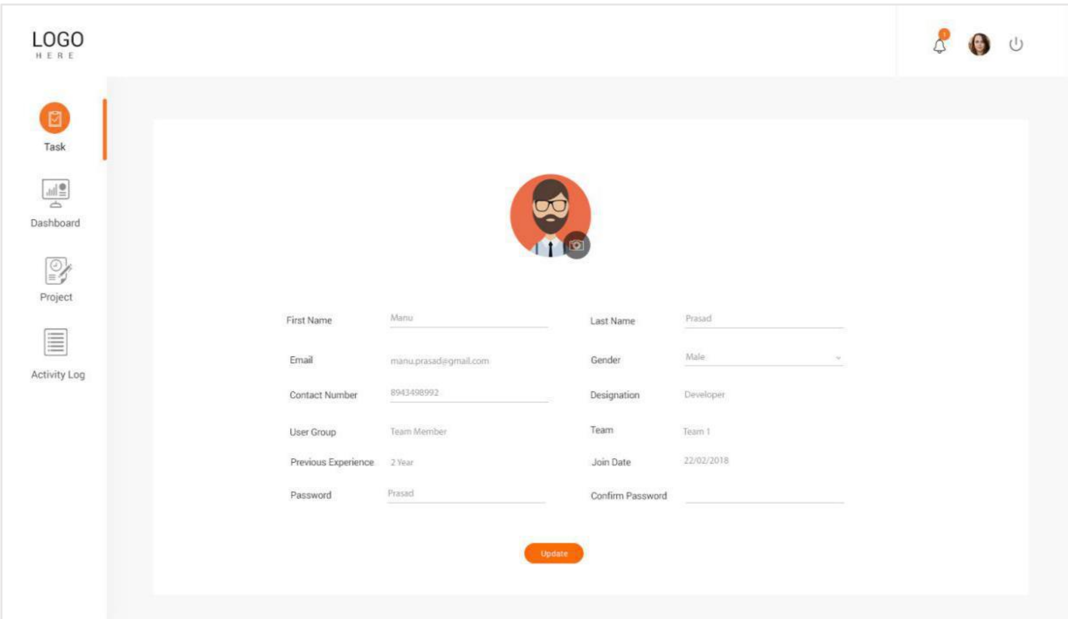
# III. Team Member

## 1. Login



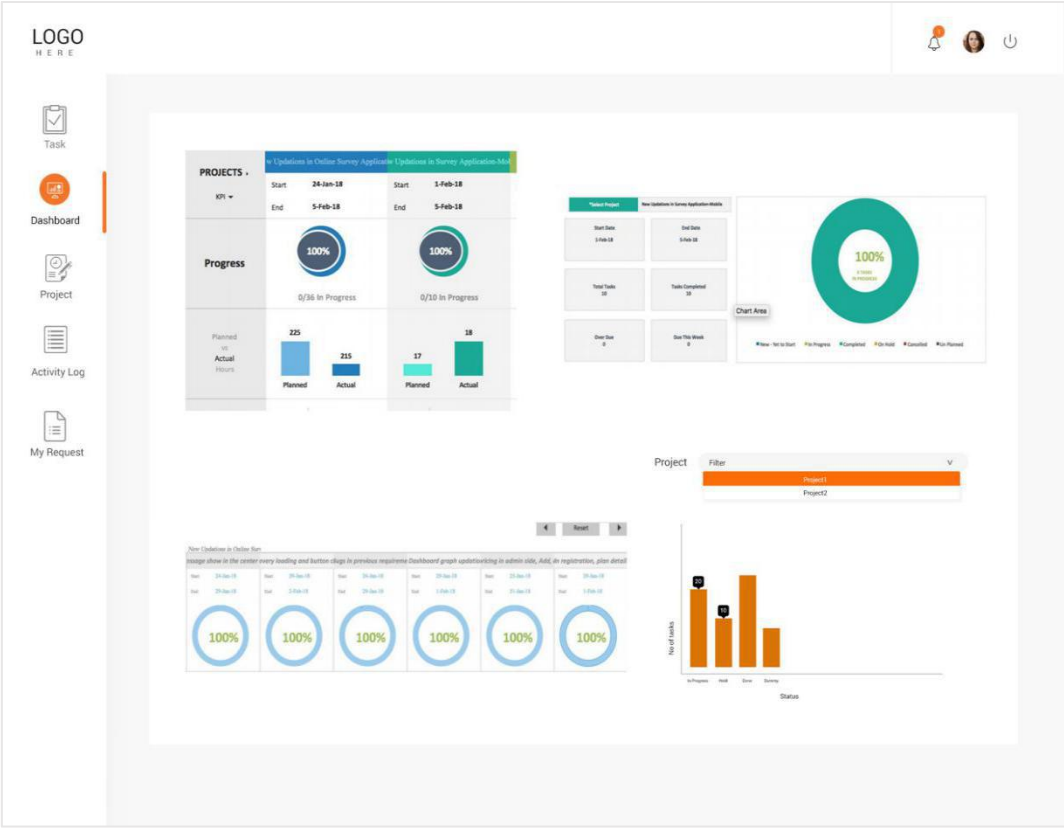

When an admin add a team member, he set a username and password to each team member. Team members can login into the system by using this credentials. If they need to change their password, then they can edit it from their profile page.

## 2. Profile

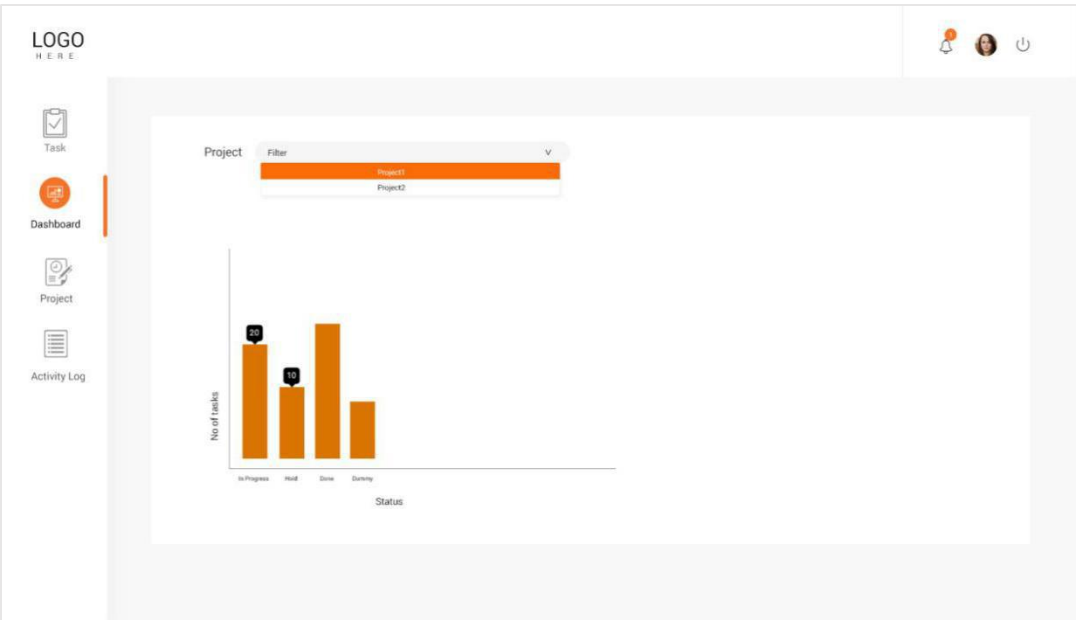



Here, a team member can view his profile. He can edit the fields first name, last name,contact number, photo, gender and password from h

## 3. Dashboard



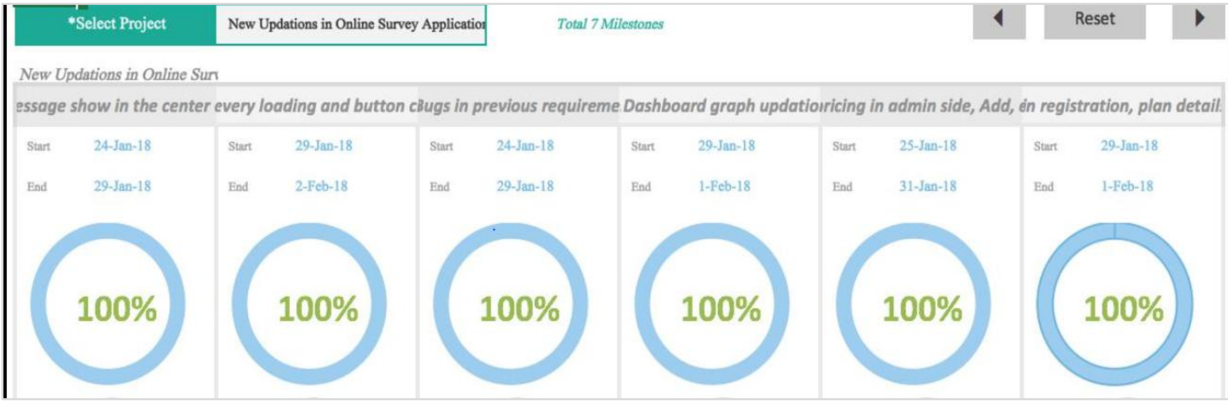

- **No.of task vs status**




X- axis of this graph shows task status and y -axis shows no of tasks.

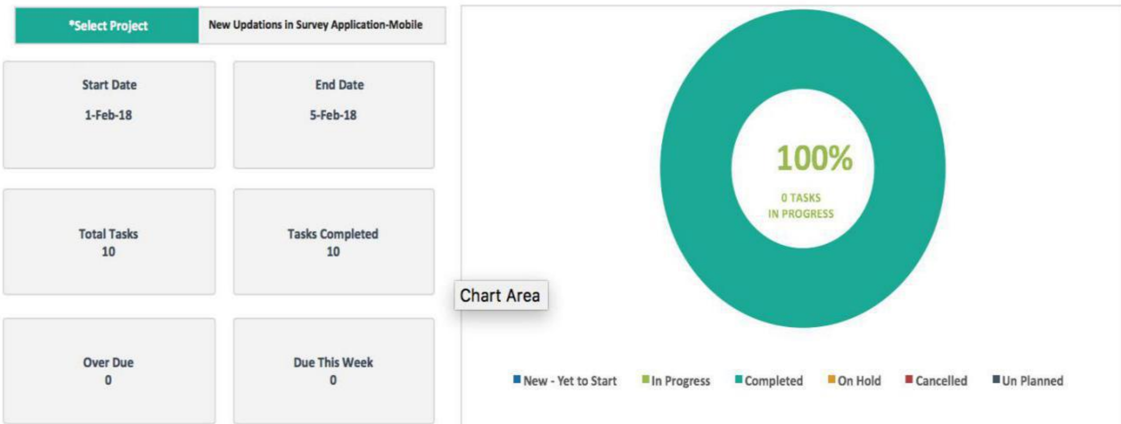
Team member can view all the projects that he belongs in a filter. If he select any one of the project, then he can analyse each of his task and its status using this graph.

■ **Percentage of projects**




It is a pie graph which shows percentage completion of each task. Team member can select start date and end date from the date picker above. Team member can filter the data based on projects by selecting a project in the drop down.

■ **No.of tasks vs status**

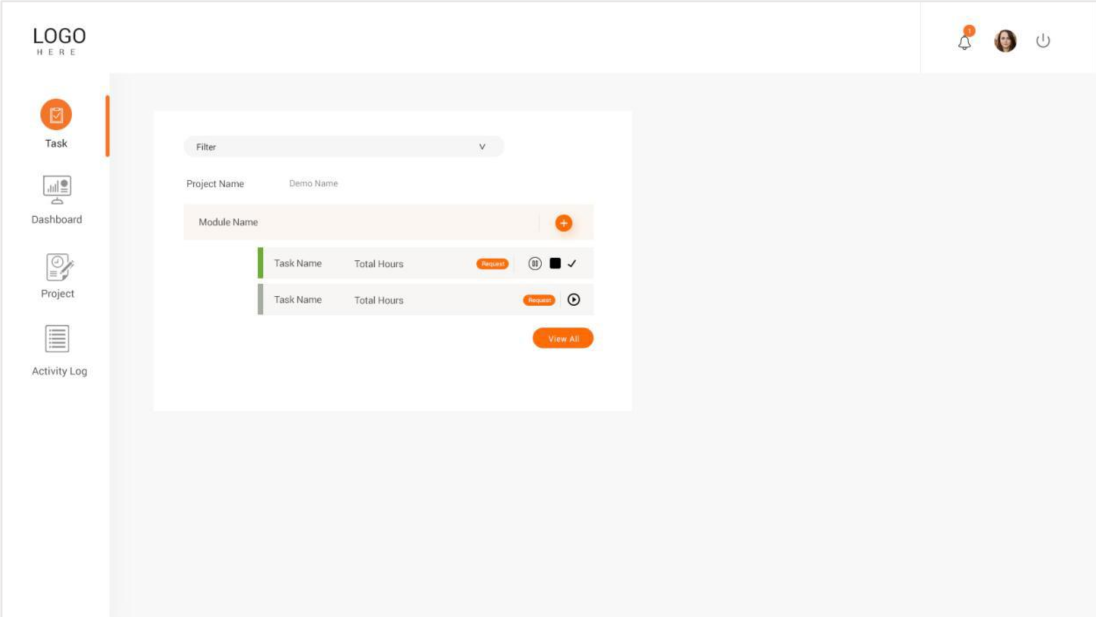


■ **Planned hours vs actual hours**


It is a bar graph which shows total planed hours and actual hours of each project that the team member belongs. He can choose any one of the project from the drop down. He can view the projects in drop down only if he belongs in it.

Team member can view all the projects that he belongs in a drop down below the graph. If he select any on of the project, then he can view the pie graph of no of task and its status of that selected project. He can also view the start date, end date, total no of task,total no .of task completed, no of task over due and no of tasks which due this week

## 4. My Task




When team member login to account, the first page visible is the personal task list. It helps to figure out what he need to work on that day-i.e., the pending tasks and his assigned work on that day. It is generated as based on the working hour of a company. Task list contain tasks with planned hours, actual hours, progress percentage and current status. He can view more tasks by clicking 'View More' button.

If the task is 'In progress', then there is a count down in actual hours side. If it is in Hold/ Paused state, the time until the status changed is displayed. If it is a new task, then the time is 0.00. The same logic is applied for progress percentage also.

It contain a filter to filter the tasks based on the status.

Each status has its own color code.

The visualization helps to identify which tasks are over due and which ones are on time.

Task status are New, Paused, In progress, Hold and Done.

Each task may have the actions like Start, Pause, Resume, Hold and Done.

Initially all the tasks have the status 'New' in default and have action 'Start'.

To start a task, Click on the start icon on right side of the particular task. From now on the application tracks the time the team member working on for that particular task. At this time, task have the status 'In Progress' and all other tasks action list are disabled. When finish a task, click on the done button.

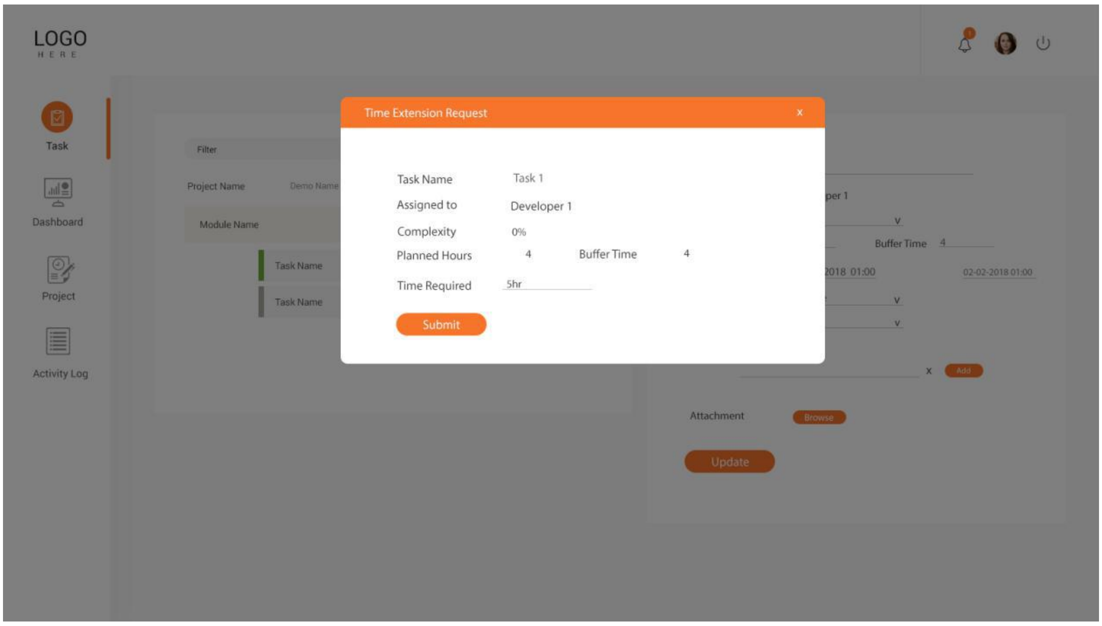
The current task can be put on ‘Pause’ with a remarks. At this time, the timer stops and start only if the team member resume the task. When a task have a status ‘Paused’, he can only resume that task- I.e., other task cannot be start. Whenever the user resume the task, task status changes from ‘Paused’ to ‘In Progress’.

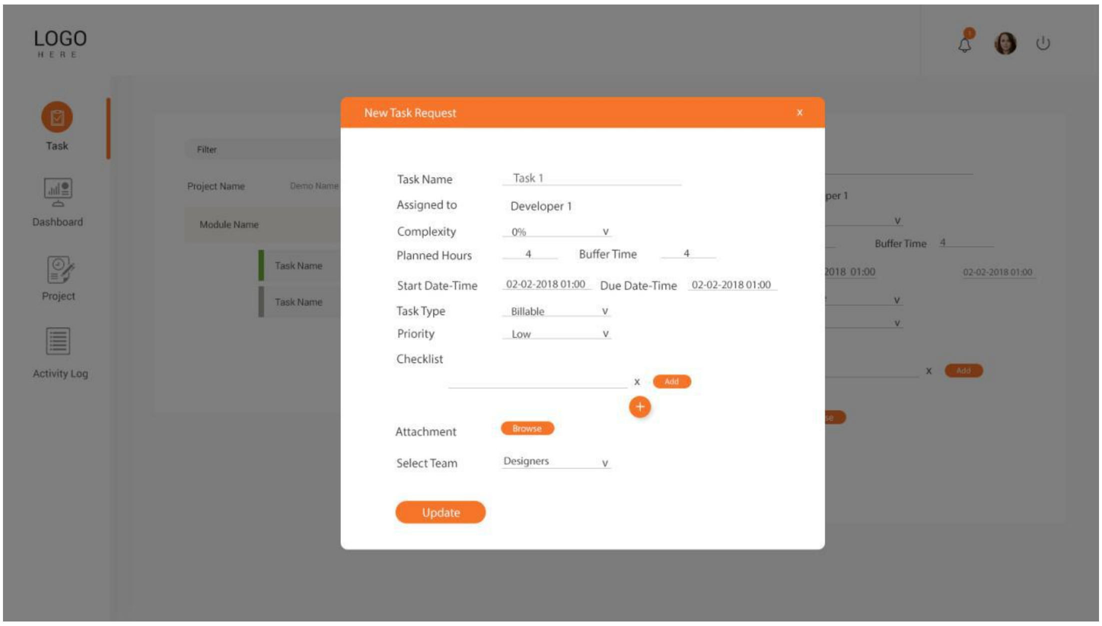
If the user want to close the current task temporarily and want to start another task, he can press the ‘Hold’ button with current task progress percentage and remarks(Here the task status is ‘Hold’). Then all the tasks action list are enabled and he can Start a new task.

If team member belong to more than one project, he need to select task that he want to work on.

The application shows the accumulate time for all tasks in one project.

Additionally there is two buttons, ‘New task request’ and ‘Time Extension request’.






'New task request' option is used by the team member to request a new task to project manager against a module.

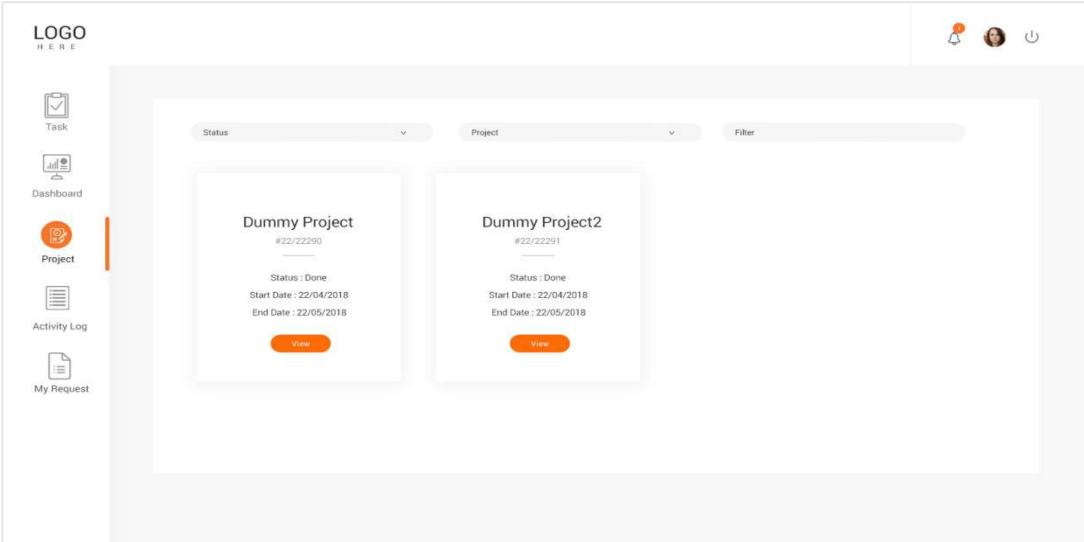
A pop up is displayed to enter the task details. If the team member is in more than one team, then the system ask the type of the task (whether it is a task from design, development or testing).

There is also another facility, Time Extension Request. This is used when the team member needs additional time to complete a task. The pop up below shows the Time Extension Request.

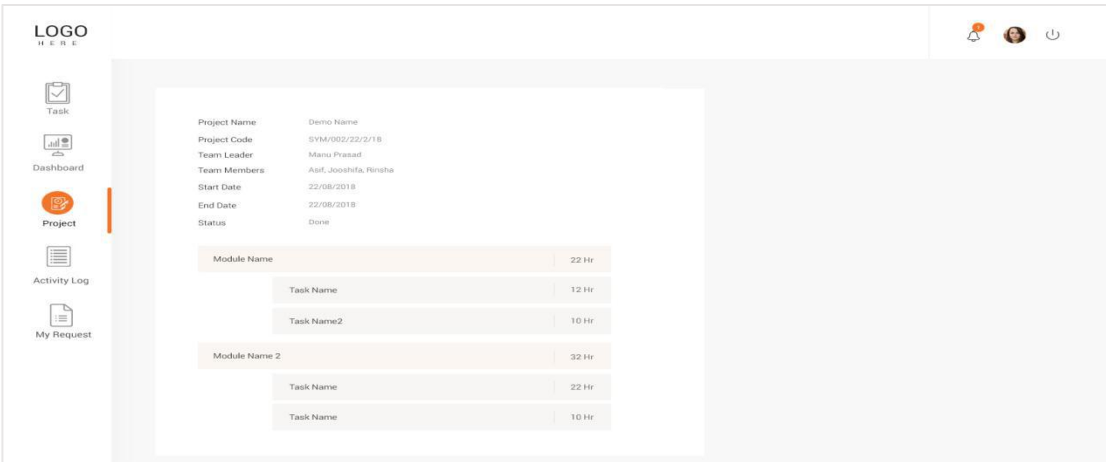
User also get a push notification at the end of company working hour to remember the current status of the task.

# 5. Projects

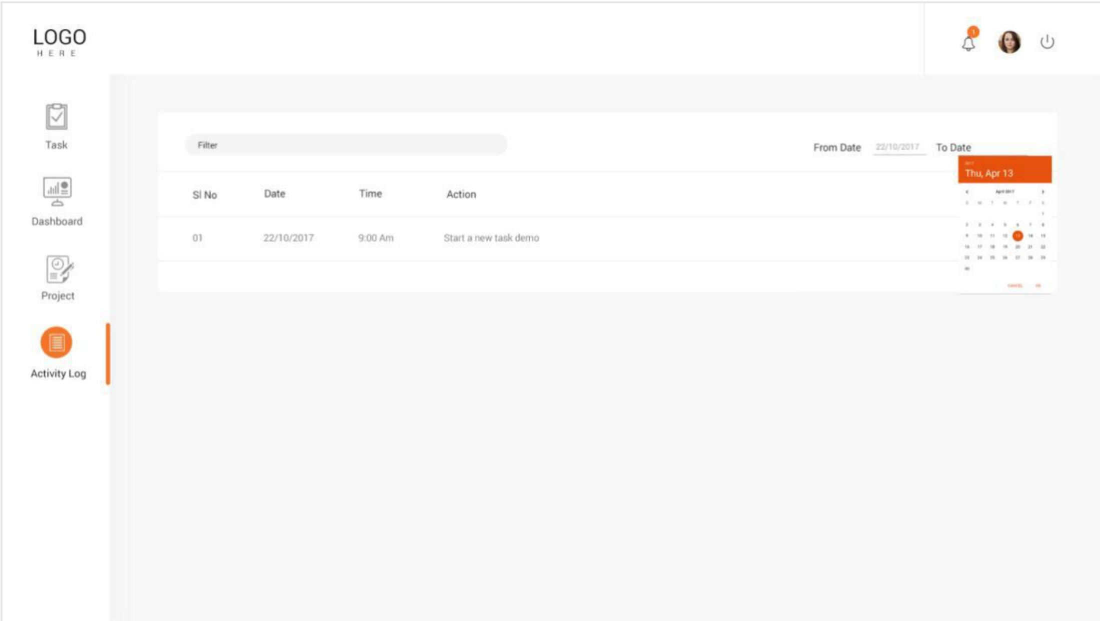
Here, team members can view all projects that he belongs.




If he click any of the tile, then he will be redirected to page which shows detailed view of the project.



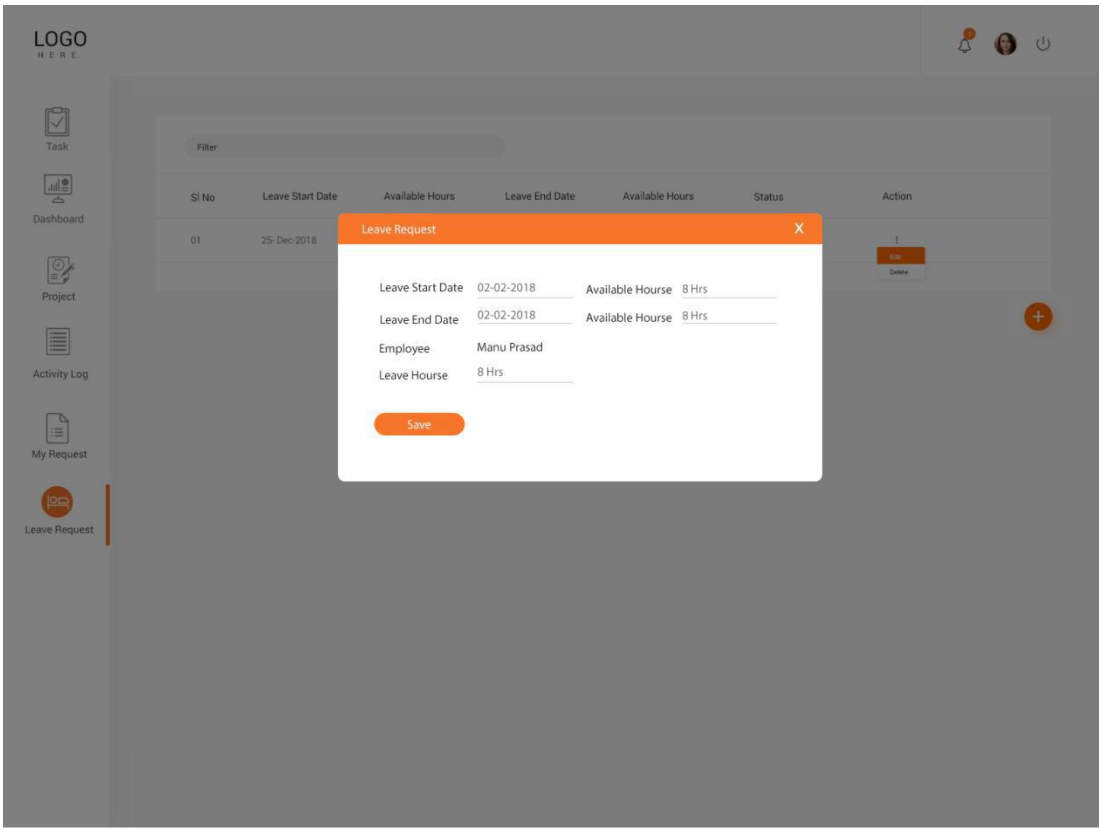
## 6. Activity log



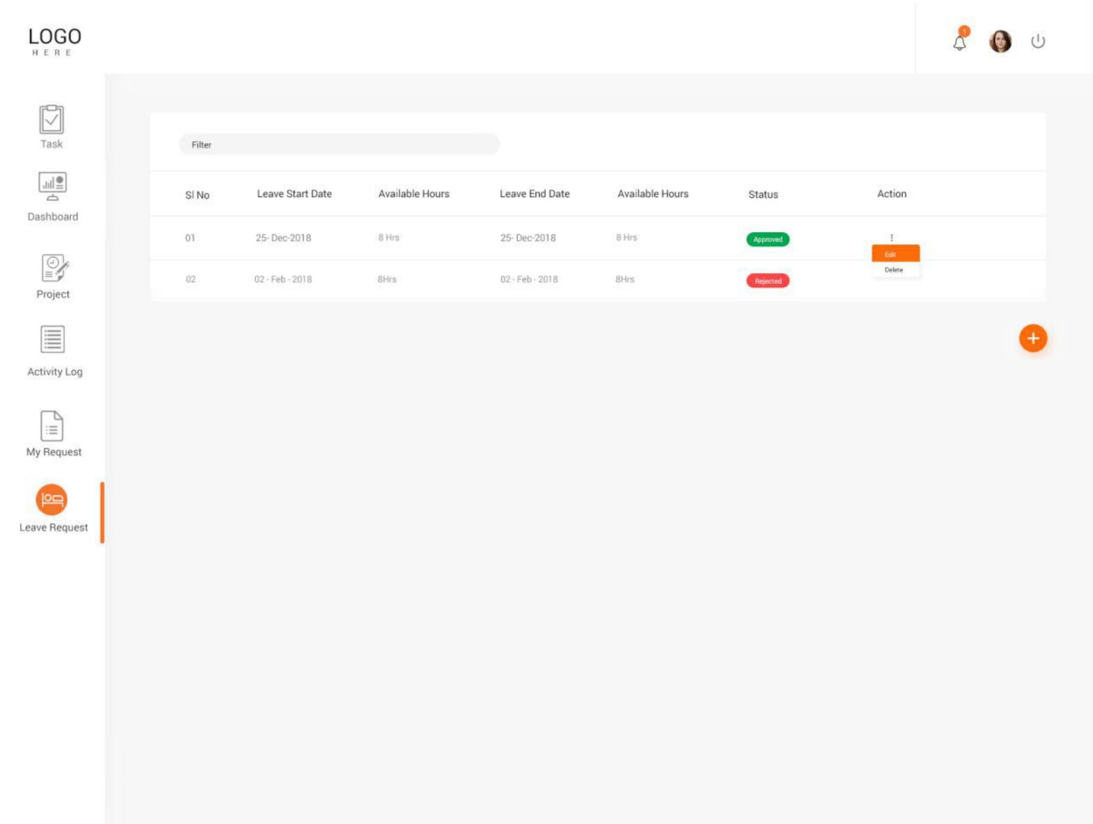

Here, team member can view all his actions with date and time. He can filter the log based on date range

## 7. Leave request

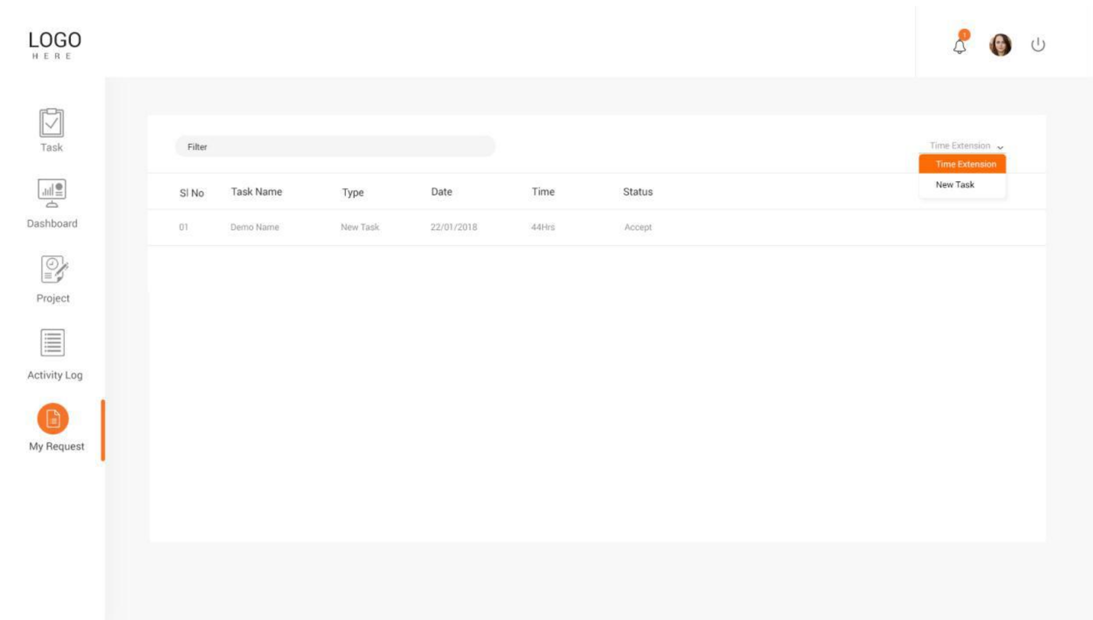
A team member can request for a leave from here.



He get a notification while the team member approve or reject the request.




## 8. My request




Here a team member can view his requests (leave request ,time extension request and add task request )and its status.