

# Project Screen

How to Create a Project in Help Desk

1. On the Menu Panel, click on **Help Desk**.
2. Click **Projects** menu to open the **Project** search screen.
3. Click **New** toolbar button to create new project.

4. Fill in data. (Required fields: **Project Name**(must be unique), **Description**, **Customer**, **Contact**, **Type**, **Project Status**)
5. Click Save button.

TABS:

- **Details**
  - The details tab indicates the Project Name, Description, LOB, Customer, Contact and other important details about the project. Fill in the necessary fields then click Save.

- **Overview**
  - To add details to the Overview tab, Click **Overview** tab, then fill out the fields.

Details Overview Activities Attachments Audit Logs

Contact Information

+ Insert X Remove Export • View • Filter (F3)

Contact Name	Contact Title	Location	Decision Role	Attitude	Extent of Contact	Key Concerns	Expectations of Us

What are the top problems they are trying to solve?

+ Insert X Remove Export • View • Filter (F3)

Description\*

Stake Holder

What are the top concerns they have?

+ Insert X Remove Export • View • Filter (F3)

Description\*

Stake Holder

What do they gain by solving these problems?

+ Insert X Remove Export • View • Filter (F3)

Description\*

Stake Holder

What is our unique business value?

+ Insert X Remove Export • View • Filter (F3)

Description\*

Stake Holder

How do we solve their problems and concerns?

+ Insert X Remove Export • View • Filter (F3)

Description\*

Stake Holder

- Activities

- To add activities to the project, Click **Activities** tab, click New Event/ New Task, New Comment, Log Call, Send Email then fill in the necessary details. Once done, save the activity.

Project -

New Save Search Undo Generate Tickets Close

Details Overview Activities Attachments Audit Logs

+ Open New Event New Task New Comment Log Call Send Email Export • View • Filter (F3)

Type	Attachment	Created	Subject	Start/Due Date	Hours	Created By	Assigned To	Status	Priority	Category

- Attachments

- Click the **Attachments** tab, select file then click ok button

Project -

New Save Search Undo Generate Tickets Close

Details Overview Activities Attachments Audit Logs

+ Add Files Preview Edit Download X Delete Export • View • Filter (F3)

Name	Type	Size	Date Added	Comment	User

- Audit Log

- Click **Audit Log** to be able to see all the changes made to the project

Project -

New Save Search Undo Generate Tickets Close

Details Overview Activities Attachments Audit Logs

+ Export Filter (F3)

Change Type	Original Value	New Value	Changed By

- Key Data

- To add details to the **Key Data** tab, click Key Data the fill in the necessary fields.

Project -

New Save Search Undo Generate Tickets Close

Details Overview Activities Attachments Audit Logs

+ Key Data Ticket List (0) Project List (0) Modules Quotes/Orders JIRA Issues (0) Milestone Summary

Project Status Customer Hold Sales Date

Project Manager Software Bill Date

Implementation Lead Software Bill Date Comments

Data Conversion Lead

Customer Success Manager

Executive Sponsor

Sales Person Hardware Order Date

Initial Data Collection Complete Hardware Order Date Comments

Confirmed Kickoff Dates

Customer Project Manager

Customer Leadership Sponsor

Customer Key Project Goals Initial User Group Dues Invoice

Custom Modifications Received Down Payment

Role	Definition
Project manager	The iRely project manager that is responsible for the project plan and budget
Implementation Lead	The iRely manager who is in charge of implementing the project
Data conversion lead	The iRely manager responsible for scheduling assigning and managing all data conversions

Customer success manager	This is the person that is responsible for the success of the customer - This should be added to the customer record and defaulted from there
Executive Sponsor	This is the person who initiated the project
Sales Person	This is the person who initiated the sale with the customer

• Ticket List

- To be able to see all the tickets under the project, go to the ticket list tab. In this tab, you will be able to link tickets, create tickets and remove tickets from the project
  - To be able to link a ticket, users should open the ticket and select the project on the project field

The screenshot shows the JIRA ticket form for ticket HDYN-204270. The 'Project' field is highlighted with a red box and shows a dropdown menu with 'HDYN-204270' selected. The form includes sections for Customer Details, Ticket Details, and a description area.

- Users may also be able to add tickets on the project screen by generating tickets from template tickets. See: [Add Ticket or Generate Ticket to the Ticket List](#) for details

The screenshot shows the JIRA project screen with a table of tickets. The table has columns for Ticket No., Subject, Contact, Priority, Module, SOP Link, Training Manual Link, and Training Agenda Link.

- The ticket list tab is where users monitor the tickets for the project.
  - To open an existing ticket, double click on the ticket number to go to the ticket screen
  - Users may edit the Description, contact, Assigned to, start date, due date, completed date, notes and status of the tickets from the project list screen. When other columns need to be edited, the user needs to open the ticket and edit it from there.
  - There are different ticket statuses for the tickets on the ticket list screen such as:



- Here you will see the ticket number, type, Jira key, summary, Estimate, reporter, Assignee, Fixed by, priority, status, date created, updates and fixed version.

Key Data   Ticket List (386)   Project List (0)   Modules   Quotes/Orders   JIRA Issues (25)   Milestone Summary											
Export • View • Filter (F3)											
Ticket No	Type	Key	Summary	Estimate	Reporter	Assignee	Fixed By	Priority	Status	Created	Fixed Version
Project: HDTN-268553 <b>Bug</b> IC-11609 <b>Import Name Error on Importing software</b> <a href="#">View</a>											
HDTN-268553	- UAP Test ...	TS-37183	Import Name Error on Importing software		William Ramirez	Alan Delano		- Critical	OPEN	4/27/2023	6/5/2023 22.1
HDTN-268553	- UAP Test ...	TS-37182	Import Name Error on Importing software		William Ramirez	Alan Delano		- Major	CLOSED	2/5/2023	2/6/2023 22.1
HDTN-268553	- UAP Test ...	TS-37055	Import Name Error on Importing software		William Ramirez	Alan Delano		- Major	CLOSED	2/5/2023	2/6/2023 22.1
HDTN-268553	- UAP Test ...	TS-37054	Import Name Error on Importing software		William Ramirez	Alan Delano		- Major	CLOSED	2/2/2023	2/6/2023 22.1
HDTN-268553	- UAP Test ...	TS-37053	Import Name Error on Importing software		William Ramirez	Alan Delano		- Major	CLOSED	2/2/2023	2/6/2023 22.1
HDTN-268553	- UAP Test ...	TS-36923	Import Name Error on Importing software		William Ramirez	Alan Delano		- Major	CLOSED	1/31/2023	1/31/2023 22.1
HDTN-268553	- UAP Test ...	TS-36924	Import Name Error on Importing software		William Ramirez	Alan Delano		- Major	CLOSED	1/31/2023	2/6/2023 22.1
HDTN-268553	- UAP Test ...	TS-36922	Import Name Error on Importing software		William Ramirez	Alan Delano		- Major	CLOSED	1/31/2023	2/5/2023 22.1

## - Milestone Summary

- To be able to see the list of milestones in the ticket, click the Milestone summary tab
- Here you will see the milestones within the project, the open tickets, completed tickets, total tickets, start date, due date, completed date, status, completion%, quoted hours, actual hours, over/shourt hours.

Key Data   Ticket List (386)   Project List (0)   Modules   Quotes/Orders   JIRA Issues (25)   Milestone Summary											
Export • View • Filter (F3)											
Priority	Description	Open Tickets	Completed Tickets	Total Tickets	Start Date	Due Date	Completed Date	Status	Completion %	Quoted Hours	Actual Hours
1	Project Management	14	10	24	9/1/2022	9/18/2023		Open	41.67	-293.75	222.25
2	Technical Install	0	14	14	10/17/2022	5/24/2023		Closed	100.00	1.00	17.75
3	Business Process Review (BPR)	5	7	12	5/31/2023			Open	58.33	0.00	86.50
5	Setup CoA, Locations & Entry	0	1	1	1/20/2022	10/18/2022		Closed	100.00	0.00	0.00
6	Build and Configuration	145	78	223	12/1/2022	7/31/2023		Open	34.98	171.00	369.50
7	Parallel Testing - Rely	0	1	1	3/31/2023	4/17/2023		Closed	100.00	0.00	11.00
8	Training	59	10	69	12/1/2022	7/31/2023		Open	14.49	49.75	72.50
9	Parallel Testing - Customer	1	0	1	5/31/2023			Open	0.00	0.00	0.00
10	Purchasing Setup	1	0	1	6/16/2023			Open	0.00	3.00	0.00
		339	191	530						-53.00	801.50