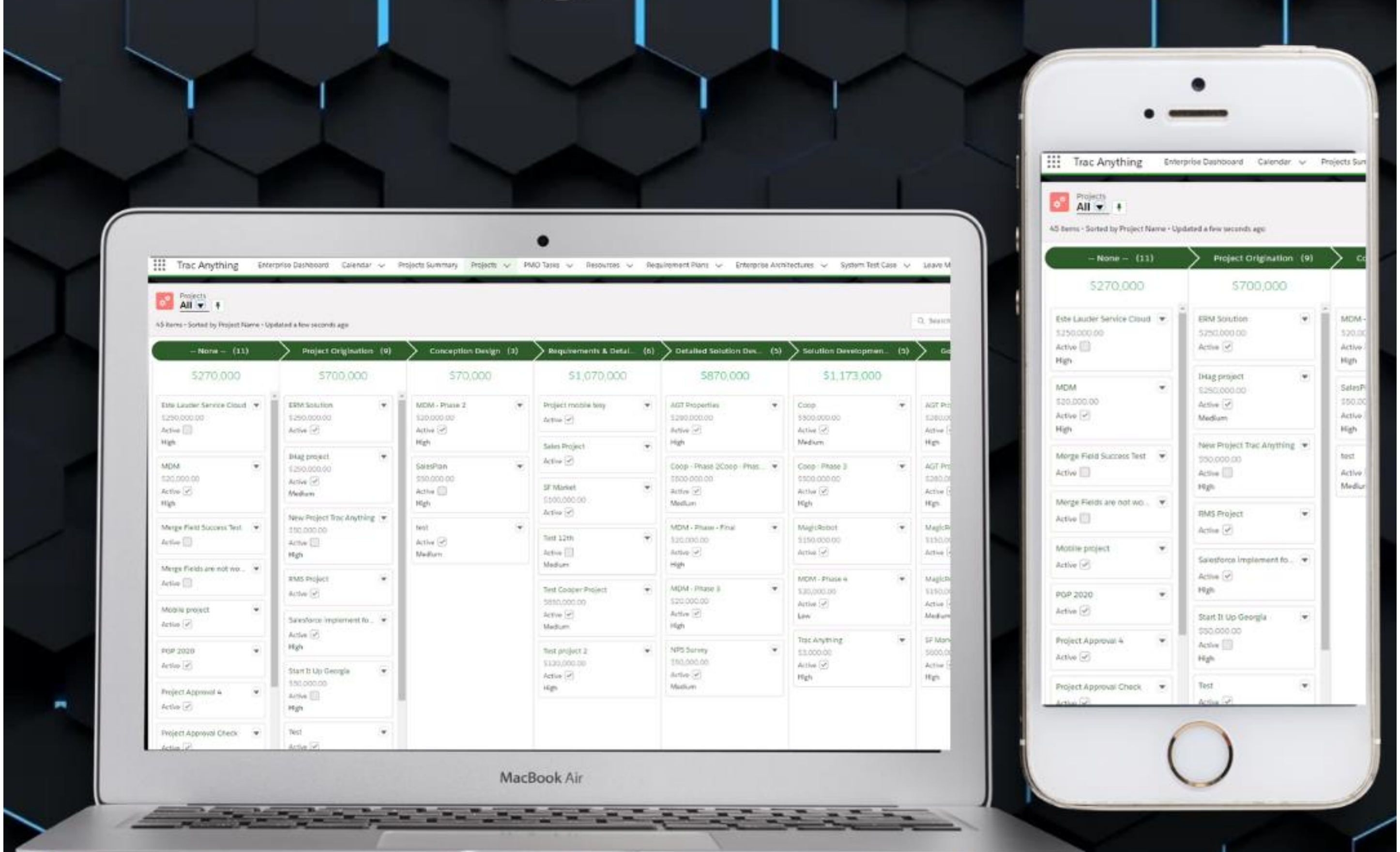
Trac Anything – Project Management and Enterprise Planning on Salesforce



Manual configuration – user guide

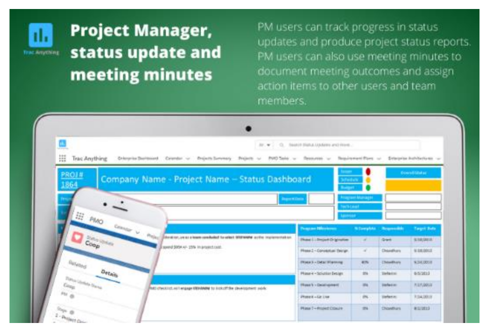
Plan Track Measure and Succeed

TracAnything.com

Fall 2020

Trac Anything is a project management and enterprise planning software that makes effective teamwork possible. We put all project and enterprise tracking needs in one app to help make your business more productive and efficient.

- **Run your business your way.** Customize your project management solution needs in a way that best suit your organization and helps shorten your time to market.
- **Modern project management.** Modern project management solutions to manage the iterative development set the value-based prioritization, improve collaboration, and bring traditional waterfall principles to effectively manage the overall project in a hybrid environment.
- **Traditional waterfall principles.** Bring traditional waterfall principles to effectively manage the overall project in a hybrid environment.



Key Benefits

Comprehensive

An integrated set of services on one platform to manage project and expenses across your entire organization.

Stay compliant

Single source of truth enabling you to understand the true cost of acquiring and retaining project portfolios.

Rapid adoption

Intuitive to use on any device, no training is required. Used within Salesforce for rapid adoption and high engagement.

The only hybrid PMO app on Salesforce

Built natively on the world's most used, secure and scalable enterprise cloud platform.

NATIVE TO SALESFORCE. Turn opportunities into projects, link deliverables to accounts, and leverage the Salesforce reporting capabilities you already know to view project management KPI's.

TASK MANAGEMENT & TEAM COLLABORATION. Assign task and collaborate. Assign the project work out to your team, collaborate with Chatter, and complete tasks quickly and easily with Trac Anything.

PROJECT MANAGEMENT OFFICE (PMO). Creating a Project Management Office (PMO) project with cost, time, scope, quality, HR, integration plan so that the Project Manager (PM) can track program level activities.

WORKFLOW & AUTOMATION. Save time with Automation. Automate the repetitive work in seconds so you can avoid human error and focus on what matters.

TRAVEL, EXPENSE and REIMBURSEMENTS. Team members and any users can submit travel requests using iTravel. A team member can submit expenses to receive reimbursements.

TRACK ASSETS, WARRANTY & CLAIMS. IT and business office can keep track of the company's assets using the asset management module.

Oversee agile timelines and streamline critical communication and project planning with other teams to deliver products in record time.

PMO Communication

Project Management Office

1. Role

Below is a list of custom roles we need to create manually for your organization.

- Finance
- IT Security
- PMO Admin
- Project Manager

After creating these roles, assign users manually.

Action	Role	Reports To
Edit | Del | Assign	CEO	
Edit | Del | Assign	Business Owner	CEO
Edit | Del | Assign	CFO	CEO
Edit | Del | Assign	COO	CEO
Edit | Del | Assign	Finance	CEO
Edit | Del | Assign	IT Security	CEO
Edit | Del | Assign	PMO Admin	CEO
Edit | Del | Assign	Project Manager	CEO
Edit | Del | Assign	QA Executive	Project Manager
Edit | Del | Assign	Software Engineer	Project Manager
Edit | Del | Assign	Team Leader	Project Manager
Edit | Del | Assign	Web Developer	Project Manager

To view detailed information about a role, from Setup, enter Roles in the Quick Find box, then select Roles, and click the role name.

In the Role Detail related list:

- To view the role detail page for a parent or sibling role, click the role name in the Hierarchy or Siblings list.
- To edit the role details, click Edit.
- To remove the role from the hierarchy, click Delete.

In the Users in Role related list:

- To assign a user to the role, click Assign Users to Role.
- To add a user to your organization, click New User.
- To modify user information, click Edit next to a username.
- To view a user's details, click the user's full name, alias, or username.

When Active is selected, the user can log into Salesforce. Deactivated users, such as employees who are no longer with your company, cannot log in to Salesforce.

2. Queue

Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they are transferred to another queue. You can specify the set of objects that are supported by each queue, as well as the set of users that can retrieve records from the queue.

Below is a list of custom queues we need to create manually for your organization.

- PMO Admin
- Business Owner
- IT Security
- Finance

New

Action	Label	Queue Name	Queue Email	Supported Objects
Edit | Del	PMO Admin	PMO_Admin	tamilsfdctest@gmail.com	Project
Edit | Del	Business Owner	Business_Owner	tamilsfdctest@gmail.com	Project
Edit | Del	IT Security	IT_Security		Project
Edit | Del	Finance	Finance	tamilsfdctest@gmail.com	Project

After creating these queues, assign users manually.

3. Custom Setting

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

We need to manually create the following two custom settings: *icon URL and icon base URL:*

New

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edit | Manage	icon base url	Public	Hierarchy	SalesHub		355	1	355
Edit | Manage	icon url	Public	Hierarchy	SalesHub		355	1	355

- Custom Setting Definition: **icon base URL**
    - Create the fields for your custom setting. The data in these fields are cached with the application.
    - icon base URL: http:///_slds/icons/utility-sprite/svg/symbols.svg
    - value: /_slds/icons/utility-sprite/svg/symbols.svg
- Custom Setting Definition: **icon url**
    - Create the fields for your custom setting. The data in these fields are cached with the application.
    - base URL: /_slds/icons/utility-sprite/svg/symbols.svg
    - value: /_slds/icons/utility-sprite/svg/symbols.svg

Note: If the custom setting is a list, click New to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

4. Remote Site Setting

Below is the list of Web addresses that your organization can invoke from salesforce.com. We need to manually create the following two remote site settings: 1) ApexDevNet, 2) MetaData API

New Remote Site

Action	Remote Site Name ↑	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit | Del	ApexDevNet	SalesHub	http://www.apexdevnet.com	✓	Chowdhury, Rashed	11/25/2019, 4:11 PM	Chowdhury, Rashed	11/25/2019, 4:11 PM
Edit | Del	MetaDataApi	SalesHub	http://soap.sforce.com	✓	Chowdhury, Rashed	12/20/2019, 3:20 AM	Chowdhury, Rashed	12/20/2019, 3:21 AM

Name	Value
ApexDevNet	http://www.apexdevnet.com
MetaData API	http://soap.sforce.com

Remote Site Details

Remote Site Detail Edit Delete Clone

Remote Site Name	MetaDataApi	Modified By	Rashed Chowdhury, 12/20/2019, 3:21 AM
Namespace Prefix	SalesHub		
Remote Site URL	http://soap.sforce.com		
Disable Protocol Security			
Description			
Active	✓		
Created By	Rashed Chowdhury, 12/20/2019, 3:20 AM		

Edit Delete Clone

Remote Site Details

Remote Site Detail Edit Delete Clone

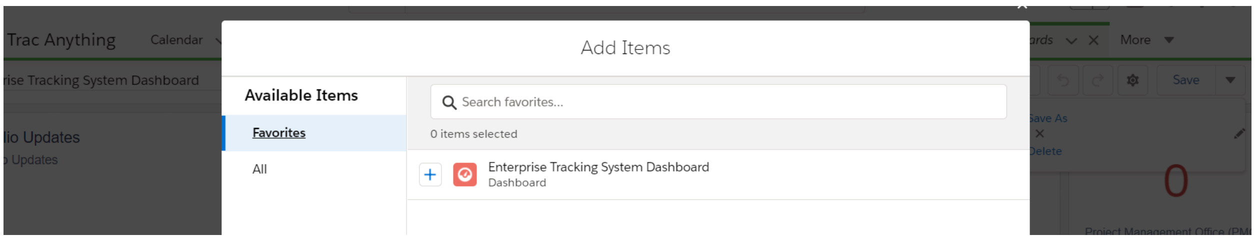
Remote Site Name	ApexDevNet	Modified By	Rashed Chowdhury, 11/25/2019, 4:11 PM
Namespace Prefix	SalesHub		
Remote Site URL	http://www.apexdevnet.com		
Disable Protocol Security			
Description			
Active	✓		
Created By	Rashed Chowdhury, 11/25/2019, 4:11 PM		

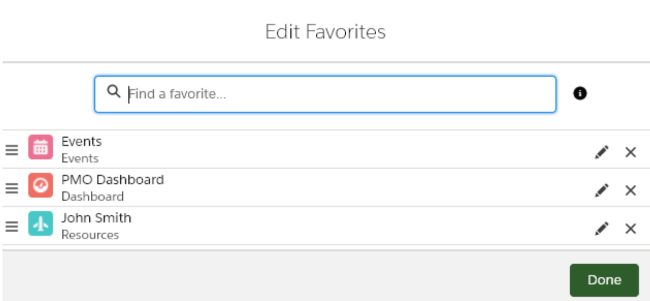
Edit Delete Clone

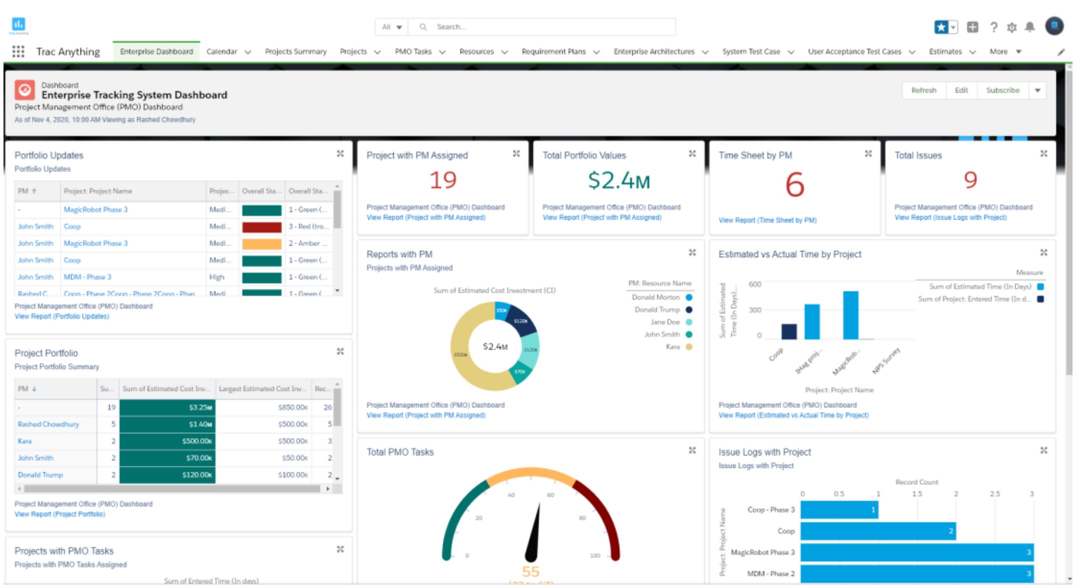
5. Adding Enterprise Dashboard as Favorite

To view the PMO Dashboard, Enterprise Tracking System Dashboard, please click on favorite abs select or type Enterprise Tracking System Dashboard. This will enable the dashboard to appear in your tab view bar.

Project Management Office (PMO) Dashboard



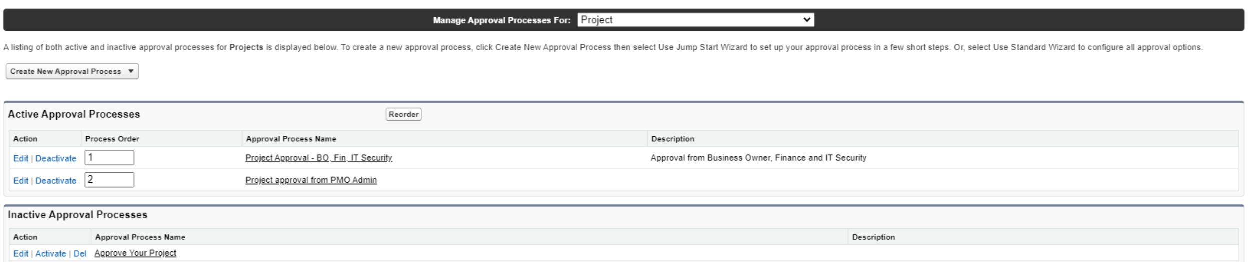




Approvals are complex business processes that require information gathering and planning before implementation. It is recommended that you follow the instructions below before getting started.

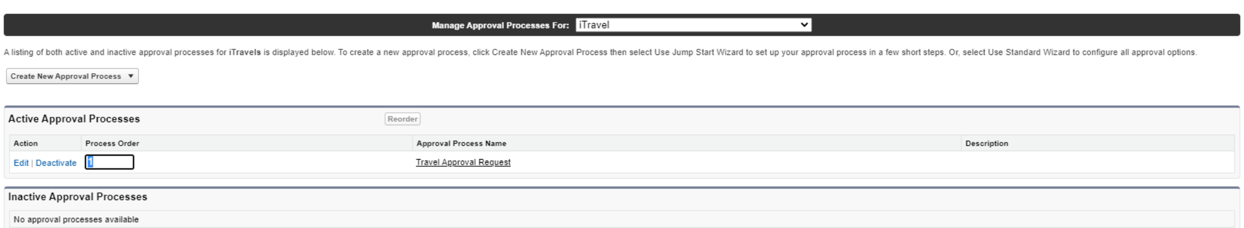
- Read the help topic
- View the checklist
- Create a custom user hierarchical relationship field
- Create email templates
- Create an approval process using either the Jump Start or Standard Wizard
- Add Approval History Related List to all page layouts
- Activate the process to deploy to your users

There is two approval process we need to configure related to the Project object.



- Project Approval - BO, Fin, IT Security
- Project approval from PMO Admin

There is one approval process we need to configure related to the iTravel object.

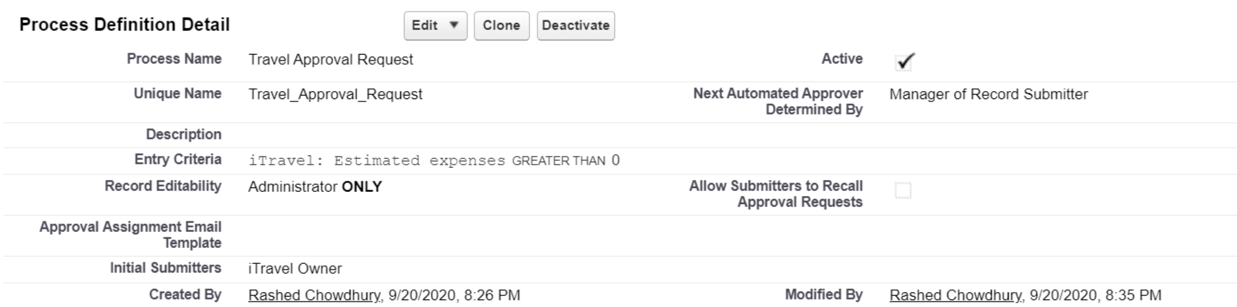


- Travel Approval Request

6. Approval Process - Travel Approval Request

To implement the Travel approval process, please follow the four steps below and manually configure the ORG.

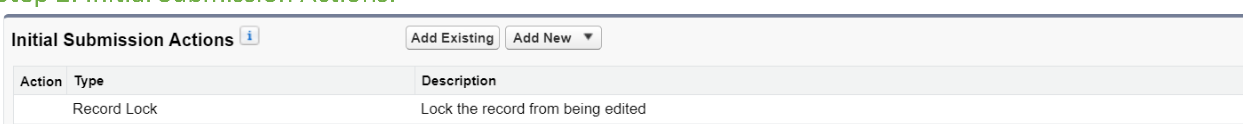
Step 1: Process Definition Details.



Process Definition Detail Edit Clone Deactivate

Process Name	Travel Approval Request	Active	✓
Unique Name	Travel_Approval_Request	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	iTravel: Estimated expenses GREATER THAN 0		
Record Editability	Administrator **ONLY**	Allow Submitters to Recall Approval Requests	
Approval Assignment Email Template			
Initial Submitters	iTravel Owner		
Created By	Rashed Chowdhury, 9/20/2020, 8:26 PM	Modified By	Rashed Chowdhury, 9/20/2020, 8:35 PM

Step 2: Initial Submission Actions.

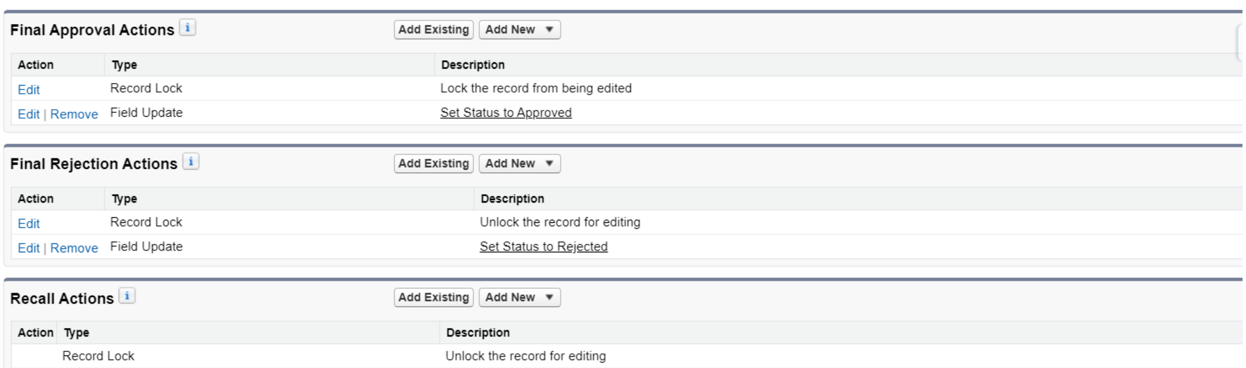


Initial Submission Actions Add Existing Add New

Action	Type	Description
	Record Lock	Lock the record from being edited

Step 3: Approval Process Steps.

Step 4: Final Actions.



7. Approval Process – Project Approval – Business Office (BO), Finance (Fin), and IT Security

To implement the Project approval process to engage business office, finance, and IT security, please follow the steps below and manually configure the ORG.

Step 1: Process Definition Details.

Approval Processes

Project: Project Approval - BO, Fin, IT Security

« Back to Approval Process List

Help f

Process Definition Detail Edit ▼ Clone Deactivate

Process Name	Project Approval - BO, Fin, IT Security	**Active**	✓
Unique Name	Project_Approval_BO_Fin_IT_Security	**Next Automated Approver Determined By**	
Description	Approval from Business Owner, Finance and IT Security		
Entry Criteria	(Project: Status EQUALS Open) AND (Project: Approved EQUALS False) AND (Project: BO Fin IT Security Approved EQUALS False)		
Record Editability	Administrator **ONLY**	**Allow Submitters to Recall Approval Requests**	☐
Approval Assignment Email Template			
Initial Submitters	Role: Project Manager, Project Owner		
Created By	Rashed Chowdhury, 8/17/2020, 10:14 PM	**Modified By**	Rashed Chowdhury, 8/28/2020, 6:54 PM

Step 2: Initial Submission Actions.

Initial Submission Actions Add Existing | Add New ▼

Action	Type	Description
	Record Lock	Lock the record from being edited

Step 3: Approval Process steps.

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Hide Actions | Edit	1	Approval from Business Owner			Queue:Business Owner	Final Rejection
Hide Actions | Edit	2	Approval from Fianance			Queue:Finance	Final Rejection
Hide Actions | Edit	3	Approval from IT Security			Queue:IT Security	Final Rejection

Step 1:

Approval Actions Add Existing | Add New ▼

You have not yet defined any actions

Rejection Actions Add Existing | Add New ▼

You have not yet defined any actions

Step 2:

Approval Actions Add Existing | Add New ▼

You have not yet defined any actions

Rejection Actions Add Existing | Add New ▼

You have not yet defined any actions

Step 3:

Approval Actions Add Existing | Add New ▼

You have not yet defined any actions

Rejection Actions Add Existing | Add New ▼

You have not yet defined any actions

Step 4: Final Actions.

Final Approval Actions Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Update BO Fin IT Security Approved

Final Rejection Actions Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit | Remove	Email Alert	Project Rejected Email Alert

Recall Actions Add Existing | Add New

Action	Type	Description
	Record Lock	Unlock the record for editing

8. Project: Project approval from PMO Admin

To implement the Project approval process to engage Project Management Office (PMO), please follow the steps below and manually configure the ORG.

Step 1: Process Definition Details.

Approval Processes

Project: Project approval from PMO Admin

« Back to Approval Process List

Help for this Page

Process Definition Detail | Edit | Clone | Deactivate

Process Name	Project approval from PMO Admin	Active	✓
Unique Name	Project_approval_from_PMO_Admin	Next Automated Approver Determined By	
Description			
Entry Criteria	(Project: BO Fin IT Security Approved EQUALS True) AND (Project: Approved EQUALS False)		
Record Editability	Administrator **ONLY**	Allow Submitters to Recall Approval Requests	
Approval Assignment Email Template			
Initial Submitters	Project Owner, Role: Project Manager		
Created By	Rashed Chowdhury, 8/18/2020, 9:21 AM	Modified By	Rashed Chowdhury, 8/28/2020, 6:40 PM

Step 2: Initial Submission Actions.

Initial Submission Actions | Add Existing | Add New

Action	Type	Description
	Record Lock	Lock the record from being edited

Step 3: Approval Process steps.

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Hide Actions | Edit	1	Approval from PMO Admin			Queue:PMO Admin	Final Rejection

Approval Actions Add Existing | Add New

You have not yet defined any actions

Rejection Actions Add Existing | Add New

You have not yet defined any actions

Step 4: Final Actions.

Final Approval Actions Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Update Approved
Edit | Remove	Field Update	Update Active
Edit | Remove	Email Alert	Project Approved Email Alert

Final Rejection Actions Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit | Remove	Email Alert	Project Rejected Email Alert

Recall Actions Add Existing | Add New

Action	Type	Description
	Record Lock	Unlock the record for editing

Trac Anything is a project management and enterprise planning software that makes effective teamwork possible. We put all project and enterprise tracking needs in one app to help make your business more productive and efficient.

Why Trac Anything

- **Intuitive UI.** Trac Anything's modern and simple UI requires no training and is highly customizable.
- **All in one pack.** Save your time and money by not juggling between multiple tools. Everything you need to plan, track, test, and release quality software is in one place.
- **Analytics.** Be on top of your KPI's with velocity charts and sprint insights that will enable you to predict the amount of work that can get done in future sprints.
- **Do more with less.** Beyond Project Management's core offering your business will have access to business office suites solutions like travel management, expense management, mileage log, receipts, asset management, and more.

About Us

We develop Salesforce-native business apps that are intuitive and easily integrated into your business to enhance your Salesforce experience.

We're dedicated to providing our clients with applications that reinvent the way they use the Salesforce platform in their business. We foster productivity, enable quick and convenient communication, and allow businesses to spend their valuable time working for clients, not on their admin.

For more information on any of our products or services please visit us on the Web at: www.tracAnything.com