ICT - iCliplse Technologies Inc.

Project Management Information System

User Guide for

www.i-projectracker.com

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1. Introduction

'i-projectracker.com' is online comprehensive Project Management Information System software that helps you to Plan, Track and Report on projects. With its unique Project Dashboard, Milestone status and Project Reporting, it helps you to deliver your projects on time and under budget. Application is divided into different roles and responsibilities as follows:

1.1 Administrator Role

This role is assigned at the company level also called 'Company Admin'. This role maintains standard references and to manage all the create Project Managers with the assigned domain to work.

1.2 Project Manager Role

This role is to execute the projects and maintains all the daily operations activities of the projects, Milestone, payment terms, deliverable, Gantt chart, time sheet and more to provide the progress of the project in all aspects.

1.3 Project User

This role is to only view the project progress as per the access provided by Administrator.

1.4 Executive Users

This role is also to view the project, however access to this role is to view all the projects under the company by domain. These could be the CEO of the company.

1.5 Team Members

This role is for the team members working on the actual deliverable of the project. Access are given to them to enter the hours for each day under the milestone worked followed with the approval of Project Manager.

1.6 Stakeholders

This role is to approve the deliverables through email with no login required.

2. Application Modules

Application is divided into the categories which are mentioned below:

2.1 Administrator Role

2.1.1 Manage Project Manager
2.1.2 Manage Domain
2.1.3 Assign Domain to Project Manager / User.
2.1.4 Manage Project user
2.1.5 Manage Executive User
2.1.6 Manage Team Member and Positions
2.1.7 Manage Company Profile
2.1.8 Manage Currency
2.1.9 Manage Vendors
2.1.10 List of all the Projects in the Company

2.2 Project Manager

2.2.1 Manage Program
2.2.2 Manage Projects
2.2.3 Assign Team Member to the Project
2.2.4 Identify Stakeholders
2.2.5 Set Milestones
2.2.6 Set Payment Terms
2.2.7 Make Payments against each Milestones
2.2.8 Define Deliverables
2.2.9 Post Deliverables
2.2.10 Identify Risk
2.2.11 Post Issues
2.2.12 Update Periodical Milestone Updates
2.2.13 Update Periodical highlights
2.2.14 Approve Time Sheet

2.3 Project User / Executive users (to view the following)

2.3.1 Projects

2.3.2 Milestones

2.3.3 Deliverables

2.3.4 Dashboard

2.3.4.1 Total Cost of the Project against the Budget

2.3.4.2 Milestone status with plan vs. actual percentage completion.

2.3.4.3 Various Graphic presentations

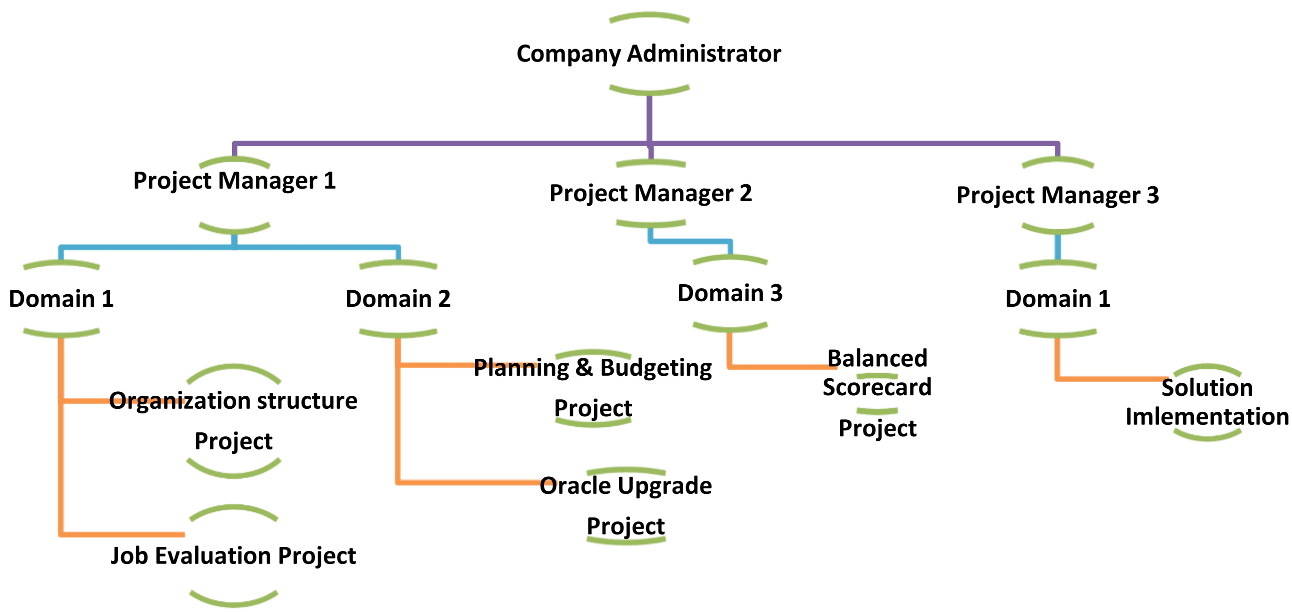
2.4 Team Members

2.4.1 Enter Time Sheet with hours against the milestone.

3. Governance of the Application

Application is structured in three layers which is Administrator, Project Manager and domain where every project manager will create his/her projects and will work accordingly. Access is restricted to own created project by Project Manager. Project Viewers are created by Administrator to give an access to any project with the consent of project manager for view only.

Hierarchy of the Application can be understood as follows:



Explanation

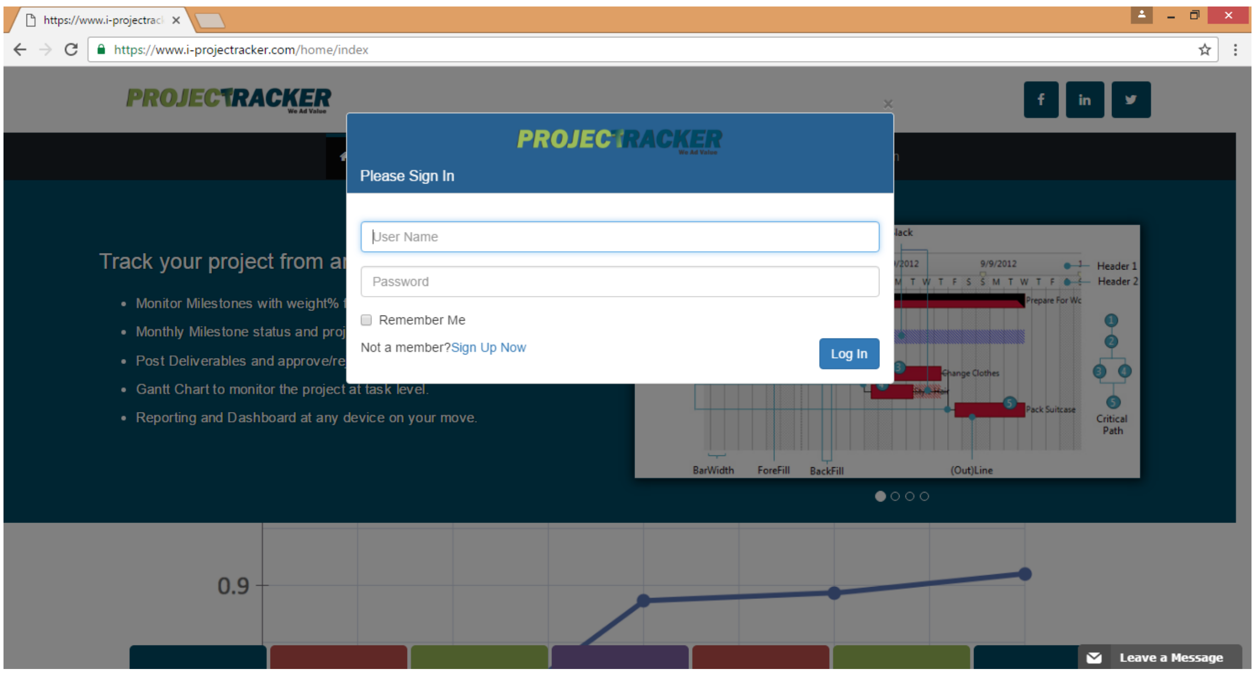
Once the Registration is done by the Company from the site or through contract agreement. Company Administration is created as the top layer of the application. This role will be Company Administrator and will start performing as follows:

- Create Organization Structure such as Department, Division and Directorate as domain.
- Create Project Managers and assign to the domain.
- Sent email to the Project Managers for setting the Password.
- Add Vendors
- Create Project Users and Executive users when required for view.

4. Application user guide

Application is located on the web site ‘i-projectracker.com’ on the cloud and can be accessed from anywhere and anytime. Once the Administrator account is created either by Signing up from the site or by us as for the corporate account. Administrator can login to the site and see his/her company name and his role as ‘Administrator, e.g. sample screen as follows:

4.1 Sign-up or Login with an Administrator Account.

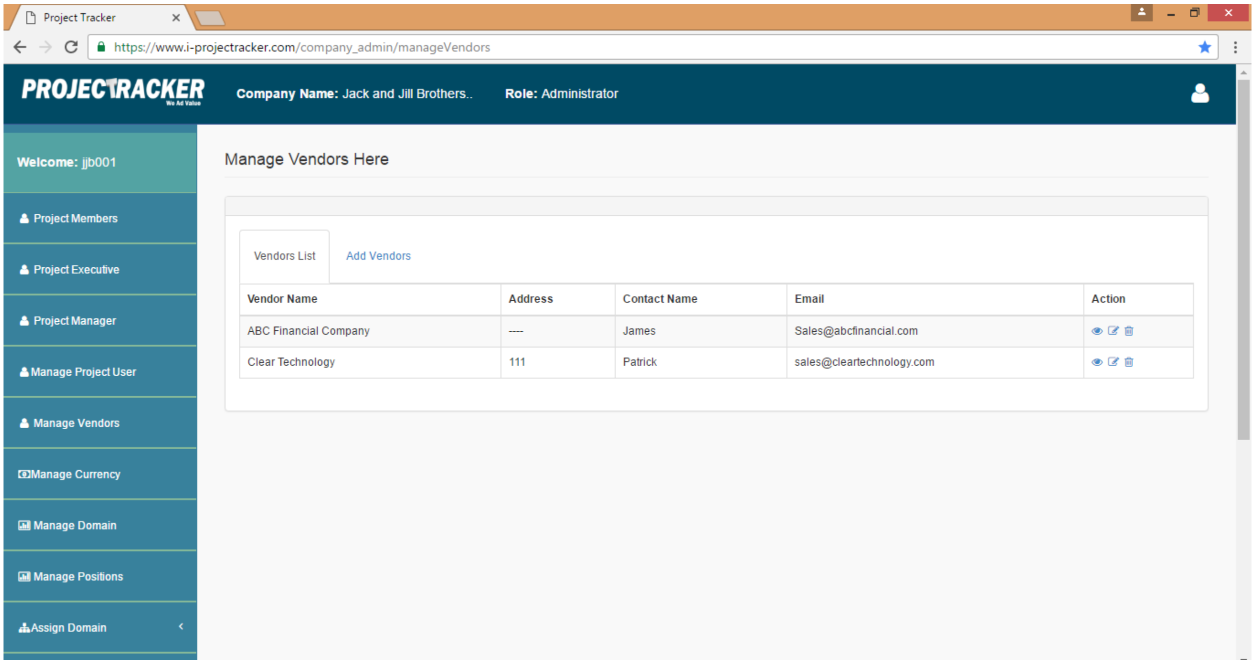


Once the successful login is done, you should see your company name and role on the page with all the options for Company Administrator to be carried out in the sequence mentioned in 4.2

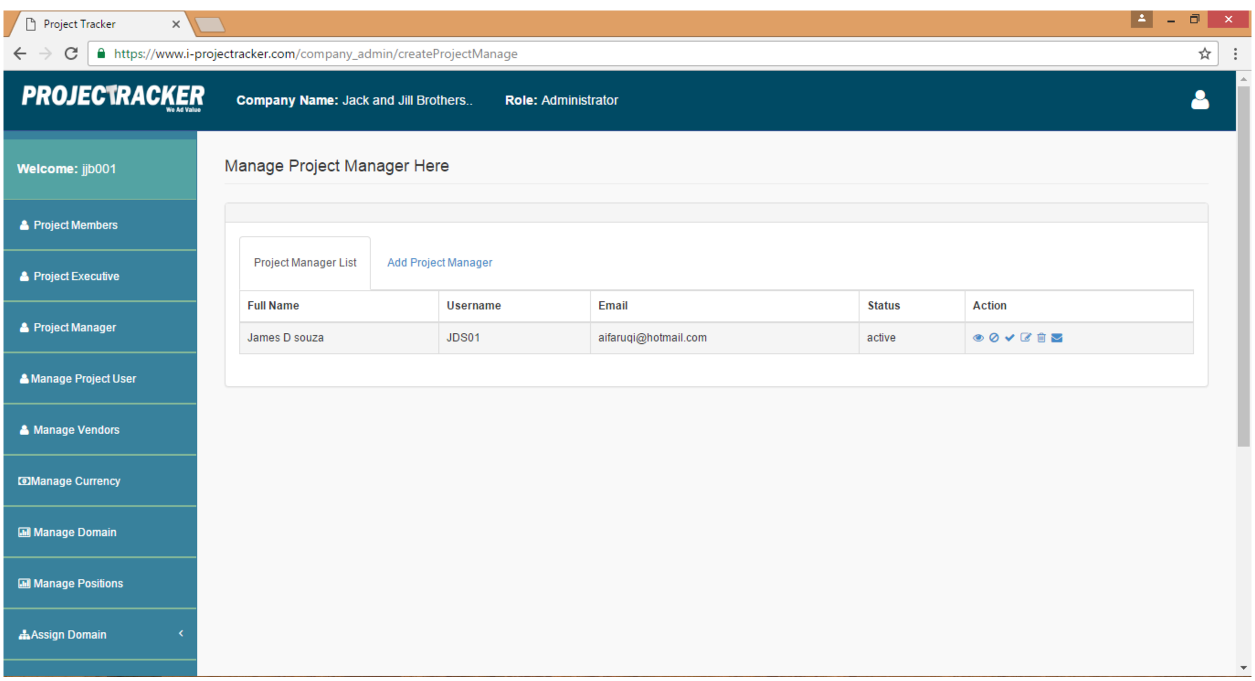
Online Payment is available to select the different packages of prices. Once the trial period of 30 days is over, access will not be available unless the package is selected and online payment is done.

4.2 **Company Administrator** to follow the steps in the same sequence:

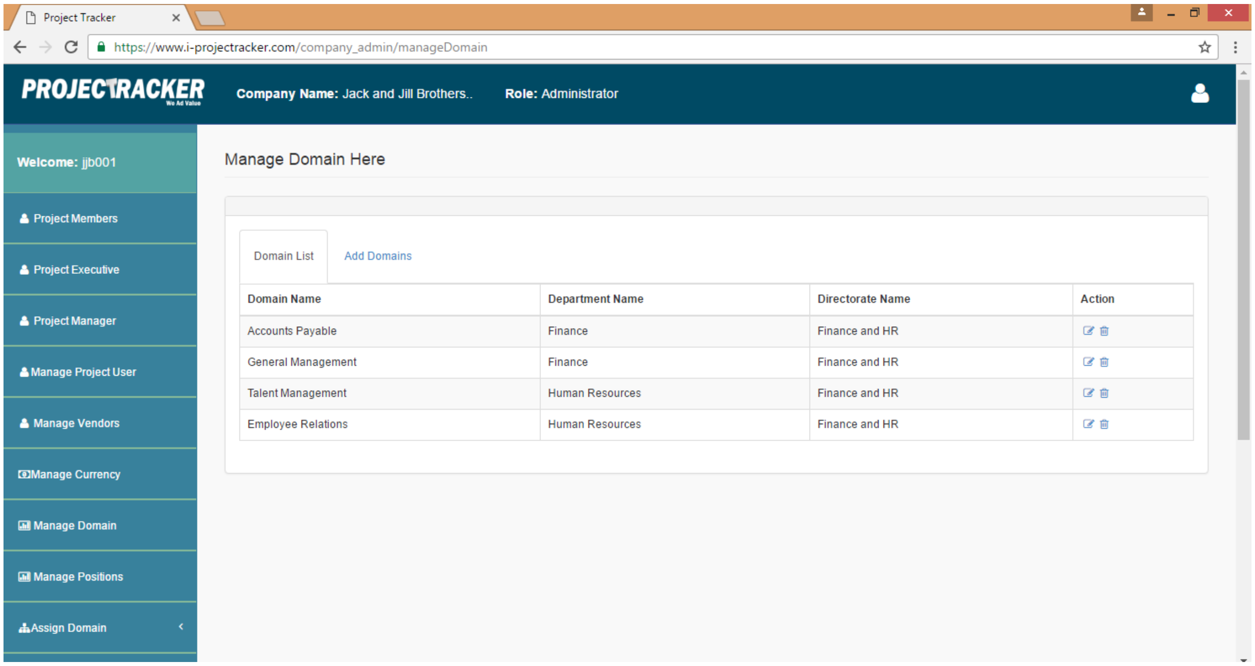
4.2.1 Create Vendors



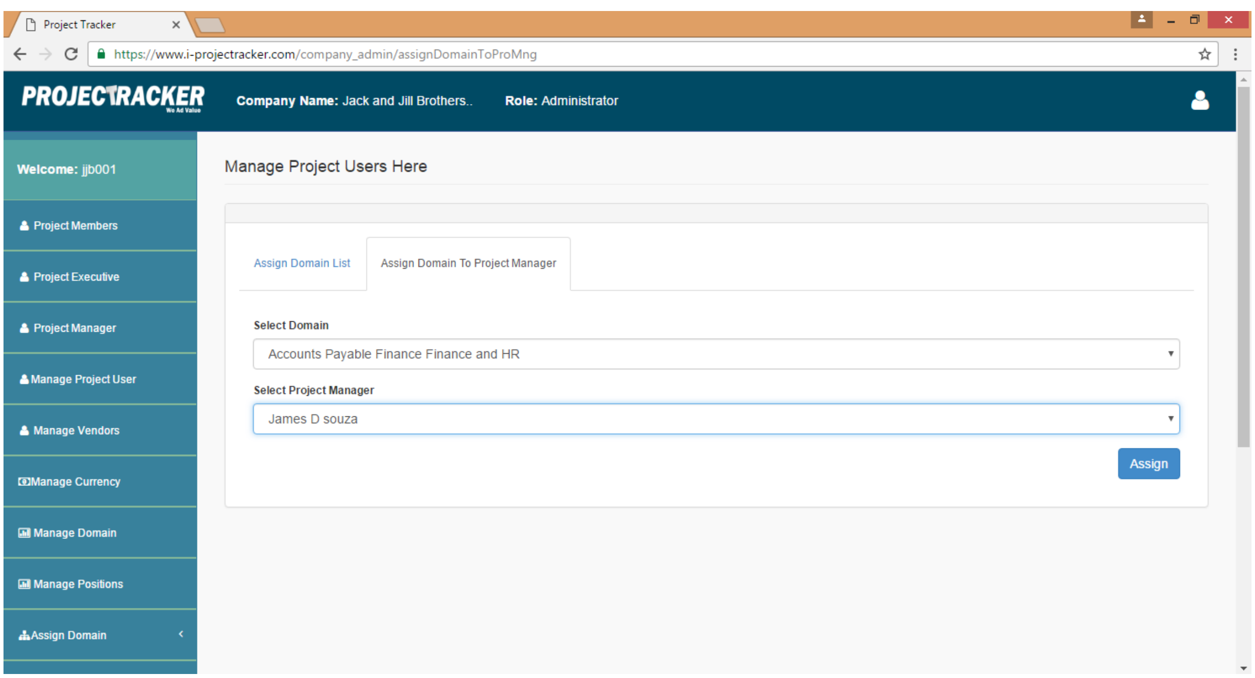
4.2.2 Create Project Managers



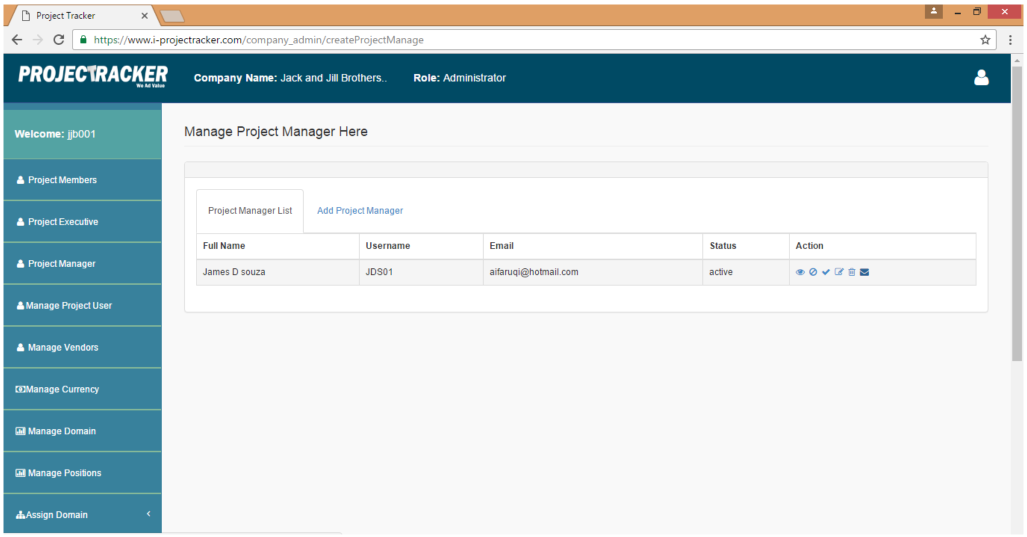
4.2.3 Create Domain (Organization with Division, Department, Directorate)



4.2.4 Assign each Project Manage to the domain to work.



4.2.5 Send Email to the Project Managers to reset the Password. Click on email icon to send the email to the project manager.



4.2.6 Create Project User and Executive User if required to view the Projects

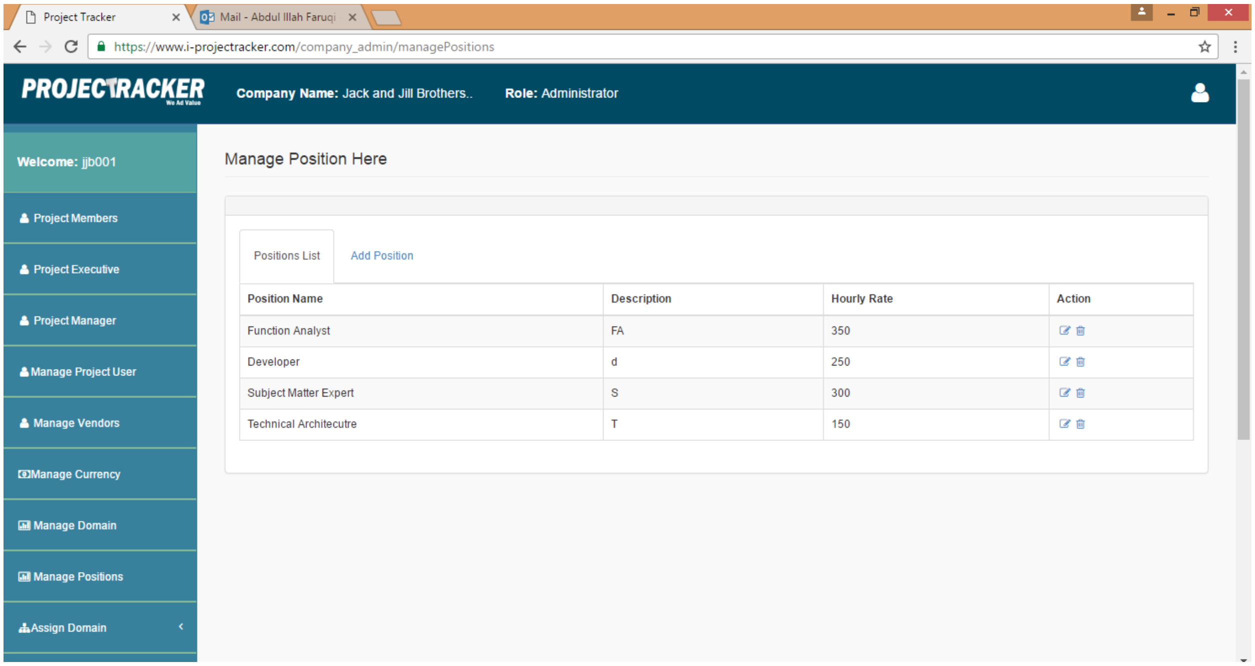
Same as Project Manager

4.2.7 Assign Project User to the domain and the Project to view.

4.2.8 Create Team Member

Same as Project Manager

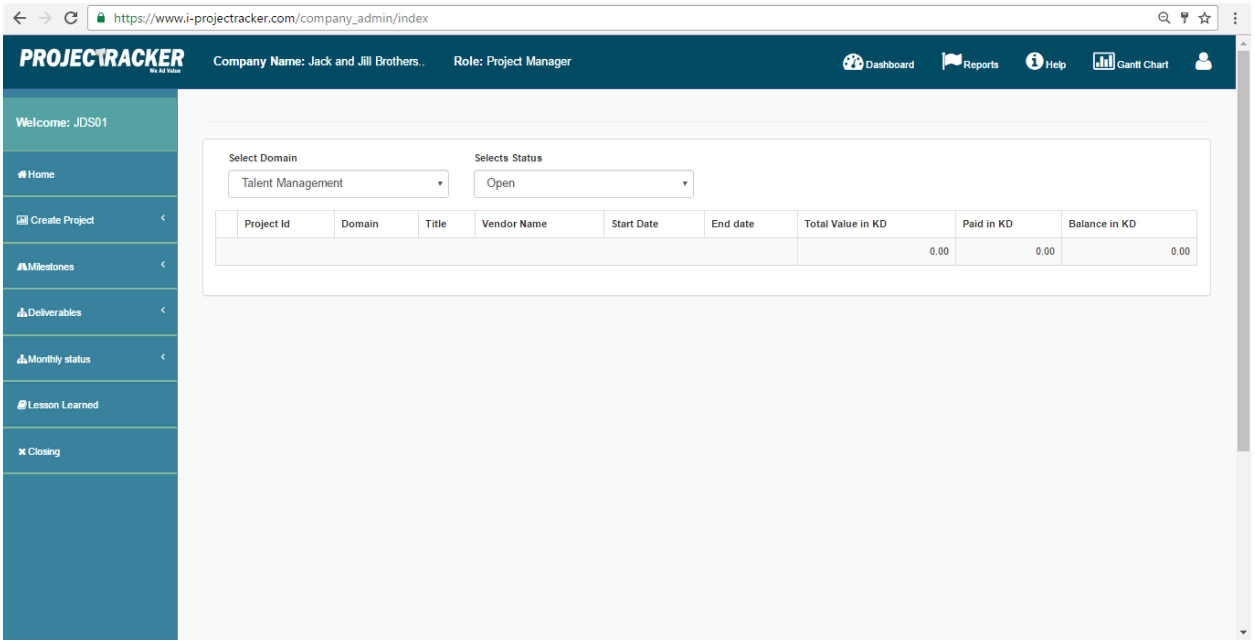
4.2.9 Create Position for Team Members with hourly rate



These are estimated rates for arriving the budget of the manpower cost. The actual rates are also allowed at the time of actual assigning the team members to the project by project manager.

4.3 Project Manager Role

Once the Project Manager log's in with the credential provided by the Administrator, he/she will on the screen as shown below:



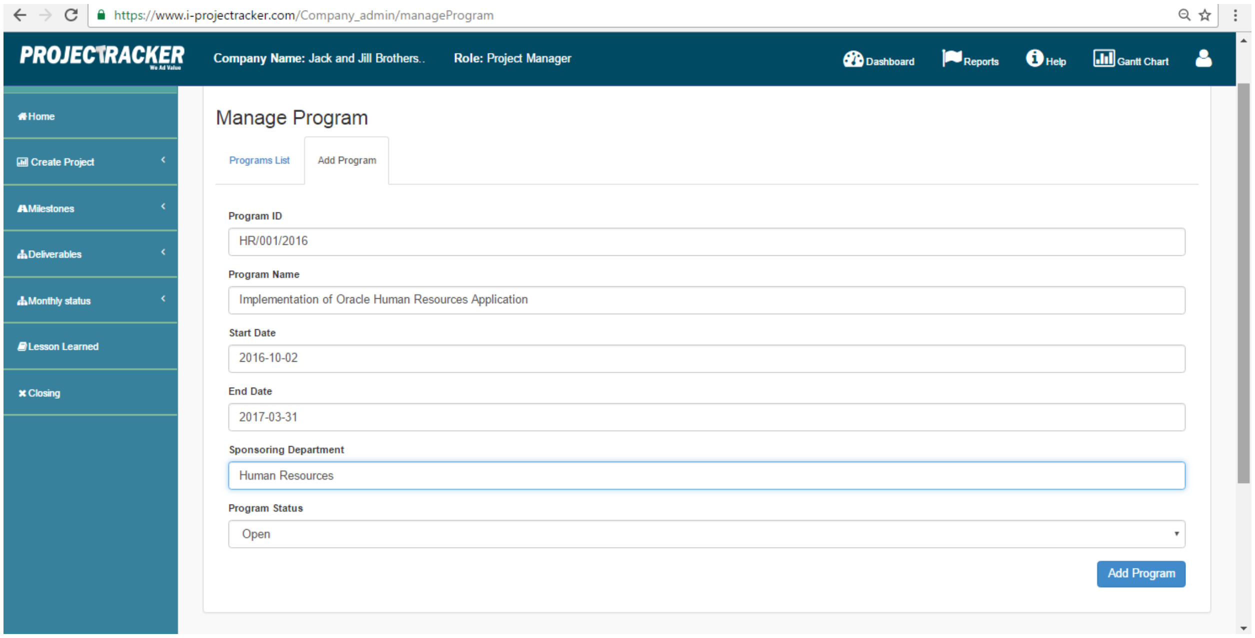
Select the Domain first for creating the project details.

Follow the steps as shown below for managing the projects:

4.3.1 Create Project

4.3.1.1 Manage Program

This option is to create a program for projects, every project must have a program even it has just one project. Following screen is to enter the program details:

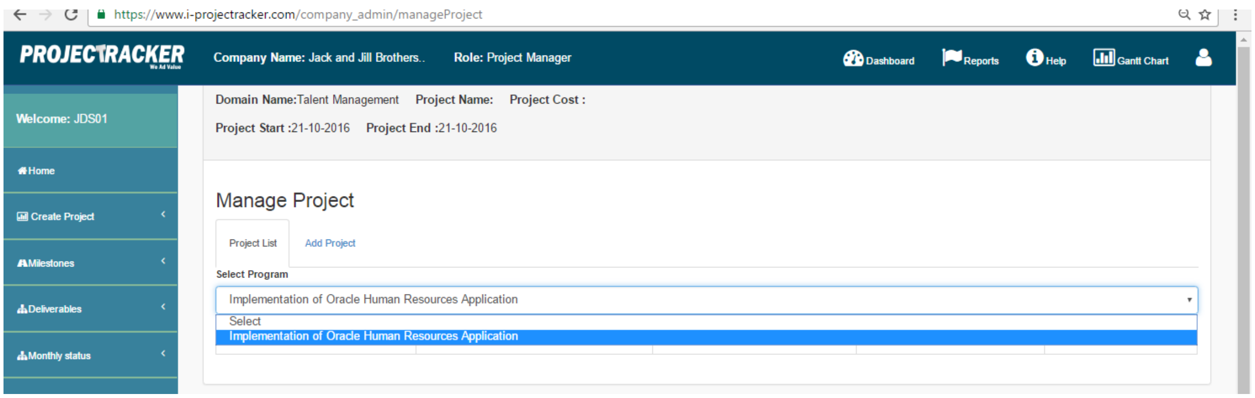


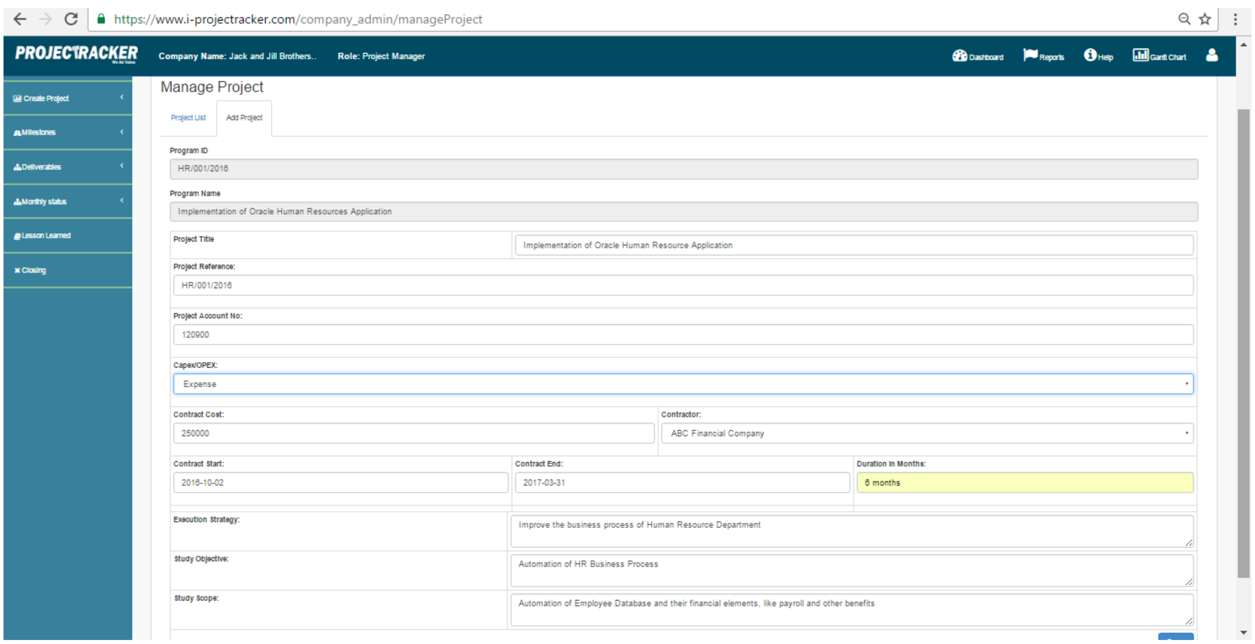
Fields explanation:

Field	**Description**
Program ID	This is primary key for entering the Program, once entered cannot be changed.
Program Name	Name of the Program of the Project.
Start Date	Enter start date of the program as overall.
End Date	Enter end date of the program as overall.
Sponsoring Department	Sponsoring Department: Enter the name of the department who is the main sponsor of the Project/program
Consultant	Pick the name of the consultant who is executing the project. The list is maintained by the Administrator, if the name of the consultant is not visible here, contact administrator to enter the one.
Program Status	Default is 'Open', can be closed if required

4.3.1.2 Manage Project

This option is to enter the individual projects under the program already entered above. Screen for the Project is as follows:



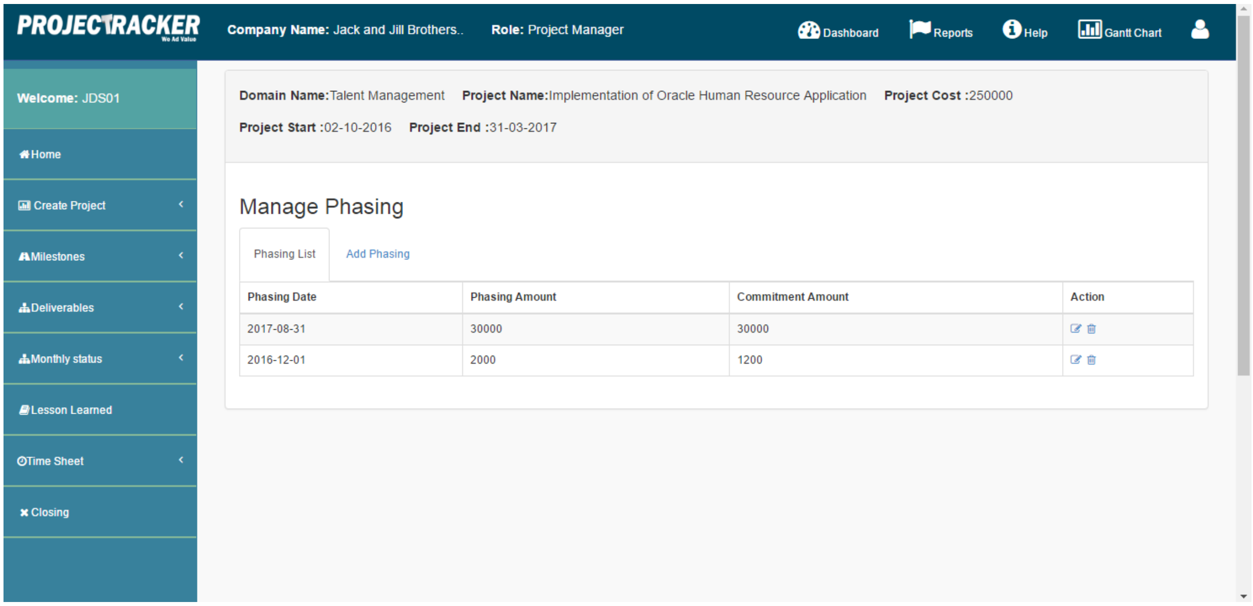


1. Select the Program under which the Project is to be entered.
2. Select Add button to enter or edit button to edit the project.

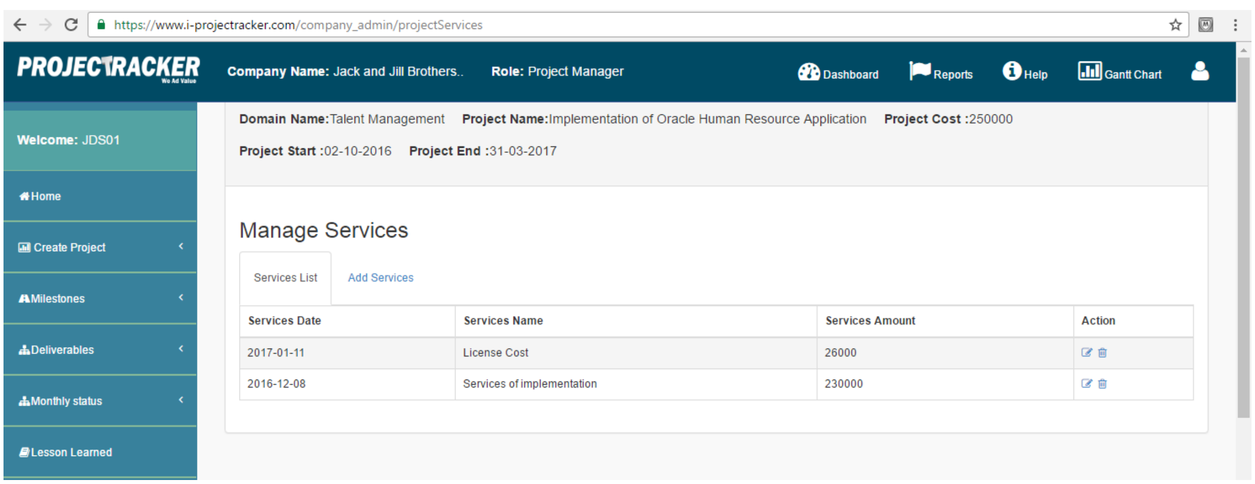
Fields explanation:

Field name	Description
Program ID and Program Name	It is a disabled field as it is already entered in the program and under which you are entering the Project.
Project Title	Project Name is the title of the project to be referred.
Project Reference	Enter the Project ID to be referred for all reports.
Project Account no.	Account No. of the Project (optional)
Project Type	Capital / Expense
Project Cost	Cost of the Project
Consultant:	Pick the consultant from the list for executing the project.
Start date:	Start date of the project
End date:	End date of the Project
Duration in months	Enter the duration in months
Project Summary:	Enter the brief summary of the project
Project Objective:	Enter the brief objective of the Project.
Project Scope	Enter the scope of the Project

4.3.1.3 Manage Phasing (Optional)



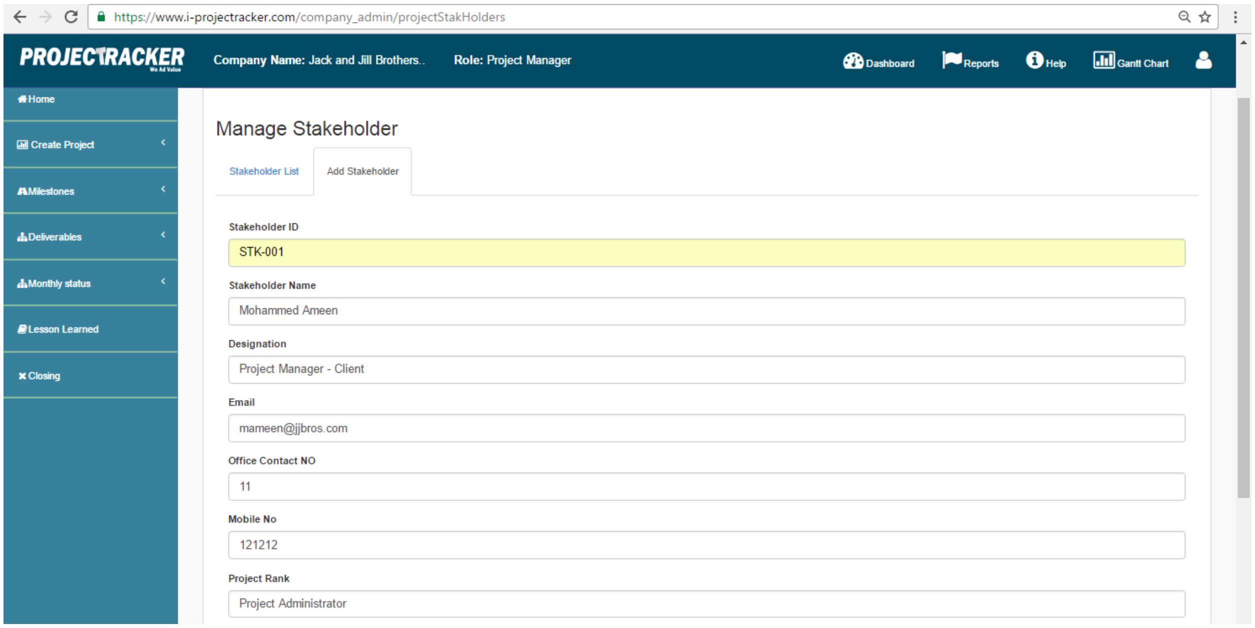
4.3.1.4 Cost breakdown by services



4.3.2 Milestone

4.3.2.1 Identify Stakeholders

This form is to manage the stakeholders of the projects who will approving the deliverables on emails.

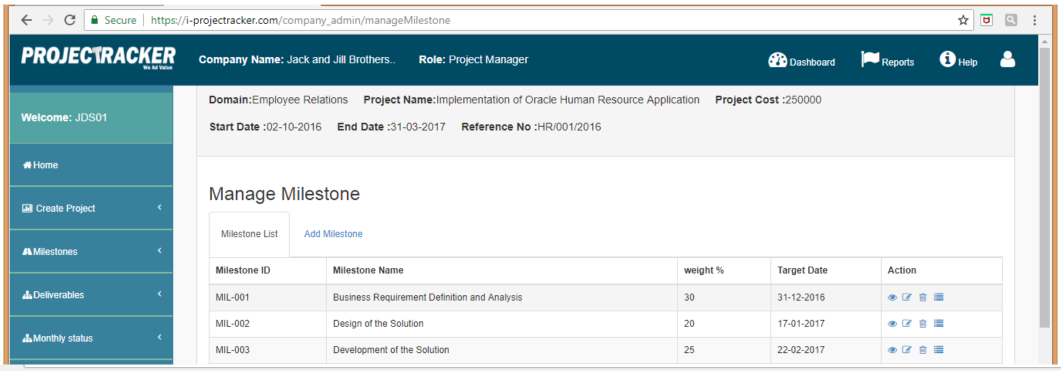


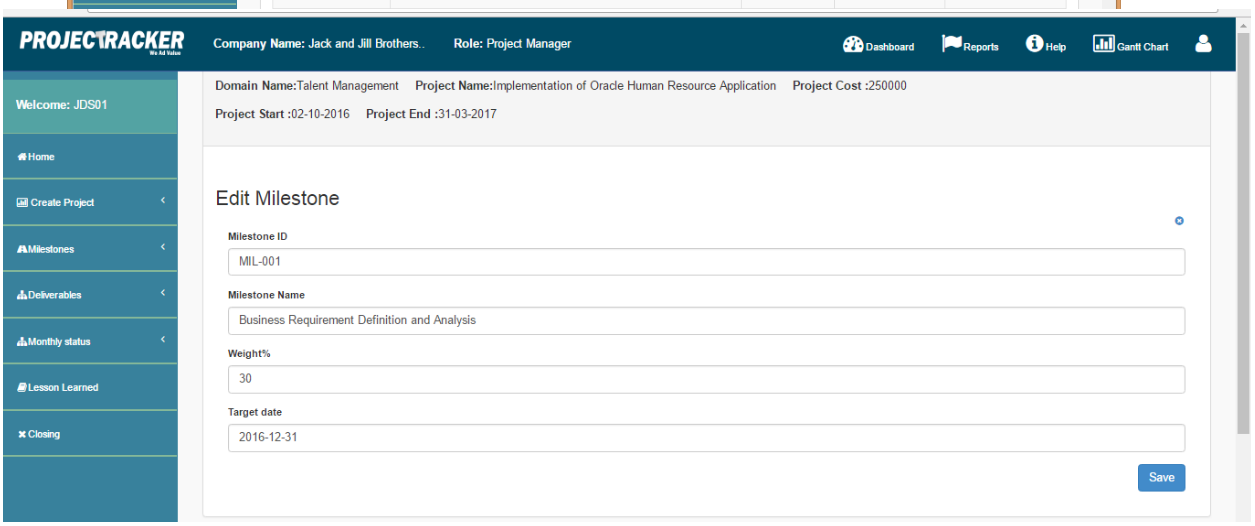
Field Explanation

Field	Description
Stakeholder ID	Enter stakeholder Id, preferred to be as ‘STK-001’
Stakeholder Name	Name of the Person to be stakeholder
Designation	Title of the person in the organization.
Email	Enter the valid email, as this will be used for deliverable approval through his/her email
Office contact No.	Office Phone number
Mobile Number	Mobile number
Project Rank	Title on the Project, like Project Manager from the client, sponsor or Coordinator
End Date	End date should be left blank, if the stakeholder is working on the project, if the stakeholder has left the project, you should enter the end date to be inactive

4.3.2.2 Set Milestones

This form is to set the project milestones to be achieved in different time lines of the project. Form to enter the milestones is as follows:

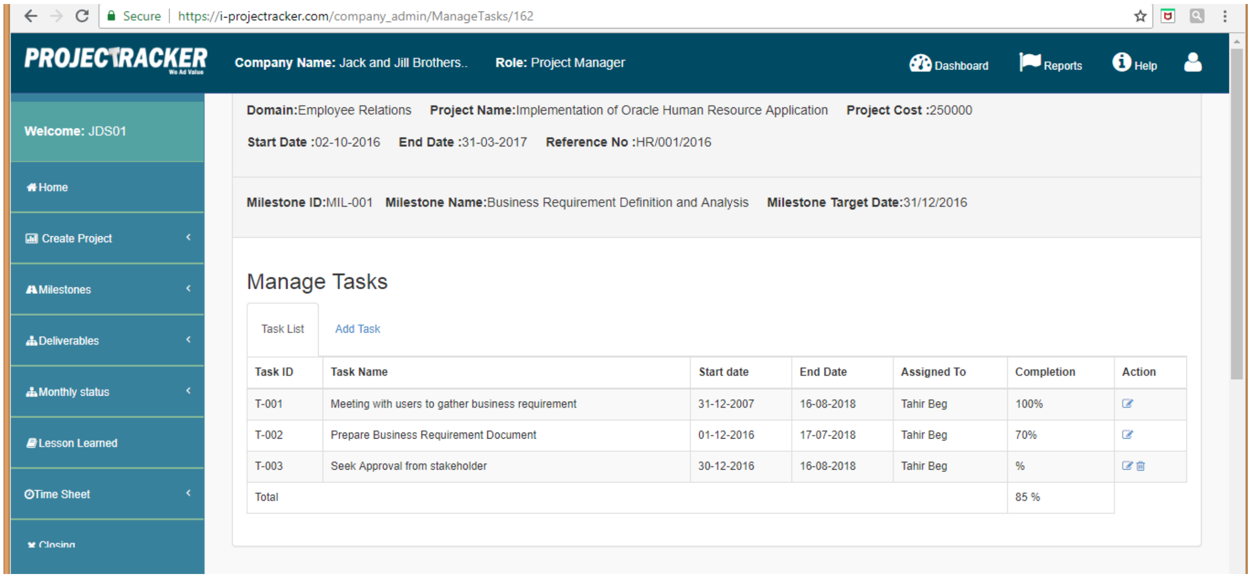




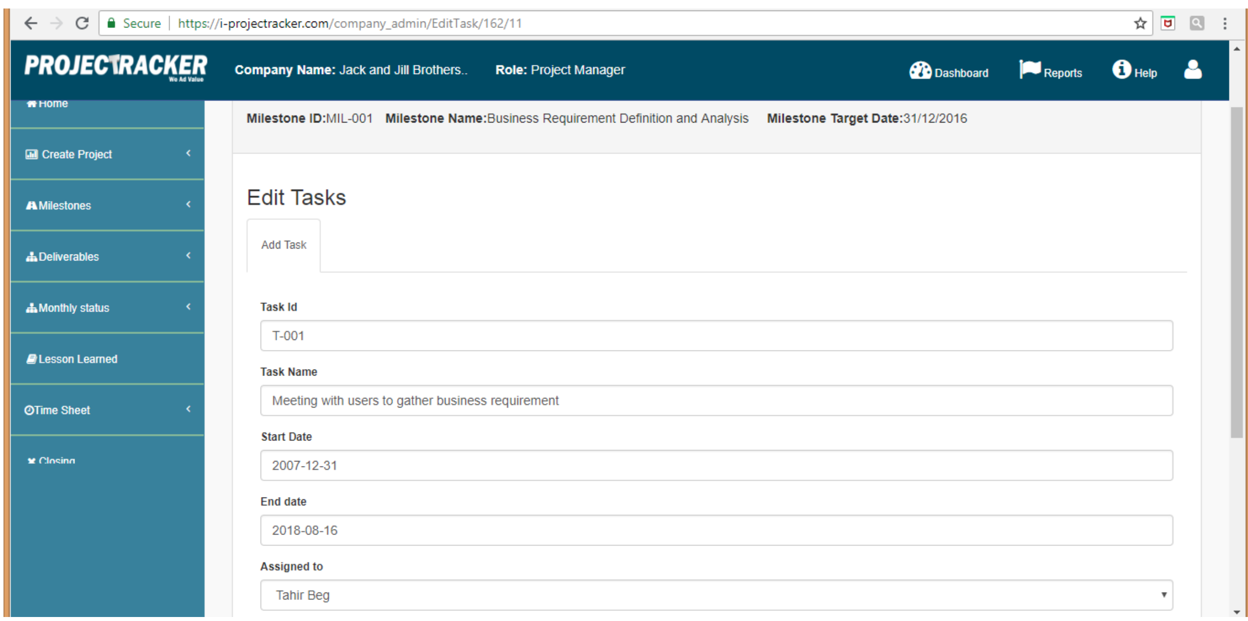
Field Explanation

Field	Description
Milestone ID	Enter the Milestone ID, which will be as the key number, enter as 'MIL-001'
Milestone Name	Enter name of the milestone as 'Acceptance of Business Requirement Document'
Weight	Weigh of the milestone among all milestone, this will be used for computing the overall completion of the project by weight * % completion to achieve the weighted % completion. This is mandatory for tracking the % completion if required.
Target Date	Target Date of the milestone to be completed.
Action	This column has view, edit, delete and the Tasks icon. Every Milestone can be further broken into many tasks and assign to the Project Team for completion

4.3.2.3 Milestone Tasks



Adding/Editing the Tasks

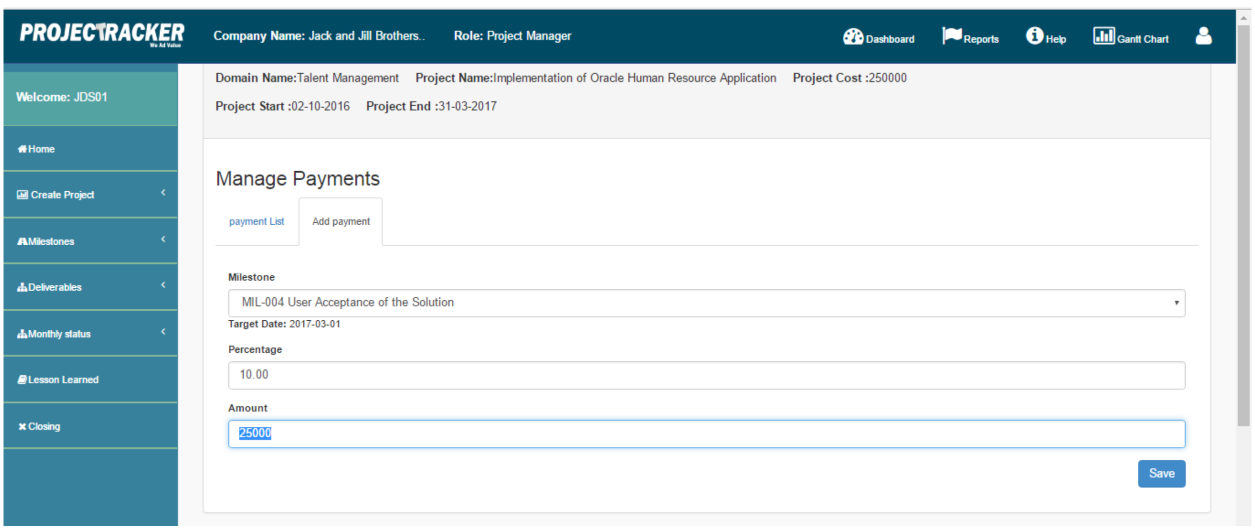


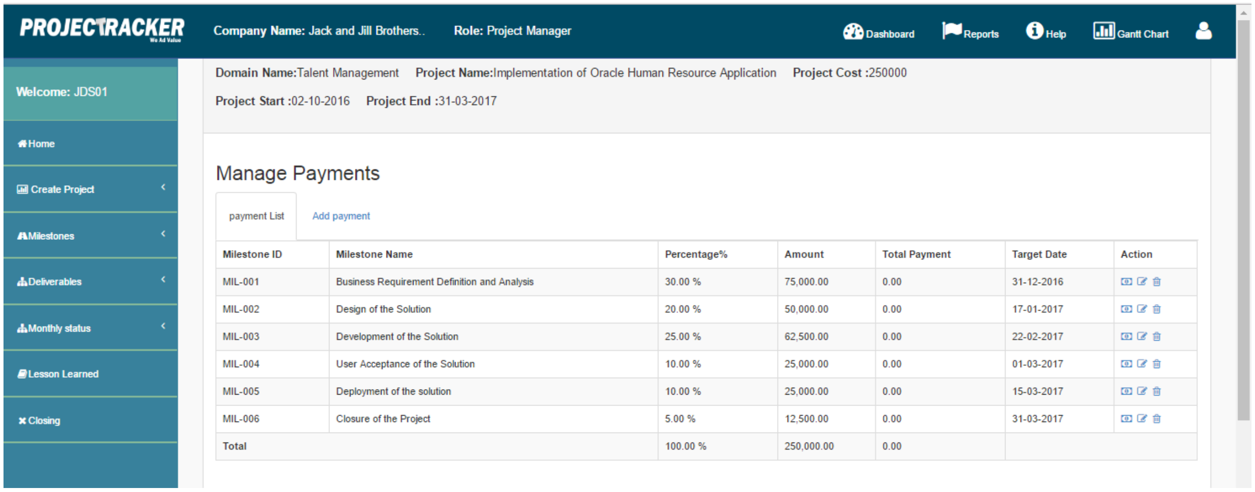
Field Explanation

Field	Description
Task ID	Enter the Task ID, which will be as the key number, enter as ‘T-001’
Task Name	Enter name of the Task as ‘Designing of the Solution’
Start Date	Enter the Start Date of the Task to be started
End Date	Enter the End Date of the Task to be completed
Assigned to	Select from the Drop down the Project Team to assign the task.

4.3.2.4 Set Payment Terms

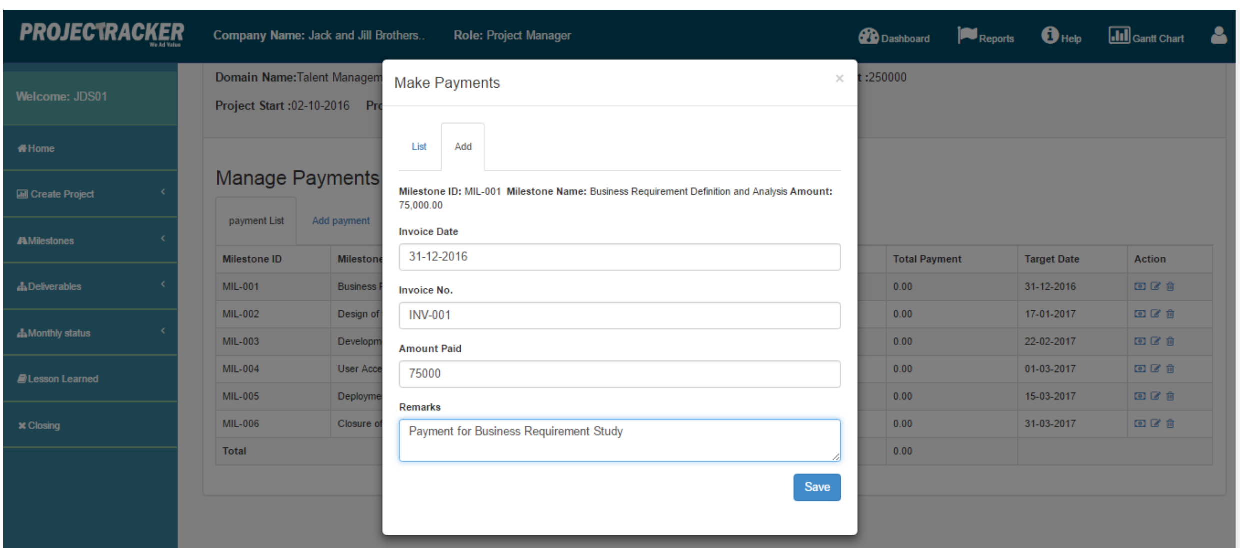
This form is to enter the Payment terms for the payment schedule agreed for the project. Screen for this is shown as follows:





Field Explanation

Field	Description
Milestone Name	Select the milestone from the pick list as entered in the set milestone
Percentage	You may enter the % against the project cost to calculate the milestone cost
Amount	Enter the whole amount for this milestone to be paid, % is calculated for the amount entered.

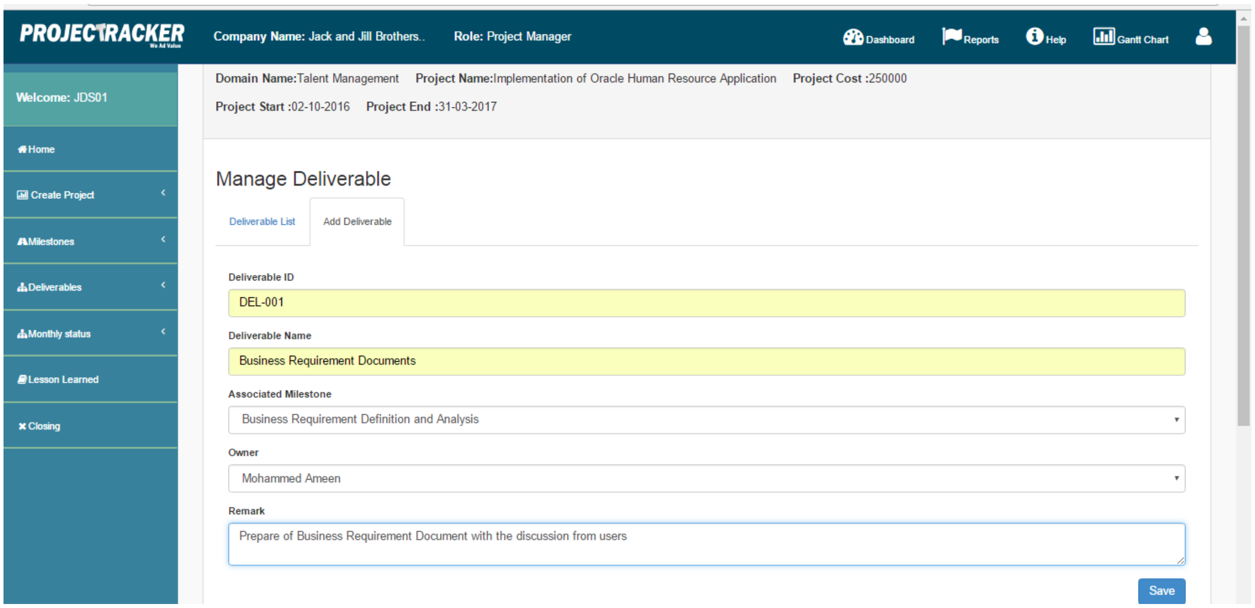


Click on the dollar note icon against the milestone and enter the invoices paid to the milestone.

4.3.3 Deliverables

4.3.3.1 Define Deliverable

This form is to enter the number of deliverables against each milestone.

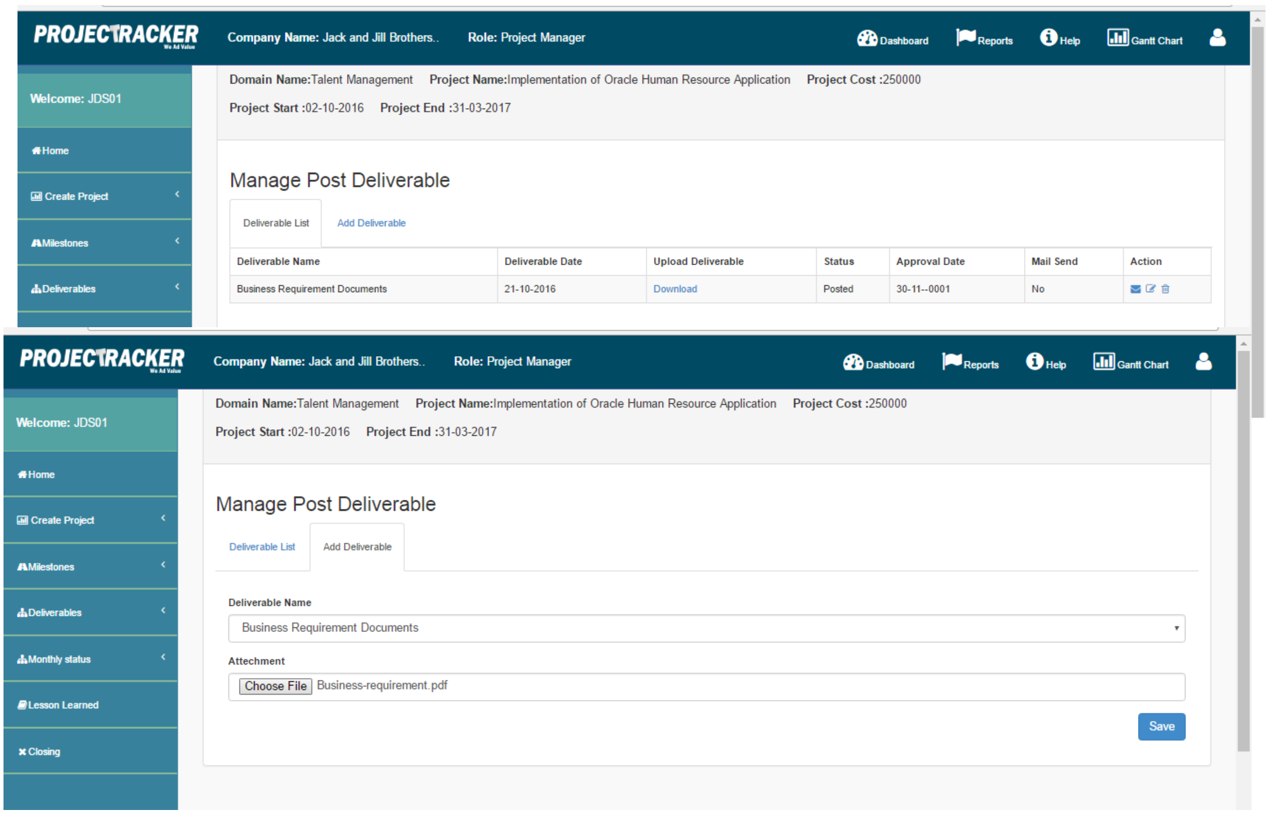


Field Explanation

Field	Description
Deliverable ID	Enter the Deliverable ID , preferable as DEL-001.1 for first milestone
Deliverable Name	Name of Deliverable as available in the contract
Associated Milestone	Select the Milestone for the deliverable to be completed
Owner	Select the stakeholder who will approve the deliverable, this was entered in identify stakeholder form
Remark	Any remark if required for the deliverable

4.3.3.2 *Post Deliverable*

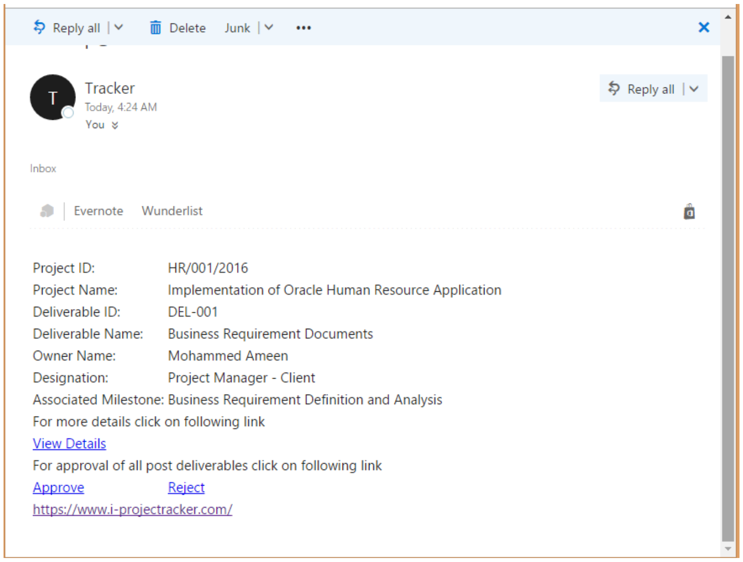
This form is to Post /attach the document against the define deliverables and send to the stakeholder.



Field Explanation

Field	Description
Deliverable Name	Select the deliverable name from drop down list
Attachment	Chose the document from the local drive (.doc, pdf, ppt, xls)
Action	From the action button on the list tab, click the email icon to send the email to the stakeholder responsible for this deliverable

Stakeholder will receive an email as mentioned below and can view/approve/reject within the email.

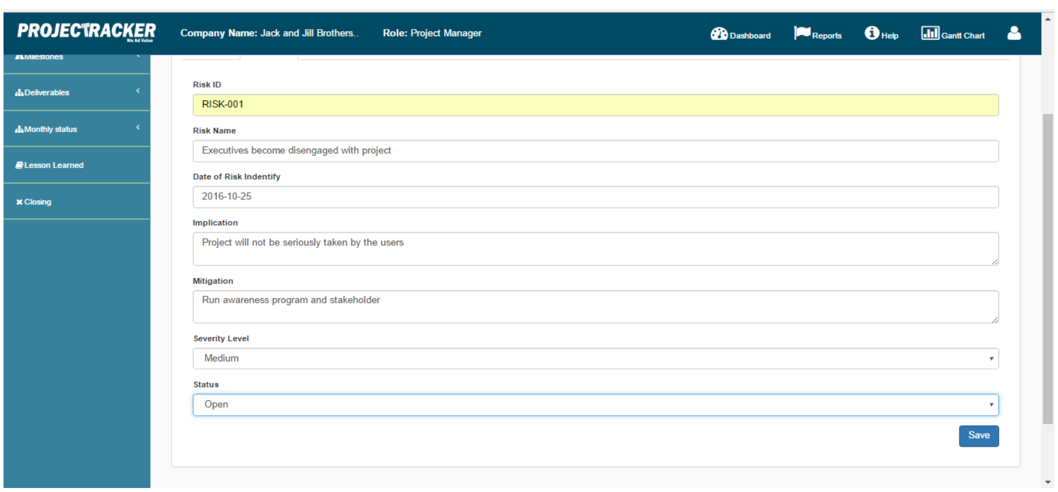


Once the deliverable is approved by the stakeholder, status is marked as 'Approved' and if the mail has been sent to the stakeholder for approval, it will mark 'Yes' under mail sent.

4.3.4 Monthly Status

4.3.4.1 Risks

This form is to identify the risk of the project and manage by priority.



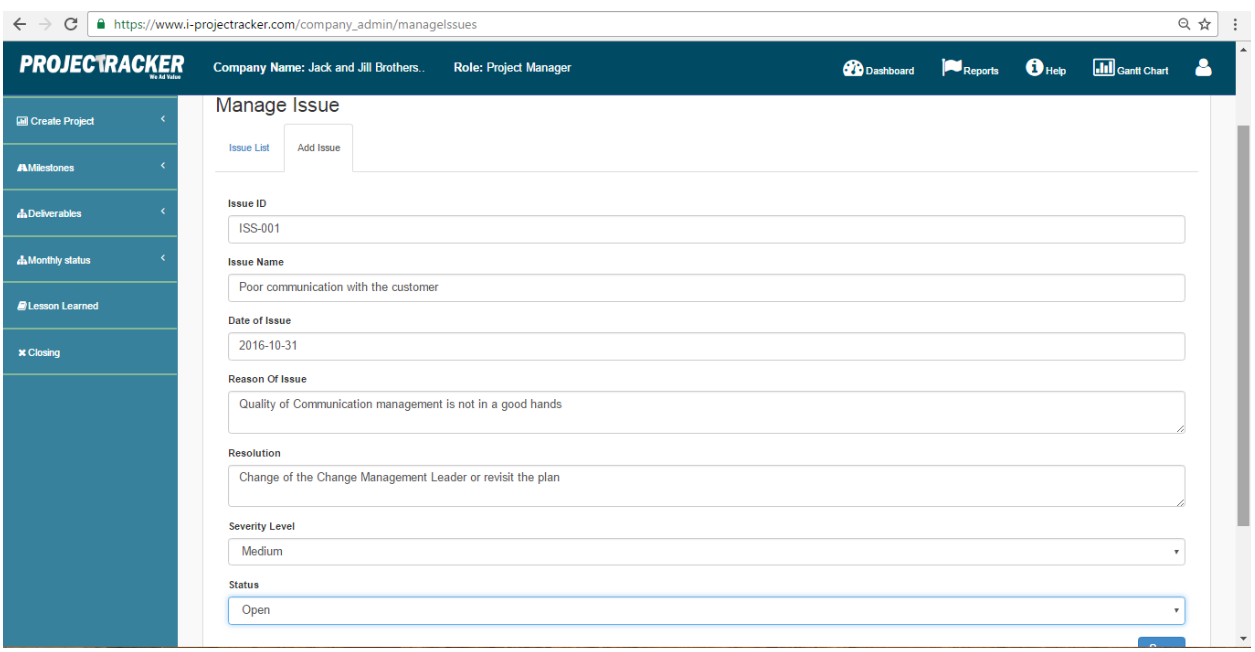
Field

Explanation

Field	**Description**
Risk ID	Enter an unique ID for the Risk
Risk Name	Enter the name of Risk
Date of Risk Identify	Date of Risk Identify
Implication	Enter the implication or impact of the risk carried out
Mitigation	Enter the mitigation to handle the risk.
Severity Level	Severity of Risk level.
Status	Open or Close

4.3.4.2 Issues

This form is to highlight the issues arising in the project and its implications.

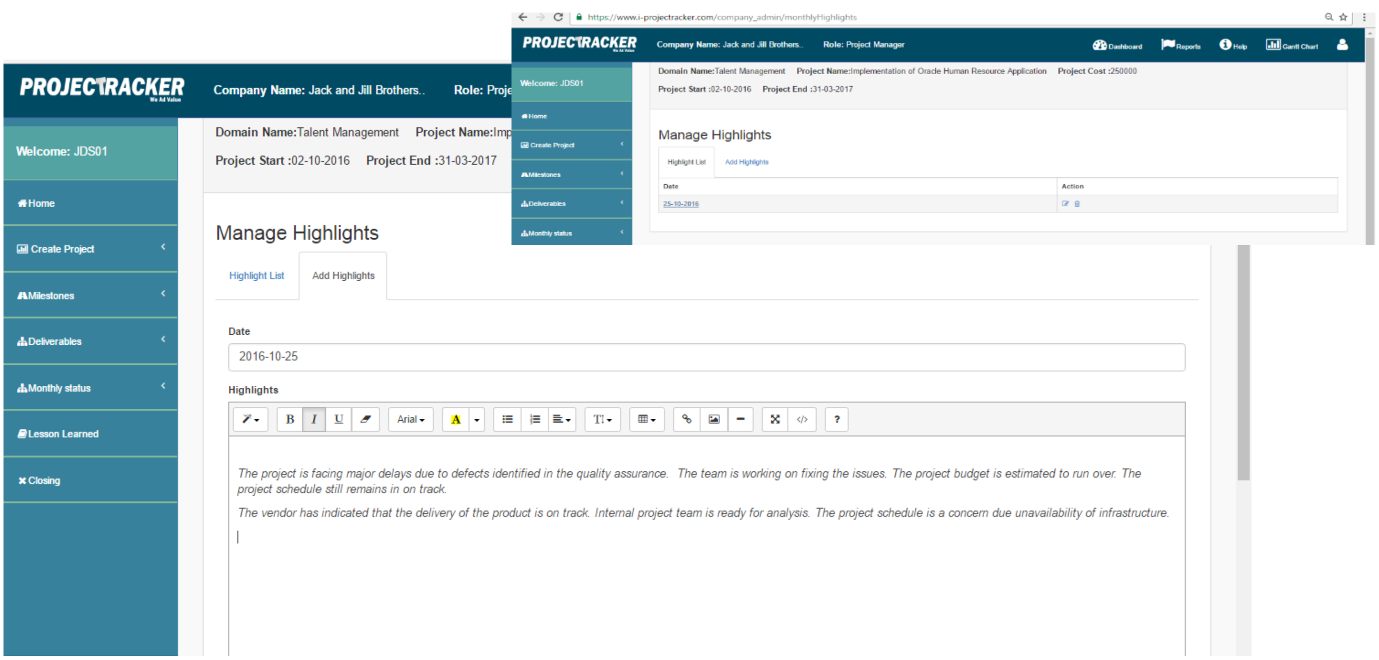


Field Explanation

Field	Description
Issue ID	Enter an unique ID for the Issue
Risk Name	Enter the name of Issue
Date of issue	Date of issue
Reason of Issue	Enter the reason of the issue
Resolution	Enter the resolution of the issue
Severity Level	Severity of issue level.
Status	Open or Close

4.3.4.3 Monthly Highlights

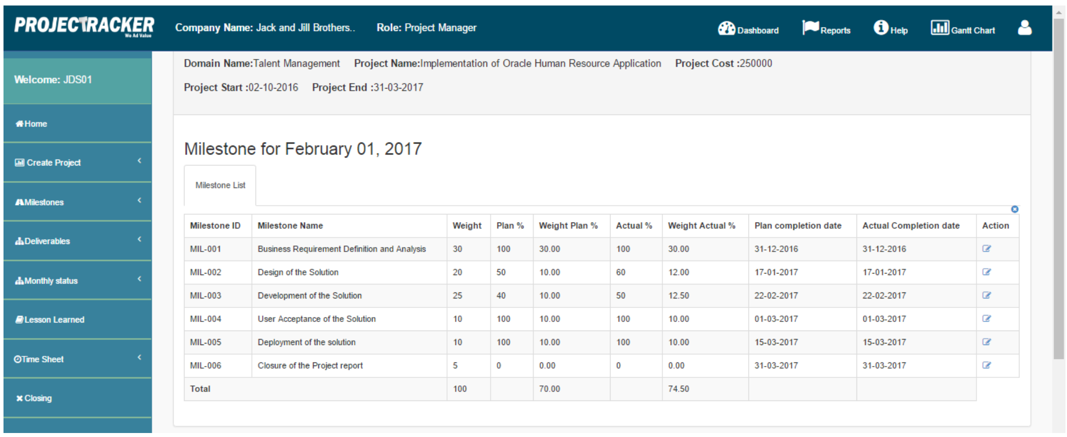
This for is to provide the monthly or selected date highlight of the project. You can enter risk text here to provide the detail note of the project at a glance for the management.



Field Explanation

Field	Description
Date	Click on Add tab and enter the date of highlight. Save the date
Date Entered	Click to select the date entered before for entering the highlight
Highlights	Enter the highlight in an open rick text area and save.

4.3.4.4 Update Milestone Status



Milestone ID	Milestone Name	Weight	Plan %	Weight Plan %	Actual %	Weight Actual %	Plan completion date	Actual Completion date	Action
MIL-001	Business Requirement Definition and Analysis	30	100	30.00	100	30.00	31-12-2016	31-12-2016	
MIL-002	Design of the Solution	20	50	10.00	60	12.00	17-01-2017	17-01-2017	
MIL-003	Development of the Solution	25	40	10.00	50	12.50	22-02-2017	22-02-2017	
MIL-004	User Acceptance of the Solution	10	100	10.00	100	10.00	01-03-2017	01-03-2017	
MIL-005	Deployment of the solution	10	100	10.00	100	10.00	15-03-2017	15-03-2017	
MIL-006	Closure of the Project report	5	0	0.00	0	0.00	31-03-2017	31-03-2017	
Total		100		70.00		74.50			

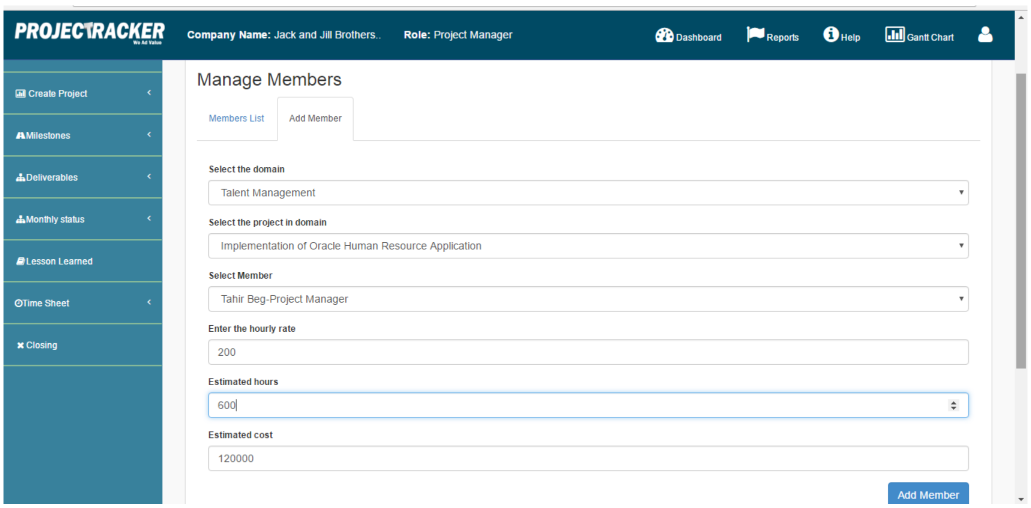
This form is to enter the monthly or periodical update of the milestones for plan vs actual percentage achieved. Percentage works based on the weight % enter against each milestone. Calculation is as follows:

Milestone Name	Weight	Plan%	Actual%	Weight Plan %	Weight Actual %
Business Requirement Definition and Analysis	30	100	100	30	30.00
Explanation	As entered at milestone stage	Entered plan as 100	Enter actual as 100	Calculated (30 * 100% enter as plan)	Calculated (30 * 100% enter as actual)

4.3.5 Time Sheet

4.3.5.1 Assign team member to a domain and project

This form is to assign the team members to work on their domain and the projects. Project Manager will select the member already created by company administrator with position for their project and give an estimated overall hour for the member to work.

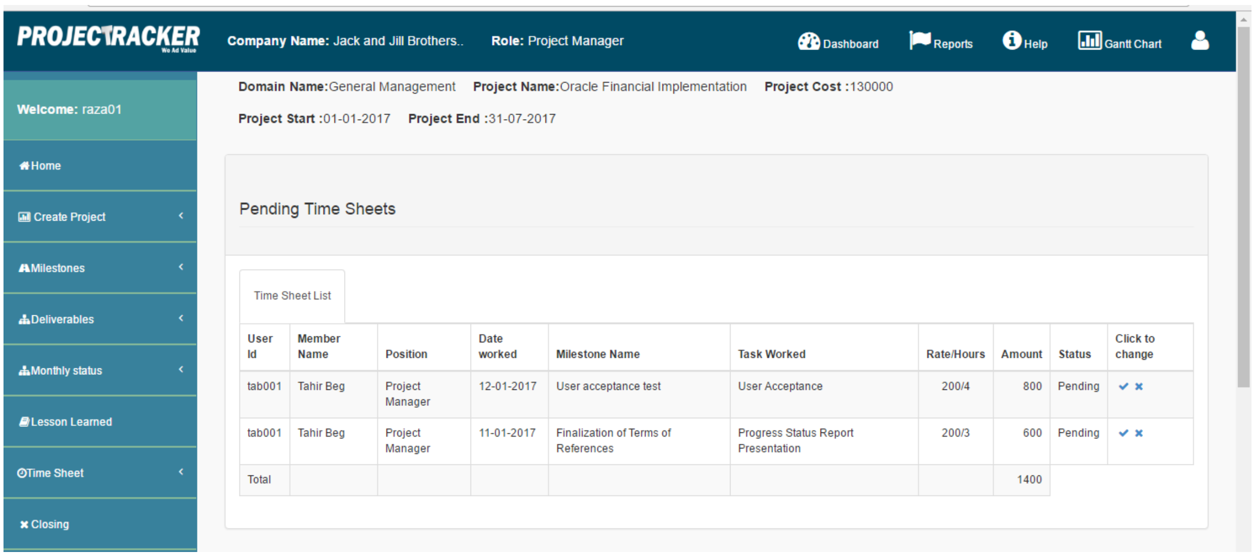


Field Explanation

Field	Description
Select the domain	Select the domain assigned to the project manager
Select the project to domain	Select the project from the assigned domain.
Select Member	Select the member for this project
Enter for hourly rate	This rate is shown from the original rate entered for the member, however can be changed.
Estimated hours	Enter an estimated total hour for this member required to work. This will be used to compare with the actual hours.

4.3.5.2 Pending Time sheet

This form is to approve/reject all pending time sheet sent by individual team members.

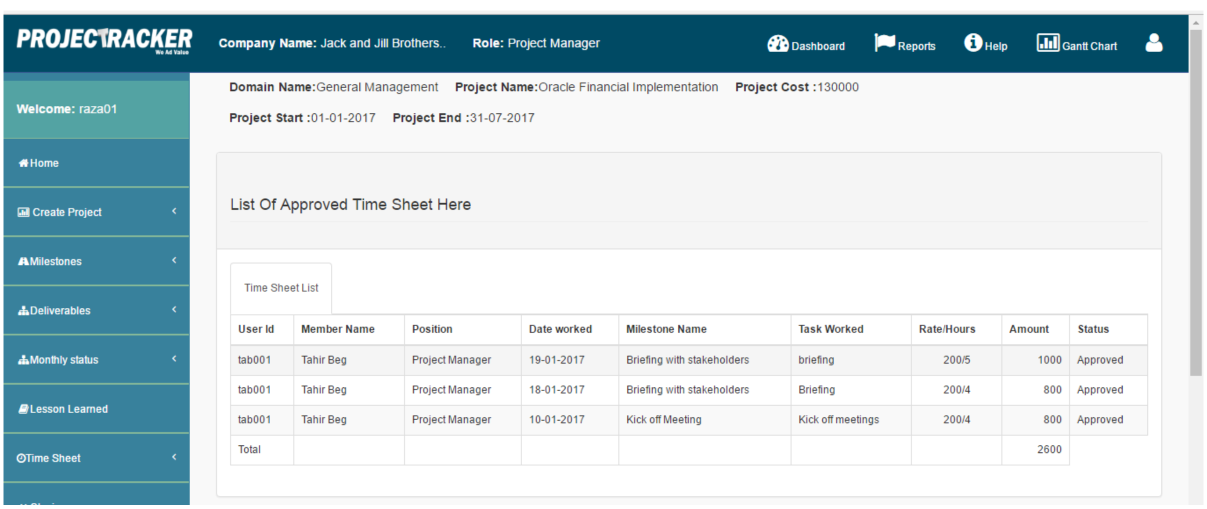


User Id	Member Name	Position	Date worked	Milestone Name	Task Worked	Rate/Hours	Amount	Status	Click to change
tab001	Tahir Beg	Project Manager	12-01-2017	User acceptance test	User Acceptance	200/4	800	Pending	✔ ✖
tab001	Tahir Beg	Project Manager	11-01-2017	Finalization of Terms of References	Progress Status Report Presentation	200/3	600	Pending	✔ ✖
Total							1400		

This form show all the pending time sheets submitted by the team members. Project Manager will either approve or reject by clicking the icon accordingly in the 'Click to Change' column.

4.3.5.3 Approved Time sheet

This form show all the approved time sheet to the project manager for this information.



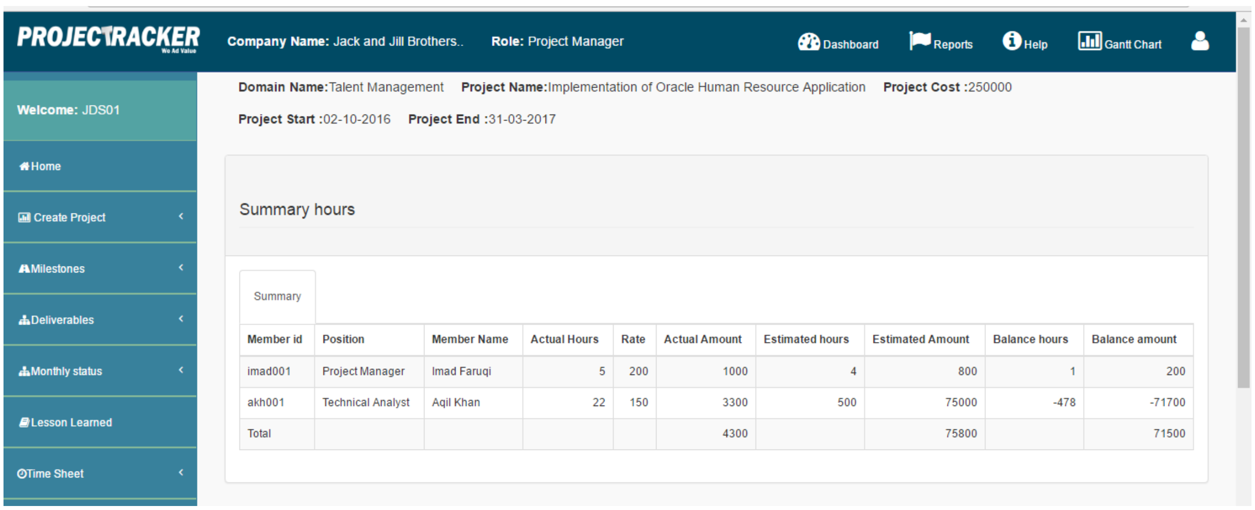
User Id	Member Name	Position	Date worked	Milestone Name	Task Worked	Rate/Hours	Amount	Status
tab001	Tahir Beg	Project Manager	19-01-2017	Briefing with stakeholders	briefing	200/5	1000	Approved
tab001	Tahir Beg	Project Manager	18-01-2017	Briefing with stakeholders	Briefing	200/4	800	Approved
tab001	Tahir Beg	Project Manager	10-01-2017	Kick off Meeting	Kick off meetings	200/4	800	Approved
Total							2600	

4.3.5.4 Rejected Time sheet

This form shows all the rejected time sheet if any, Team member has to resubmit for approval.

4.3.5.5 Summary hours of all the dates

This form is a report like form to provide the summary of hours by each team member to track against the estimated hours.



4.3.6 Lessons Learned

This form is to enter all lessons learned for the project in technical and administrative categories.

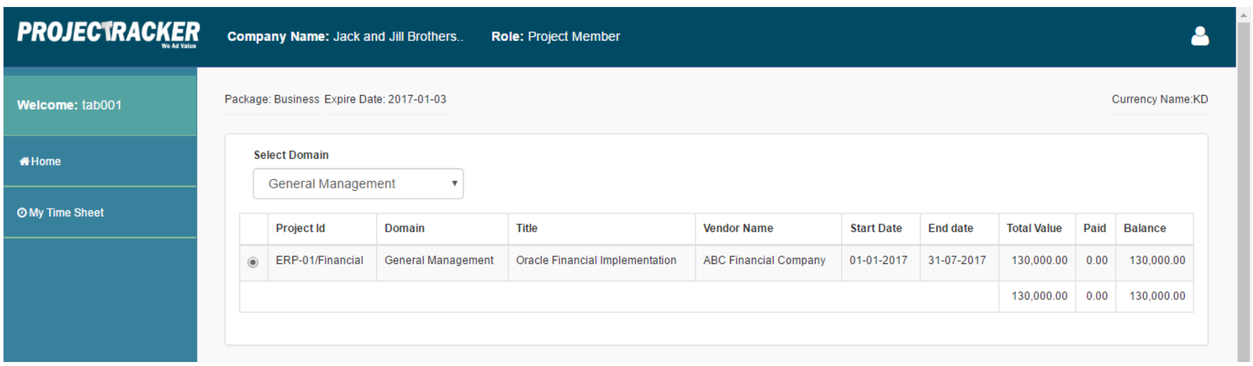
4.3.7 Closing

This form is to close the project once it is completed. Project Once closed will not be available for edit by the Project Manager unless requested by the Company Administrator to open.

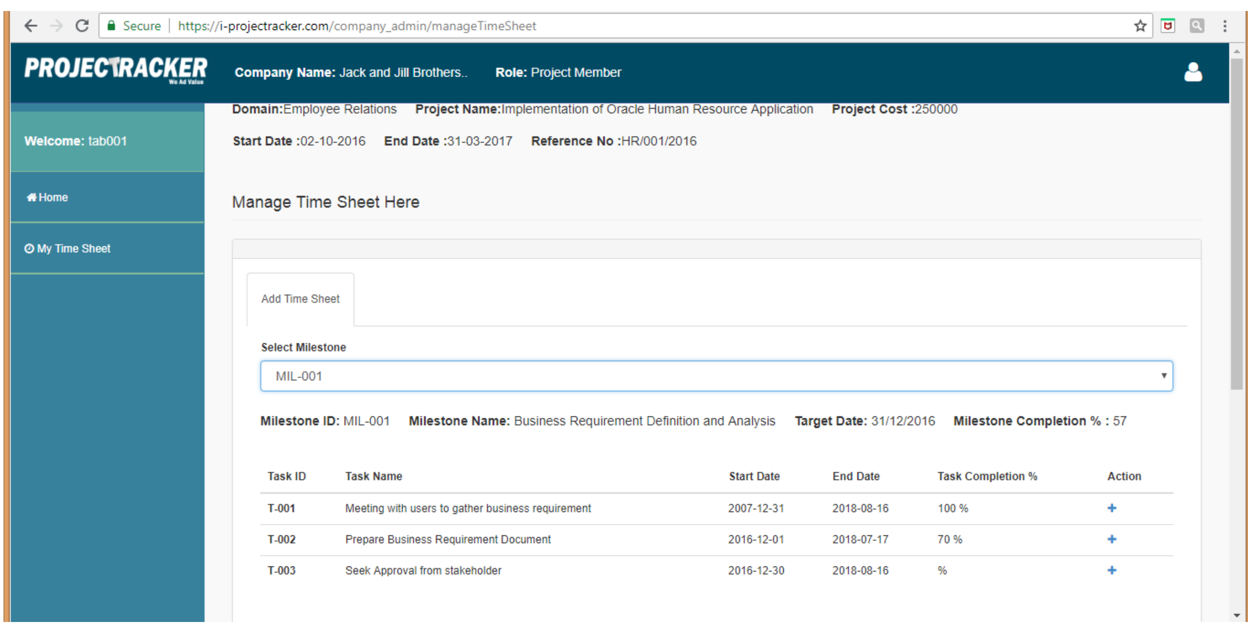
4.4 Team Member Role

This role is for the Team Member to enter their Time Sheet against the Task and submit for Project Manager to Approve.

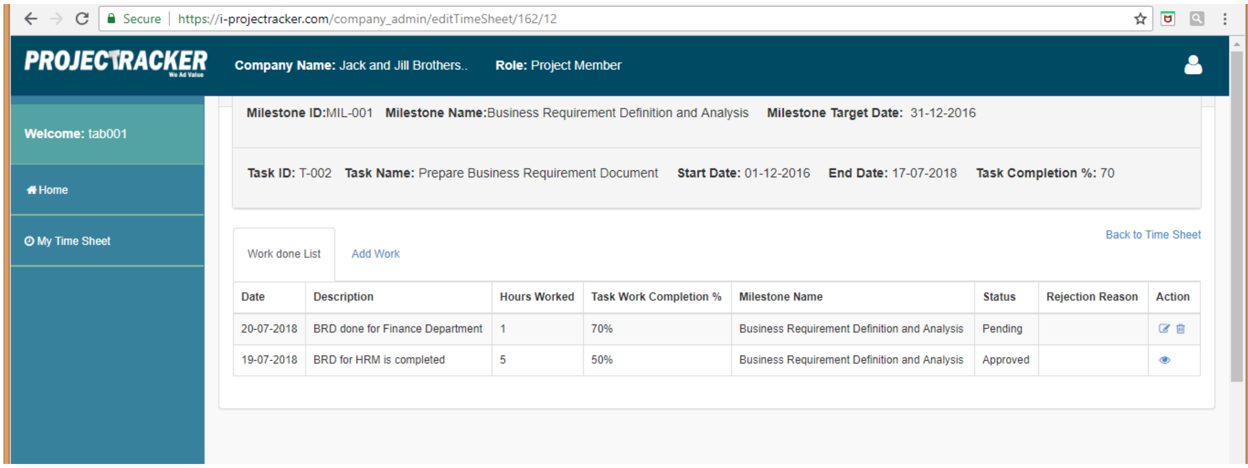
Once the Team Member User Id is created, an email is generated for the team member to notify the Project and Domain he/she has been assigned. Team Member is also requested to reset the PW. Following screen is available for the Team Member to enter/update time sheet.



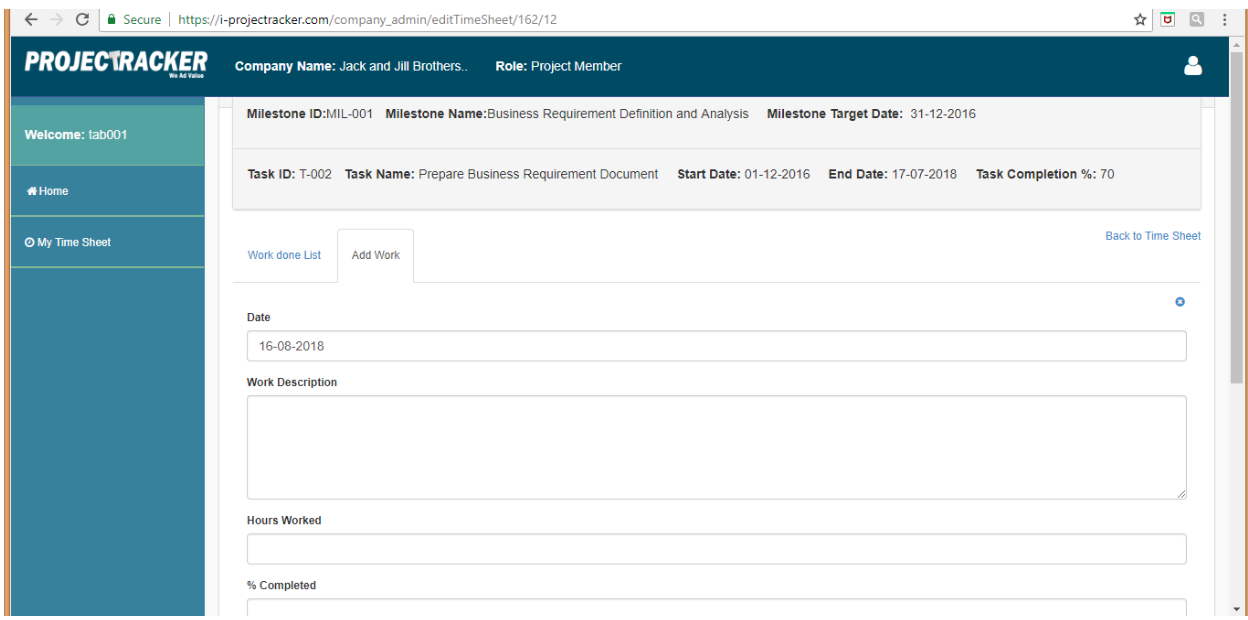
Select the Domain and the Project against which the hours for the task is to be entered. Again select the Milestone against the Work done to be entered for each Task. Click on the + sign to enter the work done for assigned task.



This is the list of Time Sheet already entered by the team member. Click Time Sheet to add work tab to enter new work done against the selected task.



Add work done against the Milestone and the Task assigned. There can be more than one work done against the task until the task is 100% completed. Every work done submitted with the % completion is approved by the Project Manager. Once the Work is approved there will be no edit or delete.

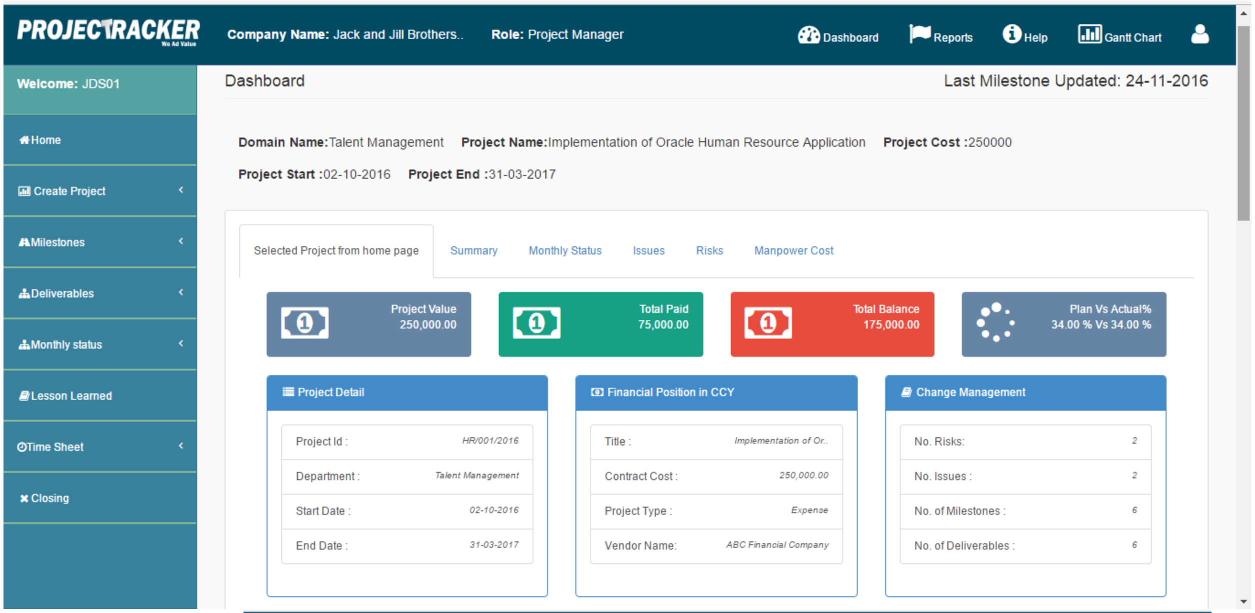


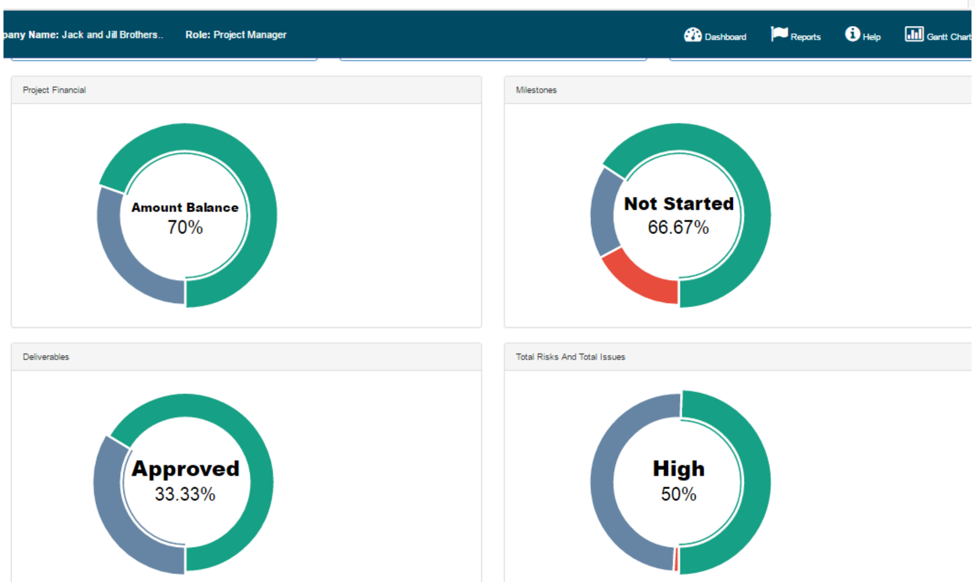
Field Explanation

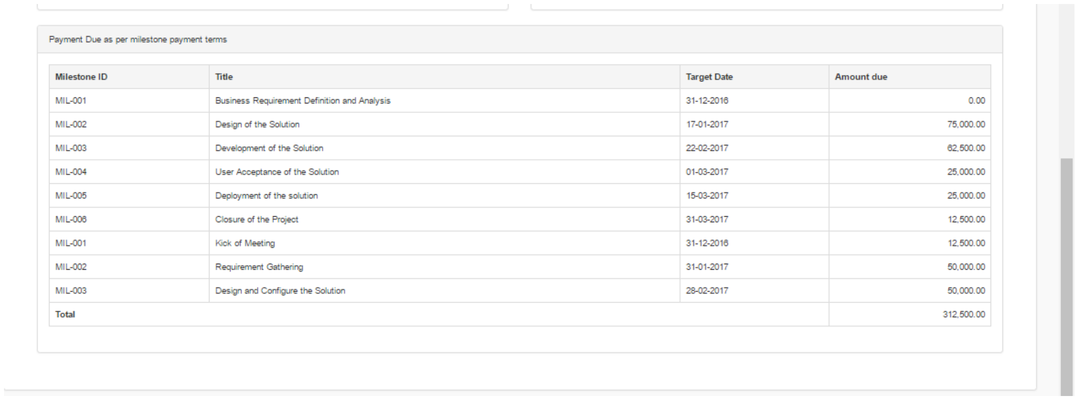
Field	Description
Date	Enter the date when the work is done for the task.
Work Description	Enter the description of the work done for the assigned task.
Hours Worked	No. of Hours worked on the date for the task. Hours should be not more than 9 hours.
% Completion	Enter the % Completion for the Task. % Completion is entered as aggregated from the previous. e.g first work done can be 30% and next work done for the same task should be entered as 40%. Last entry of % Completion is shown as % completion of the task. All Task % completion is added and divided by number of task and % completion of milestone is derived.

4.5 Dashboard

Dashboard area of the Application provides various graphs at Project level and also at Project Manager level summarizing all the projects under his/her domains. Click on the Dashboard available on top of the screen which will take you to this area.







Payment Due as per milestone payment terms

Milestone ID	Title	Target Date	Amount due
MIL-001	Business Requirement Definition and Analysis	31-12-2016	0.00
MIL-002	Design of the Solution	17-01-2017	75,000.00
MIL-003	Development of the Solution	22-02-2017	62,500.00
MIL-004	User Acceptance of the Solution	01-03-2017	25,000.00
MIL-005	Deployment of the solution	15-03-2017	25,000.00
MIL-006	Closure of the Project	31-03-2017	12,500.00
MIL-001	Kick of Meeting	31-12-2016	12,500.00
MIL-002	Requirement Gathering	31-01-2017	50,000.00
MIL-003	Design and Configure the Solution	28-02-2017	50,000.00
Total			312,500.00

Explanation>> Tab>> Selected Project from Home Page

Tab>> Selected Project from Home page>> information on this tab refers to the project selected from the home page which comprises as follows:

Tiles with Project Value, Total Paid, Total Balance and Plan vs. Actual as of date updated above.

Three Portlets with Project information and No. of Risks, Issues, No. of Milestones and Deliverables in the selected Project.

Another four Portlets provide the following information:

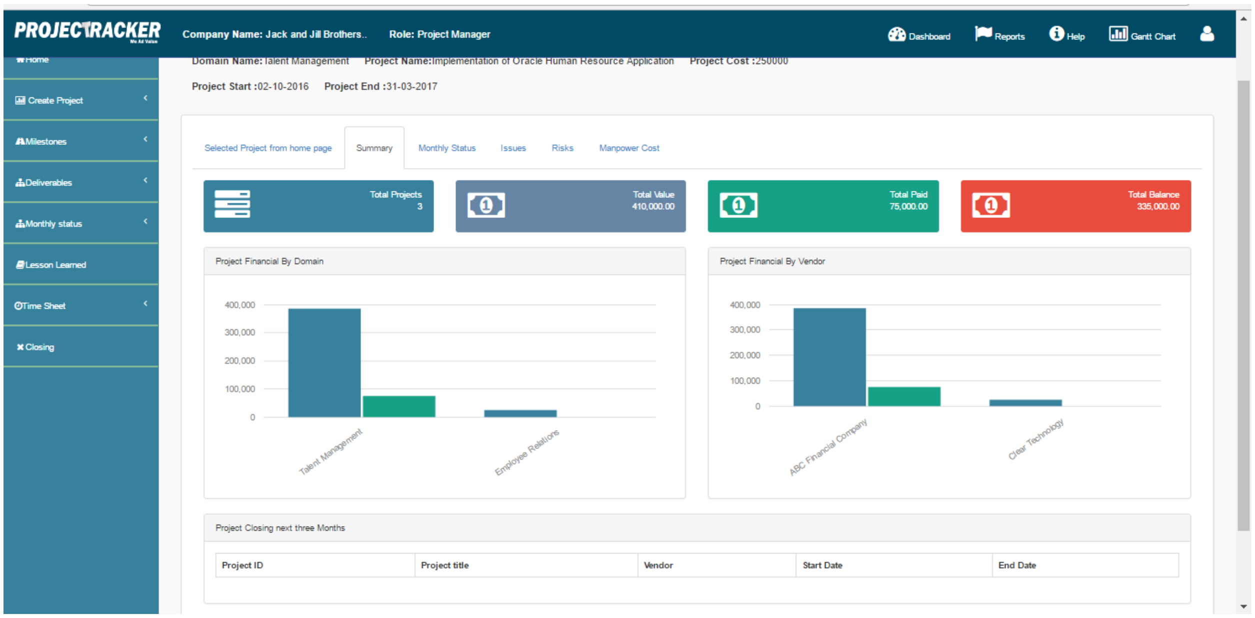
Milestones >> Percentage started, Completed, in Progress

Project Financial>> Percentage of amount paid and balance

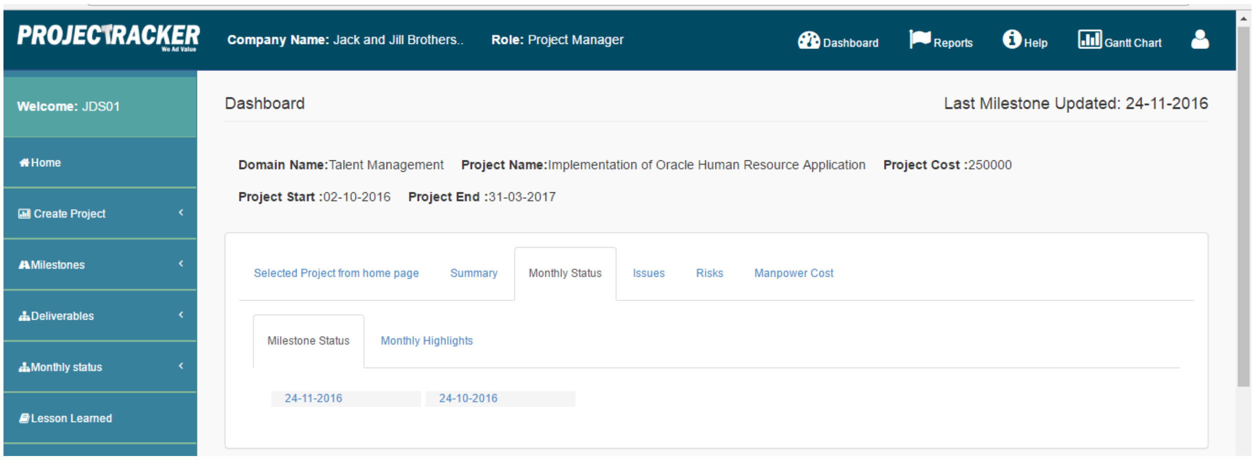
Deliverables>> Percentage of Deliverables approved and registered.

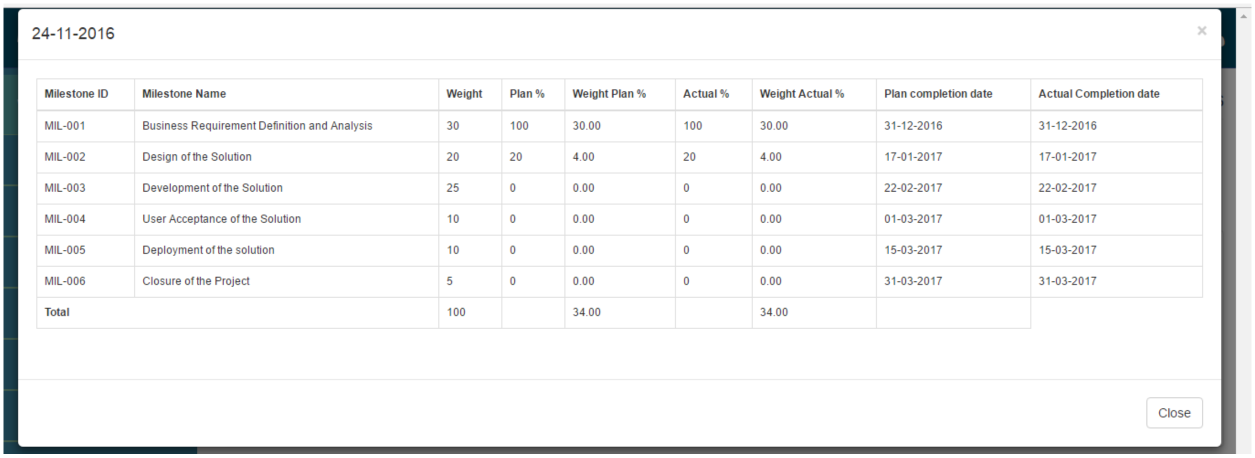
Total Risks and Issues>> Percentage of Risks/Issues on High, Medium and Low

At the bottom, a table provide the information of due payments for the selected Project.



- Tab>> Summary >> information on this tab summarize of all the projects assigned to the Project Manager which comprises as follows:
  - Tiles with aggregating all the projects and showing No. of Projects, Total Value, Total Paid, Total Balance.
  - Two Portlets showing the following information:
    - Project Financial by Domain>> Provide the information under each domain assigned to the Project Manager.
    - Project Financial by Vendor>>Provide the information by company/vendor working on the Projects.
  - At the end a table showing all the project if it is reaching near to close in next three months.





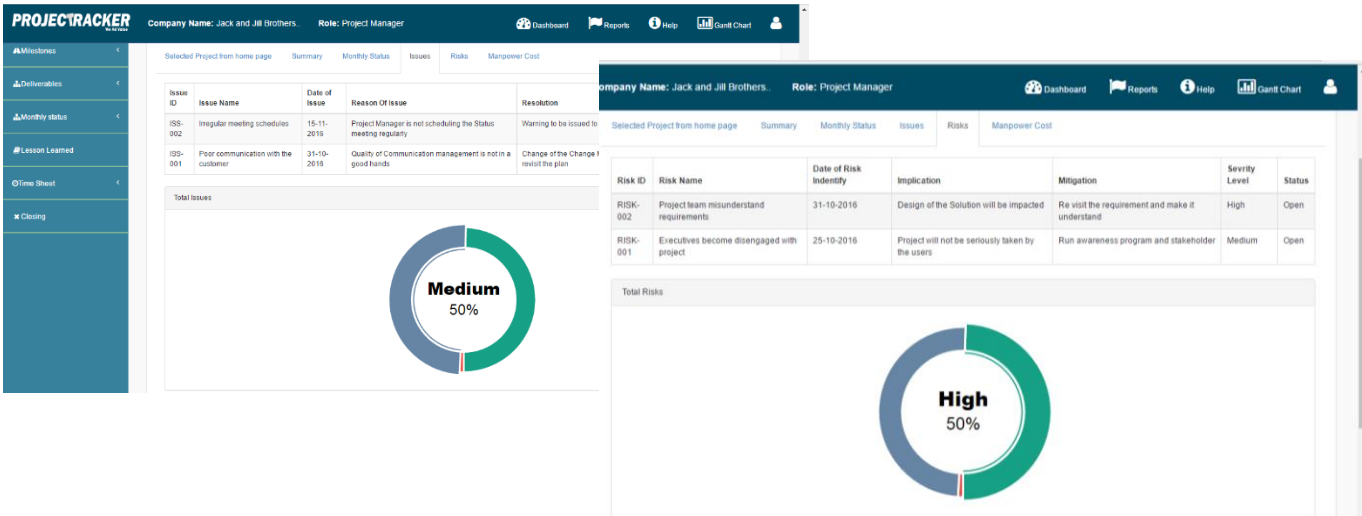
24-11-2016

Milestone ID	Milestone Name	Weight	Plan %	Weight Plan %	Actual %	Weight Actual %	Plan completion date	Actual Completion date
MIL-001	Business Requirement Definition and Analysis	30	100	30.00	100	30.00	31-12-2016	31-12-2016
MIL-002	Design of the Solution	20	20	4.00	20	4.00	17-01-2017	17-01-2017
MIL-003	Development of the Solution	25	0	0.00	0	0.00	22-02-2017	22-02-2017
MIL-004	User Acceptance of the Solution	10	0	0.00	0	0.00	01-03-2017	01-03-2017
MIL-005	Deployment of the solution	10	0	0.00	0	0.00	15-03-2017	15-03-2017
MIL-006	Closure of the Project	5	0	0.00	0	0.00	31-03-2017	31-03-2017
Total		100		34.00		34.00		

Close

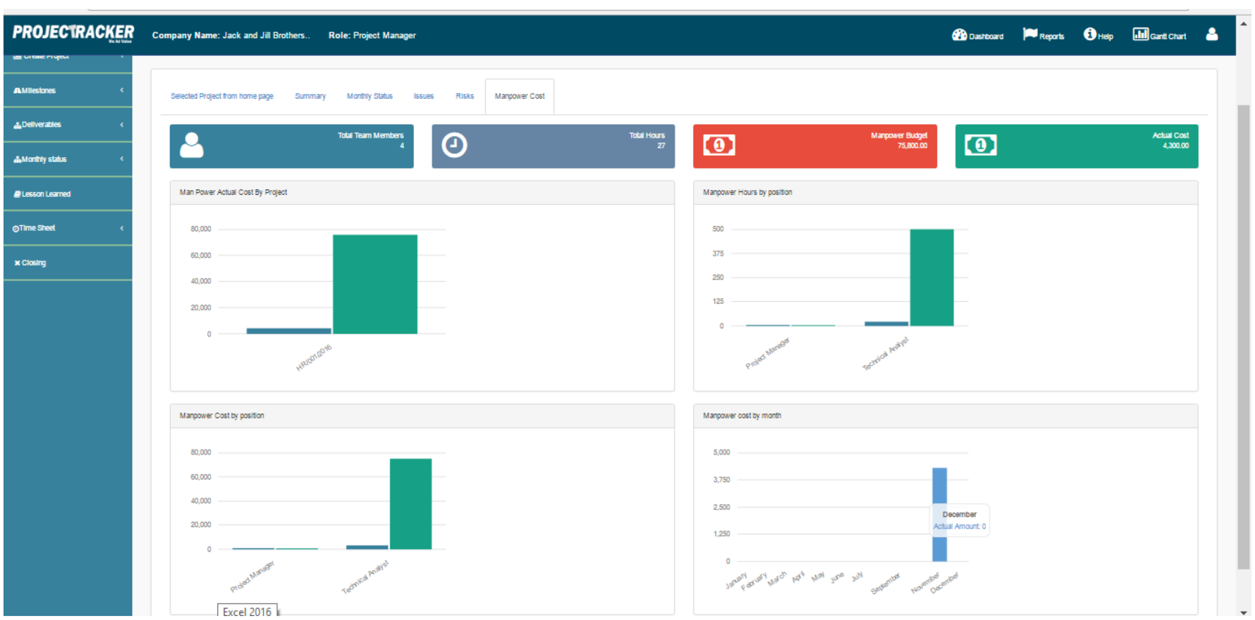
Tab>> Monthly Status

This tab provides the monthly status of milestones, select the date you would like to see the status. Last date updated is already provided on the first tab.



Tab>> Issues/Risks

This tab provide the information and details of Risks and issues of the selected Projects with the donut graph depicting the picture accordingly.



Tab>> Manpower Cost

Manpower Cost is directly related to the time sheet module of the application. Four tiles on the top provide the information for the selected project as follows:

- No of Members assigned on the selected Project
- Total number of hours aggregated worked so far.
- Total Cost estimated for the Project
- Actual Cost incurred based on their rates.

Further, four portlets provide the information as follows:

- Manpower cost Actual by different projects under the Project Manager.
- Manpower hours Actual by different projects under the Project Manager.
- Manpower Cost Actual by position under different projects for the logged in Project Manager.
- Manpower Cost by month as the project progress.

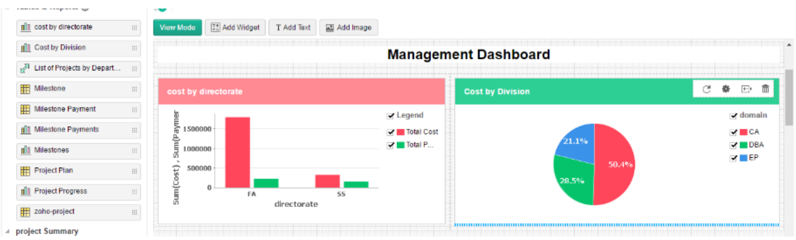
4.6 Reporting

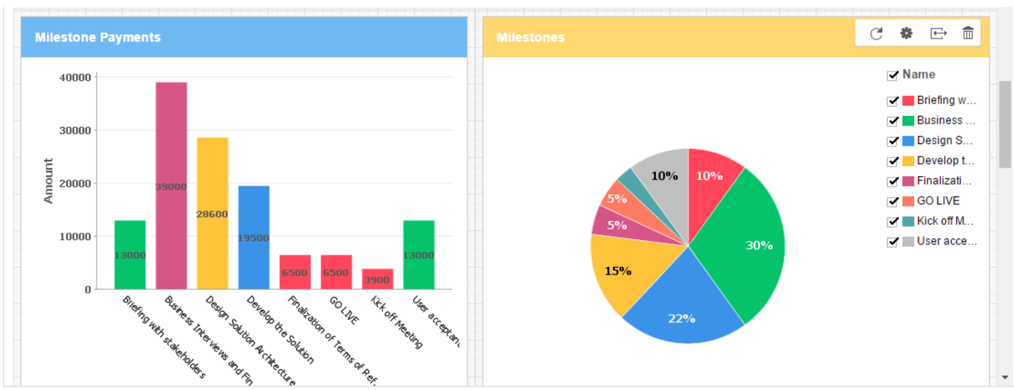
Projectracker also provides various Reports which can be downloaded on PDF format and printed, such as :

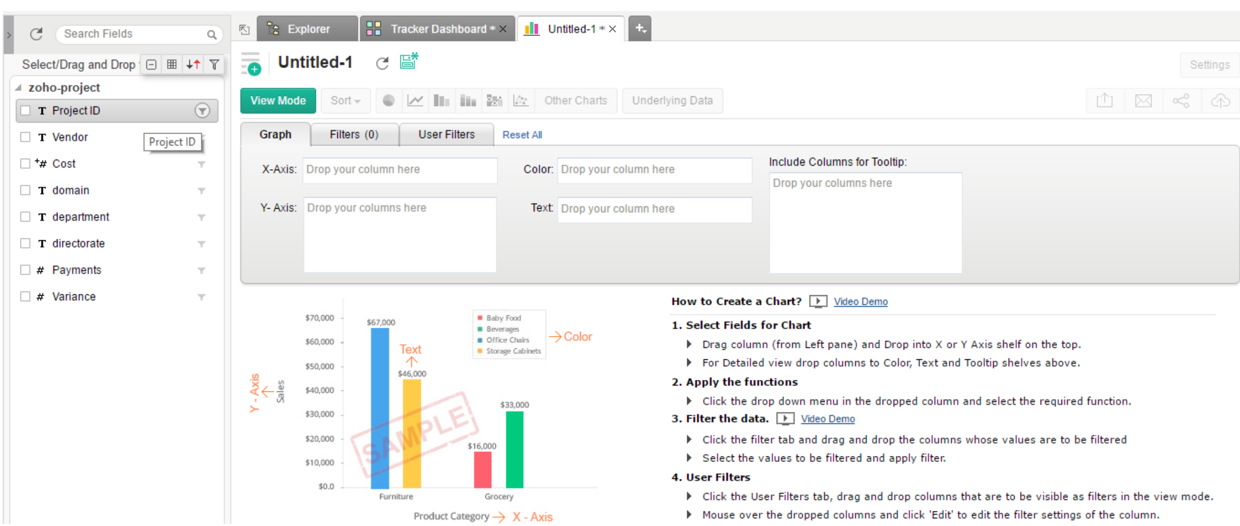
- List of projects by domain
- Projects by Program
- Projects Payments
- Invoice Reports with Payment
- Milestone with Deliverables
- Milestone Status by Month/year
- Payment Due Report
- Risk Identified
- List of Issues
- List of Tasks by team members with % completion
- List of Milestone % completion based on Tasks % completion.
- List of Pending Tasks
- Cost of Team Members by Project, Milestone and Task
- Summary of Cost of the Project.

4.7 Business Intelligence

Projectracker also provides a more Reports and Dashboards as a BI – Business Intelligence Reports powered by ZOHO Reports. All the Basic Tables are available for the client to develop their reports as required. Sample of the BI Site of the Projectracker is as follows:







This Module of the BI provides the facility to create your reports and Dashboard based on the columns available on the left by just simply dragging on X-Axis and Y-Axis of the required column.

End of Document