Setup Instruction

User Manual
SAgile Project Management Tool (SAgile PMT)

1. Login/ Register

1.1. Register

1.1.1. From the Welcome Page (Figure 2.1), click the Register button located at the upper-right corner.

Figure 2.1 Welcome Page

1.1.2. The system will display the Register Page (Figure 2.2).

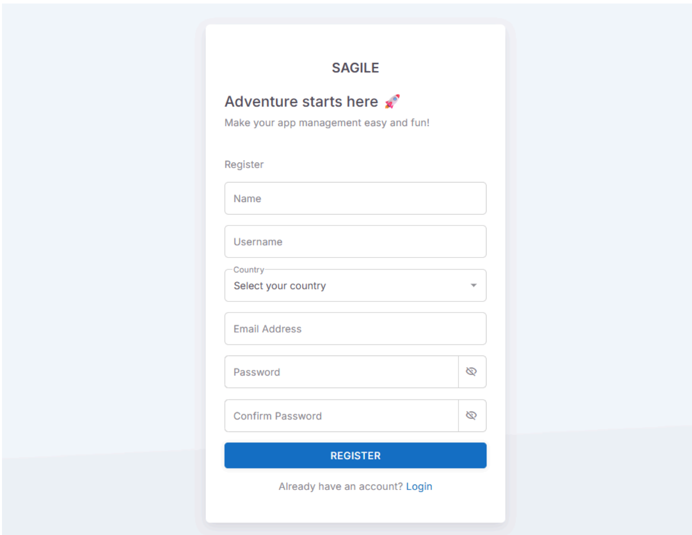


Figure 2.2 Register Page

1.1.3. Enter your name, username, country, email address,and password.

1.1.4. Click the Register button.

1.1.5. Upon successful registration, the system will redirect to the Dashboard/Home Page (Figure 2.3).

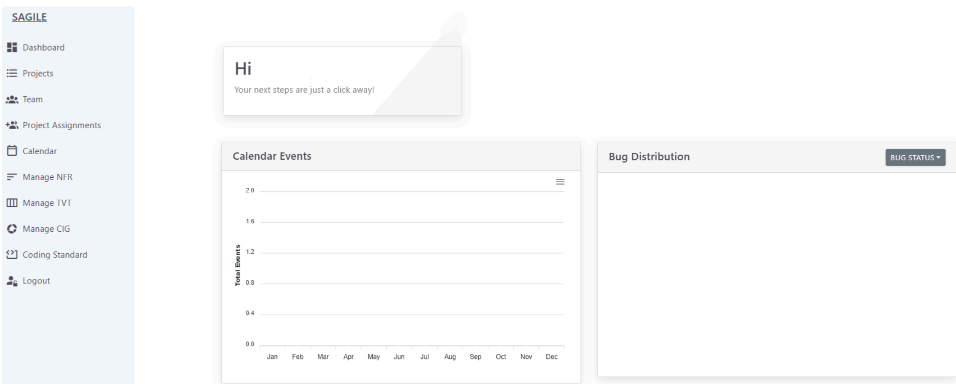


Figure 2.3 Dashboard/Home Page

1.2. Login

1.2.1. From the Welcome Page (Figure 2.1), click the Login button located at the upper-right corner.

1.2.2. The system will display the Login Page (Figure 2.4).

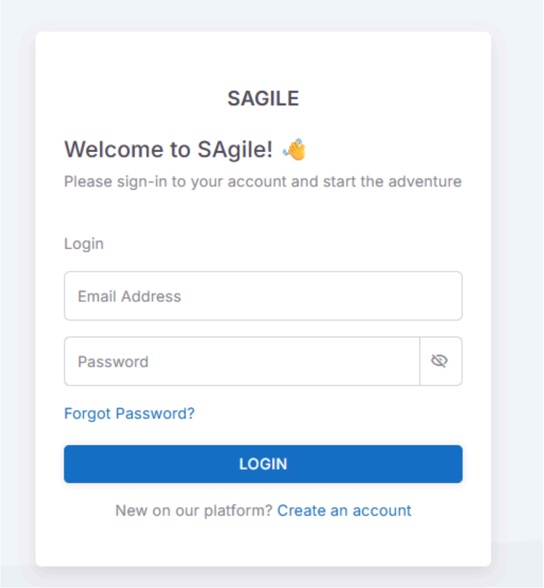


Figure 2.4 Login Page

1.2.3. Enter your registered email address and password.

1.2.4. Click the Login button.

1.2.5. Upon successful login, the system will redirect to the Dashboard/Home Page (Figure 2.3).

1.3. Forgot password

1.3.1. On the Login Page (Figure 2.2), click the Forgot Password link.

1.3.2. Enter your registered email address in the provided field.

1.3.3. A reset password link will be sent to the entered email address.

1.3.4. Follow the instructions to create a new password.

2. Manage Team

2.1. View Team

2.1.1. From the Dashboard/Home Page (Figure 2.3), click the Team button on the left navigation bar.

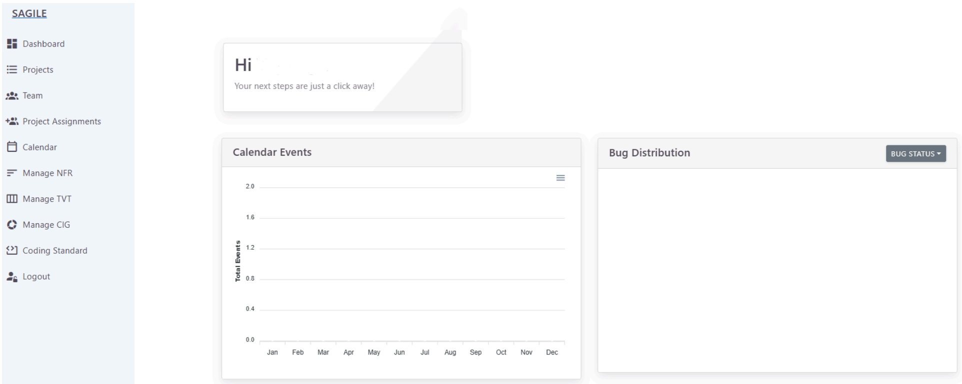


Figure 3.1 Dashboard/Home Page

2.1.2. The system will display the Team Page (Figure 3.2).

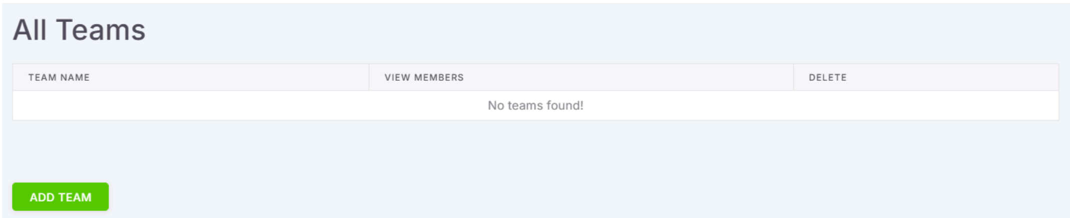


Figure 3.2 Team Page

2.2. Create Team

2.2.1. On the Team Page (Figure 3.2), click the Create Team button.

2.2.2. A Create Team Form will appear (Figure 3.3).

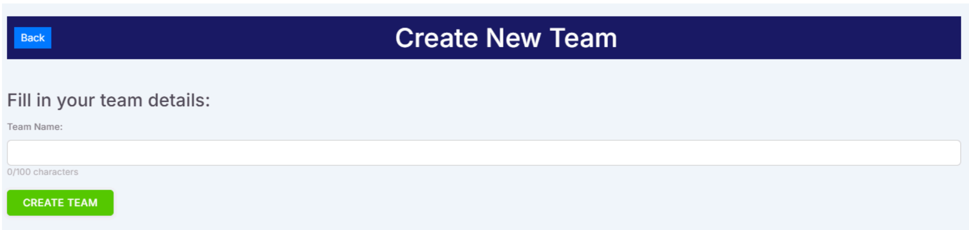


Figure 3.3 Create Team Form

2.2.3. Enter the Team Name.

2.2.4. Click the 'Create Team' button to create the team.

2.2.5. The new team will be displayed on the Team Page (Figure 3.3).

2.3. View Team Members

2.3.1. On the Team Page (Figure 3.4), click the View Members button for the selected team.

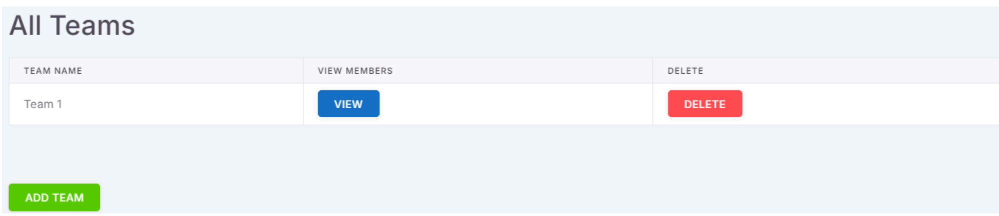


Figure 3.4 Team Page with New Team

2.3.2. The system will display the Team Members Page (Figure 3.5).

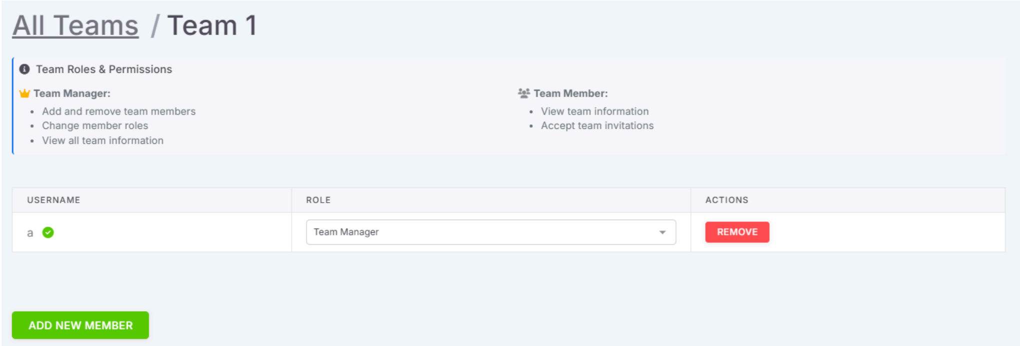


Figure 3.5 Team Members Page

Note: The Team Creator is automatically assigned the role of Team Manager by default.

2.4. Add Team Members

2.4.1. On the Team Members Page (Figure 3.5), click the Add Member button.

2.4.2. Enter the email address of the user you want to add.

2.4.3. Select the role for the new member.

2.4.3.1. By default, the role is set to **Team Member**.

2.4.4. Click Add Email.

2.4.4.1. The entered email will now appear in the Email List.

2.4.5. Click Send Invitation.

2.4.5.1. An invitation email will be sent to the user.

2.4.6. Once the user accepts the invitation, they will be added to the Team Members list.

2.5. Update Team Member role

2.5.1. On the Team Members Page (Figure 3.5), locate the team member you want to update.

2.5.2. Click the Role Dropdown Menu beside the member's name.

2.5.3. Select the new role from the list.

2.5.4. The system will update the member's role immediately.

Note:

1. ***Role changes affect the permissions and responsibilities of the user within the team.***
2. ***Available roles may include:***
    a. ***Team Manager***
    b. ***Team Member***
3. ***Only users with sufficient privileges (e.g., Team Manager) can update roles***

2.6. Delete Team Member
   2.6.1. On the Team Members Page (Figure 3.5), locate the user you want to remove.
   2.6.2. Click the Remove button beside the member's name.
   2.6.3. A confirmation popup modal will appear
   2.6.4. Click the Confirm/OK button to proceed.
   2.6.5. The selected member will be removed from the team list.

2.7. Delete Team
   2.7.1. On the Team Page (Figure 3.2), locate the team you want to delete.
   2.7.2. Click the Delete button beside the team name.
   2.7.3. A confirmation modal will appear.
   2.7.4. Type the team name into the confirmation field.
   2.7.5. Click the Confirm/OK button to proceed with deletion.
   2.7.6. The team will be permanently deleted from the system.

3. Manage Project
3.1. View Project
   3.1.1. From the Dashboard/Home Page, click the 'Project' button located on the left navigation bar.
   3.1.2. The system will display the Project Page (Figure 4.1).

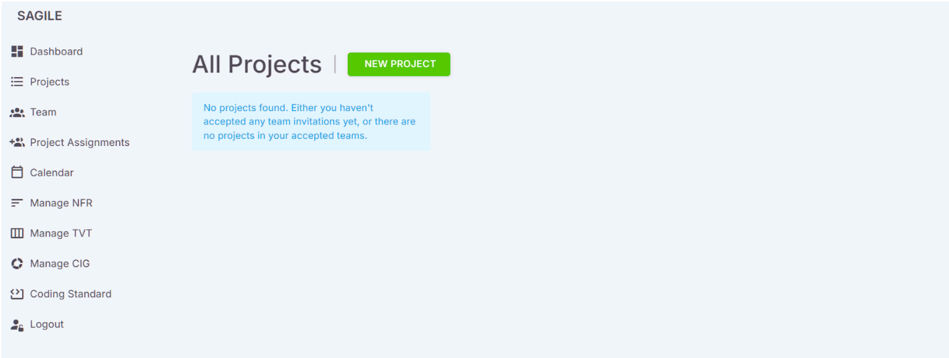


Figure 4.1 Project Page

3.2. Create Project
   3.2.1. On the Project Page (Figure 4.1), click the 'Create Project' button.
   3.2.2. Fill in the required project details as shown in Create Project Page (Figure 4.2):
      3.2.2.1. Project Name
      3.2.2.2. Description
      3.2.2.3. Start Date
      3.2.2.4. Completion Date
      3.2.2.5. Team

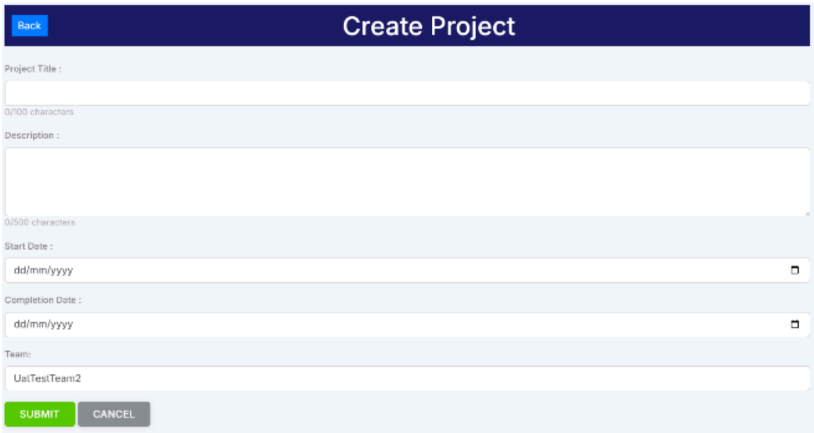


Figure 4.2 Create Project Page

3.2.3. Click the ‘Submit’ button.
3.2.4. The new project will now be displayed on the Project Page.

3.3. View Project Details

3.3.1. On the Project Page, click on the card for the newly created project.
3.3.2. On the top navigation bar within the project view, select ‘Details’.
3.3.3. The system will display the Project Details Page (Figure 4.3).

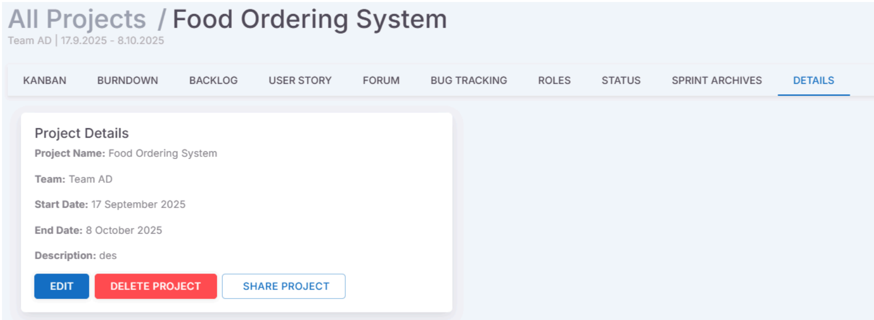


Figure 4.3 Project Details Page

3.4. Edit Project Details

3.4.1. On the Project Page, click on the project card for the project you want to edit.
3.4.2. In the project view, click the Details button on the top navigation bar.
3.4.3. Inside the Project Details Card, click the Edit button.
3.4.4. Update the required fields if needed:
3.4.4.1. Project Description
3.4.4.2. Start Date
3.4.4.3. Completion Date
3.4.5. Click the **Update** button to save changes.
3.4.6. The system will display the updated project details on the Project Details Page.

3.5. Share Project

3.5.1. On the Project Page, click on the project card for the project you want to share.

3.5.2. In the project view, click the Details button on the top navigation bar.

3.5.3. Click the 'Share Project' button.

3.5.4. In the popup window (Figure 4.4), click the 'Copy' button to copy the project link to your clipboard.

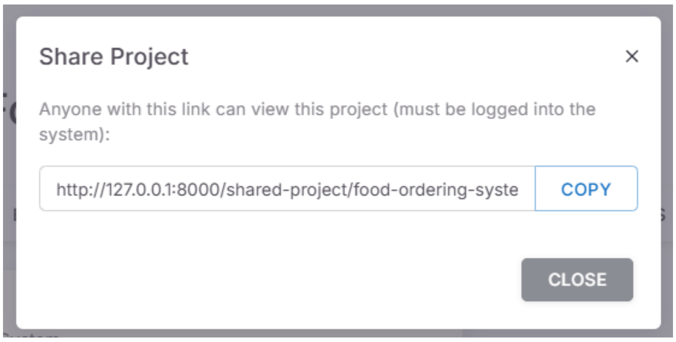


Figure 4.4 Share Project Popup

3.5.5. Share the copied link with other users as needed.

3.6. Delete Project

3.6.1. On the Project Page, locate the project you want to delete.

3.6.2. Click the 'Delete Project' button.

3.6.3. In the confirmation popup (Figure 4.5) , type the project name to confirm deletion.

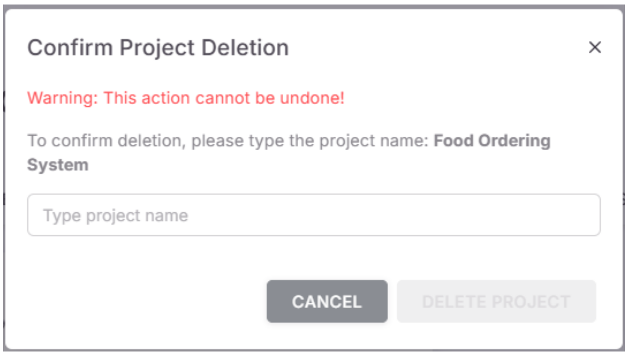


Figure 4.5 Delete Project Confirmation Popup

3.6.4. Click the 'Delete Project' button to permanently delete the project.

3.6.5. The project will be removed from the Project Page and cannot be recovered.

4. Manage Project Assignments

4.1. View Project Assignments

4.1.1. In the left navigation bar, click the 'Project Assignment' button.

4.1.2. On the Project Assignment Page (Figure 5.1), click the View Project Assignment button on the project card.

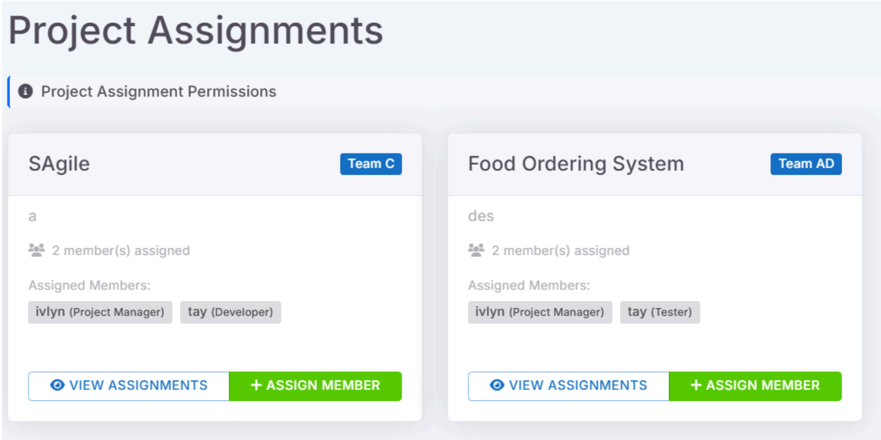


Figure 5.1 Project Assignment Page

4.1.3. The Project Assignments Details Page will be displayed (Figure 5.2).

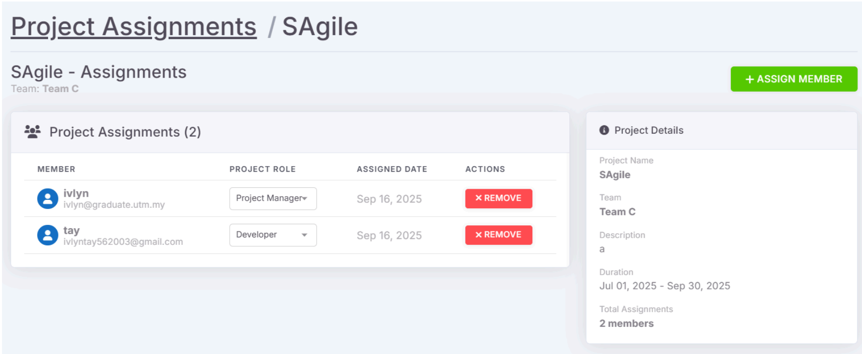


Figure 5.2 Project Assignments Details Page

4.2. Assign Member to Project

4.2.1. On the Project Assignments Page, click the Assign Member button.

4.2.2. In the Project Member Assignment Page (Figure 5.3), choose a team member to add to the project.

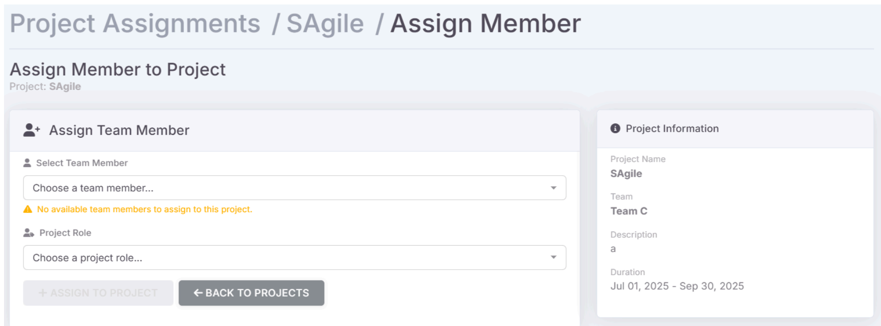


Figure 5.3 Project Member Assignment Page

4.2.3. Select a Project Role for the chosen team member.

4.2.4. Click the 'Assign To Project' button.

Note: Only Team Managers can assign members. Team Members can view only.

4.3. Update Assigned Member Role

4.3.1. On the Project Assignments Details Page (Figure 5.2), click on the member whose role you want to update.

4.3.2. Select the new role from the drop-down menu.
Note: Only Team Managers can update roles.

4.4. Remove Assigned Member

4.4.1. On the Project Assignments Details Page (Figure 5.2), locate the member you want to remove.

4.4.2. Click the ‘Remove’ button next to the member’s name.

4.4.3. In the confirmation popup window, click ‘Remove from Project’.
Note: Only Team Managers can remove members.

5. Manage User Story

5.1. View User Stories

5.1.1. In the left navigation bar, click the ‘Projects’.

5.1.2. Inside the selected project, click the ‘User Story’ in the navigation tab bar (Figure 6.1).

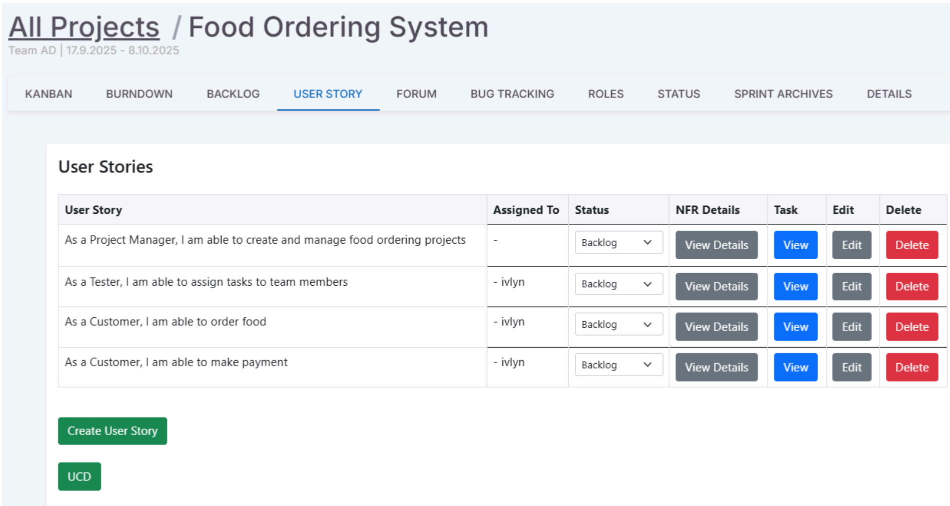


Figure 6.1 User Story Page

5.2. Create User Stories

5.2.1. On the User Stories Page, click the ‘Create User Story’ button.

5.2.2. Fill in the Role.

5.2.3. Fill in the Means.

5.2.4. Fill in the Ends (optional).

5.2.5. Select the Status.

5.2.6. Select which user to assign the story to (optional).

5.2.7. Click the Add to Backlog button.

5.3. Edit User Story

5.3.1. On the User Story Page, locate the story you want to edit and click the ‘Edit’ button.

5.3.2. Update the necessary fields.

5.3.3. Once changes are made, click the’ Update’ button.

5.4. Update User Story Status
5.4.1. On the User Stories Page, locate the story you want to update.
5.4.2. Click the Status drop-down menu.
5.4.3. Select the new status.

5.5. Delete User Story
5.5.1. On the User Stories Page, locate the story you want to delete and click the ‘Delete’ button.
5.5.2. A confirmation popup message will appear.
5.5.3. Click ‘Ok’ to confirm deletion.

6. Manage Task
6.1. View Task List
6.1.1. In the left navigation bar, click the ‘Projects’ button.
6.1.2. Inside the selected project, click the User Story button in the navigation tab bar.
6.1.3. In the User Stories Page, locate the story and click the ‘View’ button under the Task column.
6.1.4. Task List page (Figure 7.1) will be displayed.

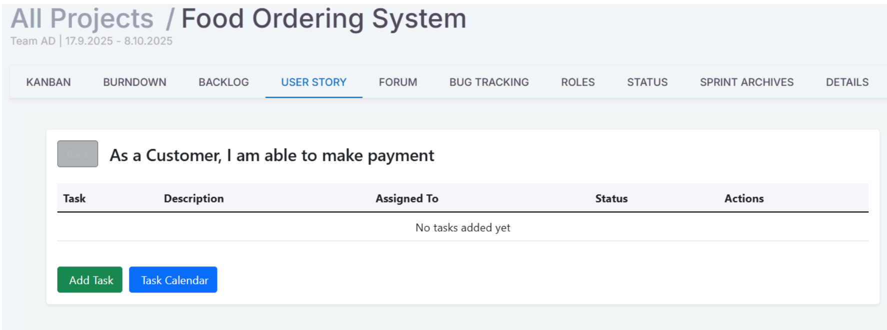


Figure 7.1 Task List Page

6.2. Create Task
6.2.1. On the Task List Page, click the ‘Add Task’ button to display Add Task Page (Figure 7.2).

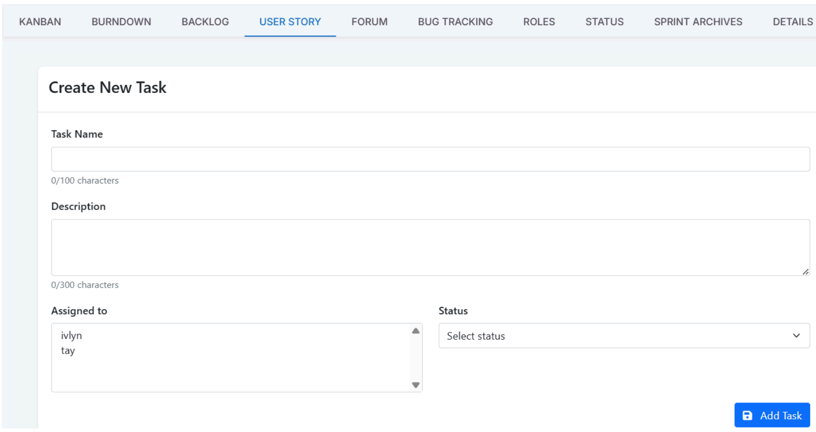


Figure 7.2 Add Task Page

6.2.2. Fill in the Task Name.

6.2.3. Fill in the Task Description.
6.2.4. (Optional) Select a user to assign the task to.
6.2.5. Select the Status for the task.
6.2.6. Click the Add Task button to save.

6.3. Edit Task
6.3.1. On the Task List Page, locate the task you want to update and click the 'Edit' button.
6.3.2. Update the necessary fields (e.g., Task Name, Description, Assigned User, or Status).
6.3.3. Click the Update Task button to save changes.

6.4. Delete Task
6.4.1. On the Task List Page, locate the task you want to delete and click the 'Delete' button.
6.4.2. A confirmation popup will appear.
6.4.3. Click Ok to confirm deletion.

6.5. Create Task Comment
6.5.1. On the Task List page, locate the desired task and click the 'Comment' button.
6.5.2. Click the 'Add Comment' button to open the comment form.
6.5.3. Enter the comment content.
6.5.4. Click Add Comment to submit.
6.5.5. A success message, *"Comment added successfully and emails sent,"* is displayed.

6.6. View Task Comment
6.6.1. On the Task List page, locate the desired task and click the 'Comment' button.
6.6.2. Task title, description, comment, created by and comment's date will be displayed.

6.7. Edit Task Comment
6.7.1. On the Task List page, locate the desired task and click the 'Comment' button.
6.7.2. Click the 'Edit' button on the comment you wish to edit.
6.7.3. Modify the comment content in the Edit Comment form.
6.7.4. Click Update Comment to save the changes.
6.7.5. A success message, "Comment updated successfully," is displayed.

6.8. Delete Task Comment
6.8.1. On the Task List page, locate the desired task and click the 'Comment' button.
6.8.2. Click the 'Delete' button on the comment you wish to remove.
6.8.3. A confirmation message, "Are you sure you want to delete this comment?", is displayed.
6.8.4. Click OK to confirm the deletion.

7. Manage Sprint
7.1. View Backlog Page
7.1.1. In the left navigation bar, click the 'Projects' button.
7.1.2. Inside the selected project, click the Backlog button in the navigation tab bar (Figure 8.1).

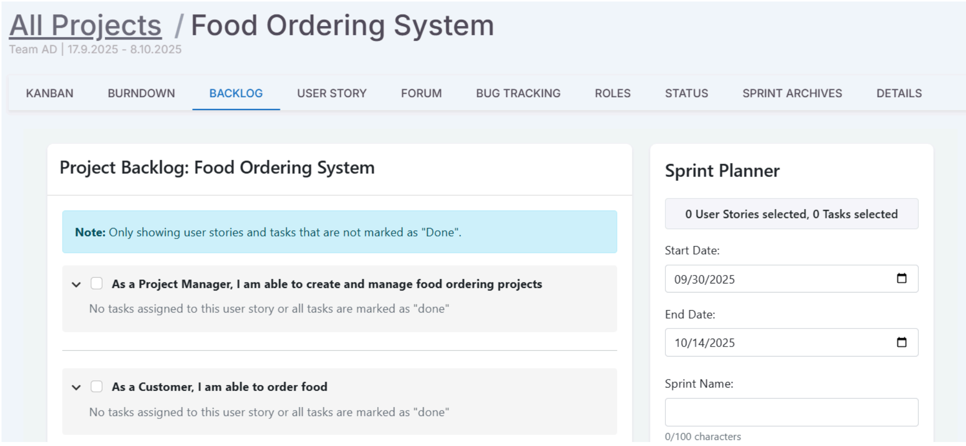


Figure 8.1 Backlog Page

7.2. Create Sprint
7.2.1. On the Backlog Page, select one or more User Stories to include in the sprint.
7.2.2. Select Tasks related to the chosen user stories to add to the sprint.
7.2.3. Set the Sprint Start Date.
7.2.4. Set the Sprint End Date.
7.2.5. Enter the Sprint Name.
7.2.6. Enter the Sprint Description.
7.2.7. Click the 'Begin Sprint' button.

7.3. Add Items to Sprint from Backlog
7.3.1. On the Backlog Page, locate the task or user story you want to add to the current active sprint
7.3.2. Select the item(s).
7.3.3. Click the 'Add To Sprint' button.

7.4. End Sprint
7.4.1. On the Backlog Page, locate the sprint you want to end.

7.4.2. Click the “End Sprint" button.
7.4.3. A confirmation popup will appear.
7.4.4. Click Ok to confirm.

8. Manage Kanban Board

8.1. View Kanban Board

8.1.1. In the left navigation bar, click the Projects button.
8.1.2. Inside the selected project, click the KANBAN button in the navigation tab bar.
8.1.3. The Kanban Board Page is shown as in Figure 9.1 and Figure 9.2.

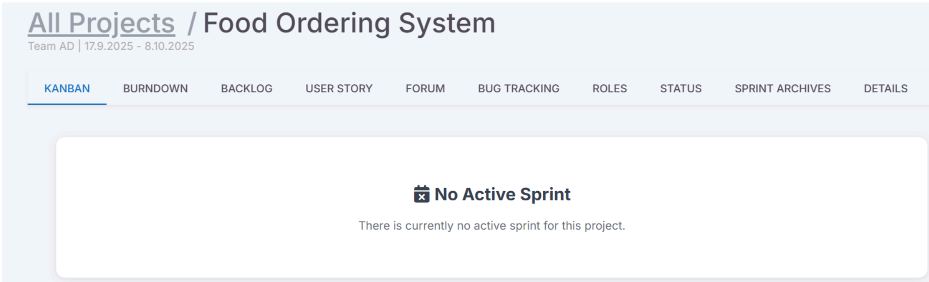


Figure 9.1 Kanban Board (No Active Sprint)

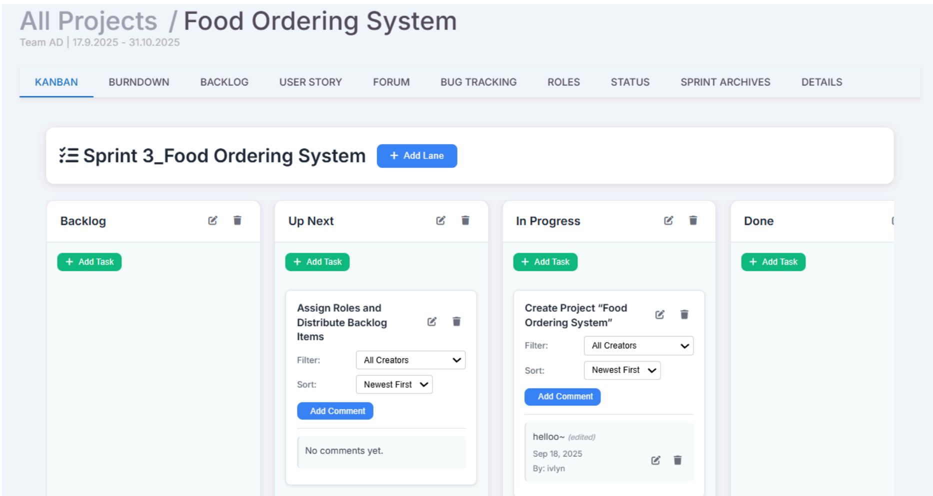


Figure 9.2 Kanban Board (Active Sprint)

8.2. Create Task in Kanban Board

8.2.1. On the Kanban Board, click the Add Task button within a swimlane (Figure 9.3).

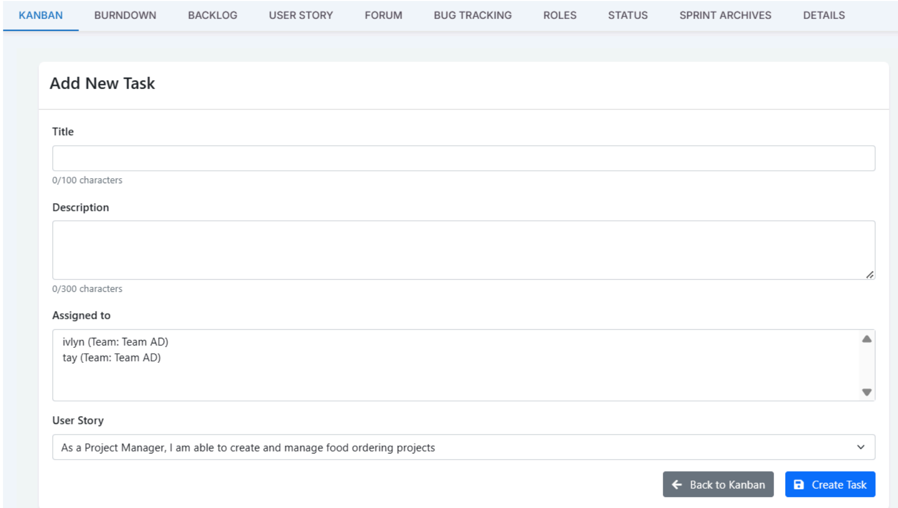


Figure 9.3 Add Task Page

8.2.2. Fill in the Task Name.
8.2.3. Fill in the Task Description.
8.2.4. Select the User to assign the task to.
8.2.5. Select the User Story the task belongs to.
8.2.6. Click the 'Create Task' button.

8.3. Edit Task in Kanban Board

8.3.1. On the Kanban Board, locate the task card you want to edit and click the Edit icon (Figure 9.4).

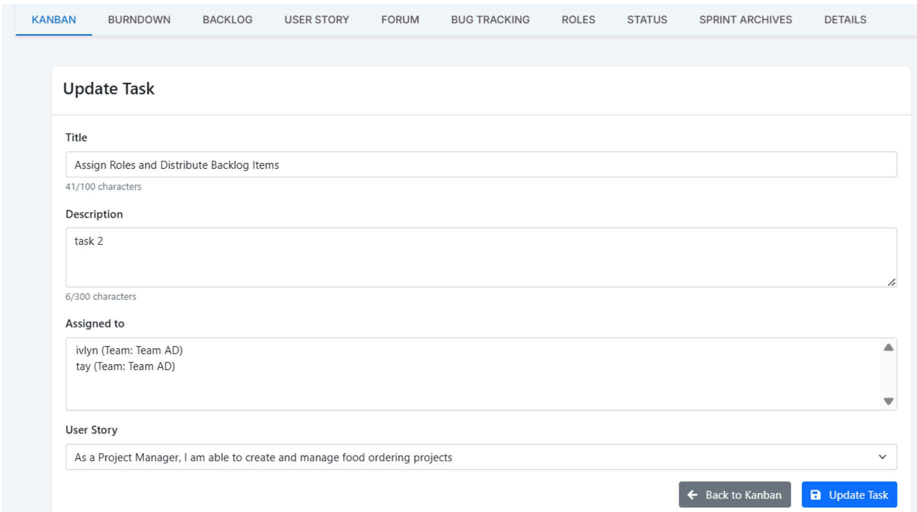


Figure 9.4 Edit Task Page

8.3.2. Update the necessary fields.
8.3.3. Click the Update Task button to save changes.

8.4. Update Task Status in Kanban Board

8.4.1. On the Kanban Board, locate the task card you want to update.
8.4.2. Click and hold the task card.
8.4.3. Drag the task to the desired status lane (e.g., To Do, In Progress, Done).

8.4.4. Release the card to update the task’s status.

8.5. Delete Task in Kanban Board
8.5.1. On the Kanban Board, locate the task card you want to delete.
8.5.2. Click the Delete icon on the task card.
8.5.3. In the confirmation popup, click Ok to confirm deletion.

8.6. Create Status in Kanban Board
8.6.1. On the Kanban Board, click the ‘Add Lane’ button.
8.6.2. Enter the desired lane name.
8.6.3. Click Ok to confirm creation.

8.7. Edit Status in Kanban Board
8.7.1. On the Kanban Board, click the Edit button for the swimlane you want to update.
8.7.2. Enter the updated lane name.
8.7.3. Click Ok to save changes.

8.8. Delete Status in Kanban Board
8.8.1. On the Kanban Board, click the Delete button for the swimlane you want to delete.
8.8.2. Click Ok to delete.

8.9. Create Comment in Kanban Board
8.9.1. On the Kanban Board, locate the desired task card and click the ‘Add Comment’ button.
8.9.2. Enter the comment content in the form.
8.9.3. Click Save to create the comment.
8.9.4. A success message, “Comment added successfully and emails sent,” is displayed.
8.9.5. Click OK to confirm.

8.10. Edit Comment in Kanban Board
8.10.1. On the Kanban Board, locate the desired task card and click the ‘Edit’ icon beside the comment.
8.10.2. The system displays the Edit Comment modal.
8.10.3. Modify the comment content as needed.
8.10.4. Click Save to update the comment.
8.10.5. A success message, “Comment updated successfully,” is displayed.

8.11. Delete Comment in Kanban Board
8.11.1. On the Kanban Board, locate the desired task card and click the ‘Delete’ icon beside the comment.

8.11.2. The system displays a confirmation message: “Are you sure you want to delete this comment?”

8.11.3. Click OK to confirm deletion.

9. Manage Burndown Chart

9.1. View Burndown Chart

9.1.1. In the left navigation bar, click the Projects button.

9.1.2. Inside the selected project, click the BURNDOWN button in the navigation tab bar.

9.1.3. The Burndown Chart Page is shown as in Figure 10.1 and Figure 10.2.

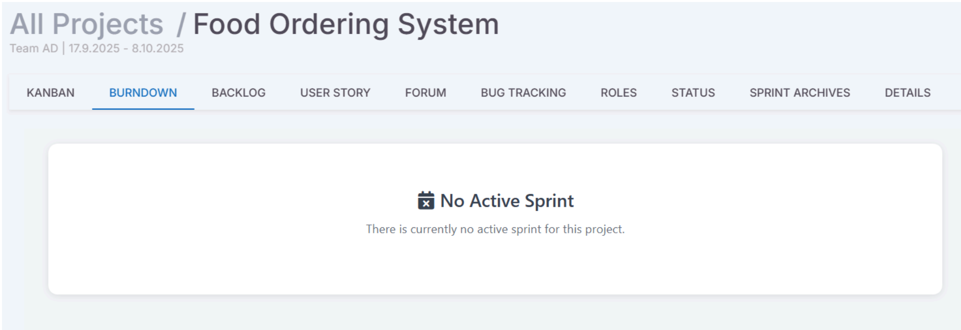


Figure 10.1 Burndown Chart (No Active Sprint)

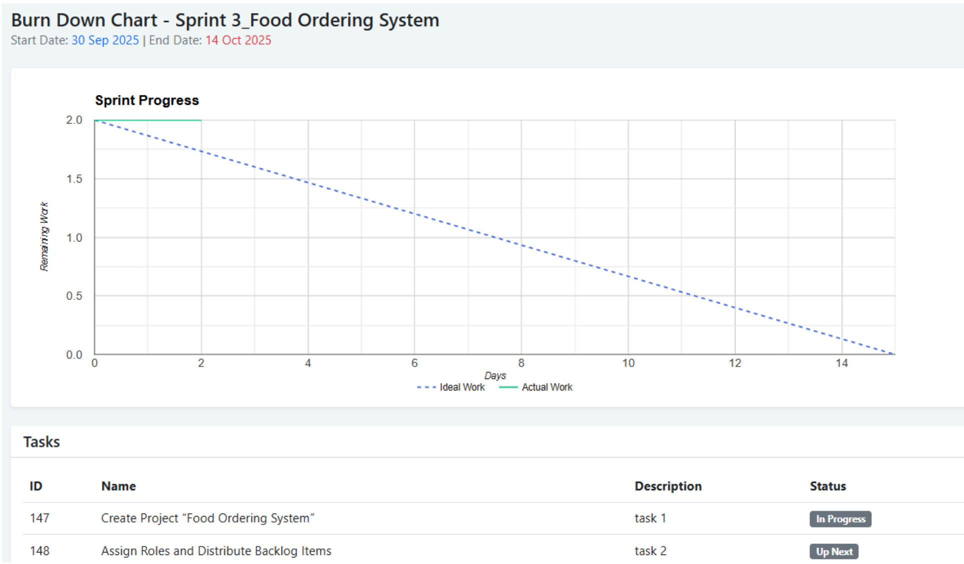


Figure 10.2 Burndown Chart (Active Sprint)

10. Manage Status

10.1. View Statuses List

10.1.1. In the left navigation bar, click the Projects button.

10.1.2. Inside the selected project, click the STATUS button in the navigation tab bar.

10.1.3. The Status List is shown as in Figure 11.1.

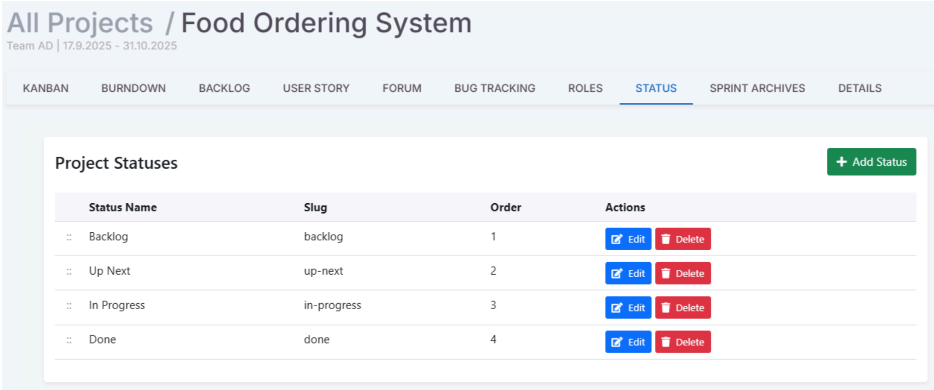


Figure 11.1 Status List

10.2. Create Status

10.2.1. On the Status List page, click the Add Status button.
10.2.2. Enter the status name.
10.2.3. Click ‘Add Status’ to confirm.

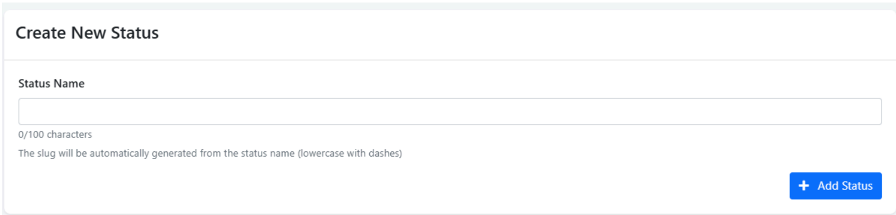


Figure 11.2 Add Status

10.3. Edit Status

10.3.1. On the Status List page, click the Edit button for the selected status.
10.3.2. Update the status name.
10.3.3. Click Update Status to confirm.

10.4. Delete Status

10.4.1. On the Status List page, click the Delete button for the selected status.
10.4.2. In the confirmation modal, click Delete Status to proceed.

10.5. Reorder Status

10.5.1. On the Status List page, click and hold the drag handle icon of the selected status.
10.5.2. Drag and drop the status to the desired position.

11. Manage Role

11.1. View Roles List

11.1.1. In the left navigation bar, click the Projects button.
11.1.2. Inside the selected project, click the ROLES button in the navigation tab bar.
11.1.3. The Role List is shown as in Figure 12.1.

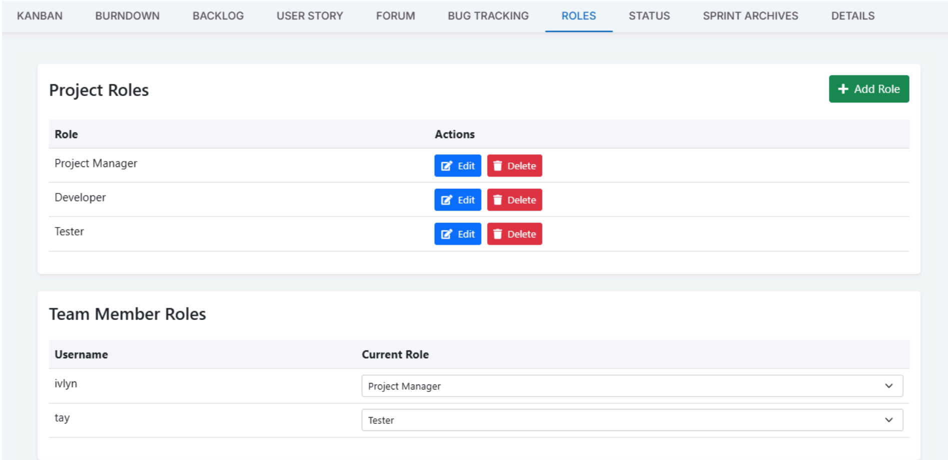


Figure 12.1 Role List

11.2. Create Role

11.2.1. On the Role List page, click the Add Role button.
11.2.2. Fill in the role name.
11.2.3. Select the permissions for the role.
11.2.4. Click the ‘Add Role’ button.

11.3. Edit Role

11.3.1. On the Role List page, click the Edit button next to the role you want to update.
11.3.2. Update the role name or the permissions for the role.
11.3.3. Click the ‘Update Role’ button.

11.4. Update User Role

11.4.1. On the Role List page, click the current role of the user.
11.4.2. Open the role selection dropdown menu.
11.4.3. Select the desired new role.
11.4.4. Reload the page to apply the updated permissions.
11.4.5. Confirm that the navigation bar and accessible tabs are updated according to the new role.

11.5. Delete Role

11.5.1. On the Role List page, click the delete button next to the role you want to remove.
11.5.2. In the confirmation modal, click ‘Delete Role’ to confirm the action.

12. Manage Sprint Archive

12.1. View Sprint Archives Page

12.1.1. In the project navigation tab bar, click the Sprint Archives button.
12.1.2. The Sprint Archives is shown as in Figure 13.1.

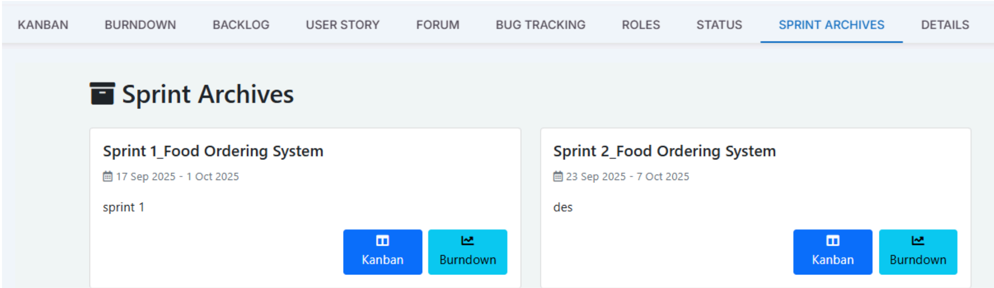


Figure 13.1 Sprint Archives

12.2. View Kanban Board Archive

12.2.1. On the Sprint Archives page, click the ‘Kanban’ button on sprint.

12.2.2. The Kanban Board Archive is shown as in Figure 13.2.

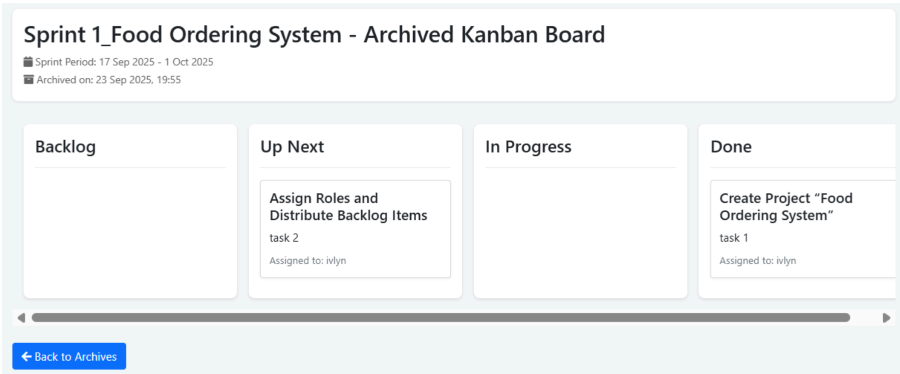


Figure 13.2 Kanban Board Archive

12.3. View Burndown Chart Archive

12.3.1. On the Sprint Archives page, click the ‘Kanban’ button on sprint.

12.3.2. The Burndown Chart Archive is shown as in Figure 13.3.

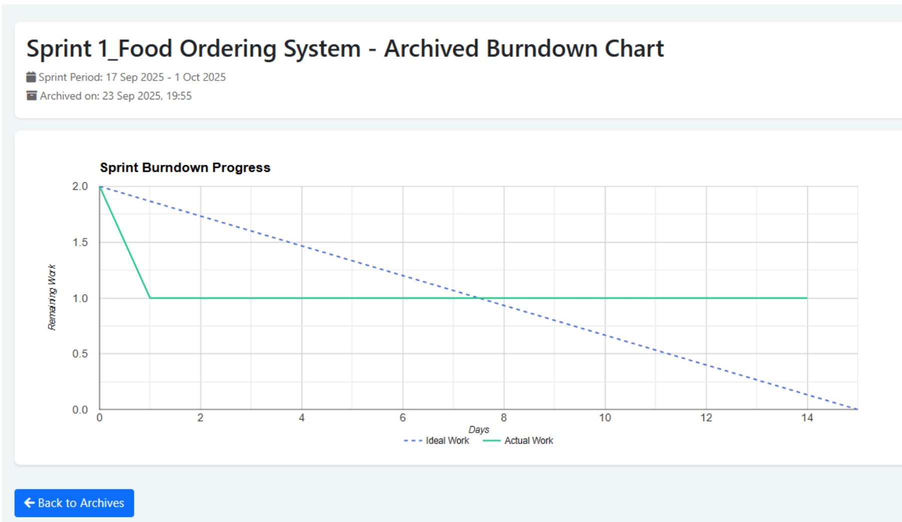


Figure 13.3 Burndown Chart *Archive*

13. Manage NFR

13.1. Create General NFR

13.1.1. Navigate to the Manage NFR section from the navigation bar.

13.1.2. General NFR List (Figure 14.1) will be displayed.

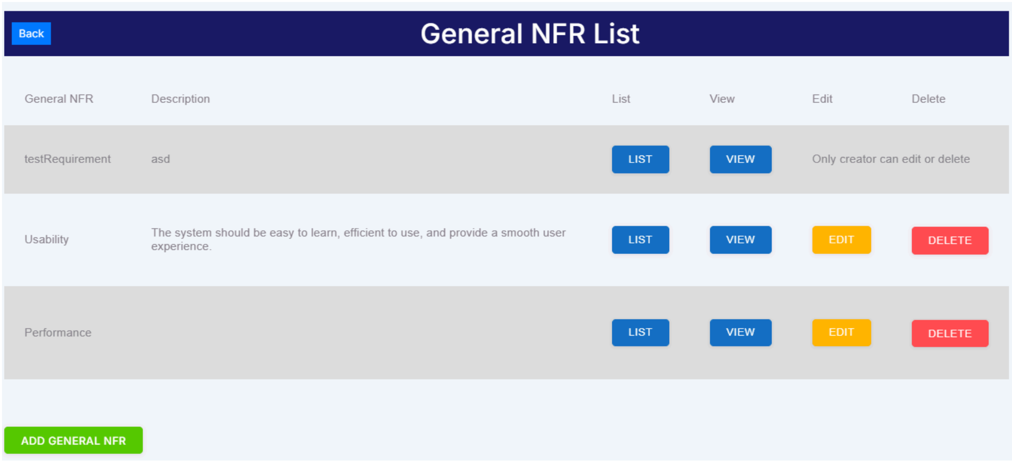


Figure 14.1 General NFR List

13.1.3. Click the Add General NFR button.

13.1.4. Fill in the form with the Title and Description.

13.1.5. Click Submit.

13.1.6. Confirm the action in the confirmation dialog by selecting OK.

13.1.7. A success message, *“General NFR created successfully”*, will appear.

13.1.8. Click OK to return to the General NFR list.

13.2. Create Specific NFR

13.2.1. Navigate to the Manage NFR section from the navigation bar.

13.2.2. Click the List button on a General NFR to open the Specific NFR Page.

13.2.3. Specific NFR List (Figure 14.2) will be displayed.

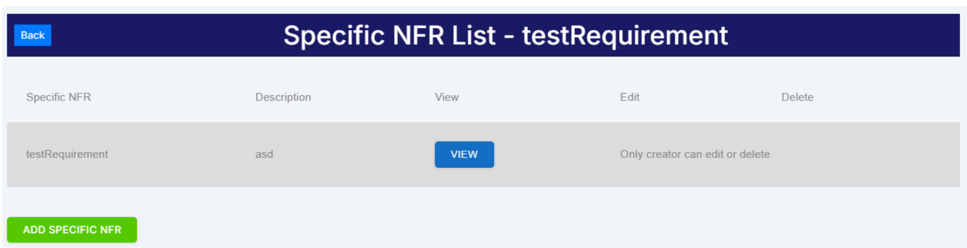


Figure 14.2 Specific NFR List

13.2.4. Click the Add Specific NFR button.

13.2.5. Fill in the Title and Description fields.

13.2.6. Click Submit and confirm the action by selecting OK.

13.2.7. A success message, “Specific NFR added successfully!”, will appear.

13.2.8. Click OK to return to the Specific NFR list.

13.3. View General NFR

13.3.1. Navigate to the Manage NFR section from the navigation bar.

13.3.2. General NFR List will be displayed.

13.3.3. Click the View button on the desired General NFR to view its description, and the linked user stories across all projects.

13.4. View Specific NFR
- 13.4.1. Navigate to the Manage NFR section from the navigation bar.
- 13.4.2. Click the List button on a General NFR to open the Specific NFR Page.
- 13.4.3. Specific NFR List will be displayed.
- 13.4.4. Click the View button on the desired Specific NFR to view its details, description, and linked user stories for the specific project.

13.5. Edit General NFR
- 13.5.1. Navigate to the Manage NFR section from the navigation bar.
- 13.5.2. Click the Edit button beside the desired General NFR to display the Edit General NFR form (Figure 14.3).

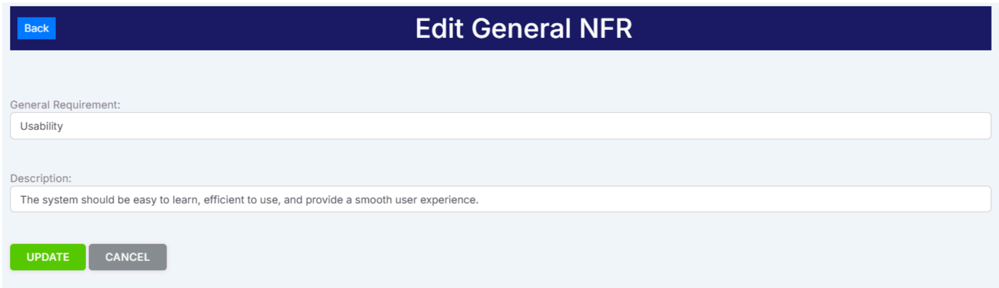


Figure 14.3 Edit General NFR Form

- 13.5.3. Update the Title or Description in the form.
- 13.5.4. Click Update and confirm the action by selecting OK.
- 13.5.5. A success message, *"General NFR updated successfully."*, will appear.

13.6. Edit Specific NFR
- 13.6.1. Navigate to the Manage NFR section from the navigation bar.
- 13.6.2. Click the List button beside a General NFR to open the Specific NFR Page.
- 13.6.3. Click the Edit button beside the desired Specific NFR to display the Edit Specific NFR form (Figure 14.4)..

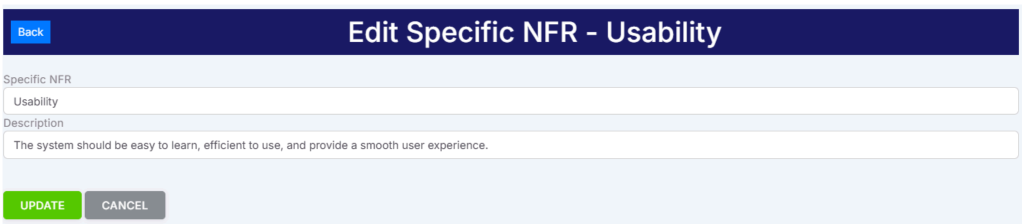


Figure 14.4 Edit Specific NFR Form

- 13.6.4. Update the Title or Description in the form.
- 13.6.5. Click Update and confirm the action by selecting OK.
- 13.6.6. A success message, *"Specific NFR updated successfully."*, will appear.

13.7. Delete General NFR

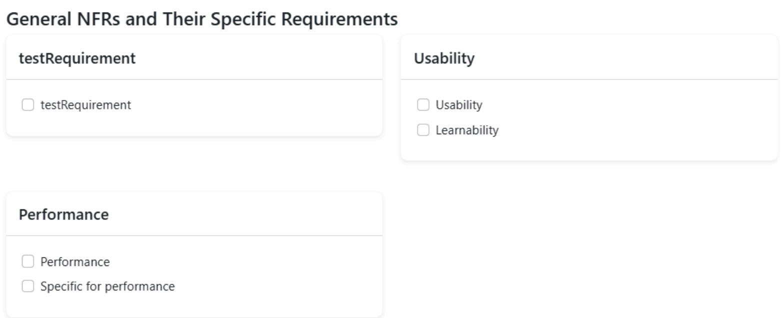
13.7.1. Navigate to the Manage NFR section from the navigation bar.
13.7.2. Click the Delete button beside the desired General NFR.
13.7.3. A confirmation message appears: *“Are you sure you want to delete this non-functional requirement?”*
13.7.4. Click Confirm to proceed.
13.7.5. A success message, *“General NFR deleted successfully.”*, will be displayed.

13.8. Delete Specific NFR

13.8.1. Navigate to the Manage NFR section from the navigation bar.
13.8.2. Click the List button beside a General NFR to open the Specific NFR Page.
13.8.3. Click the Delete button beside the desired Specific NFR.
13.8.4. A confirmation message appears: *“Are you sure you want to delete this non-functional requirement?”*
13.8.5. Click Confirm to proceed.
13.8.6. A success message, *“Specific NFR deleted successfully.”*, will be displayed.

13.9. User Story Link User Story with NFR

13.9.1. Navigate to the User Story List page.
13.9.2. Click the Create User Story button.
13.9.3. In the form, fill in the required user story details.
13.9.4. Tick the checkbox(es) for the targeted NFR(s) to link with the user story.



13.9.5. Click Submit to create the user story.
13.9.6. A success message, *“User Story has successfully been created!”*, will be displayed.
13.9.7. Click OK to return to the User Story List page.

14. Manage Trace Versioning Table (TVT)

14.1. View TVT

14.1.1. Navigate to the Manage TVT section from the navigation bar.
14.1.2. Click the View button on the desired project to display the TVT details, including sprint, backlog, user story panel, FR–NFR mappings, and QAW (Figure 15.1).

Figure 15.1 Trace Versioning Table (TVT)

15. Manage Change Impact Graph (CIG)

15.1. View CIG

15.1.1. Navigate to the Manage CIG section from the navigation bar.

15.1.2. Click the View button on the desired project.

15.1.3. The CIG visualization and a table of user stories with their linked NFRs are displayed (Figure 16.1).

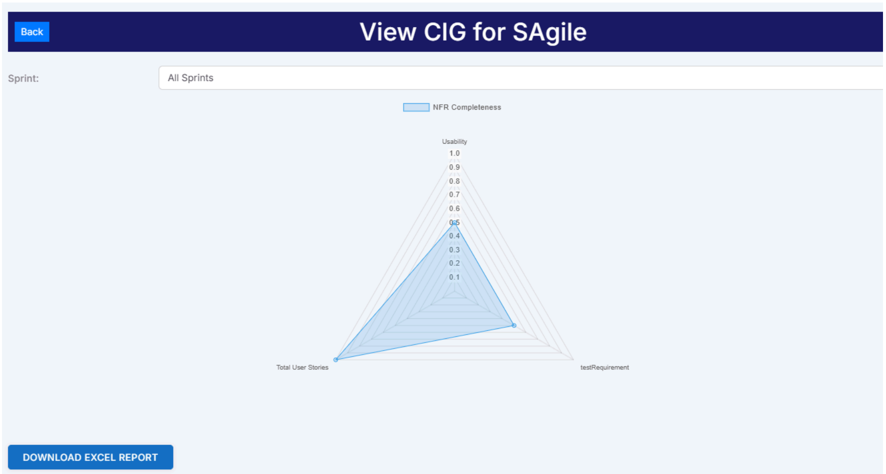


Figure 16.1 Change Impact Graph (CIG)

15.2. Generate CIG Report

15.2.1. Navigate to the Manage CIG section from the navigation bar.

15.2.2. Click the View button on the desired project.

15.2.3. Click Export CIG Report in Excel.

15.2.4. A confirmation message appears: *"Are you sure you want to generate the report?"*

15.2.5. Click Confirm to proceed.

15.2.6. The system generates and downloads the CIG report in `.xlsx` format.