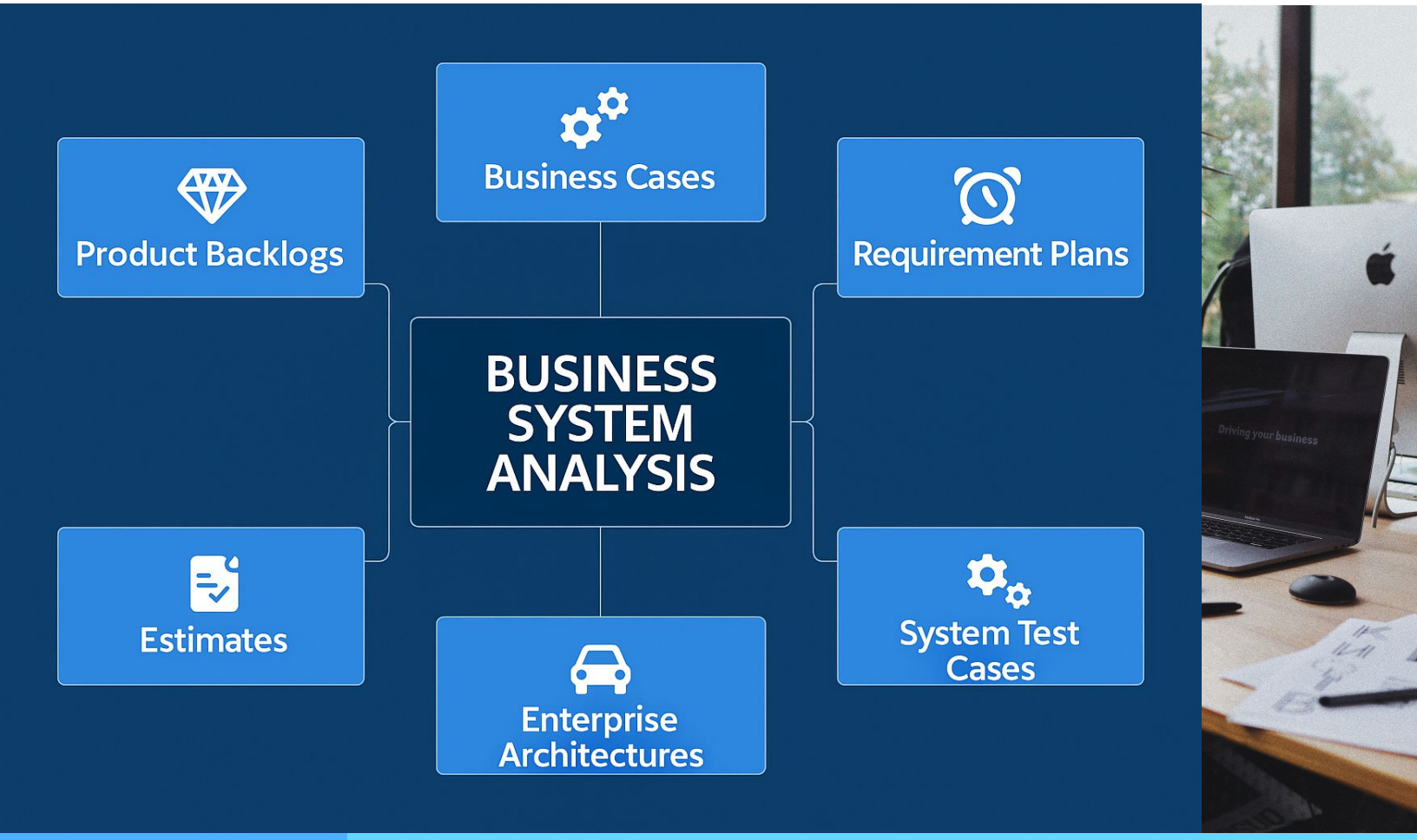
SalesHub

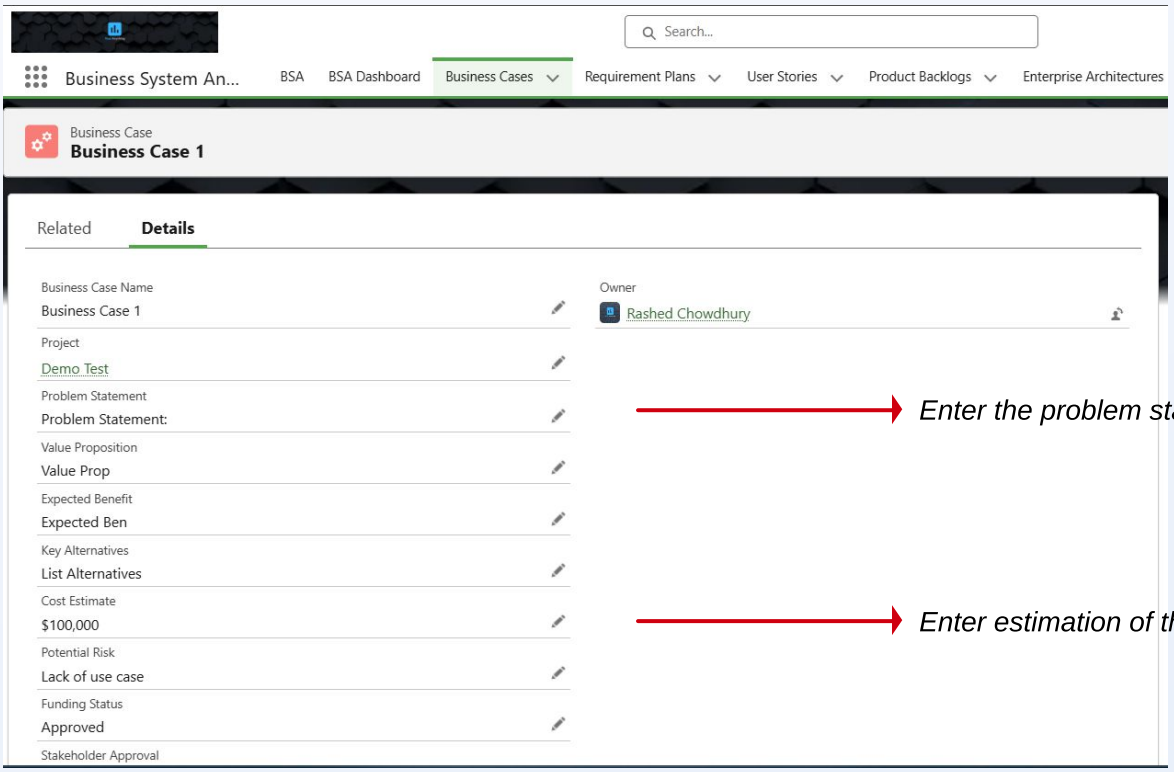
Trac Anything

Business System Analysis (BSA)



Feature Roadmap

Create a Business Case

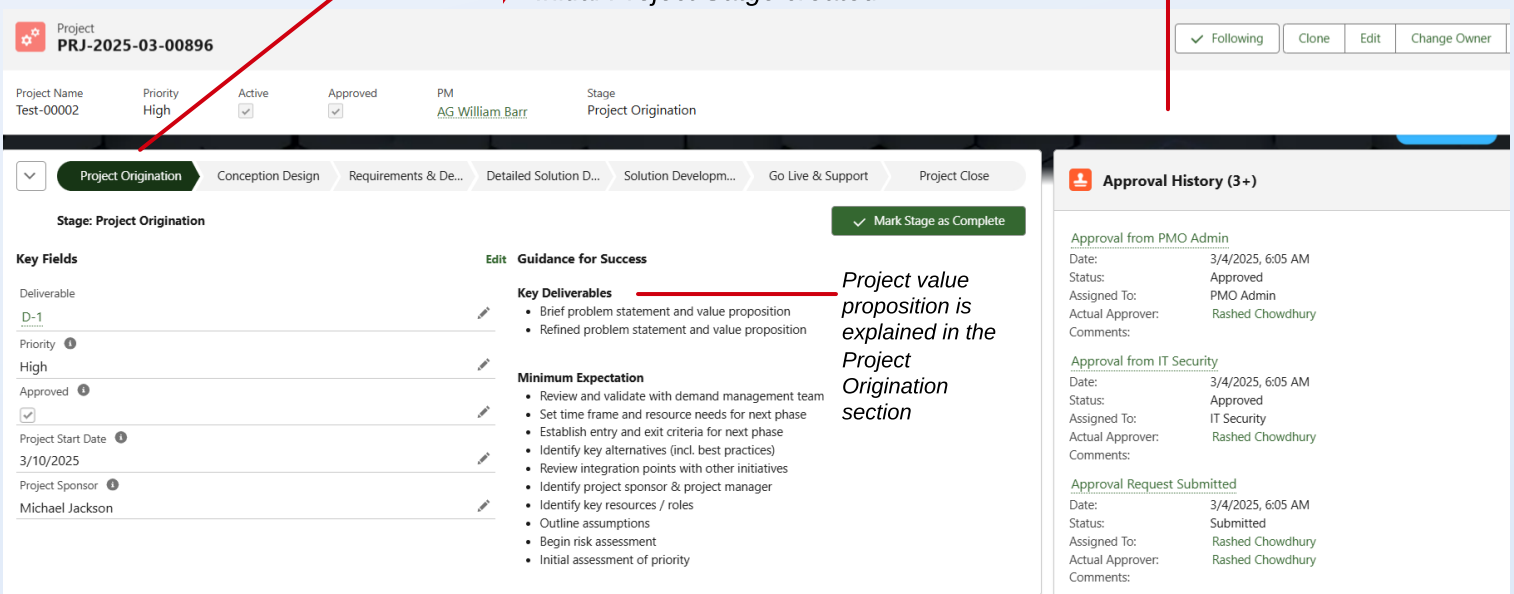


Enter the problem statement

Enter estimation of the project cost

Approval request section

Initial Project Satge created



Project value proposition is explained in the Project Origination section

Project Phases:

Mark as Current Stage

Updates the current status of a project phase

Project Origination | Conception Design | Requirements & D... | Detailed Solution D... | Solution Developm... | Go Live & Support | Project Close

Stage: Conception Design

Mark as Current Stage

Similarly each stage is defined with key deliverables

- ***Conceptual Design:*** *Initial Business Case*
- ***Requirements & Detail Planning:*** *Documents business requirements*
- ***Detailed Solution Design:*** *Test + Training plans*
- ***Solution Development & Testing:*** *Unit & Integration Test results*
- ***Go Live & Support:*** *Validate the project final phase and testing*
- ***Project Close:*** *Final project tracking*

Under PMO:

Program Milestones

Details | **PMO** | Analysis | Agile Development | Operation | Deliverables | Chatter

Program Milestones | PMO Tasks | Status Update | Meeting Minutes | Issue Logs | Allocations | PMO Chec

Program Milestones (7)

7 items • Sorted by Program Milestone • Updated a few seconds ago

	Program Milestone Name	Program Mi...	Program Milestone	Percent Co...	Target Date
1	2025-Q1-Demo Test-Project Origination	PMI - 00485	1 - Project Origination	0%	3/14/2025
2	2025-Q1-Demo Test-Conception Design	PMI - 00486	2 - Conception Design	0%	3/21/2025
3	2025-Q1-Demo Test-Requirements & Detail Planning	PMI - 00487	3 - Requirements & Detail Plann...	0%	3/28/2025
4	2025-Q1-Demo Test-Detailed Solution Design	PMI - 00488	4 - Detailed Solution Design	0%	4/4/2025
5	2025-Q1-Demo Test-Solution Development & Testing	PMI - 00489	5 - Solution Development & Tes...	0%	4/11/2025
6	2025-Q1-Demo Test-Go Live & Support	PMI - 00490	6 - Go Live & Support	0%	4/18/2025
7	2025-Q1-Demo Test-Project Close	PMI - 00491	7 - Project Close	0%	4/25/2025

Gives the Target Date for each of the project completion

PMO Tasks

Program Milestones | **PMO Tasks** | Status Update | Meeting Minutes | Issue Logs | Allocations | PMO Check

Actions (10)

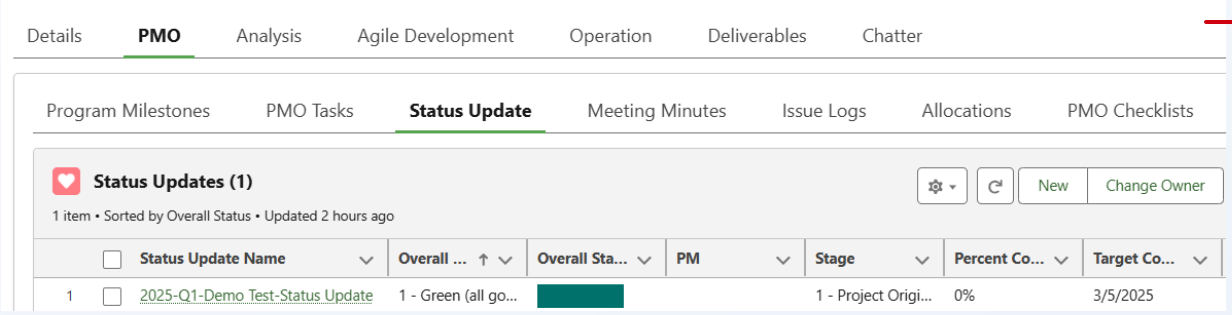
10 items • Updated a minute ago

	Task Name	Assigned User	Charge Code	Due Date	PMO Task Id
1	2025-Q1-Demo Test-Scope	Rashed Chowdhury	Expense	3/6/2025	PMO-T-00758
2	2025-Q1-Demo Test-Time	Rashed Chowdhury	Expense	3/7/2025	PMO-T-00759
3	2025-Q1-Demo Test-Quality	Rashed Chowdhury	Expense	3/8/2025	PMO-T-00760
4	2025-Q1-Demo Test-Procurement	Rashed Chowdhury	Expense	3/9/2025	PMO-T-00761
5	2025-Q1-Demo Test-Human Resource	Rashed Chowdhury	Expense	3/10/2025	PMO-T-00762
6	2025-Q1-Demo Test-Integration	Rashed Chowdhury	Expense	3/11/2025	PMO-T-00763
7	2025-Q1-Demo Test-Risk Management Plans	Rashed Chowdhury	Expense	3/12/2025	PMO-T-00764

Task ID *created with* ***Priority*** *and* ***Status*** *for each project*

Priority	Status
Normal	Not Started

Status Update



Updates the % of project completion level

Meeting Minutes

Estimates the meeting time

Issue Log

Configures any project/ system backlog

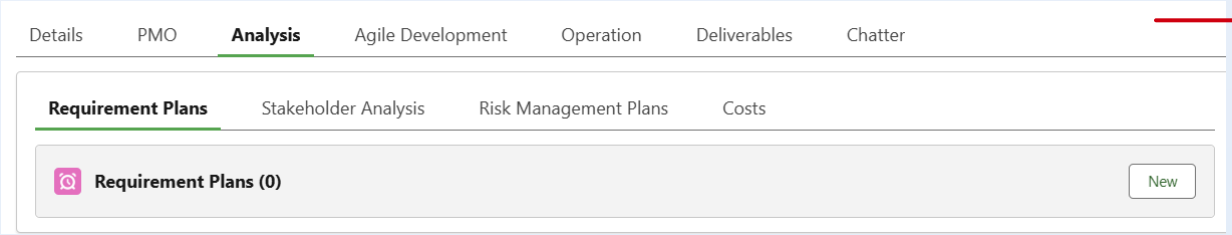
Allocations

Shows the allocated group of members who's currently working on the next phase

PMO Checklist

Project Managers list of feature groups

Under Analysis: Requirement Plans



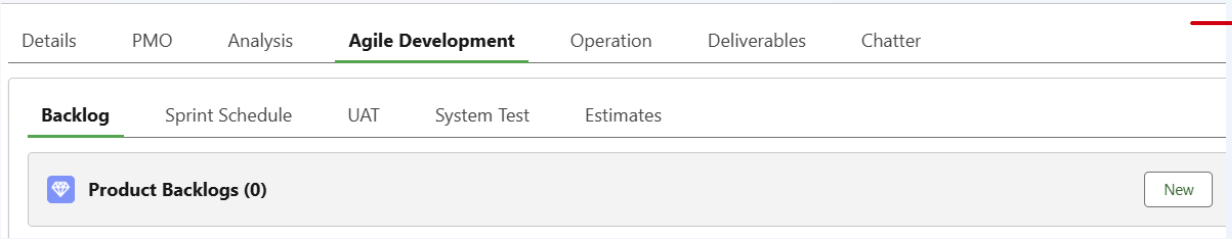
Project value proposition is explained in the Project Origination section

Stakeholder Analyisis: *Identify and manage key project stakeholders*

Risk Management Plans: *Outline and mitigate potential project risks*

Costs: *Track and manage project budget and spending*

Under Agile Development:
Backlog



Organize and prioritize development tasks

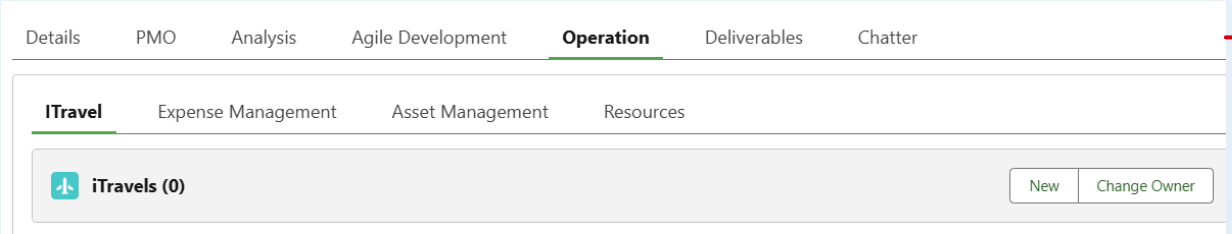
Sprint Schedule *Plan and track sprint timelines and goals*

UAT *Validate the solution meets end-user needs*

System Test *Test system functionality and performance*

Estimates *Define effort and resources for tasks*

Under Operations:
iTravel



Manage travel requests, approvals, and reimbursements

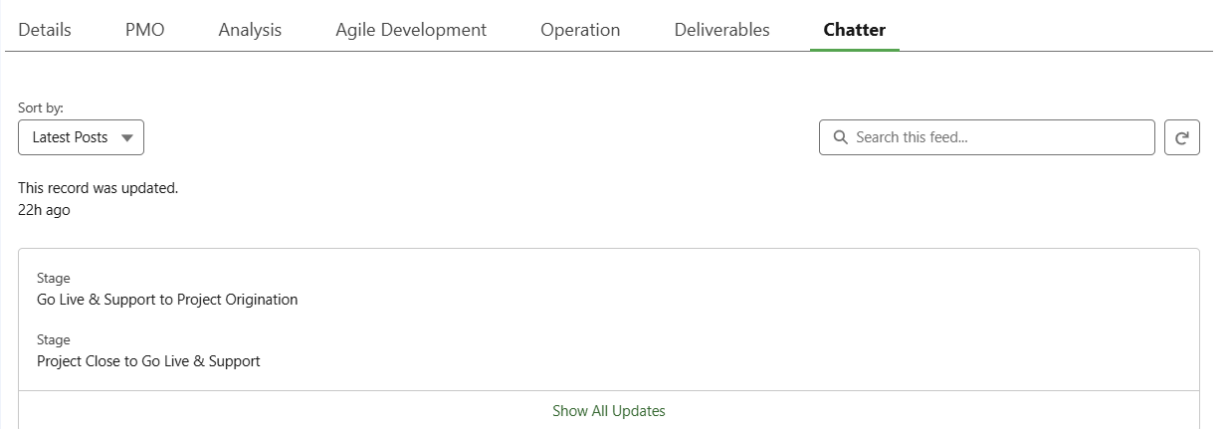
Expense Management: *Track, categorize, and approve employee expenses*

Asset Management: *Monitor and manage physical and digital assets*

Resources: *Oversee resource availability, assignments, and utilization*

Deliverables:

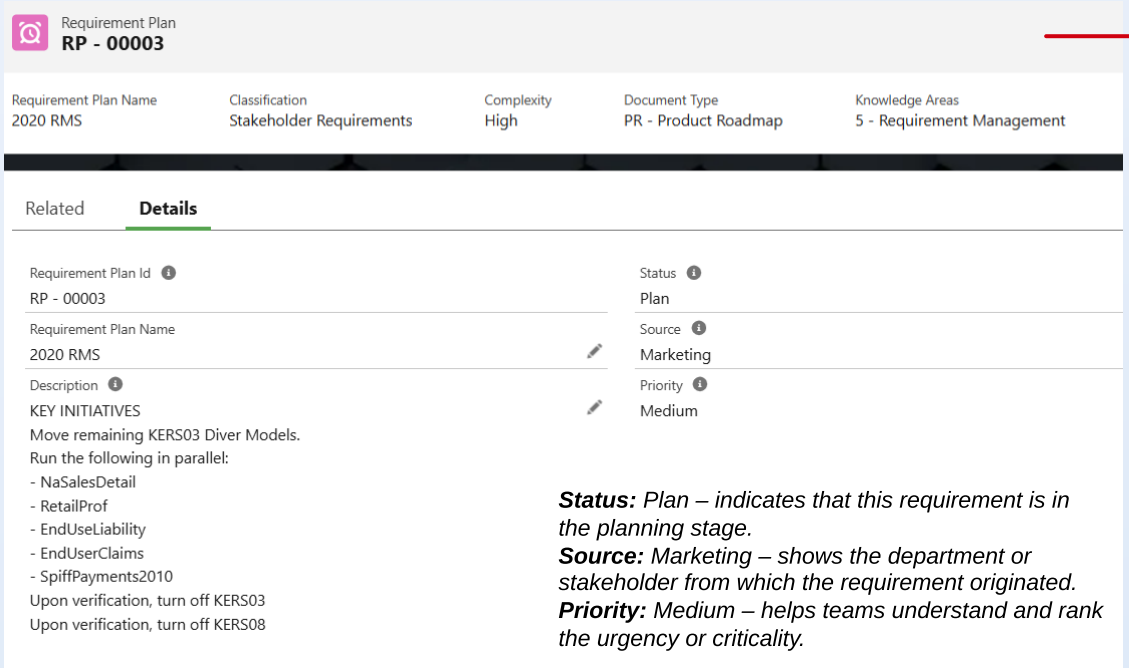
Displays key project deliverables for each stage, helping teams track what needs to be completed and when, ensuring alignment with project milestones



Chatter:

A collaboration feed for real-time updates, stage transitions, and team communication related to the project record.

Requirement Plans



Illustrates how teams can formally document and manage specific project requirements with a plan ID in a structured and trackable way

Optional:
Upgrade to Diver 6.4.
Introduce Dive ETL (Integration tool)

Complexity: High	Stability: Medium
Absolute Reference: ✓	Classification: Stakeholder Requirements
Project: Coop	Knowledge Areas: 5 - Requirement Management
Author: Rashed Chowdhury	System Test Case Id: 02
Owner: Rashed Chowdhury	User Acceptance Test Case Id: UAT - Coop - 2020 - Q1
Story Point Estimate: 4	

Defines Scope Clearly: *Captures detailed requirement info*
Tracks Ownership: *Assigns author and owner for accountability.*
Supports Agile Planning: *Includes story points to help with sprint estimation.*
Links Testing: *Connects to system and UAT test cases for validation.*
Manages Change: *Tracks stability and requirement classification*

This detailed requirement view illustrates how TracAnything bridges Agile, QA, and project governance into one cohesive workflow

Project Objective

Executive Summary: Re-architect RMS system from ground up.	In Scope: Front End. Database. Data Conversion. Training Materials, Training.
Objective: Improve rollup calculation accuracy and improve overall system efficiencies.	Out of Scope: Sales Training, DIGS, Score product catalog.
Key Deliverable: - RMS Front End. Dot Net application. - SQL Server database tables. Stored Proc, DTS packages.	

Project Teams

Requester: Steve Griffith	Authorization: Dan Haycook
Project Champion: Joanne Ash	Project Sponsor: Dan Haycook
Stakeholders: Retail Support, Coop Team, Field Sales Users	

Summarizes core goals and deliverables (e.g., SQL Server & .NET components)

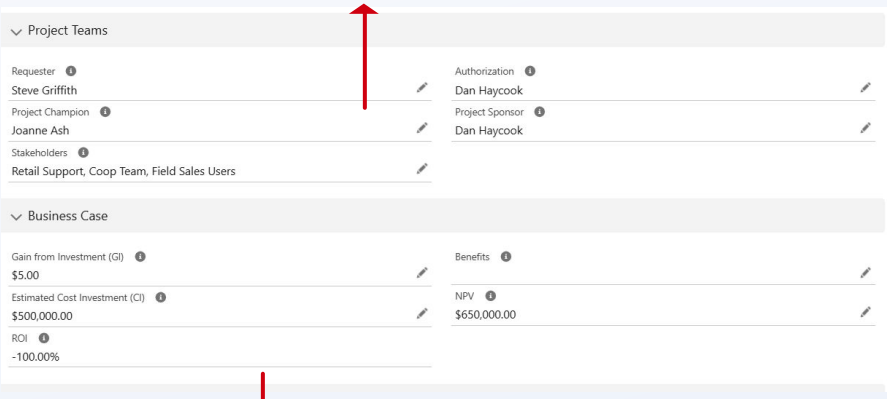
- *Defines scope clearly, both included (e.g., training) and excluded (e.g., product catalog)*
- *Aligns objectives with business needs like efficiency and accuracy.*

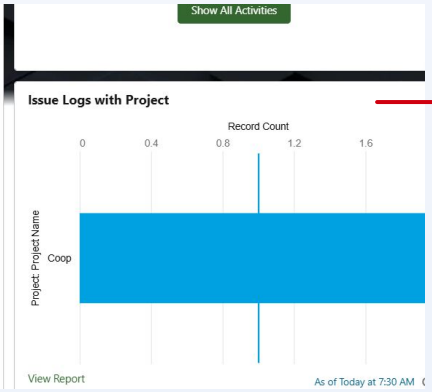
- *Breaks down project costs by hours, rates, and total fees*
- *Shows travel and total budget with clarity on remaining funds*
- *Indicates fee structure (Time & Materials model used).*

Budget

Project Class: Time and materials	Travel Budget: $4,000.00
Budget: Total Project Hours	Total Budget:
Total Project Hours: 2,000	Total Spent:
Hourly Rate: $97.00	Budget Remaining: $0.00
Total Project Fees: $194,000.00	

Displays team roles including Requester, Sponsor, and Stakeholders

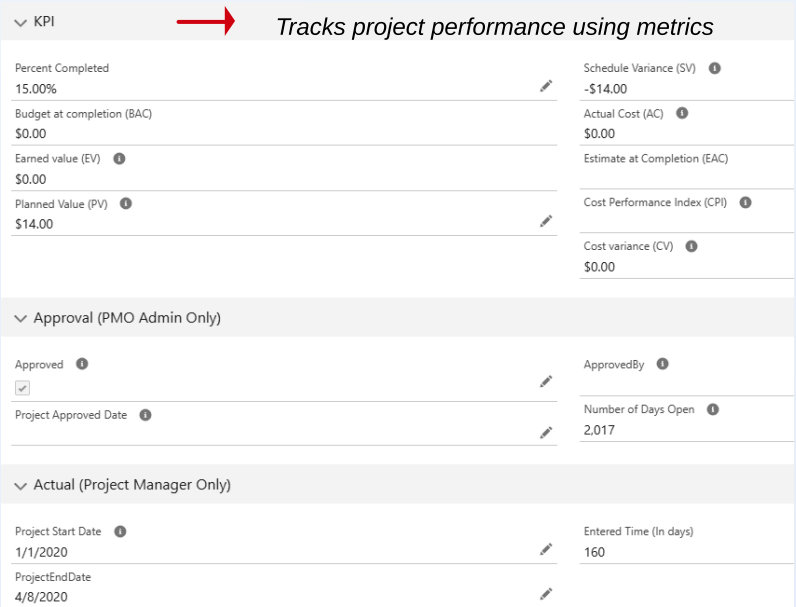




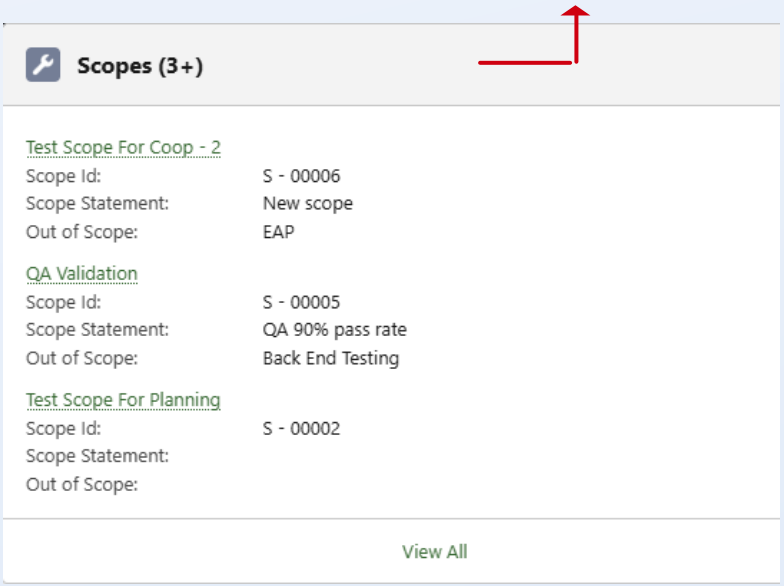
Assesses financial viability with cost vs. benefit comparison

Defines business value through investment figures, ROI, and NPV

Tracks project scope elements



Tracks project performance using metrics

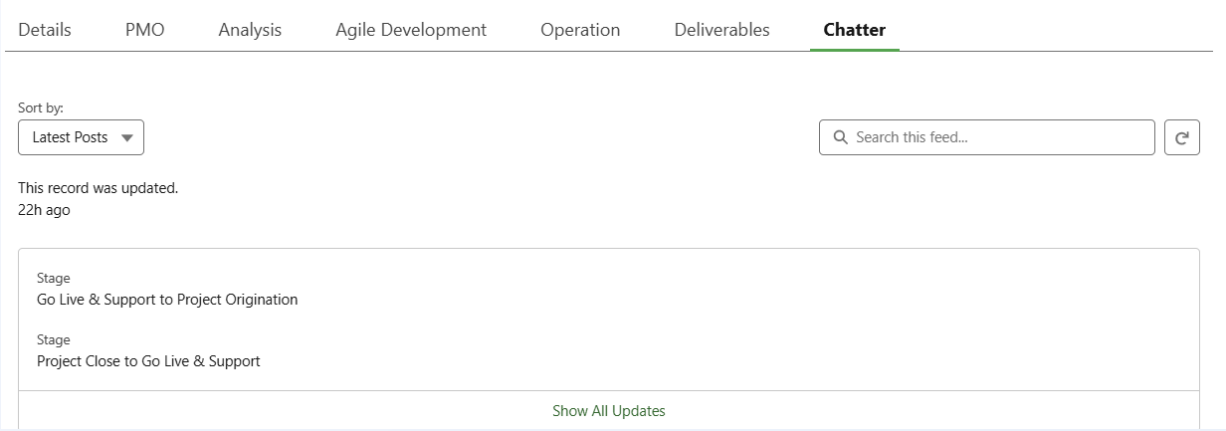


- *Highlights variances in budget and time, showing progress and potential delays and captures PMO approval data*
- *Records actual timeline data (Start, End Dates, and Time Entered)*

- *Helps define project boundaries – what's included and what's not (e.g., backend testing).*
- *Supports traceability for different testing phases (e.g., QA Validation, Planning)*

Deliverables:

Displays key project deliverables for each stage, helping teams track what needs to be completed and when, ensuring alignment with project milestones



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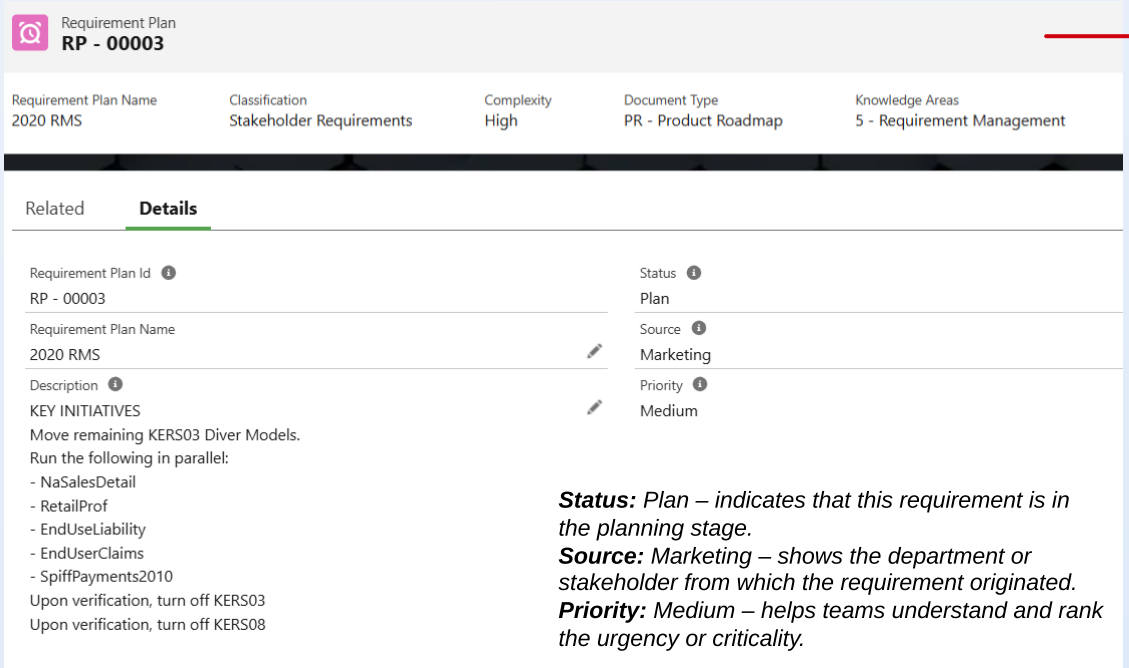


Illustrates how teams can formally document and manage specific project requirements with a plan ID in a structured and trackable way

User Stories

Short descriptions of a feature/requirement told from the end user perspective

User Story
US-00004

Related | **Details**

User Story ID: US-00004	Status: New
Summary: New user story	Delivery Status: Planned
As a: Zahin	Requirement: 2020 BCS
I want to: I wan to	Action: 2025-Q1-Test-00002-Scope
So that I can: So that	
Acceptance Criteria: UAT	
Checklist Item: CI-01	
Product Backlog: Coop PB - 2020 - Q2	
Created By: Rashed Chowdhury, 3/11/2025, 10:13 PM	Last Modified By: Rashed Chowdhury, 3/11/2025

Story ID

Notes on how user story is evaluated

Action
PMO-T-00748

Assigned User	Percent Completed	Due Date	Milestone	Project	Priority
Rashed Chowdhury	10%	3/31/2025		Test-00002	High

1. Task Information

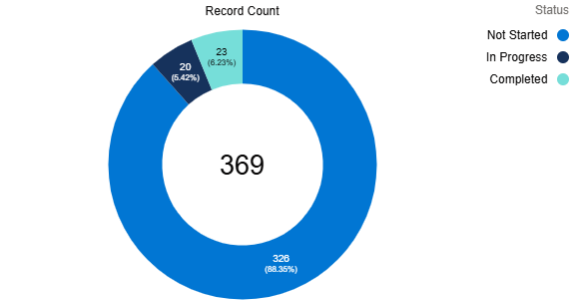
Task Name: 2025-Q1-Test-00002-Scope	Status: In Progress
Task Description: Scope Definition	Priority: High
PMO Task Id: PMO-T-00748	Priority Color
Project: Test-00002	Task Type: Project
Subject: Other	Sort Order: 1
Late Task Flag	
Completion Progress: 5.00%	
Remaining Work: 50	
Critical Path Indicator	

***Red:* High Priority tasks**

Represents tasks assigned for execution under a project and gives the completion/progress %

Donut Chart Status

Action Status Report By Status



Links the user story to a specific sprint/development cycle, ensuring all tasks are tracked, and aligned with project goals

Product Backlog

Product Backlog
Coop PB - 2020 - Q2

Related | **Details**

Product Backlog Id: PBI-00001	Owner: Rashed Chowdhury
Product Backlog Name: Coop PB - 2020 - Q2	Business Priority: High
Project: Coop	Technical Priority: High
Epic	Estimated Cost: Medium
Feature: - Coop Commission - Rollup calculation	Sprint Schedule: Sprint 1 - 2020- Q1
User Story: This is a place for user story	
UAT Case	
System Test Case: Oracle Test SIT 2	

2. Resource and Responsibility

Assigned User: Rashed Chowdhury	Resource Units: People
Role: Consultant	Work Task Type: Fixed Units
Team: Tech Team	Charge Code: Expense
Skill Matrix: Phthon	Exclusion Flag

3. Timeline & Scheduling

Start Date: 3/5/2025	Late Finish (LF): 0
Due Date: 3/31/2025	Late Finish (LF): 0
Early Start (ES): 1	Float (Slack): -1
Early Finish (EF): 0	Overdue: 103

5. Completion and Progress

Percent Completed: 10%	
Work: 50	
Unit Value: 100.00%	

6. Estimates

Estimate - Most Likely (ML): 5	PERT: 6
Estimate - Optimistic (O): 6	Variance: 0
Estimate - Pessimistic (P): 7	Standard Deviation: 0

Enterprise Architecture

Related | **Details**

defines how the organization's business processes, data, applications, and technology align

Enterprise Architecture Id: EA - 00001	State: Proposed
Enterprise Architecture Name: Coop	Owner: Rashed Chowdhury

Current Vs Future

Process: Current Process	Future Process: Future Process
Location: Texas - US	Future Location: Florida - US
Organization: HR	Future Organization: Global HR
Data: Customer Data	Future Data: Customer and Employee Data
Application: Open Source	Future Application: Salesforce - Sales Cloud and Community
Technology: Open Source - On prem	Future Technology: Cloud
Created By: Rashed Chowdhury, 1/18/2020, 9:21 AM	Last Modified By: Rashed Chowdhury, 5/18/2020, 11:39 AM

Expanding from customer-only to customer + employee data

Shifting from Open Source to Salesforce (Sales + Community Cloud)

Migrating from on-prem to cloud-based infrastructure

User Acceptance Test (UAT) Cases

User Acceptance Test Case
UAT - Coop - 2020 - Q1

Ensures the system meets business requirements and is ready for end-user use before go-live

Related | **Details**

User Acceptance Test Case Id: UAT-F-P-App-0001	Expected Result: - Calculate Bonus and Commission per Sales Employee - Complete Commission Calculation Twice Per Month
User Acceptance Test Case Name: UAT - Coop - 2020 - Q1	Pass/Fail Indicator: ✕
Tested By: Rashed Chowdhury	Owner: Rashed Chowdhury

Unique identifier for the UAT scenario

Status showing if the test passed (✔) or failed (✕)

Test Details:

Project: Coop	Test Priority:
Test Age: 1,919	Test Environment:

Number of days since the test was created

Execution Details:

Test Date: 4/10/2020	Result: Pass