Projects

This screen enables a user to create, edit and delete projects, and corresponding templates.

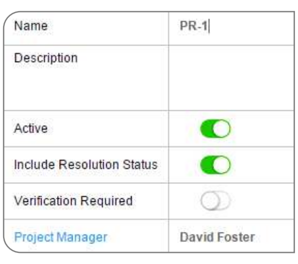
Projects

1. Details tab

This tab enables a user to perform the following functions:

Add a project:

A new Project can be created at this tab.



- Click on *Add Project* **+** button.
- Enter the name and its description at the respective fields.
- Include the resolution status and verification required by selecting the respective toggle.
  Tip: Including *Verification* status restricts the user from closing an Issue until it is verified. Whereas, including *Resolution* status prompts the user to add notes at the time of saving the Issue.
- Select the name of the person to whom the Project is assigned by clicking the *Project Manager* link
- Click on *Save*.

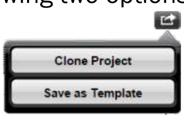
Delete a project:

Click *Delete* to remove the selected Project from the application.

- Select the Project (displayed in the left panel) to be deleted.
- Click on *Delete*. Delete

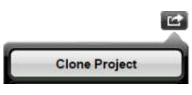
Action button:

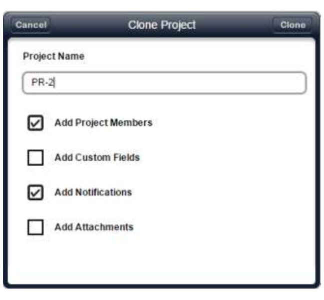
This option is available to the Administrator and Project Managers only. Clicking the button provides the following two options:



A. Clone Project

- This button enables the user to create a duplicate Project. The Project created is then immediately listed with the other Projects. To clone a project:
- Click on *Action*.
- Select the *Clone Project* option.





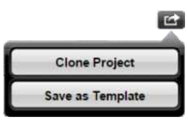
- The *Clone Project* window appears. Specify the name with which the duplicated Project will appear. Select the check boxes of the intended tabs which are to be cloned.
- Click on *Clone*.

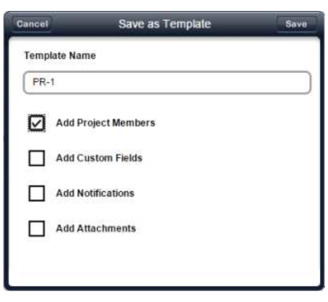
B. Save as Template

This button enables the Administrator to save the settings of the Project as a template. The template saved can later be converted into a Project or a number of Projects.

To save as a template:

- Click on *Action*. Click on *Save as Template*.





- On the window appears, specify the name with which the template is to be created at the *Template Name* field
  Check the required check boxes for the options available on the screen.
- Click on *Save*.

2. Members tab

This tab enables the user to associate users with a Project.

- Click *Add Member* **+** button.
- The *Select Member* window appears. Select the intended person(s). Click on *Select*.

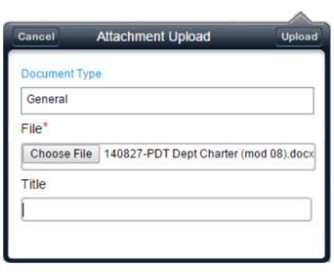
The name of the selected user(s) then appears on the *Members* screen.

- Click on *Edit* The *Select Role* window appears. Select the role to be associated with a user.

- Click on Delete to remove a user from the Project.

3. Attachments tab

This tab enables a user to attach documents to the Project.

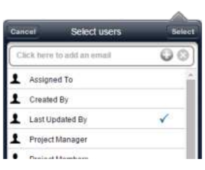


- Click on *Add Attachments* button.
- Then click on *Choose File* to browse the location of the file to be attached. Enter the name of the file at the *Title* field.
  Click on *Upload*.

4. Notifications tab

This tab enables a user to specify the users who will be notified at the Project level when a particular activity occurs.

- Click on *Recipient* to select the users who will be notified when a particular activity occurs.
- A notification screen is displayed where a user can enter the email address of the concerned user. Click on *Select*.



5. Import Issues tab

This tab enables a user to import Issues from the file. In order to do so, the entries should first be made into templates.

- Click on *Choose File* to select the file from which Issues are maintained.
  Then browse the location of the file to be attached. Select the required file.

- Click on *Import*.

6. Custom Fields tab

This tab enables a user to add new fields on the Issue screen. The change will reflect all Issues under the Project.

To execute the same:

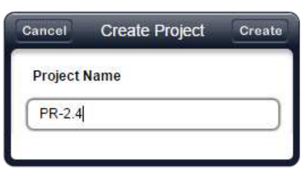
- Click on *Add Field* **+** button. The *New Custom* Field window appears.
- Click on the *Field Type* field to select the type of fields to be added.
- Click on the *Include* slide bar to make the field available on the *Issue* screen.
- Click on the *Required* slide bar to make the field mandatory.
- Specify the value that should automatically appear at the *Default Value* field.
- Click *Save*.
- The added field appears on the *Custom Fields* screen. Click on *Edit* to edit the details of the custom field. Click on *Delete* to delete the custom field.

Template

This screen enables a user to create a Project with the settings specified in a template.

- Select the required template.

- Select *Create Project* option.



- The Create Project window appears.
  Enter the name with which the Project will appear.
- Click on Create. Clicking the button creates a Project with the settings specified in a template.