ProjeQtOr User guide

Release 11.2

ProjeQtOr

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ProjeQtOr is an open source project management software that combines in one tool all the functionalities needed to organize your projects. It is simple, easy to use and covers a maximum of project management features.

Its particularity, in addition to its completeness, is to be oriented towards quality.

This means you can record all the events of your projects and thus simplify compliance with leading standards in quality management, be they ISO, CMMI, ITIL or other.

Find in this manual, every 3 months, the latest features integrated into ProjeQtOr.

We offer you a small overview of the major developments and you will find the full list of developments covered in the update here.

Autosave

Warning message when modifying without saving

Autosave

Contextual Menu on list views

Access main features on item with righ click menu.

Contextual menu

Tags management

Extension to Tickets, Activities and Projects

Quick search on tags

Report from list

Technical Improvements

Lazy Loading on Gantt

Delayed consolidation

Report from list

New design for Kanban

More clear design

Possiblity to hide some fields on tiles

New kanban

CHAPTER

ONE

FEATURES

ProjeQtOr is a “Quality based Project Organizer”.

It is particularly well suited to IT projects, but can manage any type of project.

It offers all the features needed to different Project Management actors under a unique collaborative interface.

1.1 Start guide

- Startup page for new installations to assist the administrator in the first steps of implementing the application.

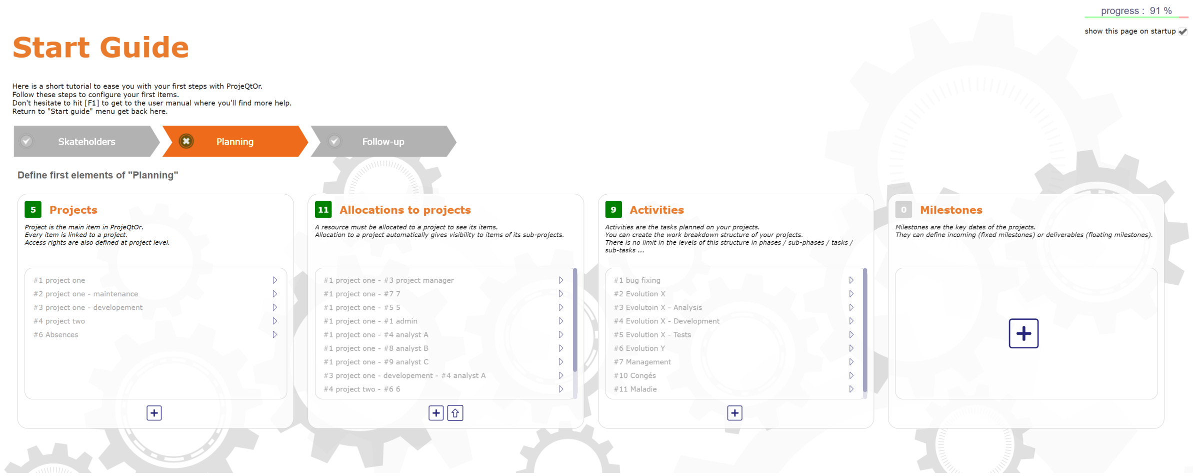


Fig. 1: Start guide

- Several steps are necessary to configure the bases and a progress display allows you to determine the percentage of progress in the installation.
- You can hide this section on startup by unchecking the “show this page on startup” checkbox.

Fig. 2: progress of installation

- To display it again, select it as the start page in the *users settings* screen or in the *session menu*
- The guide is available at the next login and can also be found in the main menu

1.2 Planning management

ProjeQtOr provides all the elements needed to build a planning from workload, constraints between tasks and resources availability.

Multiple Access

Users can edit the same item (if they have the right) at the same time, without disturbing each other, as long as they don’t edit and save exactly the same field and at the exact same time.

Project

The project is the main element of ProjeQtOr. it is a planning element. See: *Project*

It is also the highest level of visibility and definition of access rights based on profiles.

You can define profiles, some have visibility on all projects, others only on the projects they are assigned to.

You can also define sub-projects of a project and sub-project of sub-projects without limit to this hierarchical organization.

This allows for example to define projects that are not real projects, but just a definition of the structure for your organization.

Projects and sub-projects appear on the *Gantt Planning view*.

Activity

An activity is a task that must be planned, or includes other activities. It is a planning element. See:*Activity*

This is usually a task that has a certain duration and should be assigned to one or more resources.

Activities appear on the *Gantt Planning view*.

Milestones

A milestone is an event or a key date of the project.

Milestones are commonly used to track delivery dates or force a start date of activity.

They can also be used to highlight the transition from one phase to the next one.

Unlike activities , milestones have no duration and no work.

But on Projeqtor, you can specify deadlines (positive or negative) to apply to your milestones

See: *Milestones*

Resources

Resources can be assigned to activities. See:*Resource*

This means that some work is defined on this activity for the resource.

Only the resources allocated to the project of the activity can be assigned to the activity.

Real work allocation

Resources enter their time spent on the Real work allocation screen in their *timesheet*.

This allows for a real-time monitoring of work.

Moreover, updating the left work allows to recalculate the planning taking into account the actual progress on each task.

Planning

The planning is based on all the constraints defined:

- left work on each activity
- availability of resources
- rate of resource allocation to projects.

  See: *Allocations section* and *Allocation rate*
- assignment rate of resources to activities.

  See: *Assignment section* and *Assignments rate*
- planning mode for each activity (as soon as possible, fixed duration, …).

  See:*Planning modes*
- dependencies between activities.

  See: *Dependencies*
- priorities of activities and projects.

  See: *Priority* and *Planning priority*
- The planning is displayed as a *Gantt chart*.

Project Portfolio

The planning can also be viewed as a *project portfolio*, which is a Gantt planning view restricted to one line per project, plus optionally selected milestones.

Global Planning

The *Global Planning* allows you to display many more elements on the gantt chart in addition to the usual projects, activities, and milestones.

In this diagram view, you can view decisions, test sessions, deliveries, risks, tickets or opportunities …

All of which can be linked to an activity or any other element of the diagram.

Resource Planning

You can display the planning for each *resource*, but also by *teams*, by *pool of resources* or you can display all the resources whatever their *assignments*.

More details

- *Planning elements*
- *Gantt chart*
- *Resource planning*

1.3 Resource management

ProjeQtOr manages the availability of resources that can be allocated to multiple projects. Tool calculates a reliable, optimized and realistic planning.

Resources

A *resource* can be a person working on the activities of one or more projects. Or material assigned to a particular task.

A resource can also be a group of persons for which you do not want to manage individual detail. See: *Teams* and *Pool of resources*

You can manage this through the capacity of the resource, *FTE*, that can be greater than 1 (for a group of people for example) or less than 1 (for a person working part-time).

Allocations

The first step is to allocate each resource to the projects on which it has to work.

Specifying the *allocation rate* (% of maximum weekly time spent on this project)

Where again the periods during which it will be planned on these projects.

Assignments

Then you can assign resources to project activities.

You fill in the workload you assigned to the resource.

Only the resources allocated to the project of the activity can be assigned to the activity.

See: *Assignments*

Calendars

To manage working and non-working days, for resources with reduced working hours or with a different rhythm from the French calendar, for days off or public holidays, you have configurable calendars.

You can create multiple calendars to manage different types of availability.

- you can create a '80% 'calendar with every Wednesday closing day, for example.
- you can manage separate vacations when working with international teams.
- A calendar is assigned to each resource.

more details

- *Calendars*

Real work allocation

Resources enter their time spent on the *Timesheet screen*. This allows for a real-time monitoring of work.

The planning recalculation takes into account the left work and makes it possible to take into account the actual progress on each task.

1.4 Tickets management

ProjeQtOr offers a Ticketing environment.

With its bug tracking to monitor incidents on your projects, you with the ability to include work on planned tasks of your projects.

Ticket

A Ticket is an intervention that does not need to be planned or that cannot be planned.

It is generally a short task, whose granularity, too small, cannot correspond to an activity and whose progress you want to follow to describe and provide a result.

For example, bug fixes or issues can be handled through tickets. You cannot plan bugs until they are identified and logged, and you must be able to provide a solution to a bug (workaround or workaround).

- Ticket management allows you to program *delays* according to the type of ticket
- As on an activity it is possible to estimate the workload.
- You can assign a *coordinator* and/or a manager.
- It is possible *to attach external documents*, *to link other elements*, to leave *notes*…

Simple tickets

Simple tickets are just simplified representations of Tickets for users that will "create" tickets but not "treat" them.

Elements created as simple tickets are also visible as Tickets, and vice versa.

more details

- *Tickets*
- *Tickets dashboard*

1.5 Costs management

Costs can be tracked on projects. From resources, activities, assigned work, and other management expenses, all project costs are tracked, consolidated, and can generate invoices.

Projects

The Project is the main entity of ProjeQtOr.

In addition to tracking work on projects, ProjeQtOr can track the costs associated with this work.

Activities

An Activity is a task that must be planned, or includes other activities.

Work assigned to resources on activities is converted into associated costs.

See: *Activity price*

Resource cost

To calculate the cost of expenses ProjeQtOr defines the Resources cost.

This cost may vary depending on the role of the resource and may change over time.

See:*Functions and cost*

Project expenses

Projects expenses can also record expenses not related to resource costs (purchase , lease, sub-contracting).

See: *Project expenses*

Individual expenses

Individual expenses can record expenses generated by a given resource.

See: *Individual expenses*

Quote, Orders, Term, Bill

ProjeQtOr can manage various financial elements found on a project:

- Quotation (proposals),
- Orders (received from customers),
- Invoicing Terms,
- Bills.

more details

- *Expenses*
- *Incomes*
- *Client invoices*
- *Financial Gallery*

1.6 Quality management

The specificity of ProjeQtOr is that it is Quality Oriented : it integrates the best practices that can help you meet the quality requirements on your projects.

This way, the approval stage of your Quality Systems are eased, whatever the reference (ISO, CMMI, . . .).

Workflows

Workflows are defined to monitor changes of possible status.

This allows, among other things, to restrict certain profiles from changing some status.

You can, for instance, limit the change to a validation status to a given profile, to ensure that only an authorized user will perform this validation.

See: *Workflow*

Delays for tickets

You can set delays for tickets or on ticket types. This will automatically calculate the expiry date of the Ticket when creating the Ticket.

The supported and closing time of the ticket can be defined and calculated for statistical purposes.

See: *Delay for tickets*

Indicators

Indicators can be calculated relative to respect of expected work, end date or cost values.

Some indicators are configured by default, and you can configure your own depending on your needs.

Non respect of indicators (or the approach of non-respect target) can generate Alerts.

See: *Unit indicators*

Checklists

It is possible to define custom Checklists that will allow, for instance, to ensure that a process is applied.

See: *Checklist*

Reports

Many Reports are available to track activity on projects, some displayed as graphs.

See: *Reports*

All is traced

All your manipulations, modifications, recordings are traced. Nothing is drawn at random.

You can follow, in a centralized and collaborative way, all the elements created: list of questions and answers, recording decisions affecting the project, managing the configuration of documents, follow-up meetings . . .

In addition, all updates are tracked on each item to retain (and display) a history of the item's life.

more details

- *Control and automation*
- *Reports*
- *Activity stream*
- *The history*

1.7 Risks management

ProjeQtOr includes a comprehensive risks and opportunities management, including the action plan necessary to mitigate or treat them and monitoring occurring problems.

Risks

A Risk is a threat or event that could have a negative impact on the project, which can be neutralized, or at least minimize, by predefined actions.

The risk management plan is a key point of the project management. Its objective is to :

- identify hazards and measure their impact on the project and their probability of occurrence,
- identify avoidance measures (contingency) and mitigation in case of occurrence (mitigation),
- identify opportunities,
- monitor the actions of risks contingency and mitigation,
- identify risks that eventually do happen (so they become issues).

Opportunities

An Opportunity can be seen as a positive risk. This is not a threat but an opportunity to have a positive impact on the project.

They must be identified and followed-up not to be missed out.

Issues

Issue is a risk that happens during the project.

If the risk management plan has been properly managed, the issue should be an identified and qualified risk.

Actions

Actions shall be defined to avoid risks, not miss the opportunities and solve issues.

It is also appropriate to provide mitigation actions for identified risks that did not occur yet.

More details

- *Risks*

1.8 Perimeter management

ProjeQtOr allows you to monitor and record all events on your projects and helps you in managing of deviations, to control the perimeter of projects.

Meetings

Follow-up and organize Meetings, track associated action plans, decisions and easily find this information afterwards.

Periodic meetings

You can also create Periodic meetings, which are regularly recurring meetings (steering committees, weekly progress meetings, …)

Decisions

Decisions follow-up allows you to easily retrieve the information about the origin of a decision :

- who has taken a particular decision ?
- when?
- during which meeting ?
- who was present at this meeting?

Not revolutionary, this feature can save you many hours of research in case of dispute .

Questions

Tracking Questions / Answers can also simplify your life on such exchanges, which often end up as a game of Ping - Pong with a poor Excel sheet in the role of the ball (when it is not a simple email exchange…).

Product and Version

ProjeQtOr includes Product management and Product Versions.

Each version can be connected to one or more projects.

This allows you to link your activities to target version.

This also allows to know, in the case of Bug Tracking, the version on which a problem is identified and the version on which it is (or will be) fixed.

More details

- *concept*
- *common-sections*
- *type-restriction-section*
- *Meetings*

1.9 Documents management

ProjeQtOr offers integrated Document Management.

This tool is simple and efficient to manage your project and product documents.

ProjeQtOr support only digital document.

A document will be stored in the tool as versions.

Document can be versioning and an approver process can be defined.

Directories structure management

- Allows to define a structure for document storage.
- Directories structure is defined in document directory screen.

Document management

- Document screen allows to manage documents.

Document access

- Global definition of directories is directly displayed in the document menu, to give direct access to documents depending on the defined structure.

More details

- *Documents*
- *Repertory and Document*
- *Document directories*

1.10 Commitments management

ProjeQtOr allows you to follow the requirements on your projects and measure at any time coverage progress, making it easy to reach your commitments.

In addition to the standard functionalities to manage your projects and monitor costs and delays, ProjeQtOr provides elements to monitor commitments on products.

By linking these three elements, you can obtain a requirements covering matrix, simply, efficiently and in real time.

Requirements

Requirements management helps in describing requirements explicitly and quantitatively monitor progress in building a product.

Test cases

The definition of Test cases is used to describe how you will test that a given requirement is met.

Test sessions

Test sessions group test cases to be executed for a particular purpose.

More details

- *Requirements*
- *Requirements dashboard*

1.11 Asset Management

ProjeQtor includes IT asset management. The park is made up of equipment and each of these equipment may contain other equipment and will have a type of equipment.

Licenses

The concept of license will be managed in the form of equipment, by defining license type equipment, which is linked to software type equipment.

This method makes it possible to define a stock of purchased licenses and to assign them progressively to the equipment on which they are installed.

Equipment

This feature allows you to manage equipment types, categories, brands and models of equipment.

But also the suppliers and the locations of this equipment.

More details

- *Module Management*
- *Requirements dashboard*

1.12 Humans Resources

This section allows to manage the society's Humans Resources This system comes in addition to the standards of the management of absences

- You can define the employees, contract types, the contract for the employees
- You can choose the leave entitlement standard for each type of contract
- The employee may reserve periods of leave of absence according to his rights.
- The system also includes a validation process of the requests during the leave period.

Humans Resources Sections

- Leaves Calendar
- Leaves Period
- Leaves rights earned
- Employees
- Employment Contract
- Employee Managers
- Leaves Dashboard
- Regulated leaves parameters

Variable capacity

- The resources may have a capacity that varies over time.
- This allows you to reserve and enter additional time (for periods of overtime)
- or less than the standard capacity (for some periods of rest)

More details

- *humans resources*
- *Variable capacity*
- *Resource*

1.13 Tools

ProjeQtOr includes some tools to generate alerts, automatically send emails on chosen events, import or export data in various formats.

Imports

ProjeQtOr includes an import feature for almost all elements of project management, from CSV or XLSX files.

CSV and PDF exports

All lists of items can be printed and exported to CSV and PDF format.

The details of each item can be printed or exported in PDF format.

MS-Project export

The Gantt planning can be exported to MS-Project format (XML).

Alerts

Internal alerts can be generated automatically based on defined events.

Emails

These alerts can also be dispatched as emails.

It is also possible to manually send emails from the application, attaching the details of an item.

It is also possible to retrieve answers to this type of email to save the message in the notes of the relevant item.

Administration

ProjeQtOr provides administrative features to manage connections, send special alerts and manage background tasks treatments.

CRON

Moreover, the tool features its own CRON system, independent of the operating system and able to handle the PHP stop and restart.

More details

- *Tools*
- *Administration*

1.14 Activity Stream

The Activity stream allows you to display certain information about each of the elements of ProjeQtOr.

It is a kind of light history which allows you to quickly see the information of creation, deletion, changes of state of the element or the comments left by users according to their right of visibility.

The screen dedicated to the Activity Stream allows you to view all the feeds.

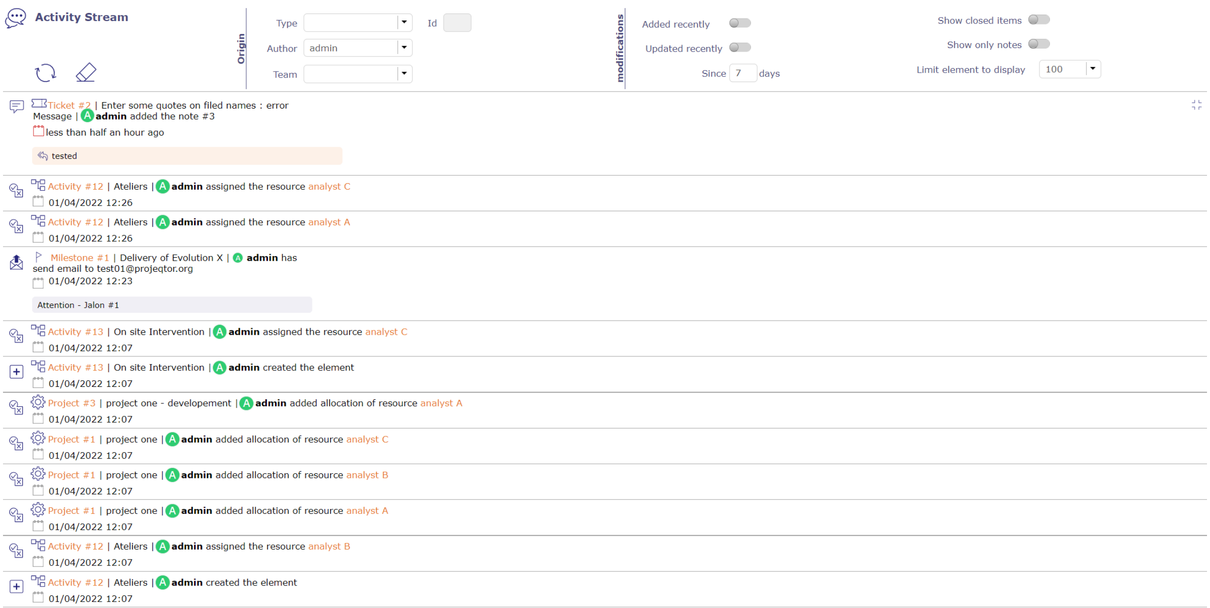


Fig. 3: Task list zone v9

Filter system

Fig. 4: Filter system

This filter allows you to restrict the display by . . .

- Type of element
- Its id
- Author
- Team
- Periods
- Show the closed items
- Show only notes

You can also select the amount of information to display and restrict the list to the screen.

Elements displayed

We can see on this summary several elements:

- The element and its ID
- The name given to this element
- The creator of change
- The operation that was performed
- The date and the hour of the change
- Any notes related to the item

- Emails sent for the element with the object and text of the message.

Fig. 5: Activity stream line

The impacted elements are all clickable.

Notes

In the case of notes, the comment is displayed alone.

You can view notes in discussion mode if you filter the stream activity screen by author.

This allows you to escalate an entire discussion.

Activity Stream on element screen

You can view the Activity Stream for each element on the screen of the latter.

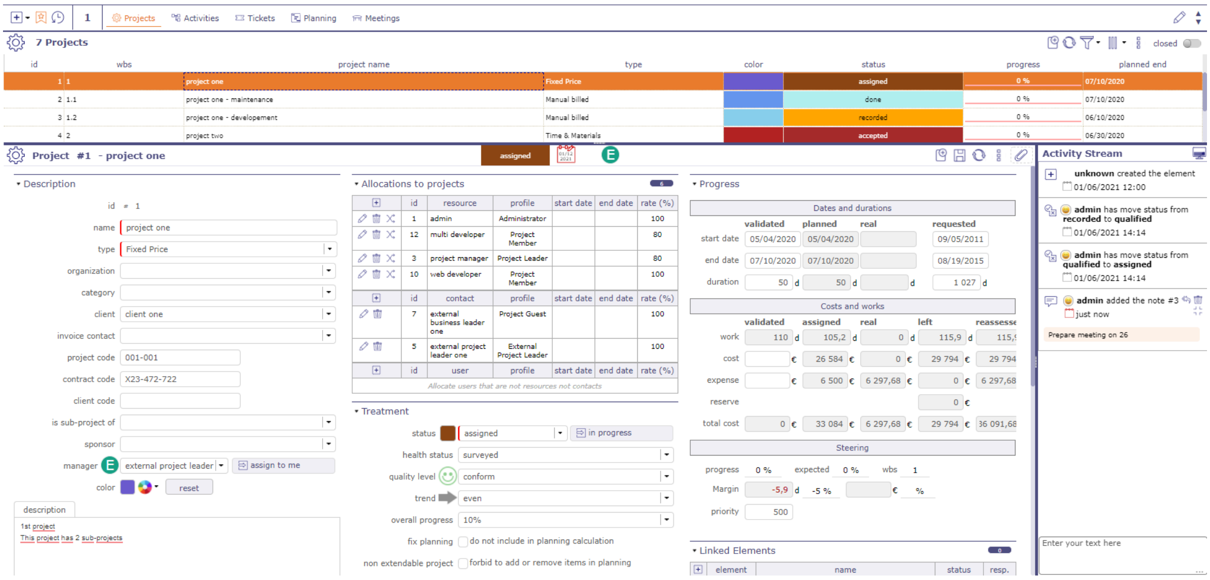


Fig. 6: Activity stream on the screen of a Project element

The items displayed depend on your visibility rights.

Activity stream zone

- Click on  to display the Activity stream zone.
- Click on  to hide it.
- Click on  to choose the location of the zone on the left of the page
- Click on  to choose the location of the zone at the bottom of the page

Activity stream information

In the activity stream area you can view the same information as on the dedicated screen.

- The author of the information relayed with his profile icon
- The type of information displayed: creation, deletion, change of state or comments

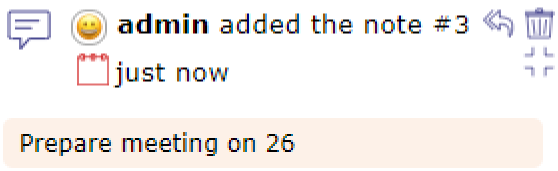


Fig. 7: Activity stream details

- The date and time of the modification

  Icon for type of information

  – Note/Comment
  – Creation
  – Change of state
  – Mail sending

Add a note

You can add a note simply by clicking in the text box at the bottom of the activity stream area.

By default, your note is visible to all users assigned to the project linked to the item.

- Click on to make your note private
- Click on to share it in public (project team: resources allocated to the project)
- Click on to share the note only with your team

  Show/Hide notes

  Likewise, it is possible to view the notes directly by using the following buttons

  - Click on to hide note comment.
  - Click on to display note comment.

  By default, you will see all visible notes for each item.

  - Click on **Show only notes on activity feed** to display only notes type information.

1.15 Global view

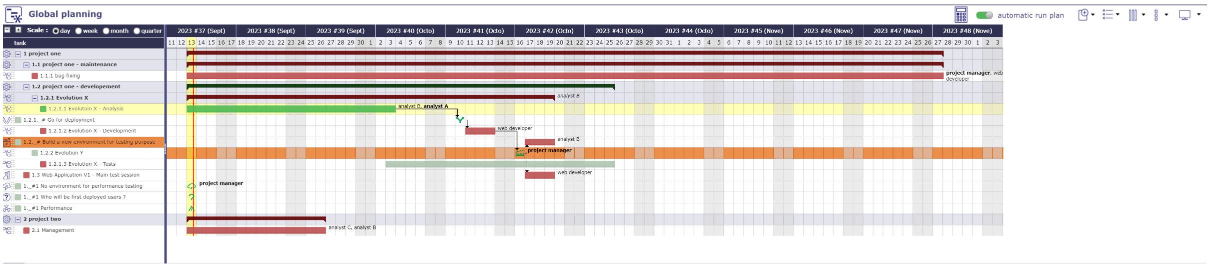


Fig. 8: Global view screen

The "Global view" screen lists all the main objects created during a project. This allows you to quickly search through all types of items available.

You can also choose to display only certain items through the list to display

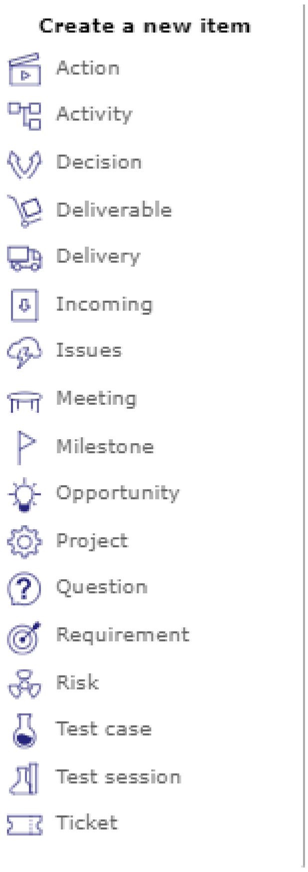


Fig. 9: Display one or more items

CHAPTER

TWO

CONCEPTS

This chapter defines the concepts of ProjeQtOr.

They can be referred in the following chapters.

2.1 Concepts

2.1.1 Project

A project is the main entity of ProjeQtOr.

Project element is more than a *Planning elements*.

Gather all project data

It is also used to allow gathering all data depend on project:

- *Risk management*: mitigation, reserve
- *Ticketing*: Issue, Bug tracking, Change request, Support
- Steering: *Meetings*, *Decisions*, *Action plan*
- *Requirement & Test*
- *Expense* and ref:*Incomes<incomes>*: project expenses, individual expenses, activities expenses, Order, Bill, Payment…
- *Documents*

Restrict data visibility

Allows restricting data visibility to users by project.

The project data visibility is granted according to the user profile.

- See: *Profiles definition*
- See: *Allocation to project*

Project selector

The project selector works as a filter.

By default, the selector displays "all projects", you can change this view in the user parameters and choose the project to display by default.

You can restrict data for one or more dedicated projects without necessarily being bound

See also:

Top bar and *User parameters*

The project type

Four project types can be defined:

1 - Operational project

Code: OPE

Most common project to follow activities.

Manual Billed, Fixed price, Capped time, Time & materials, Internal are operationals projects

2 - Administrative project

Code: ADM

Allows to follow the non productive work as holidays, sickness, training, …

All resources have access to this project type without being allocated (Project) or assigned (Activity).

Create an activity, like an OPE project, for each type of absence.

3 - Template project

Code: TMP

Designed to define models to be copied into an operational project.

Any project manager (profile) can see and copy these projects without having to be assigned to them. To edit this template project directly, an assignment is required.

To modify it without assignment, you must first copy the project into an operational type project (OPE).

A model project, even if it is displayed in the Gantt chart, is not taken into account in planning. Even if there are assignments and assigned load, it is not stored and therefore is not planned.

You will not be able to display the planning detail on template type projects.

See: *Copy an item*

4 - Proposal project

Code: PRP

Proposal-type projects are intended to identify strategic projects. It allows you to define objectives based on internal and external factors to achieve them.

For projects of this type, 4 additional fields are displayed:

- Strength
- Weakness
- Opportunity
- Threat

Strategic value is mandatory

see: *critical resource*

The project is automatically saved as “Under construction” and is read-only. .. note:

```
The project type is defined in a project type.

Which is associated to a project. See: :ref:`planningelem_project`
```

Define billable project

A project can be billable or not.

Non billable project

The non billable project is used for internal or administrative project.

Billable project

For billable projects the billing types available are: at terms, on producing work, on capping produced work and manual.

The actual work done and billed is locked.

Note: The project billing type is defined in a project type.

Which is associated to a project. See: *Project*

Warning: Deleting a project also deletes the indicators, Emails and Delays for the tickets of this project

Hat project

The definition is made by the project type, you define that certain types of projects can not have activities, only subprojects or milestones.

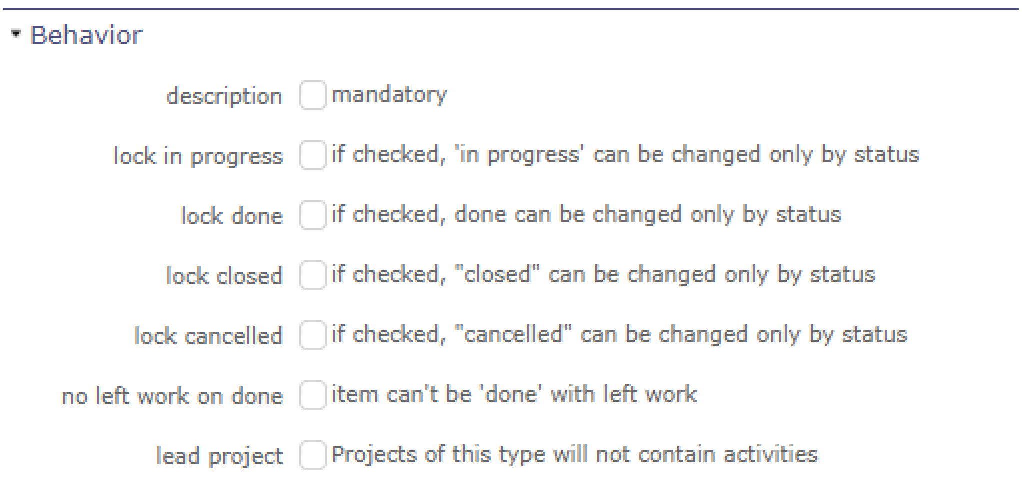


Fig. 1: Project type Behavior

Fix the planning

You can freeze the content of a project or projects from the moment you do not want to extend the project or modify it.

Allocation to project

Concepts

- *Profiles definition*
- *Stakeholder definition*

Allocation to project is used to:

- Define project data visibility.
- Define resource availability.
- Define the period of access to project data by the user.

Table 1: Required field

Field	Description
Id	Unique Id of the resource.
Resource	Resource name.
Or contact	Contact name.
Or user	User name.
Profile	Selected profile.
Project	Project allocated to.
Rate	Allocation rate for the project (%).
Start date	Start date of allocation.
End date	End date of allocation.
Closed	Flag to indicate that the allocation is archived.
Description	Complete description of the allocation.

Allocation behavior

Example 1

- R allocated to project A
- B is a subproject of A
- B has no allocation
  - R can be assigned to an activity of B
  - It is impossible to delete the allocation of R on project A because R is assigned on the activity of project B

Example 2

- R allocated to projects A and B
- B is a subproject of A
- R is assigned to the activity of B
  - It is possible to remove the allocation from R to B because the allocation on A preserves consistency
  - A being the parent project, it is not possible to delete the allocation from R to A although the allocation from R to B exists

Fields Resource & Contact

- You can select resource or contact.
- If none is selected then the user connected is used to define the allocation.
- If a contact is a resource and inversely, then resource or contact name will be selected too.

The following sections describe allocation to project, performed for user, resource or contact.

User allocation

Allocation to project gives data visibility on a project.

Allocation to project can be defined in the *Users* screen.

Profile selection

The selected profile allows you to define the rights on all the elements of the project.

The profile displayed first will be the default

The profile given to an assignment for a user / resource / contact may be different on each project

These rights are applied only on the said project

Note: Profile defined in allocation to project does not grant or revoke access to users.

General access to application functionalities and data is defined by user profile.

Period selection

Allows you to define the visibility period of the project data.

Can be used to limit the access period, in accordance with the service agreement.

Resource allocation to project

Allocation to project allows to define the resource availability on project.

A resource may be allocated to projects at a specified rate for a period.

Allocation to project can be defined in *Project* and *Resource* screens.

You can also allocate a team or an organization to a project in *Teams* and *Organization* screens.

Note: A resource allocated to a project can be defined as *responsible* of project items treatment.

Period & Rate selection

A resource may be allocated to a project or assigned to a task at a specified rate for a period.

This rate is used to keep some scheduling time for other tasks.

For instance, if rate is 50%, the resource will not be planned more than half days on the task.

If the period is not specified then the resource is allocated throughout the project.

Warning: The planning calculator tries to plan, the remaining work on the task assigned to a resource within the allocation to project period.

If remaining work on the task can't be planned, a purple bar appears in the Gantt view.

Change resource on an allocation to project

A resource can be changed on allocation to project.

All tasks assigned to old resource will be transferred to the new resource with planned work and remaining work.

Work done on tasks belongs to always the old resource.

Multi-allocation to project

A resource can be allocated to multiple projects in the same period.

Make sure that the allocation to projects for a period not exceeding 100%.

In the section **Allocations** in *Resource* screen, a tool allows to displayed conflicts.

Tip: How resolve conflicts?

You can change allocation period to avoid overlap between projects.

You can change the rate of allocation for it does not exceed 100% for the period.

Contact allocation to project

A contact allocated to a project can be defined as *requestor*.

Allocation to project can be defined in *Project* and *Contacts* screens.

2.1.2 Activity

An activity is a kind of task that can be planned or that groups other activities.

This is usually a long-term task that can be assigned to one or more resources.

Activities will appear on the Gantt schedule view.

For example, you might consider an activity:

- Scheduled tasks,
- Modification requests,
- The phases,
- Versions or new deployments,

Activities can be grouped as a Mother / Daughter link.

The parent activity must belong to the same project.

A WBS structure is applied and a dynamic index is calculated for all activities.

The WBS Activity Index can be changed in the Gantt schedule view using drag and drop.

Planning Activity

An activity can be linked to elements that cannot be planned. So that the time spent on tickets, which cannot be scheduled, can be taken into account in the overall planning of the project, you can create a planning activity.

This option allows you to assign a time pool that will be scheduled and to link tickets to this tank.

The time spent on tickets will then be decremented to that of the planning activity.

See: *Planning activity*

Assignment

The assignment is used to assign resources to project tasks (activity, test session, meeting).

Consists to assign a resource to a task in a specific function. The function allows to define the resource daily cost.

A resource assignment contains data about work on task (planned, real, left and reassessed work).

Basic, you cannot delete a resource assignment after the resource has entered actual work on the activity.

This assignment can be deleted by a profile including the option "Can delete items with real work" in the access rights menu in the specific acces.

Similarly, if the resource has completed its activity, deletion is not possible.

You keep track of the resources that have been assigned and worked on the activity.

Note: Only resources allocated by the project can be assigned to project tasks.

Assignment can be done in *Activity*, *Test sessions* and *Meetings* screens.

2.1.3 Organization

The notion of organization introduces a way to consolidate projects on a different hiererchic structure, apart from projects / sub-projects structure.

Definition of the structure of the company in the frame of organizations

Departments, Units, Location, …

The organization summarizes the data of the projects in progress for the organization.

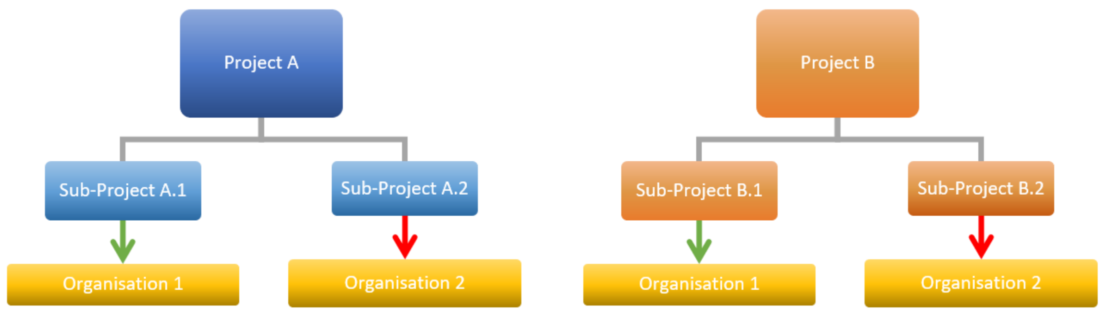


Fig. 2: distribution within organizations

Organization link

Each project can be linked to an organization.

Resources can be linked to an organization.

Note: Depending on the profile, you can limit the visibility of resources to people in the same organization or team as the current user.

Sub-projects are by default attached to the same organization as the parent, but can be integrated into another organization.

2.1.4 Product

A product is a material object or for IT/IS projects is a software application.

Composition of product

A product can have a complex structure that can be composed of sub-product and components.

A product and its components can have several versions that represent each declination.

See: *Product structure*

Linked to a project

A product is an element delivered by a project.

The link with the project have no impact on project planning.

Indicates only that project is devoted to a specific product versions.

The link management is done in *Project* and *Product Versions* screens.

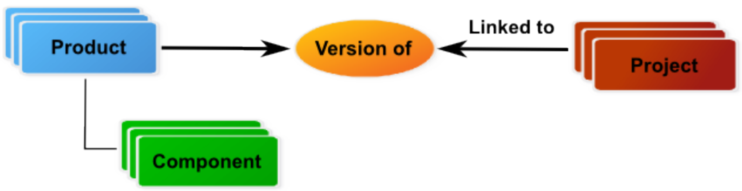


Fig. 3: Link with projects

Identifying the version that is the subject of treatment

Product (component) versions can be identified in these elements:

- *Activity*
- *Milestone*
- *Requirements*
- *Test cases*
- *Test sessions*
- *Tickets*.

The purpose is to identify which product (component) and its version that is the subject of the treatment.

Depending on the element, it has the possibility identifying version of origin, target version or both.

Document management

Documents can be identified to products.

See: *Documents*

Management of product and component elements

See: *Configuration Management*, for detail about management of product and component elements.

Product structure

The product structure is defined depending on the relationships defined between product and component elements.

The rules defining a product structure are:

Relationships between product elements

- A product can have several sub-products.
- A sub-product can be in the composition only one product.

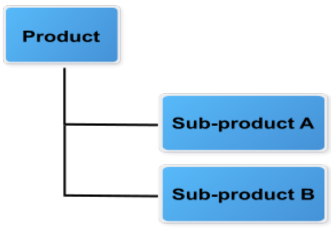


Fig. 4: Relationships between product elements

Relationships between product and component elements

- A product can be composed of several components.
- A component can be in the composition of several products.

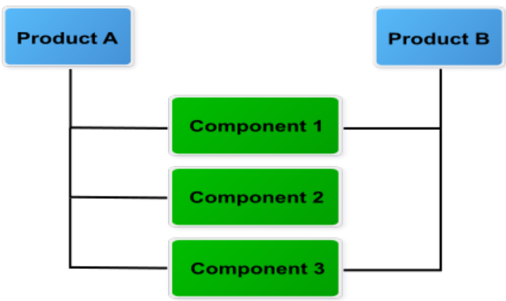


Fig. 5: Relationships between product and component elements

Relationships between component elements

Components can be linked between them (N to N relationships).

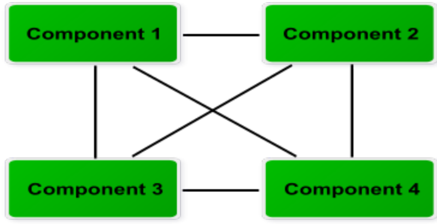


Fig. 6: Relationships between component elements

Versions of product and component elements

A product can have several versions that represent each declination of product.

A component can have several versions that represent each declination of the component.

Links can be defined between versions of products and components, but only with the elements defined in the product structure.

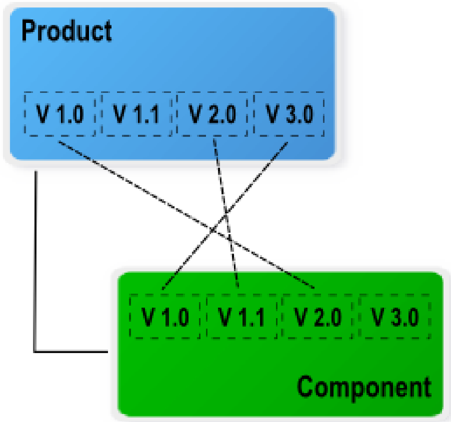


Fig. 7: Link between versions of product and component

2.1.5 Planning

ProjeQtOr implements work-driven planning method.

Based upon on resource availability and their capacity.

Resource availability

Resource availability is defined by calendars and project allocation period.

Resource calendar

- Each resource is attached to a calendar to define its working days.
- Tasks assigned to the resource will be planned according to working days defined in the calendar.
- More detail, see: *Resource calendar*

Project allocation period

- The resource can be allocated to several projects.
- Possibility to define allocation period.
- More detail, see: *Resource allocation to project*

Resource capacity

Resource capacity is defined on daily base.

The scheduling tool does not exceed the daily resource capacity.

Note: Full Time Equivalent (FTE)

- This indicator is defined for each resource.
- It allows to define the daily capacity.
- More detail, see: *Resource*

Project allocation rate

The project allocation rate is used to resolve allocation conflicts between projects.

It allows to define resource availability for a project during a period.

Use with the resource capacity, it allows to define the project allocation capacity on a weekly base.

Task assignation rate

The task assignation rate is used to keep some scheduling time for other tasks.

Use with the resource capacity, it allows to define the assignation capacity on a daily base.

Draft planning

Two methods can be used to create a draft planning.

Use planning mode "fixed duration"

This planning mode is used to define fixed duration tasks. See: *Planning mode*

Dependencies allow to define the execution order of tasks. See: *Dependencies*

You can define this planning mode as defaut in the Activities Types screen for some types of activities you'll use in draft plannings

Use faked and team resource

The faked and team resource can be useful to get a first estimate of project cost and duration without involving the real resources.

Planning schedule is calculated using of the work-driven planning method.

Faked and team resources can be mixed in same draft planning.

Faked resources

- For instance, you want to define a Java developer resource. You can create a resource named "Java developer #1".
- There are several levels of Java developer with different daily costs (beginner, intermediary and expert).
- You can define for this resource the functions and average daily cost for each level. (See: *Resource function and cost*)
- You assign this resource to tasks, to a specific function (level). (See: *Assignment*)
- Faked resource will be easily replaced with real resources when project becomes real, with allocation replacement feature .

Team resource

- A team resource is a resource whose daily capacity has been defined to represent capacity of a team (Capacity (FTE) > 1).
- For instance, you needed to define four Java developers, but you don't want to create a resource for each. You can *overload* the daily capacity of the resource (Example: Capacity FTE=4).
- Using team resources is very easy but renders estimation of project duration as draft, not taking into account constraint of different resources such as possibly different skills or expertise level.
- With team resources it is very easy to estimate planning with different number of members in the team : what if I include 5 Java develpers instead of 4 ? Just change capacity to 5 and re-calculate planning…

Planning elements

ProjeQtOr offers standard planning elements like Project, Activity and Milestone.

But also, it offers two more planning element: Test session and Meeting.

Project

This planning element defines the project.

- It allows to specify information on the project sheet like the customer, bill contact, sponsor, manager and objectives.
- Documents, notes and attachments can be annexed.
- More detail: *Project*

  Sub-project

  Sub-project is used to split the project.

  The project can be split to correspond the organizational breakdown or something else.

Note: Separation of duties

- A project can be split into multiple sub projects.
- A project leader and team can be allocated to each sub-project.
- Project allocation allows to define data visibility and isolate sub-projects. See: *Allocation to project*
- A supervisor can follow-up the project in its totality.

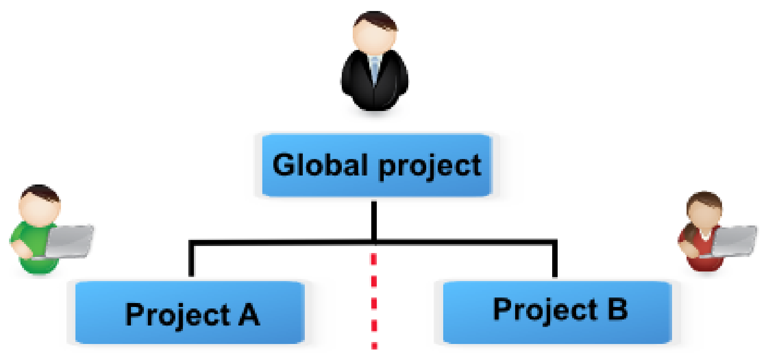


Fig. 8: Separation of duties

Activity

This planning element can be a phase, a delivery, a task or any other activity.

An activity can grouped other activities or be a task.

More detail, see: *Activity* screen

Grouping of activities

- An activity can be the parent of activities.
- This allows to define the structure of phases and deliveries.

- Dates, works and costs of activities (child) are summarized in the activity (parent).

Task

- An activity is a task when it's not a parent of activities.
- A task is assigned to resources for to be performed.

Test session

This planning element is a specialized activity aimed for tests.

A test session allows to define a set of test case that must be run.

A test session can grouped other test sessions or be a task.

More detail, see: *Test sessions* screen.

Grouping of test sessions

- A test session can be the parent of test sessions.
- This allows to define the structure of test sessions.
- Dates, works and costs of test sessions (child) are summarized in the test session (parent).

Task

- A test session is a task when it's not a parent of test sessions.
- A task is assigned to resources for to be performed.

Milestone

This planning element is a flag in the planning, to point out key dates.

May be a transition point between phases, deliveries.

ProjeQtOr offers two types of milestone floating and fixed.

More detail, see: *Milestone* screen.

Meeting

This planning element acts like a fixed milestone, but it's a task.

Like a milestone, a meeting can be a transition point.

But also, like a task because it's possible to assign resources and planned work.

More detail, see: *Meetings* screen.

Role of an dependency

Dependencies allow to define the execution order of tasks (sequential or concurrent).

All planning elements can be linked to others.

Dependencies can be managed in the Gantt chart and in screen of planning element.

Note: Global parameter "Apply strict mode for dependencies"

If the value is set to "Yes", the planning element (successor) can't start the same day that the end date of planning element (predecessor).

Dependency types

- ProjeQtOr offers only the dependency (Finish to Start).
- This section explains what are they dependency types can be reproduced or not.

  Start to Start

  To reproduce this dependency type, it's possible to add a milestone as prior of both tasks.

  Start to Finish

  This dependency type can't be reproduced in ProjeQtOr.

  This is a very weird scenario.

  Finish to Finish

  The successor should not end after the end of the predecessor, which leads to planning "as late as possible".

  Anyway, the successor can end before the predecessor. Note that the successor "should" not end after the end of predecessor, but in some cases this will not be respected:

  - if the resource is already 100% used until the end of the successor
  - if the successor has another predecessor of type "End-Start" or "Start-Start" and the remaining time is not enough to complete the task
  - if the delay from the planning start date does not allow to complete the task.

Delay (days)

A delay can be defined between predecessor and successor (start).

Planning mode

Planning mode allows to define constraints on planning elements: activity, test session and milestone.

Milestones planning mode

Planning modes are grouped under two types for milestone :

Floating

- These planning modes have no constraint date.
- Planning element is floating depending on its predecessors.
- Planning modes: As soon as possible, Work together, Fixed duration and floating milestone.

Fixed

- These planning modes have constraint date.
- Planning modes: Must not start before validated date, As late as possible, Regular and fixed milestone, Manual planning.

See also:

Activity and Test session planning modes and *Milestone planning modes*.

Planning element planning mode

Several planning modes for your project elements are proposed to best manage the time spent on certain planning elements.

See: *Planning Modes*

- As soon as possible
- Work together
- Fixed duration
- Must not start before validated start date
- Must start at validated date
- Should end before validated end date
- Regular between dates
- Regular in full days
- Regular in half days
- Regular in quarter days
- Recurry (on weekly basis)
- Manual planning

  Prioritized planning elements

  Planning elements are planned in this order of priority:

  1. Manual planning
  2. Fixed date (Fixed milestone, Meeting)
  3. Recurrent activities - Planning modes "Regular…" (Activity, Test session)
  4. Fixed duration (Activity, Test session)
  5. Others

Note: Since ProjeQtOr does not plan in advance, the "As soon as possible" planning mode without constraint date (floating point) is not available.

Default planning mode

Possibility to define the default planning mode according to element type.

See: *Activities types*, *Milestones types* and *Test sessions types* screens.

Planning priority

The planning priority allows to define planning order among planning elements.

Possible values: from 1 (highest priority) to 999 (lowest priority).

planning priority value is set in progress section of planning element.

Note: If projects have different priorities, all elements of project with highest priority are planned first.

Project structure

Work breakdown structure (WBS) is used to define project structure.

Breakdown can be done with sub-projects, activities and test sessions.

Structure management

- As seen previously, the project can be split in subprojects.
- All other planning elements concerned by the project or subproject are put under them without structure.
- Planning elements can be grouped and orderly in hierarchical form.
- Structure management can be done in the Gantt chart or in planning elements screen.

WBS element numbering

- The project is numbered by its id number.
- All other elements are numbered depending on their level and sequence.
- WBS numbering is automatically adjusted.

Project planning calculation

The project planning is calculated on the full project plan that includes parents and predecessor elements (dependencies).

Planning

The calculation is executed task by task in the following order:

1. Manual Planning
2. Dependencies (Predecessor tasks are calculated first)
3. Prioritized planning elements
4. Project priority
5. Task priority
6. Project structure (WBS)

Constraints

The remaining work (left) on tasks will be distributed on the following days from starting planning date, taking into account several constraints:

- Resource availability
- Resource capacity
  - Project allocation capacity (Project allocation rate)
  - Assignation capacity (Task assignation rate)
- Planning mode

Resource overloads

- This is not possible to overloading the resources.
- The planning calculation process respects availability and capacity of the resource.
- If it is not possible to distribute remaining work, on already planned days, the calculation process uses new available time slot.

2.1.6 ProjeQtOr roles

A stakeholder can play many roles in ProjeQtOr.

Roles depends on *Stakeholder definition*.

Specific roles are defined to allow:

- To categorize the stakeholders involved in the projects.
- To identify the stakeholders on items.
- To regroup the stakeholders to facilitate information broadcasting.

Use to

- In items of elements.
- As reports parameters.
- As recipients list to mailing and alert.

2.1.7 Profiles definition

The profile is used to define in-app permissions and data access rights.

Each resource, user or contact is assigned a profile. This is mandatory. This is the default profile.

Multiple resources, users, or contacts can have the same profile. They are linked to a profile and belong to this group and share the same application behavior.

Note: You can define profiles to be conformed to the roles defined in your organization.

See: *Profils*

See: *Access rights*

Used for

The profile is used to define access rights to application and data, first.

Also, the profile is used to send message, email and alert to groups.

Selected profile in project allocation

A profile can be selected to a user, resource or contact in project allocation.

The profile selected is used to give data access to elements of the projects.

A resource can have a different profile on each project to which it is assigned.

Workflow definition

The profile is used to define who can change from one status to another one.

You can restrict or allow the state transition to another one according to the profile.

Workflow definition is managed in *Workflow* screen.

Predefined profiles

ProjeQtOr offer some predefined profiles.

Administrator profile

- This profile group all administrator users.
- Only these users can manage the application and see all data without restriction.
- The user "admin" is already defined.

Supervisor profile

- Users linked to this profile have a visibility over all the projects.
- This profile allows to monitor projects.

Project leader profile

- Users of this profile are the project leaders.
- The project leader has a complete access to owns projects.

Project member profile

- A project member is working on projects allocated to it.

- The user linked to this profile is a member of team projects.

Project guest profile

- Users linked to this profile have limited visibility to projects allocated to them.
- The user "guest" is already defined.

Predefined profiles (External)

ProjeQtOr allow to involve client employees in their projects.

The distinction between this profile and its equivalent, user access is more limited.

2.1.8 Stakeholder definition

ProjeQtOr makes it possible to define the roles of the stakeholders.

The definition of stakeholders is done in part with the profile. This allows certain access and visibility rights to be determined. See: profiles

and with the definition of user / resource / contact.

These combinations are used to define:

- Connection to the application.
- Data visibility.
- Availability.
- Roles.

These stakeholders can be either resource, contact, or users, but they can also be all three.

The next matrix shows the different possibilities.

Table 2: U=User - R=Resource - C=Contact

	Connection	Visibility	Availability
URC	✓	✓	✓
UR	✓	✓	✓
UC	✓	✓	✗
U	✓	✓	✗
R	✗	✗	✓

Data visibility

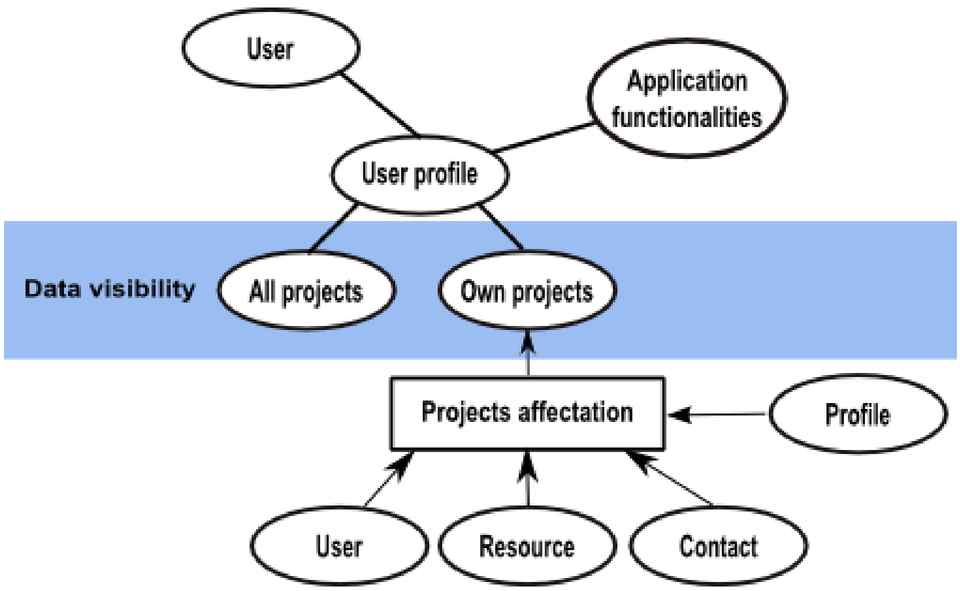


Fig. 9: Data visibility diagram

User profile

- To a user, data visibility is based on its user profile.
- User profile defined general access to application functionalities and data.
- Base access rights defined if a user has access to own projects or over all projects.

All projects

- This access right is typically reserved for administrators and supervisors.
- Users have access to all elements of all projects.

Own projects

- Users with this access right must be allocated to project to get data visibility.
- Selected profile in allocation allows to define access rights on project elements.
- For more detail, see: *Allocation to project*.

Resource availability

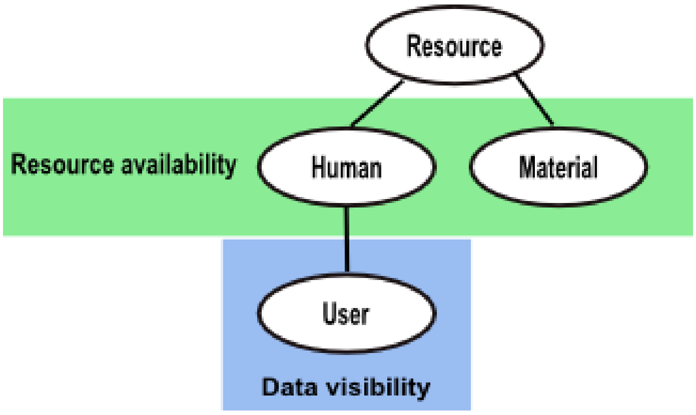


Fig. 10: Resource availability diagram

Only resource can be assigned to project activities.

Project allocation allows to define the resource availability on project.

Human resource

- Human resource is a project member.
- Combined with a user, a human resource can connect to the application.

Material resource

- Material resources availability can be defined on projects.
- But, material resource must not be connected to the application.

Contact roles

- ProjeQtOr allows to involve contacts in projects.
- Combined with a user, a contact can connect to the application
- Combined with a resource, contact availability can be planned in projects.

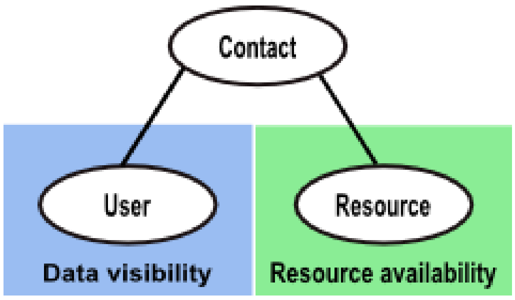


Fig. 11: Contact roles diagram

Shared data

For a stakeholder, data on user, resource and contact are shared.

Allocation to project and user profile are also shared.

Note: For a stakeholder, you can define and redefine the combination without losing data.

2.1.9 Resource function and cost

Function

The function defines the generic competency of a resource.

It is used to define the role play by the resource on tasks.

In real work allocation screen, the function name will be displayed in the real work entry.

A main function must be defined to resource and it is used as default function.

A daily cost can be defined for each function of the resource.

The *Functions* screen allows to manage function list.

Resource cost definition

Allows to define the daily cost, according to the functions of the resource.

The daily cost is defined for a specific period.

Real cost calculation

When real work is entered, the real cost is calculated with work of the day and daily cost for this period.

Planned cost calculation

When the project planning is calculated, resource cost is used to calculate planned cost.

Planned cost is calculated with planned work of the day and current daily cost.

Note: Function and cost are defined in *Resource* screen.

2.1.10 Resource calendar

A calendar defines the working days in a the year.

A calendar is defined for a type of resources and each resource is attached to a calendar.

Planning process

Calendars are used in the planning process which dispatches work on every working day.

During the planning process, the assigned work to a resource is planned in its working days.

> **Note:** You must re-calculate an existing planning to take into account changes on the calendar.

Shows the availability of resources

Working days defined in a calendar allows to show availability of resources.

Default calendar

The default calendar is used to define the working days in the year.

By default, this calendar is defined for all resources.

Specific calendar

A specific calendar can be created to define working days for a type of resource.

Note: A calendar is set in *Resource* screen.

The calendar is defined in *Calendars* screen.

Use case

Public holiday

You can use the default calendar to set public holidays.

Work schedule

You can define a different work schedule to some resources.

This calendar defined exceptions to normal working days.

For instance, you can define a calendar for resources on leave on Wednesdays.

Important: Personal calendar

Even if you can create a specific calendar to each resource, this is not the advised way to manage personal days off and vacations.

You'd better use Administrative projects (enter real work in advance).

2.1.11 Contexts

The contexts defines a list of elements selectable to define ticket context and test case environment.

Contexts are initially set to be able to define contexts for IT Projects, for three context types :

- Environment
- Operating System
- Browser

They can be changed to be adapted to any kind of project.

Section Description

Field	Description
Id	Unique Id for the context.
Context type	One of the three context type.
Name	Name of the context.
Sort order	Number to define the order of display in lists
Closed	Flag to indicate that the context is archived.

Fields Context type

The list is fixed.

Captions are translated and so can be changed in language file.

CHAPTER

THREE

AGILE METHODS

This chapter includes ProjeQtOr features that allow you to practice agile methods.

3.1 Agile Methods

Agile methods are groups of practices of piloting and realization of projects. They originate from the Agile Manifesto, written in 2001, which uses the term “agile” to refer to multiple existing methods.

Agile methods are more pragmatic than traditional methods, involve the client as much as possible and allow a great reactivity to his requests. They are based on an iterative, incremental and adaptive development cycle and must respect four fundamental values, based on twelve principles, from which a base of practices, either common or complementary, derives.

3.1.1 KanBan

Other sections

- *Actions*
- *Decisions*
- *Questions*
- *Requirement*
- *Ticketing*

The Kanban methodology comes from the Japanese automotive industry. It was created with the aim of optimizing the production capacity.

The Kanban method is based on the continuous improvement of production processes to enable lean production management.

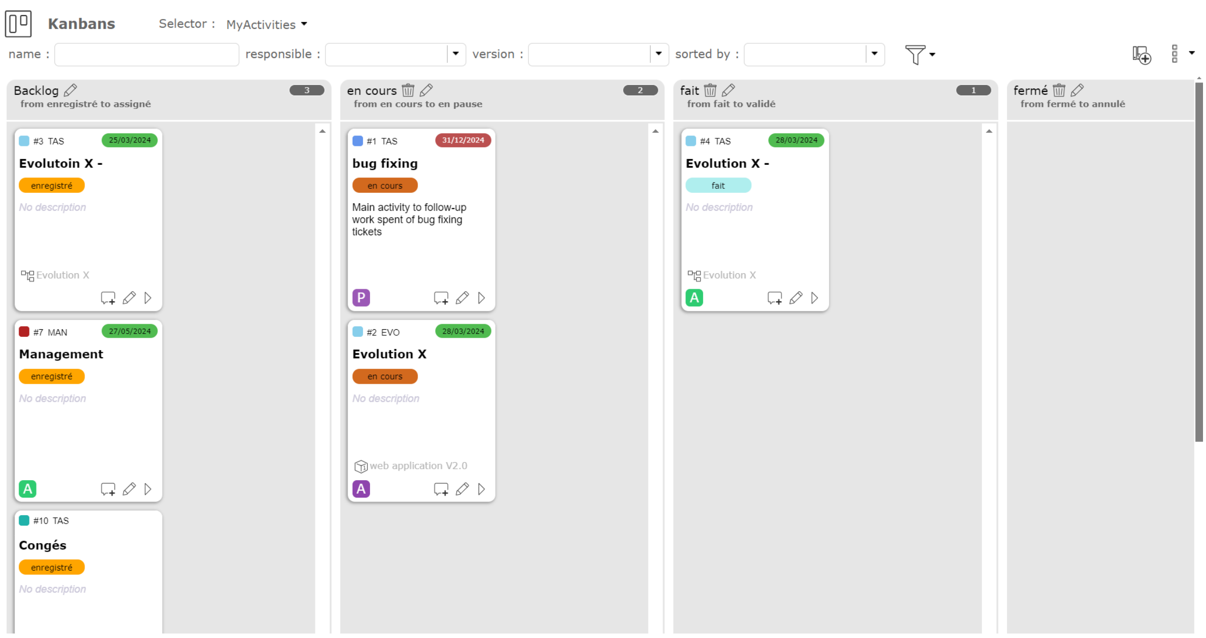


Fig. 1: Kanban Screen

The Kanban approach is a stock management method that allows you to produce on demand.

The main objective is to balance production and demand.

With Kanban, you can create a new Kanban board for

- Tickets,

- Activities,
- Actions,
- Requirements
- Add / Remove columns to an existing Kanban board
- Direct update of elements

Dashboard management

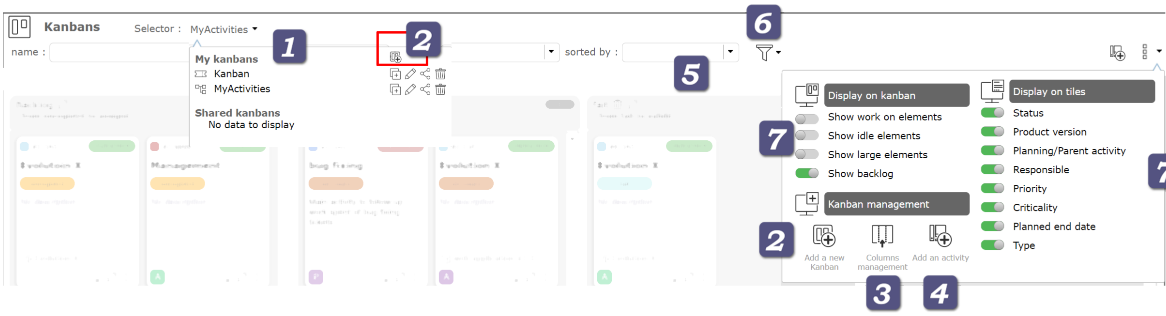


Fig. 2: Header area

Interface areas:

The Drop-down list

Create a new table

Create a new column

Create a new element

Fields restriction

Kanban filters

Display options on kanban

Display options on tile

The Drop-down list

You can see the complete list of created tables by clicking on the Kanbans drop-down list in the My Kanbans section.

The icon used for kanban tables created corresponds to the type of elements selected.

You can see the shared kanban tables by others users on the shared Kanbans section.

- Click on to create a new kanban
- Click on to copy this kanban
- Click on to edit this kanban
- Click on to share this kanban. The icon is fill when it is already shared.
- Click on to delete this kanban

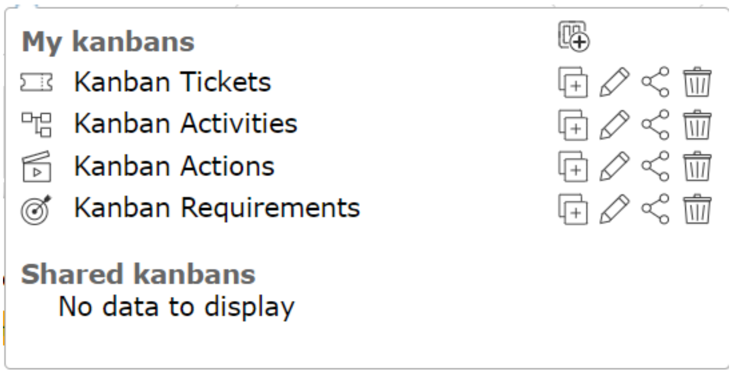


Fig. 3: List of existing kanban

Create a new table

When you create a kanban, no matter what type, only one column is available.

You create the following columns according to your needs.

- Click on to create a new Kanban

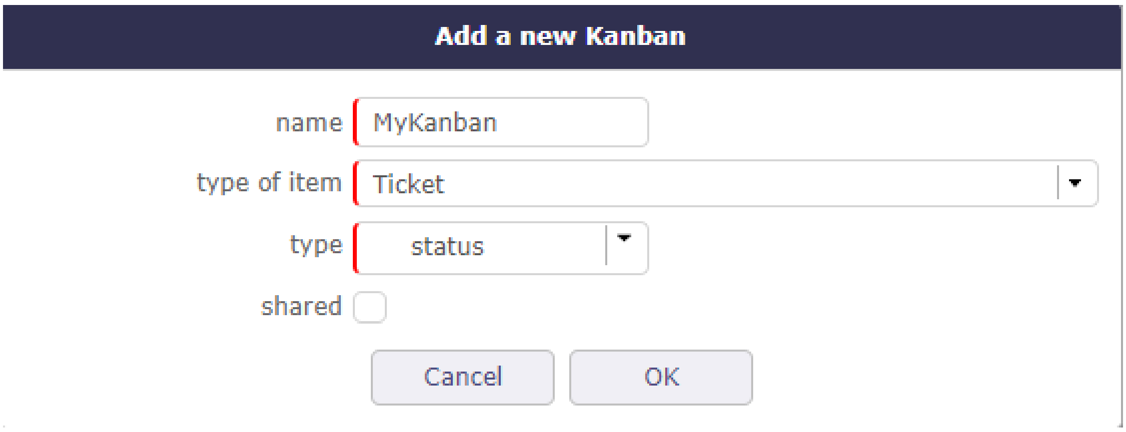


Fig. 4: Add a new kanban of tickets

You will need to define:

- **Name** for the new Kanban board
- **Type of item:** you can define a Kanban of Tickets, Activities, Actions or Requirements

When you have selected the item type, you must then define the type of Kanban board to apply:

- **Status:** you will manage the most standard “status based” kanban board
- **Target product version:** you can distribute the tickets among the target product version
- **Planning activity:** You will be able to send tickets among planning activities, which can be your Sprints in the Scrum method.
- **Target milestone** You manage your elements according to the target milestones of your project

See also:

See *Planning activity* on the tickets screen and *Milestone*

You can choose directly if you want to share the newly created kanban with other users so that they can use it.

When you share a Kanban, other users will see your share in the list of shared Kanbans.

Each time you access the Kanban screen, the last selected Kanban map is displayed.

Create a new Column

By default, when you create a new Kanban table, it gets a single column.

- Click on to create a new Column

The pop up is different depending on the type of kanban board created beforehand.

Fig. 5: Add a new column

In the case of a status arrangement, the columns contain items from one status to another in the order of presence of your workflow.

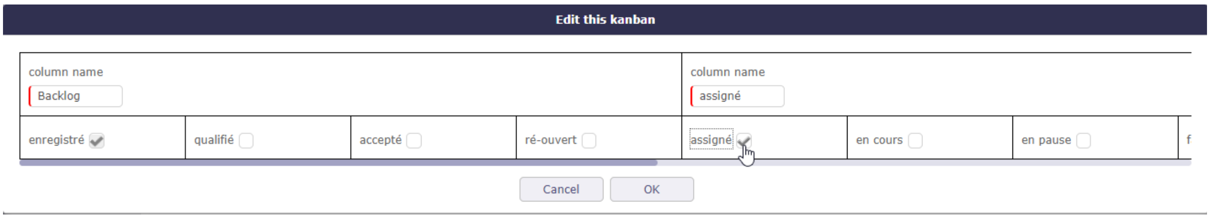


Fig. 6: Select the next status

The next column will show the next status following your workflow to the last or the status you have determined.

Fig. 7: Details header column

Each column indicates the number of elements contained in.

Click on to edit the column name.

Click on to delete the column.

Create a new element

The creation button change depending on the type of the element selected.

Click on to add a new ticket into the Kanban Board or

Click on to add a new action into the Kanban Board or

Click on to add a new activity into the Kanban Board or

Click on to add a new action into the Kanban Board

Fields restriction

As with other ProjeQtOr screens, you can restrict the display of items in the created columns of your kanban.

You can restrict items by name, manager, version, and sort them by ID, name, manager, status, or target version product.

Advanced filters

Click the icon to set an advanced filter.

The advanced filter is used to define a clause to filter and sort

for more information on advanced filters

see: *Advanced filters in Graphic User Interface*

Display options on kanban

Show work on elements

You can view the work information of items on each column.

The estimated work, actual work, and work remaining information on the selected item can be displayed

If your profile is not allowed to see the job, you will not have access to this option.

The format for displaying the job (days or hours) depends on the overall configuration:

- **unit for real work allocation** for Tickets
- **unit for workload** for Activities

Show idle elements

Allows you to display or not inactive elements (closed, canceled, paused, etc.)

You switch to archive mode.

Show large element

By default, Kanban board columns display two tiles side by side.

By displaying the tiles in wide mode, each tile takes the maximum width of the column.

Hide backlog

When you create a kanban, you do not yet have columns representing a state, a set of states or even versions.

The tiles then appear in a Backlog column.

You have the option to hide this column.

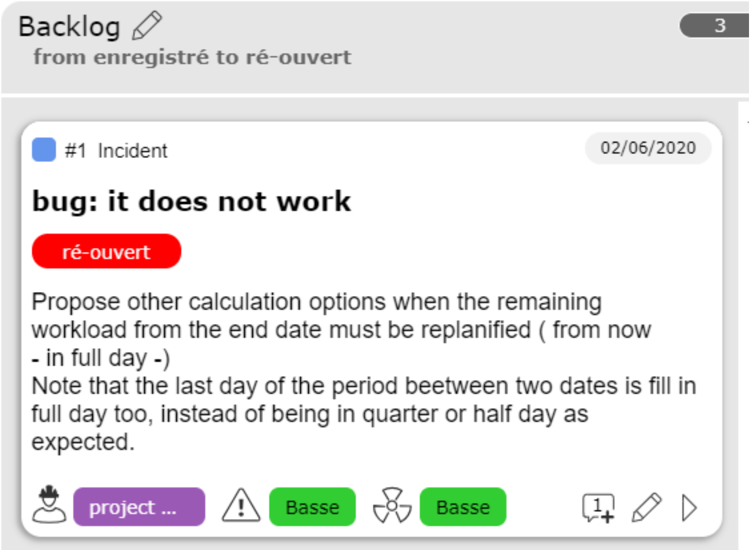
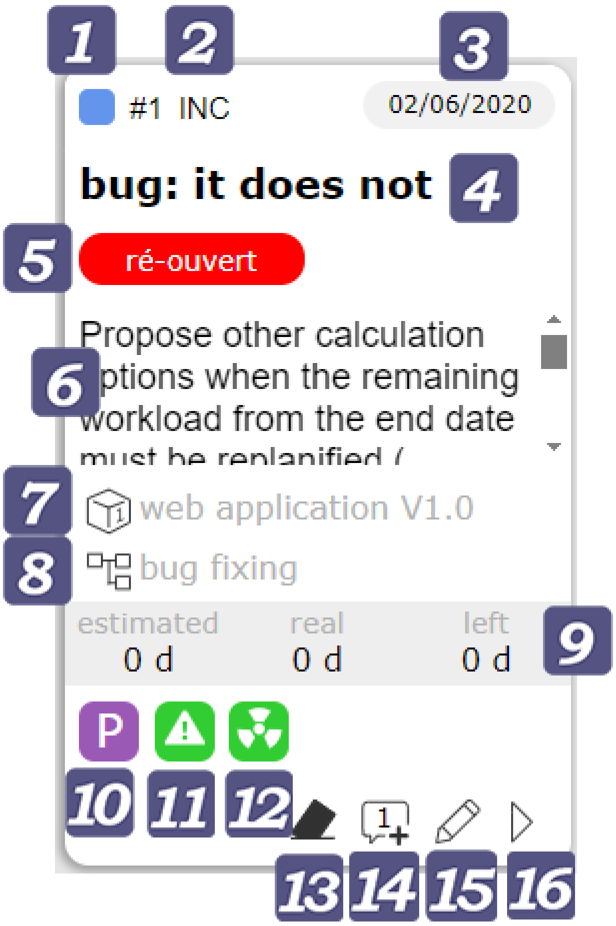


Fig. 8: Wide kanban board display



0 Details of an element

1 ID of the element with in the background the project color

2 The type of the element

3 The planned due date for the element

4 The name of the element

5 Status in which the tile is located in relation to your *Workflow*

6 The description of the element

7 The target product version

8 The planning activity or parent activity related to the element

9 Estimated work | Real work | Left work

10 Responsible of work Photo - The name is displayed on mouse over

11 Priority of the element - *Priorities* are customizable.

12 Criticality of the element - *Criticality* are customizable.

13 Vote. The button allows you to vote on the item if you have the rights. Click the button to display the voting pop-up

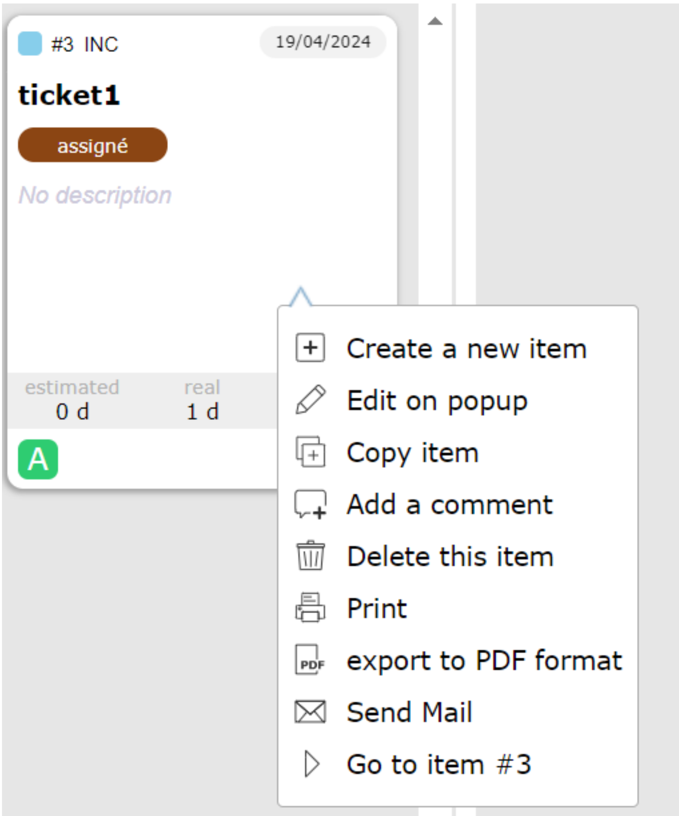
14 Add a note. The number of notes is displayed on the icon

15 Edit the element

16 Go to the element screen

Contextual menu

By right-clicking on a tile, you access the contextual menu which gives you access to several options



These are the main options like create, edit, copy but also shortcuts to add comments or go to the element.

Edit an element

- Click on to edit the element.
- Click on the button to edit the element directly from the Kanban screen.

  A pop-up is displayed with your item information as on the dedicated screen.

  - Click on to save your changes

Fig. 9: Edit element window

Moves an element

To move tickets, activities, or anything else from your kanban, drag and drop a ticket into the corresponding column.

The heading of the moved element then changes to **green** when it is on a column where the movement is allowed and is **red** when it is on a column where the movement is prohibited.

If the Kanban is arranged as statuses, the new status after move, will be the first status of the range defined for the column.

For Kanbans based on the target product version and planning activities, the new field value will simply be the target.

Forbidden moves

Displacements will change the value of the corresponding field for the moved element.

But the "status" change must respect the workflow configuration for the given item type. This is why some movements are prohibited.

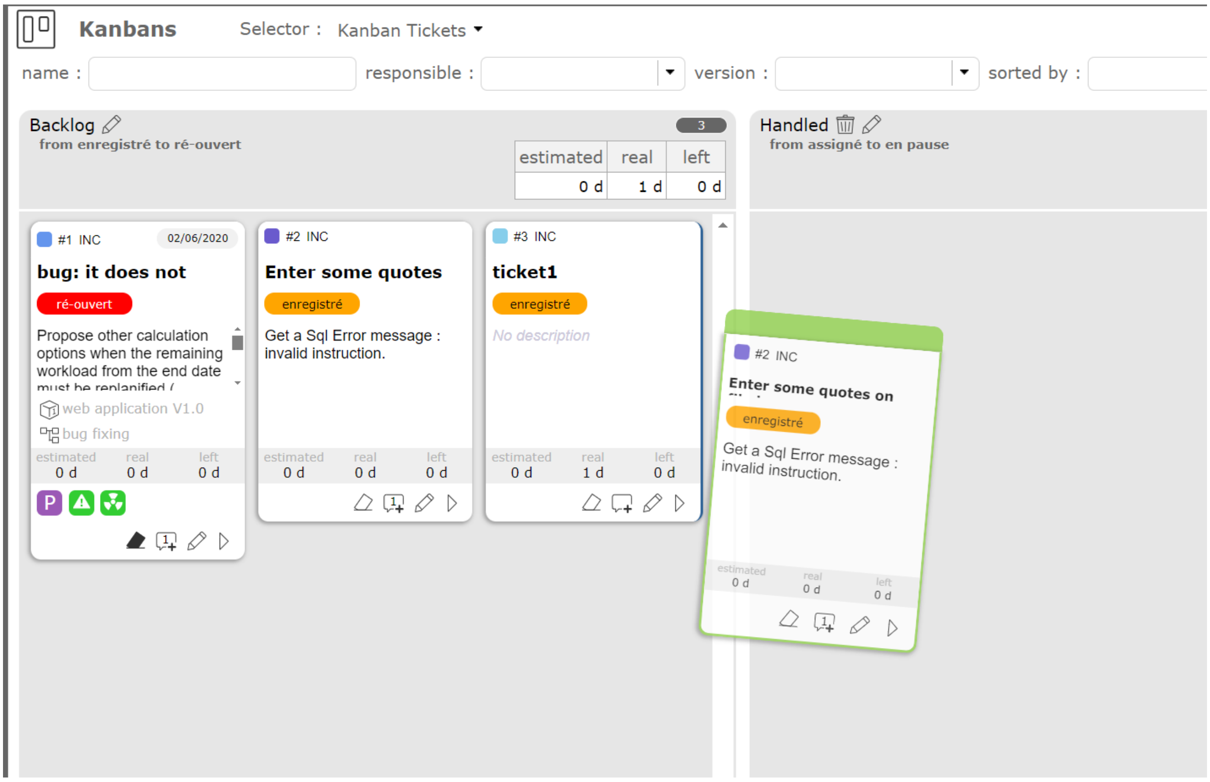


Fig. 10: Move an element

Permitted moves are easily identified from prohibited moves by the color of the Ticket header or the moved Activity.

Updating

Depending on the configuration of the ticket type, some state changes may require the definition of new fields.

For example, in the default configuration, when changing to the "assigned" state, "responsible" is required, and when transitioning to the "terminated" state, "result" is required ".

In this case, when you move a ticket in the Kanban columns, a pop-up window appears to allow you to enter the missing value if it is not already defined.

Vote

If the voting settings and your rights allow you to vote on an element, then the vote button will be clickable and you will be able to vote directly on the element from the Kanban screen.

Renseignez votre vote. Les points restants sont automatiquement décrémentés.

Cliquez sur valider pour fermer le pop-up.

Selon les régles établies pour le vote sur l'élément, le bouton va se remplir au fur et à mesure des votes.

See: *voting management*

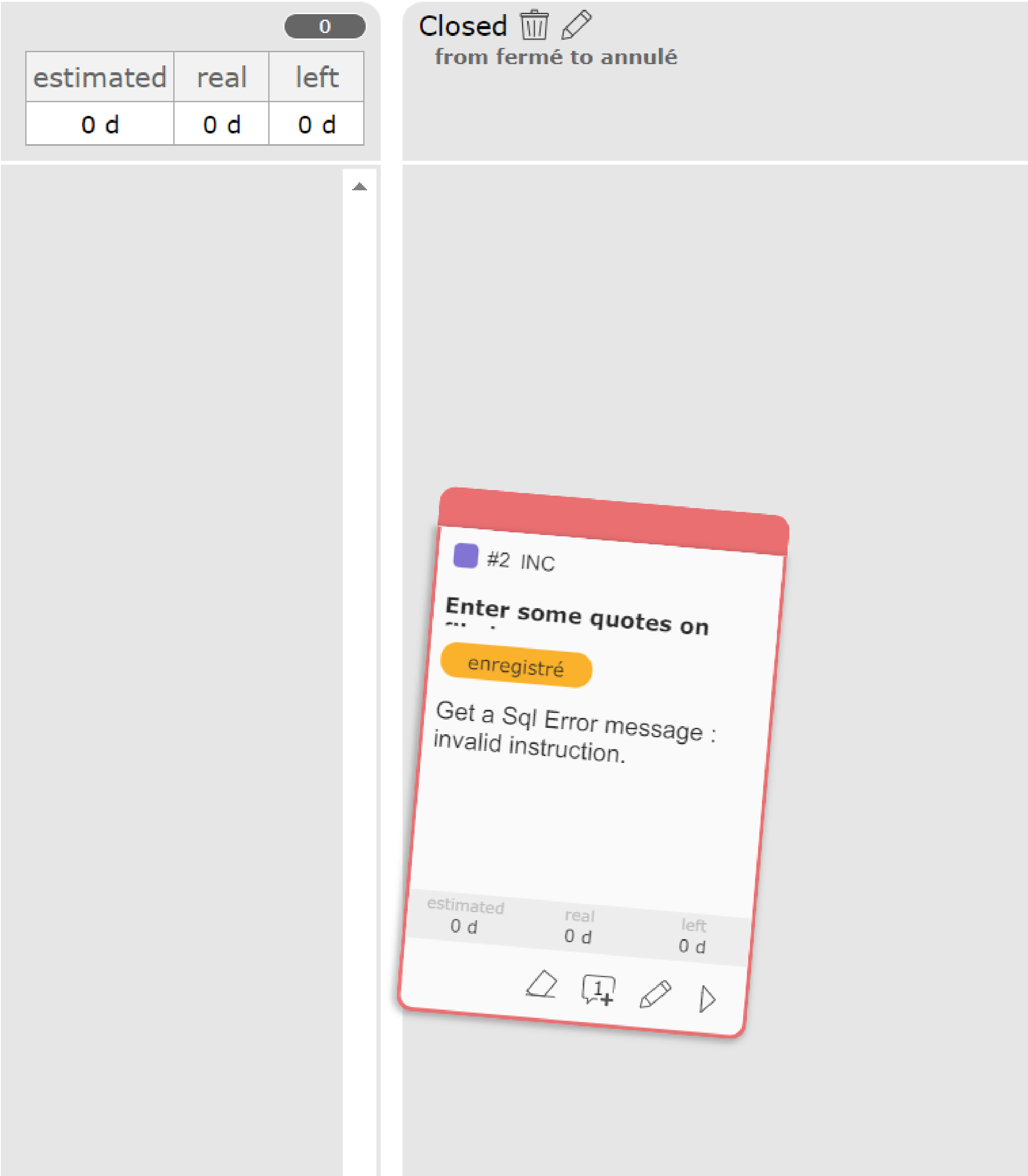


Fig. 11: movement refused

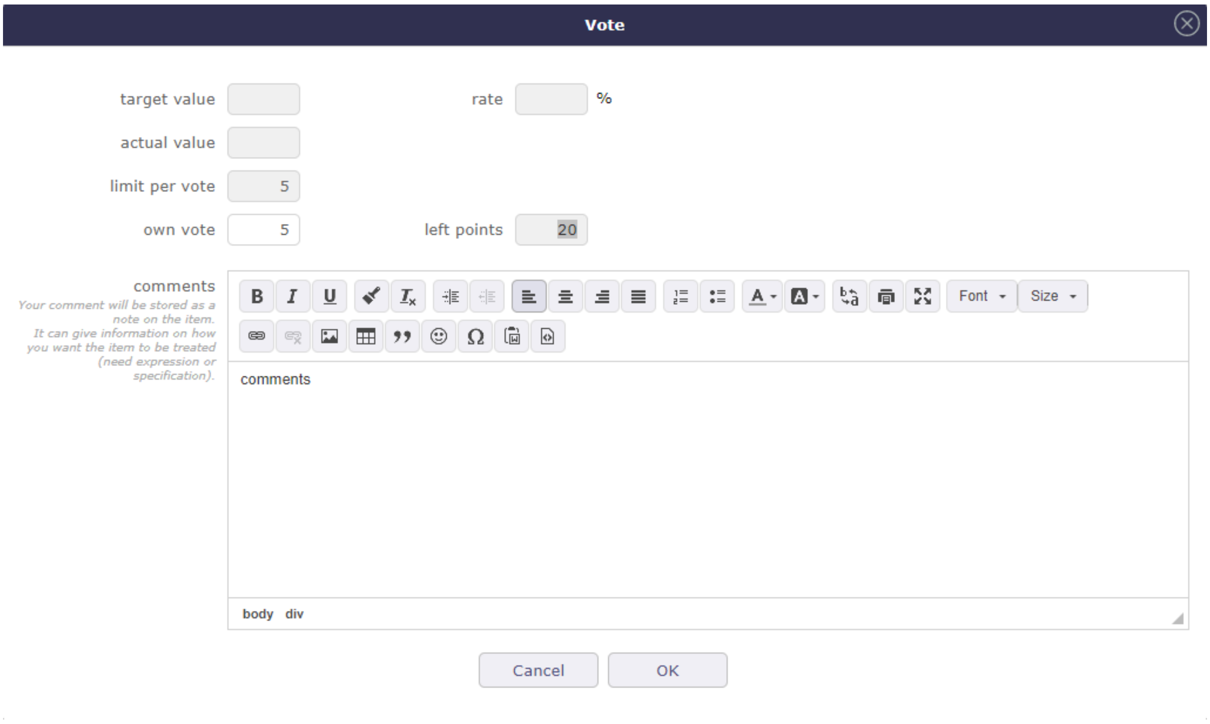


Fig. 12: Vote pop-up

3.1.2 Live Meeting

LiveMeeting allow you to manage meetings in an agile way:

- Manage written production quickly and easily
- Recovery in the liveMeeting of the agenda established on the meeting screen
- Automatic saving of the minutes when leaving the live meeting
- Automatically share the time between all participants
- Dynamically measure the speaking time of each participant
- Easily write minutes while assistants speak
- Easily manage actions / decisions / questions while writing minutes and add them with the enter button.
- Manage tickets, activities, actions and requirements with Kanban while writing minutes.
- Kanban status change manipulations are also indicated in the meeting minutes.

Click this button to access the Live Meeting Management screen.

- Click on **Hide time counters** to show or hide participants' tabs with their speaking time
- Click on to exit the LiveMeeting screen
- Click on to manage your kanbans since the livemeeting
- Click on to display the QUestions / Actions and Decisions
- Click on to save the live meeting report

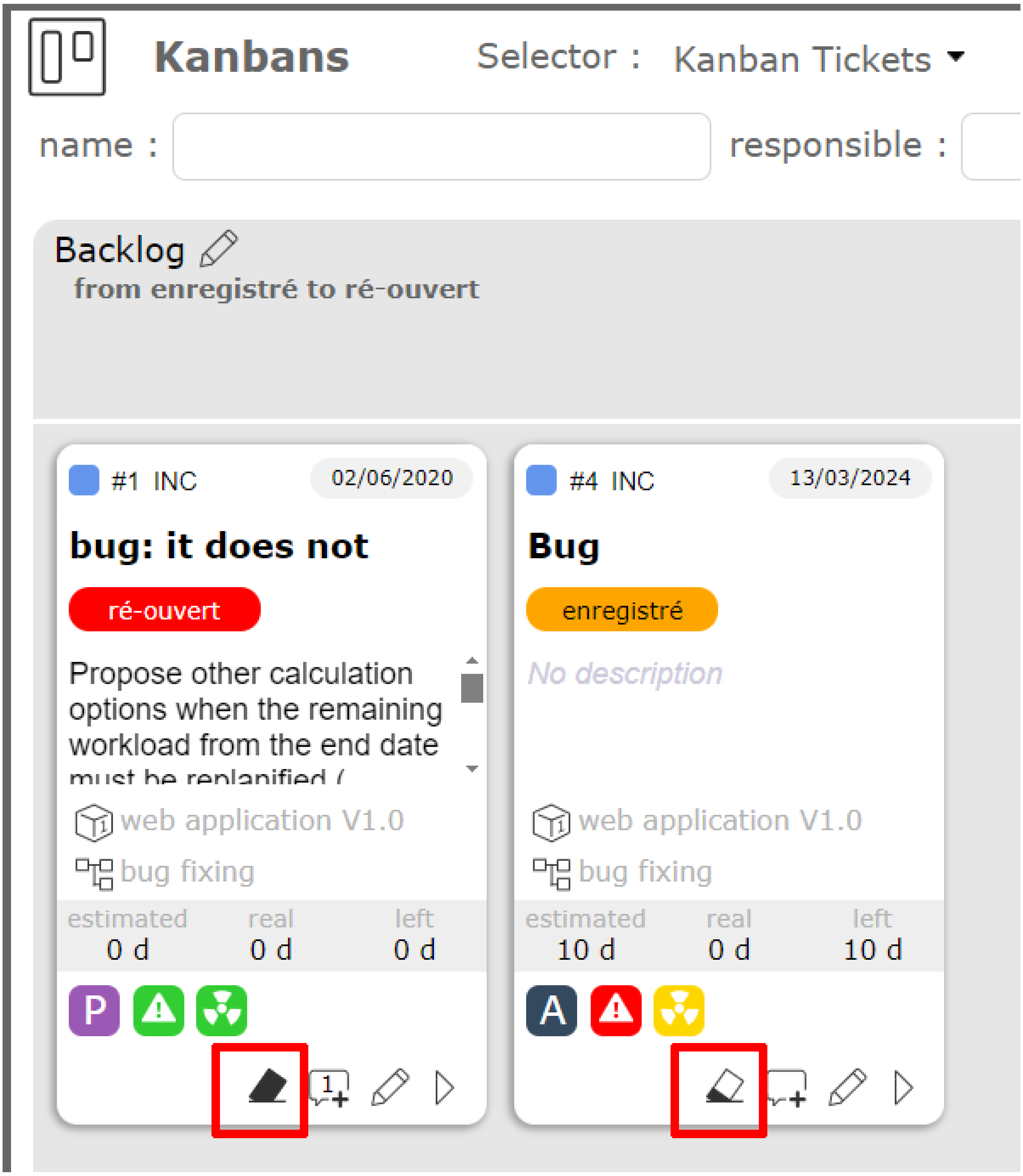


Fig. 13: icon indicating that votes have started or have been completely filled

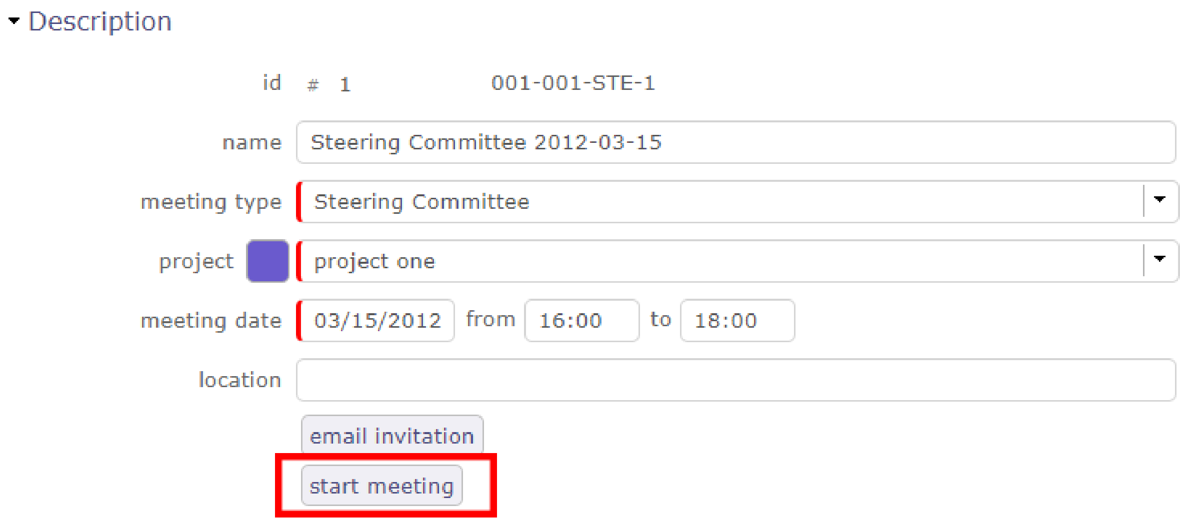


Fig. 14: The Live Meeting button

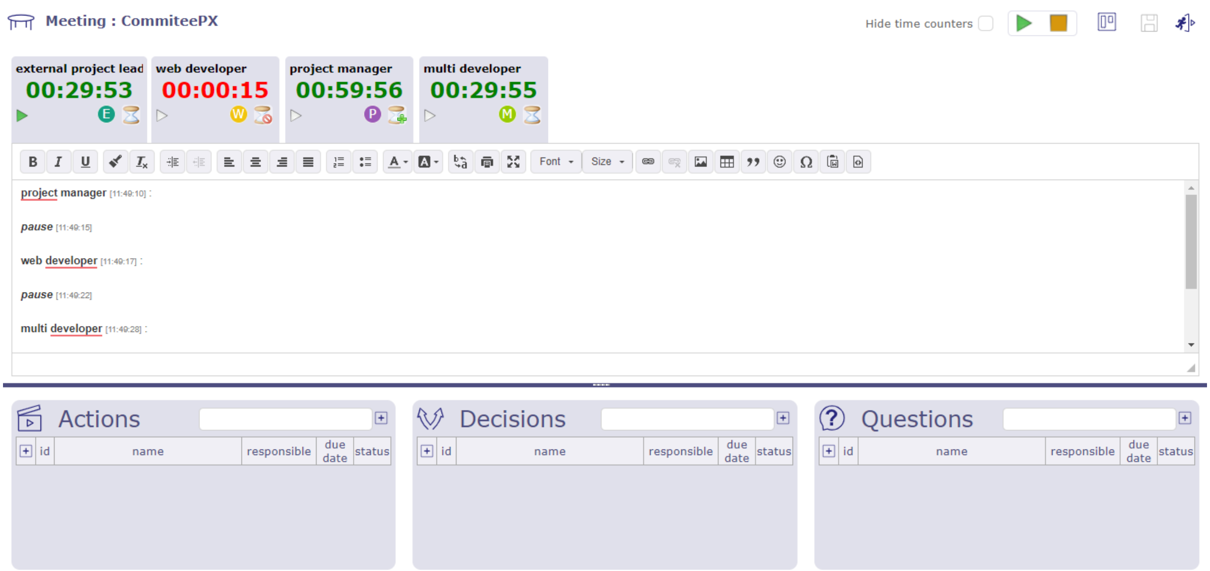


Fig. 15: The Live Meeting screen

Starting a meeting

When the Live Meeting screen opens, the duration of the meeting is automatically distributed equally to all participants.

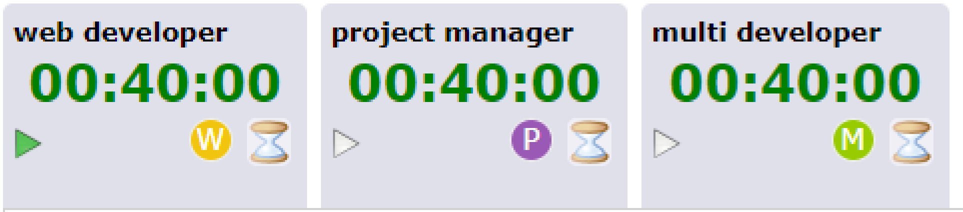


Fig. 16: Time distribution

- Click on  to start the meeting and to start decrementing the speaking time
- Click on  To stop the meeting and therefore close the LiveMeeting window to return to the current meeting screen
- Click on  to pause the speaker's time

  Set the organizer

  Before starting the meeting, you can define an organizer who will need additional speaking time to be able to lead the meeting.

  To designate it, click twice on the hourglass  to obtain the symbol  on the icon.

  The organizer is designated, and sees his time increment double by taking equitable time on the other participants.

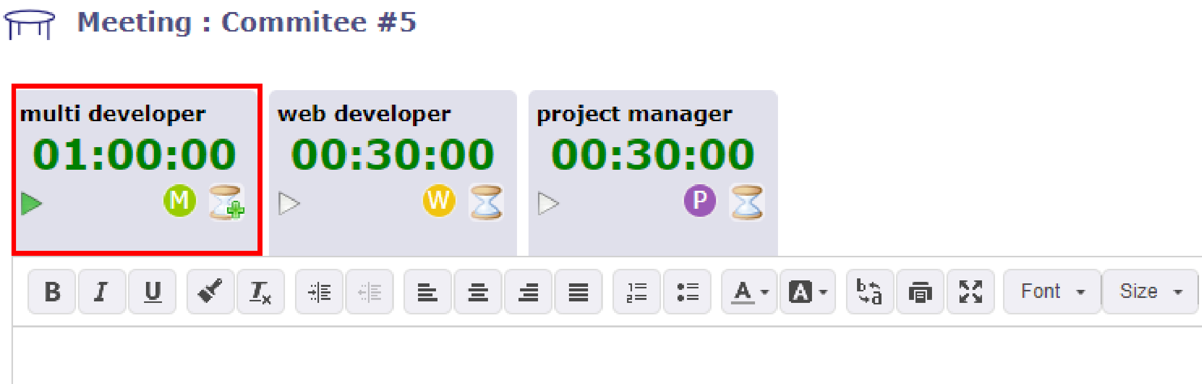


Fig. 17: The designated organizer has a PLus on the hourglass icon of his tab

Note that only one participant can be defined as an organizer.

To set another participant as an organizer, you must first redefine the current organizer as a normal participant by clicking the hourglass button again.

Speaking Time

If you started the meeting by clicking on the Play icon at the top right of the screen, then this is the first speaker displayed, the one with the green sign that will begin speaking.

Otherwise, click on the speaker's tab of your choice to start your speaking time.

- Click on  to prevent a speaker from speaking
- Click on  to give him the floor again

If you prevent a speaker's speaking time by clicking on the hourglass, then the remaining speaking time of the speaker will be redistributed to the other participants entitled to speak.

Write a meeting report

During the course of the meeting, the person in charge of the report can inform and report the words of the various participants.

The text editor is dynamic and reacts to speakers who have the floor.

When one speaker is finished and another speaker speaks, a field is added in the text editor with the name of the speaker with the detail of the time

The pause is also mentioned always with the detail of the time.

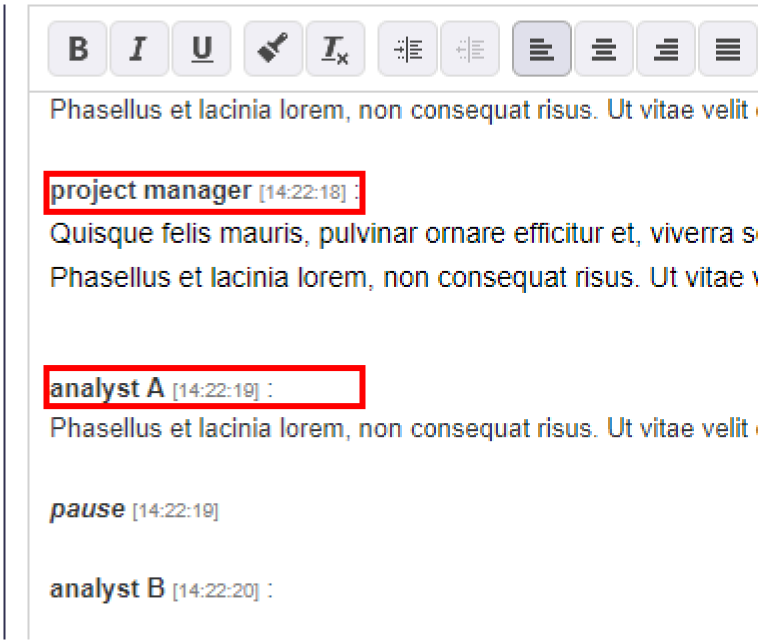


Fig. 18: Field with the speaker's name

When you stop LiveMeeting by clicking | meetingStop | the meeting report is automatically copied to the Minutes field in the treatment section.

Actions, Decisions and Actions

In the lower part of the screen, if the kanban is not open, you have direct access to actions, decisions and questions.

Each list acts as the standard "linked element" element present on almost every element screen.

You can then list an item to add it to the list of related items, but also create a new item to add to the list, just like for the Linked Items feature.

All linked items through this feature will appear in linked items in the meeting.

There is a slight difference with related items, when you click on the name of an item, you are not redirected to it.

It simply opens in a pop-up form, allowing you to update it without leaving the LiveMeeting screen.

New element

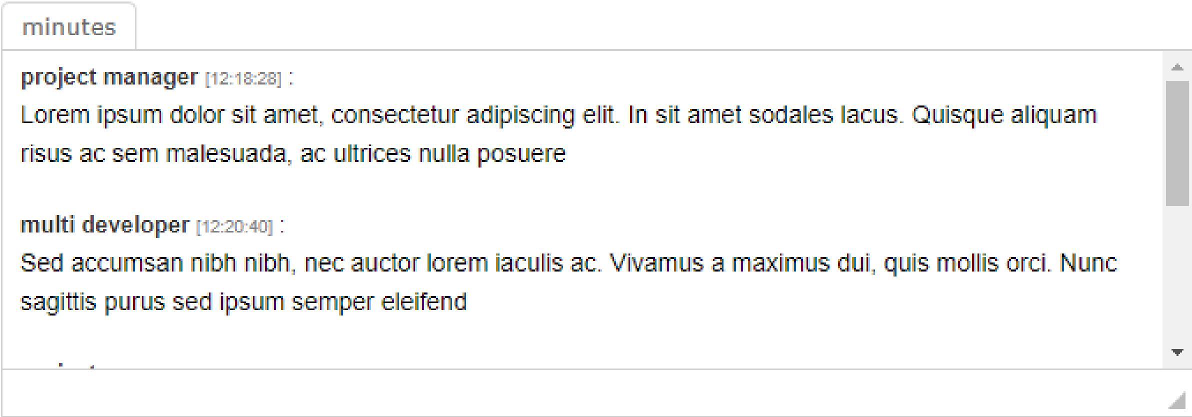


Fig. 19: The meeting report is copied in the minutes field in the treament section

Fig. 20: Actions, Decisions, Questions Management

You can create, edit, or delete an action, decision, or question from the live meeting screen.

Click on at the top right of each section to add a new element

A pop up opens and allows you to create and edit the selected element.

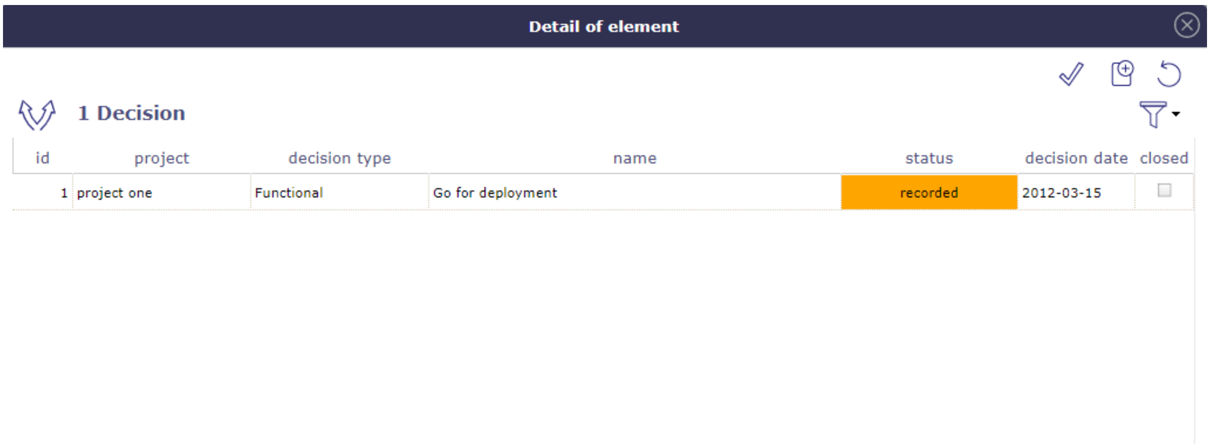


Fig. 21: Creating a new element

- Click on to select an item into the list by
- Click on to create an item
- Click on to undo the current manipulating and close the window
- Click on click on filter to restrict display

You can also create a new item directly.

Fill in the fields with an explicit title and click on [+] to validate.

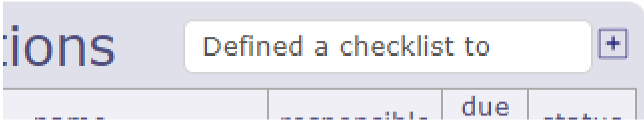


Fig. 22: Add a new element

The line is displayed directly in the corresponding section without opening the pop up.

3.1.3 Planning Poker

Planning Poker, also known as Scrum Poker, is a consensus-based gamified estimation technique primarily used to estimate the relative effort or size of development goals. (wikipedia)

Projeqtor integrates planning poker into its functionalities. You will be able to plan a planning poker session as a meeting and see it appear on the Gantt chart.

You define the project to which the session is linked, the user story (s) as well as the voters.

Planning poker session

The planning poker session screen is reserved for the session organizer and certain supervision profiles.

A planning poker session can be scheduled and is visible on the Gantt chart of the planning view.

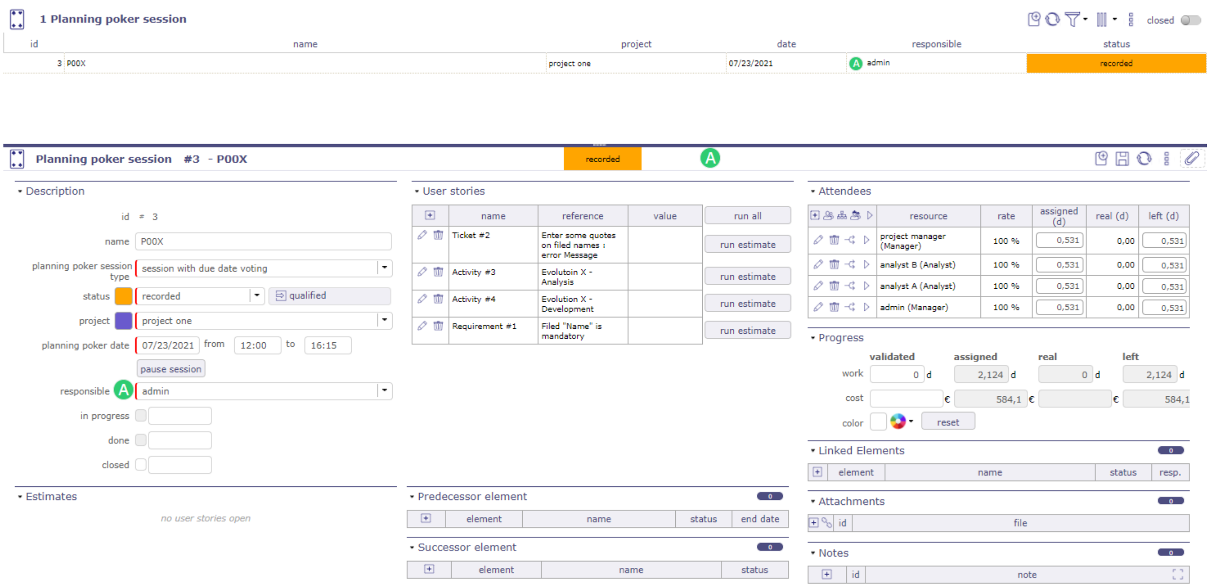


Fig. 23: Planning poker session screen

Run a poker session

You define a date for your session, one or more user stories and the participants in the votes.

Click on `Run estimate` in front of the user stories you want to launch or on `run all` to launch all the user stories

When at least one user story is started, then voters will be able to access it on the planning poker estimate screen.

Only profiles with update rights can vote on the planning poker sessions screen.

The user story estimate is identical between the planning poker session screen and the planning poker estimate screen.

Planning poker type

In ProjeQtOr, basic, you find the types "live session" or "session with a due date".

The types are customizable and can be changed according to your needs.

See: *Planning poker type*

User story

The User Story represents an Agile practice, used above all in Scrum, to "capture" the needs of the users by expressing in a general and not detailed way, the characteristics, the functions and the requirements of the product to be created.

In ProjeQtOr, a user story can be a ticket, an activity or a requirement.

A session can contain several user stories, there is no limit.

Each of these user stories can be started individually, in part or in full.

Attendees

Participants can be resources, contacts, or users.

Participants are assigned as on an activity, with a function linked to a cost.

You can assign a load manually but if you have entered a time slot then the load is automatically calculated.

Pause and stop session

You can pause the session. This will remove user stories from the planning poker estimates screen without actually closing or stopping the session.

Stop the session, will change the status of the latter to "done".

User stories will still be visible on the estimates planning poker screen but you will no longer be able to vote.

Change the status to **in progress** so that the `pause` and `closed` buttons are visible again.

Closed a poker session

When all the votes are recorded, you have two options :

- Close the vote
- Turn the cards over

When you turn over the cards, the vote is indicated on each participant's card.

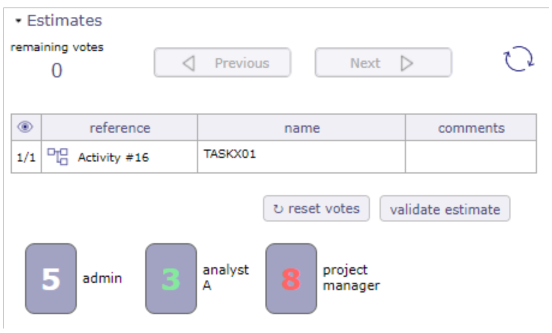


Fig. 24: Flip cards

You then have the possibility to reset the votes and this in accordance with the Scrum method, until the vote is unanimous.

If all the votes are unanimous, when the user story is closed, the complexity point that was voted on is indicated.

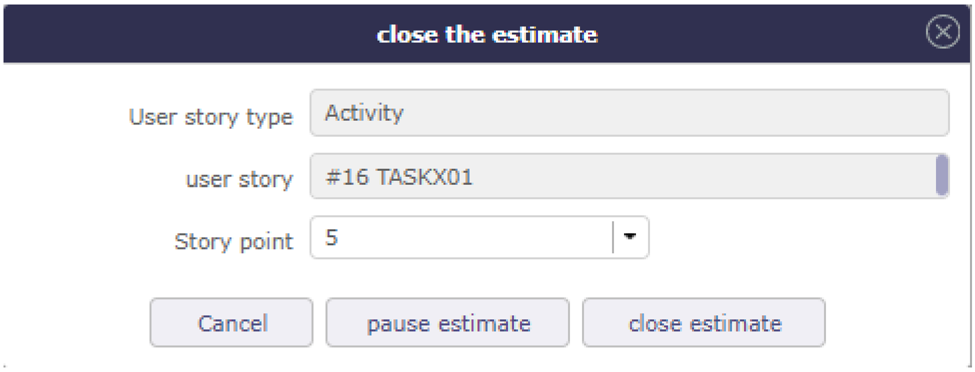


Fig. 25: Close of unanimous votes

If you close without the votes being unanimous, at the time of closing, the lowest and highest values are shown.

The lowest value is selected by default, but you can click the highest value to select it or select another value from the drop-down list.

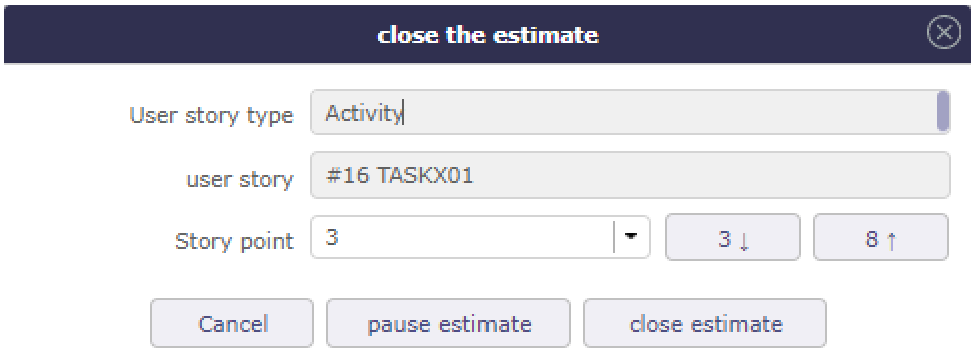


Fig. 26: Closure of non-unanimous votes

When the estimate is closed, the value that was voted on is displayed in the user story table.

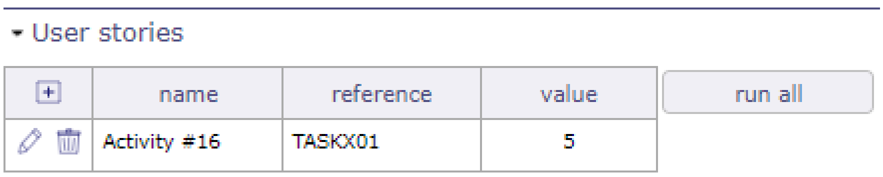


Fig. 27: Report of the value in the table of user stories

Planning poker estimate

This screen is intended for participants of the voting sessions.

User stories are visible on the planning poker estimates screen only when at least one user story is started.

The participants can vote thanks to a series of numbered cards on the principle of the Fibonacci sequence, but in a rounded way.

These values are customizable.

See: *list of value - Story point*

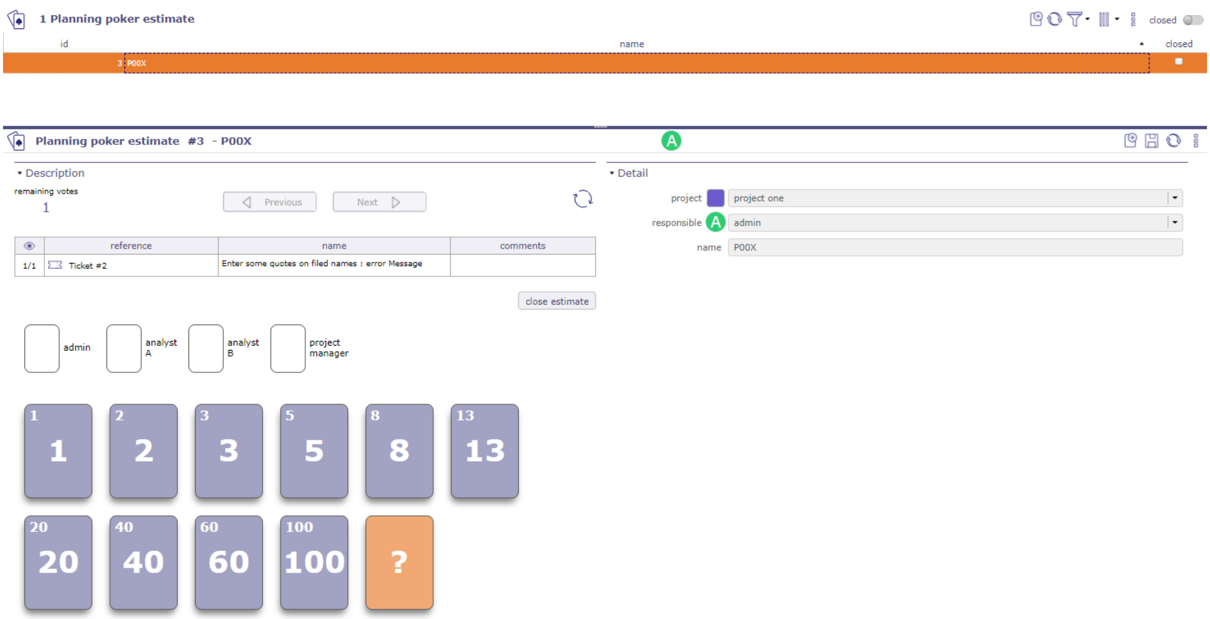


Fig. 28: Estimate planning poker screen

Estimate an user story

Each participant clicks on a card in order to estimate the proposed user story.

If more than one user story then click on `next` to vote for the next user story.

- Click on to refresh your screen and the votes
- Click on `flip card` to return the cards. Only if the user has the rights to do so.

When you have voted, the card changes color. Your vote has been registered

Remaining vote

The remaining votes correspond to the number of votes you need to cast.

Use this information to make sure you don't forget a user story.

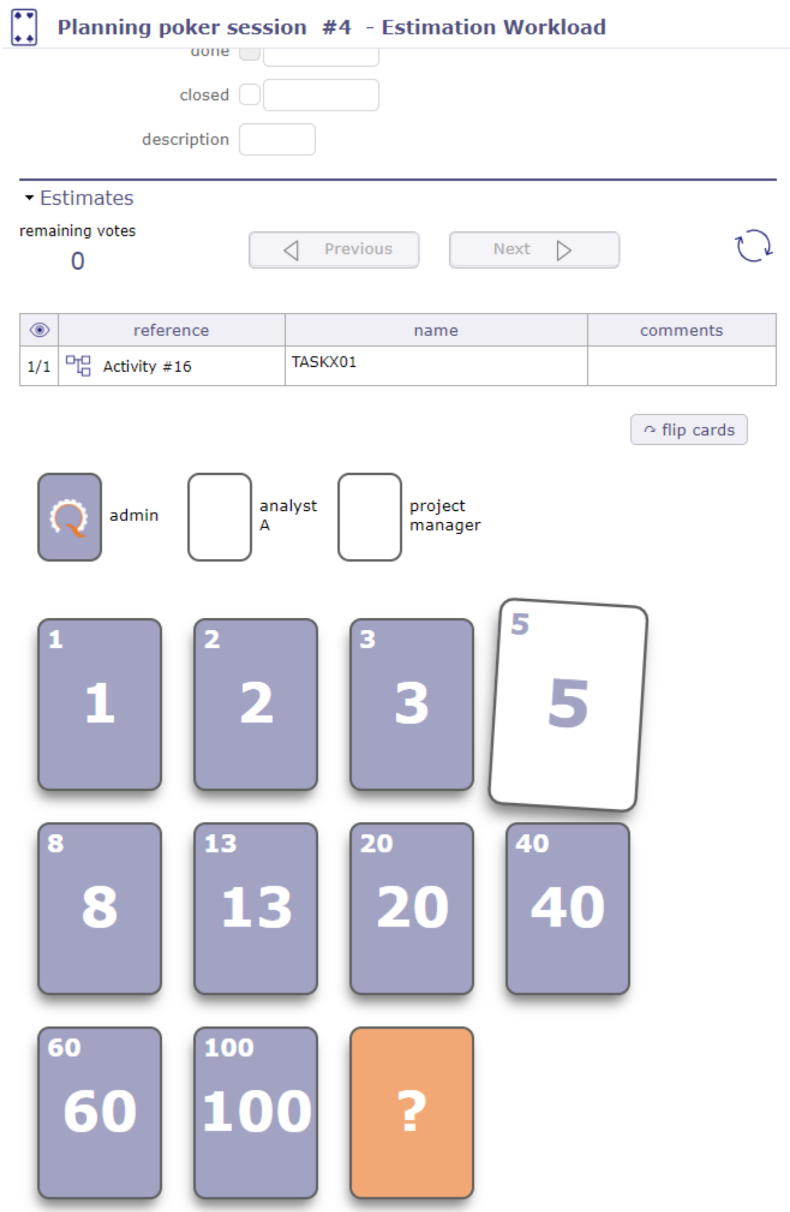


Fig. 29: Planning Poker estimate

CHAPTER

FOUR

SETTINGS

ProjeQtOr provides a very rich user interface.

It may be frightening at first glance because of the very numerous elements it provides, but once you'll get familiar to the structure of the interface you'll discover that it is quite simple as all screens have the same frames and sections always have simular structure and position.

4.1 User parameters

The User Settings screen allows you to configure personal settings, that is, for your personal session.

The parameters are organized by tab.

You can access the user parameters by going through the Configuration menu or through the connection window.

See: *Menu session*

Note: User parameters are efficient even without saving.

Saving parameters will retrieve the selected parameters on each connection.

4.1.1 Tab Display

Generic display parameter for user. Choose your theme - Language or size of icons…

Allows you to define the display of some elements of the interface like the history, the checklists, the closed elements or the style of the notes

or choose default behaviors like closing the page or flipping mode.

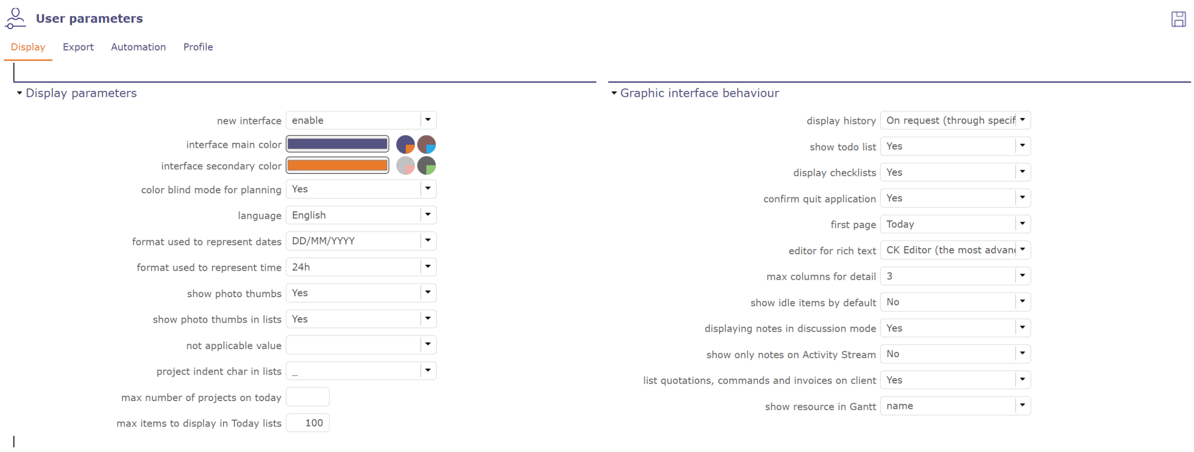


Fig. 1: Display Parameters

A color system for color blind people can be obtained on the planning view to modify the gantt bars and adapt them for this handicap.

See: *Detail's bars Gantt*

4.1.2 Tab Export

In this section, you define some simple export or print settings.

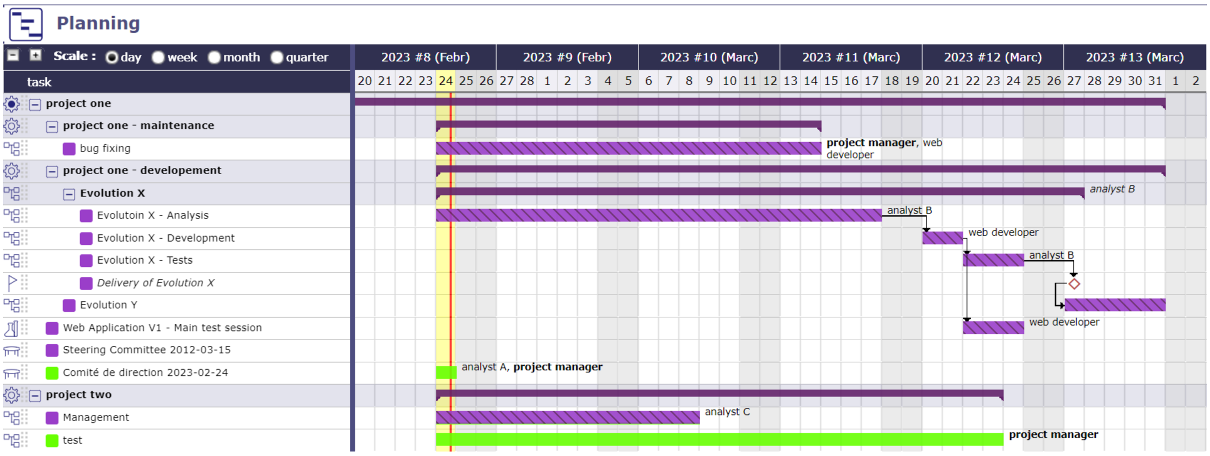


Fig. 2: Blind color Gantt view

4.1.3 Tab Automation

Default selected project and choice of character (Set to "none" to get a flat list) used to indent lists of projects, to represent the WBS structure of projects and sub-project.

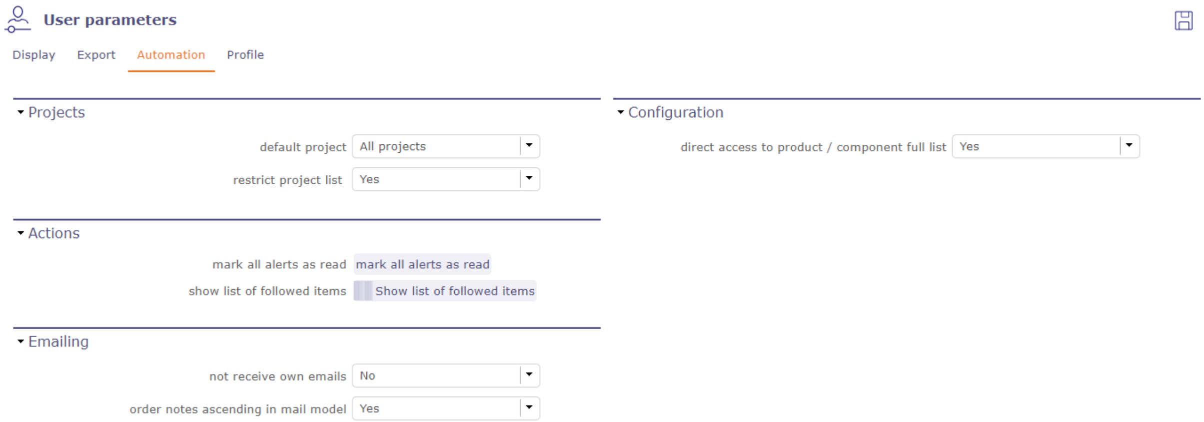


Fig. 3: Automation tab

you can also see all the items you are registered for tracking and delete them from this window.

4.1.4 Tab Profile

A photo can be defined for a user, a resource and a contact.

It is a visual identification associated with the name.

To default, the first letter of the name appear as long as you don't add photo.

Photo management

Browse your pc to find an image that suits you or drag and drop in the area indicated and validate.

- Click on or photo frame to add an image file. To complete instruction (see: *Attachment file*).
- Click on to remove the image.
- Click on the image to display the photo in its original format.

Note:

- Photo management can also be done in *Users*, *Resource* , *Contacts* screens, *thumbnails*

Section Password

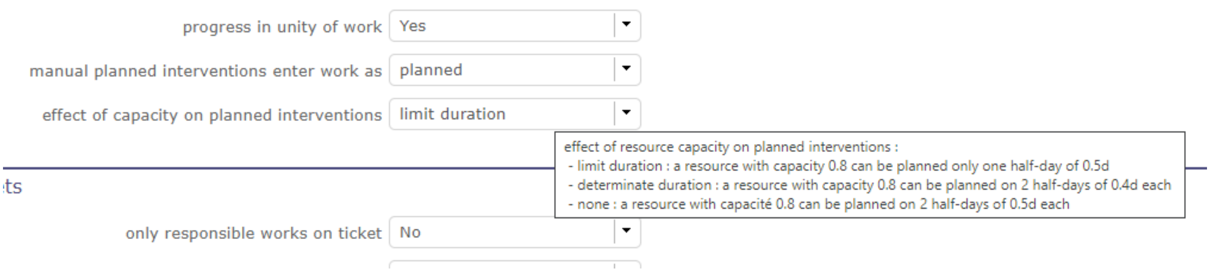
Click on `Change Password` to set a new one.

4.2 Global Parameters

Global parameters screen allows configuration of application settings.

depending on the modules installed, some tabs may not appear.

Tip: Good to know



Moving the mouse over the caption of a parameter will display a tooltip with more description about the parameter.

4.2.1 Tab Work time

Work time sections

- *Daily work hours*
- *Open day*
- *Unit for work*
- *Timesheet*

Daily work hours

Definition of the working hours applied in your company.

Used to calculate the time based on “hours worked”.

working hours per project

You can also apply specific working hours to each of your projects by setting the working hours per project option to yes.

You can then apply specific working hours on the project screen.

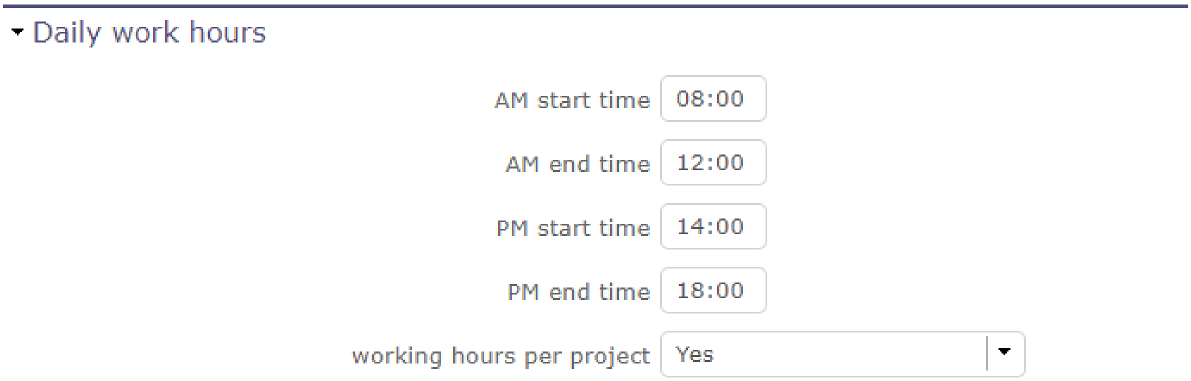


Fig. 4: Workflow screen

Open days

Possibility to define the working days in the company.

For each day of the week, you can choose between open days or off days.

See: *Resource* section Calendars

Note: This parameter are taken into account in : **working days on calendars**,

the working days on the calculation and the display, the working days on the display of real work allocation.

Units for work

Parameters to determine the units used to calculate the actual work

Unit for Timesheet (real work) & Unit for Workload

Parameters to real work allocation and workload.

The fields Unit for real work allocation and for all work data can be in days or hours.

Number of hours per day

Allows to set number of hours per day.

Warning:

- If both values are different, rounding errors may occur.
- Remember that data is always stored in days.

- Duration will always be displayed in days, whatever the workload unit.

Timesheet

Defines behavior of tasks in the real work allocation screen.

Display only started tasks

Display only tasks with the *Macro status* activated.

Set to first 'in progress' status

Change the status of the task to the first "in progress" status when actual work is entered.

Set to first 'done' status

Change status of the task to the first "done" status when no left work remains.

Max days to book work (warning) :

Number of days that user can enter real work in the future before getting a warning.

Leave blank if you do not want warning.

This parameter does not apply to administrative projects

Max days to book work (blocking)

Number of days that user can enter real work in the future. This limit is blocking.

Leave blank if you do not want blocking.

This parameter does not apply to administrative projects.

Lock timesheet before validated start date

In the planning modes "must start on the validated date" and "does not start before the validated date", it is possible to block the resource allocation sheets before the validated start dates entered

Alert resource on input done by someone else

Alert the resource when some real work is entered by someone else.

Select your type of alert : Internal, Email, both or none.

Alert when timesheet canceled by other

Send an alert or mail when timesheet is cancelled by another resource.

Select your type of alert : Internal, Email, both or none

Display pools on timesheet

Possibly to display the pool whose the resource belongs to.

You can manage different trigger settings per recipient

Warning: Resources that do not have access to the imputations screen do not receive these alerts

Show pool to update their left work

This option is only accessible if the previous one is set to no.

When the resource pools are not displayed in the allocation lines, an icon gives you the possibility of displaying at least the remainder to be done for them.

- Click on  to view the resource pool row and edit the left work.

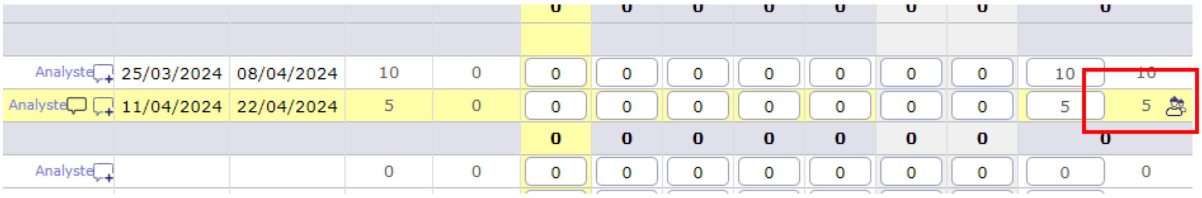


Fig. 5: Line of the pool

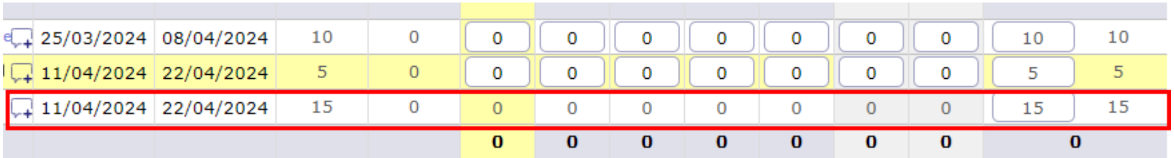


Fig. 6: Line of the pool

Auto update left work on Pool

Auto update of left work on pool when resource add real work on activity with no left work

After submit, alert to project leader

After submission what type of alert would you want to send to the project leader

After submit, alert to team manager

After submission what type of alert would you want to send to the team manager

After submit, alert to organism manager

After submission what type of alert would you want to send to the organism manager

if work input to soon, alert to the project leader

If the resource starts filling out actual work on an activity that shouldn't start on the date of this posting, then the project manager can receive an alert, an email, or both.

Timesheet input format

- Week / Month: You can choose between displaying by week or by month directly on the allocation sheet using the dedicated button.
- Week: Display will only be done per week.
- Month: Display will only be per month Be careful with this display which can cause problems on screens that are too small (<15")

Hide button "Enter real as planned"

Define whether to show/hide autofill of scheduled work.

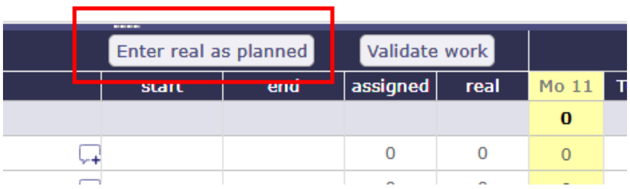


Fig. 7: Enter real as planned on the timesheet screen

4.2.2 Tab Activity

Activity tab's sections

- *Tickets*
- *Control and restriction*
- *Leaves system*

Tickets

Specific behavior for ticket management

Only responsible works on ticket

Only responsible can enter some real work on the ticket.

Ticket responsible from product Responsible

Select if the product Responsible is displayed (always, if empty, never) as Ticket Responsible on that screen

Limit planning activity to those with flag

Display planning activity selected for the ticket

Enable to filter ticket reports by priority

Can display tickets on Report screen by level of priority

Display ticket at client level

Display of tickets on the client screen and on the Contacts screen

Display ticket at version level

Display of tickets on the version screen

Manage accountable on tickets

Display the coordinator as Accountable, so the Responsible is the current actor

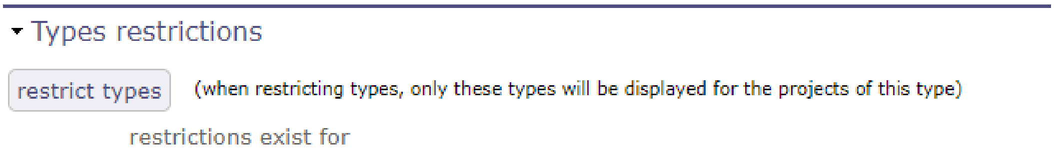
Controls and restrictions

Specific parameters for the control and management of restrictions

Allow type restriction on project

Allow to define additional restriction's type on each project additionally to restrictions defined at project type level.

If so, a Restrict Types button appears in the detail area and allows you to define the type restriction .



Restriction on types by profile hides items

If set to yes, users with profiles won't see items of unselected types

If set to no, users will just not have possibility to create new items with such types

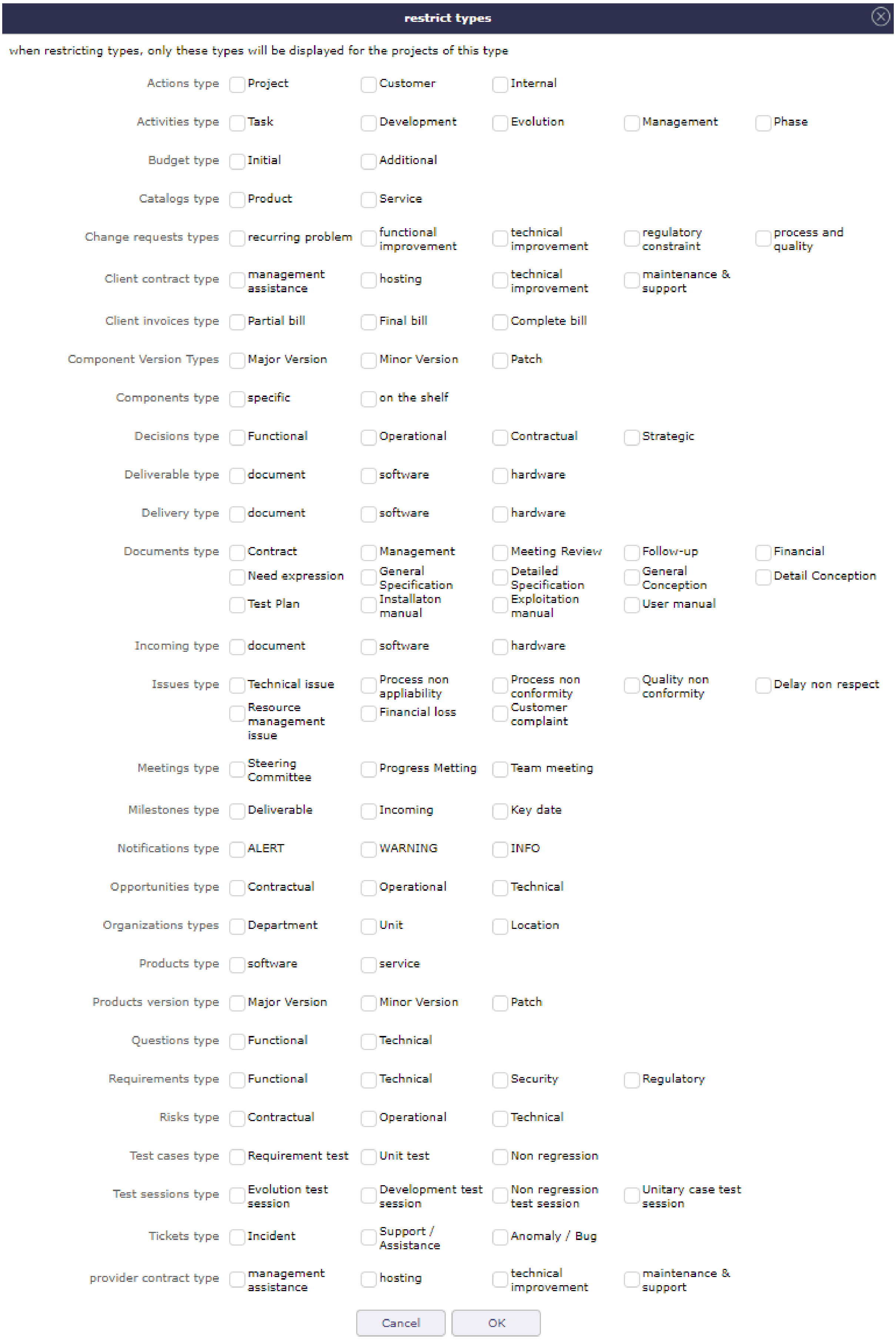


Fig. 8: Restrict type box

Limit the functions to those of the resource

On assignments limit functions to those of the resource. Ones with cost and defaut one.

Leaves system

Allows you to determine who will be the administrator of regulated absences.

The administrator of regulated absences can define the parameters and authorizations of the screens in this module.

4.2.3 Tab Planning

Display tab's sections

- *Planning*
- *Milestones*
- *Allocation & assignation*
- *Automation*

Planning

Specific parameters about Gantt planning presentation.

Do not start before the validated start date

This option allows you to use the validated dates of the project to start it at a later date.

- Planning only starts from this date, as if there was a fixed milestone preceding the project.
- Resource timesheets on the project will be blocked before the specified date.

priority of activities from end date

If this parameter is Yes, the activities will be prioritized according to the validated end date.

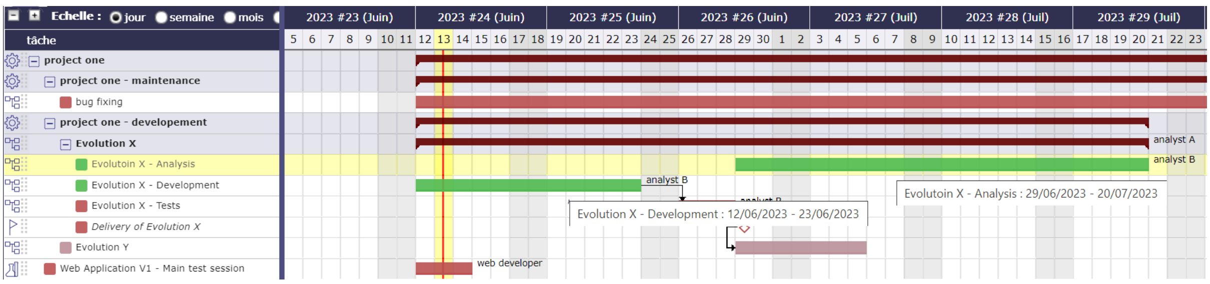


Fig. 9: Despite its priority place in the WBS, the Evolution X - Analysis activity is scheduled after the Evolution X - Development activity due to its end date later than the second

- End date can be inherited from successors or parents
- Whether this parameter is Yes or No, the last priority criterion is the order in the WBS.
- Prioritization by end date occurs just before this default criterion.

Show resource in Gantt

Select if the resource can be displayed in a Gantt chart, and format for display (name or initials or none).

Apply strict mode for dependencies

Defines if a task can begin the same day as the preceding one.

- If yes, the successor should begin the next day
- If no, the successor can start the same day.

Manual progress of fixed-duration activities

Choose whether the progress should be calculated or entered manually.

Possibility of managing activities on real time

If yes, you correlate the validated, assigned, actual loads and the rest to be done.

That is, the validated load, the assigned load and the revised (reassessed) load will always be equal.

If so, the addition of an "activity over time" option is added to the *activity types*.

> **Warning:** This option is not available for activities managed in work units.

Manual planned interventions enter work as

Choose whether the work entered in the manual planning should be saved as real work or planned work.

See: *Manual planning mode*

See: *Planned Interventions*

Effect of capacity on planned interventions

- **Limit duration**

Limit duration a resource with capacity 0.8 can be planned only one half-day of 0.5d

- **Determine Duration**

Determine duration a resource with capacity 0.8 can be planned on 2 half-days of 0.4d each

- **None**

A resource with capacité 0.8 can be planned on 2 half-days of 0.5d each

max items to display in Gant Planning

You choose the number of rows you display in the Gantt chart.

Milestones

Specific parameters for Milstones management

Auto link the milestone

It optionally allows you to display the element linked to the milestone (The option above should be on "yes" to have access to the selection of milestone targetted)

Set milestone from product version

It optionally allows you to automatically retrieve the milestone from the milestone of the Project Version.

Update milestone responsible from deliverable

Update milestone Responsible automatically when the Responsible of deliverable has changed.

Update milestone responsible from incoming

Update milestone Responsible automatically when the Responsible of deliverable has changed.

Update deliverable responsible from milestone

Update deliverable Responsible automatically when the Responsible of mielstone has changed.

Update incoming responsible from milestone

Update incoming Responsible automatically when the Responsible of milestone has changed.

Allocation & Assignation

Specific parameter for Pool of resource et behavior on activities.

Automatic allocation of pool resources

Automatic allocation of resources of the pool when allocating a pool to a project.

Explicit allocation

When you assign the pool to the project, the resources will appear in the allocation table in addition to the pool row.

And in the drop-down list of resources for assigning to activities.

Implicit allocation

When you assign the pool to the project, only the row of the pool is shown in the allocation table.

The resources composing it are however present in the drop-down list of resources on the table of assignments.

No

None of the resources making up the pool are visible in the assignments table and they will not appear in the drop-down list of assignments.

Status change on assignment

When you assign a resource to a schedulable element of ProjeQtOr, you can modify the status of the element when creating an assignment.

For this behavior to be effective, you must specify which status will trigger this behavior. See: *Status*

When creating the assignment, the status will be automatically changed unless it was already in the trigger status..

Automation

Parameters to manage automations

Consolidate validated work & cost

Select if validated work & cost are consolidated on top activities and therefore for projects.

Select whether posted work and cost are consolidated across major activities and therefore across projects.

It is therefore the charges and costs of the sub-activities that will be transferred to the "mother" activities and therefore to the projects.

- **Never**: Not consolidated. Charges and costs will only be entered and consolidated manually.
- **Always**: The values are always replaced on the parent activities and the project. If the parent activities were filled in then the values will be overwritten by the child activities.
- **Only is set**: Replaces values only if parents are given. An exception is made if the parent is set to 0 / "null". In this case, the parent is not overwritten.

Auto set Responsible if single resource:

Behavior about management of responsible, including automatic initialization of responsible.

Automatically set Responsible if not set and by the only one resource allocated to the project

Auto allocated manager to the project:

Automatically create an allocation for the project Manager to the project. He should be a resource.

Auto set responsible if needed:

Automatically set Responsible to current resource (as using the element) if not set and if a Responsible is required (respecting access rights)

Auto assign responsible to activity:

Assign automatically the Responsible to activity

Auto set parent status:

Automatically set the status of the parent element (in the WBS structure) from the status of the child elements.

So that when the first child changes to "in progress", the parent changes to "in progress" and when all children are done, the parent changes to done.

4.2.4 Tab Display

Display tab's sections

- *Display*
- *Translation*
- *Default values for user parameters*

Display

Graphic interface behavior and generic display parameters.

Name of the instance

Change the window's name. The name appears at the top center of the window.

Max number of projects on today

Limit the display of the "today list". items are generally ordered by issue date increasing.

Max items to display in Today lists

Limit the display of items displayed in sections of the Today screen. Items are generally ordered by ascending issue date.

Quick filtering by status

Display one button. Allow to filter on lists the element by status checking boxes. Refresh to make appear on boxe a new state just created on list .

Translation

Choose how the monetary units behave in your area

Currency

Choose your symbol displayed on each monetary box

Currency position for cost display

Symbol sets before or after each monetary box

Default values for user parameters

Default values for user

New interface

Choose between interface v8.6 or the new interface v9.0

Theme colors

The v9.0 interface is composed of two main colors which are declined throughout the application in different hues and saturation to keep the same charter spirit.

Interface main color

Choose the main color that will be applied to the main architectural elements

Interface secondary color

Choose the secondary color that will be applied on the navigation and highlighting elements

Color discs

You have pre-recorded color discs available. One offers the colors of classic ProjeQtOr. Two others are proposals. The fourth will take the colors that you have saved in the global settings for your instances.

They are accelerators to apply your themes.

Default language

Choose among 19 languages / easy come back with translation in target language.

Default theme (only available with version 8.6)

More than 30 themes choices.

First page

Choice of the first visible screen after the connection.

Lock first page

Allows the administrator to select the screen of their choice and block it for users.

They will not see the setting in their connection menu or in user settings > Display

Menu top mode view

You choose how your favorites will be displayed. As text, icons, or both.

Menu left view

The top menu is invisible or not at each connection.

Choose how your principal menu will be display. Text or icons and text.

Tip: Menu v9.0

To show or hide the icons of the new menu, right click on the menu.

Icone size in menu (only available with version 8.6)

Icon size are default : user can overwrite these values.

Display of the upper menu (only available with version 8.6)

The top menu is invisible or not at each connection.

Display of the left menu (only available with version 8.6)

The top menu is invisible or not at each connection.

Create new item on pop-up

You determine if the global creation button will open a pop up or go directly to the screen of the element you want to create.

Display history

- No
- Yes
- Yes with work
- On request trhough specific button

To show or hide the icons of the new menu, right click on the menu.

The button will then be displayed in the menu of the details area of each element.

Editor for rich text

Choose your favorite text editor.

Not applicable value

Choice of the symbol defining the non-applicable values.

On the global view the value of the field that has no applicable value for the given column will display this symbol

Restrict project list

When creating an element, name of the project stays like than the one selected at the selector or on contrary offers choice on global list of projects

Export in XLS or ODS

Choose the format in which you want to export either in native excel format or with the ODS format of OpenDocument.

Displaying notes in discussion mode

By default, the notes are displayed in ascending order of creation. To quickly and easily view the replies to certain notes, this option allows you to display the replies under the corresponding notes with an indentation to the right.

Show only notes on Activity Stream

if so, you will not see the status change and item update.

Not receive own emails

You don't receive the emails you create.

Order notes ascending in email model

Choice of display of notes in the email template.

If **YES**, you display the notes in ascending order of creation. From the first ID to the last. Some notes containing answers will therefore not necessarily follow the order of display.

If **NO**, You display the notes as they appear on the screen with the answers under the corresponding notes

In email templates you can call notes in different ways.

With the codes ${NOTES} and ${NOTESTD}

${NOTESTD} allows you to display notes as they are by default.

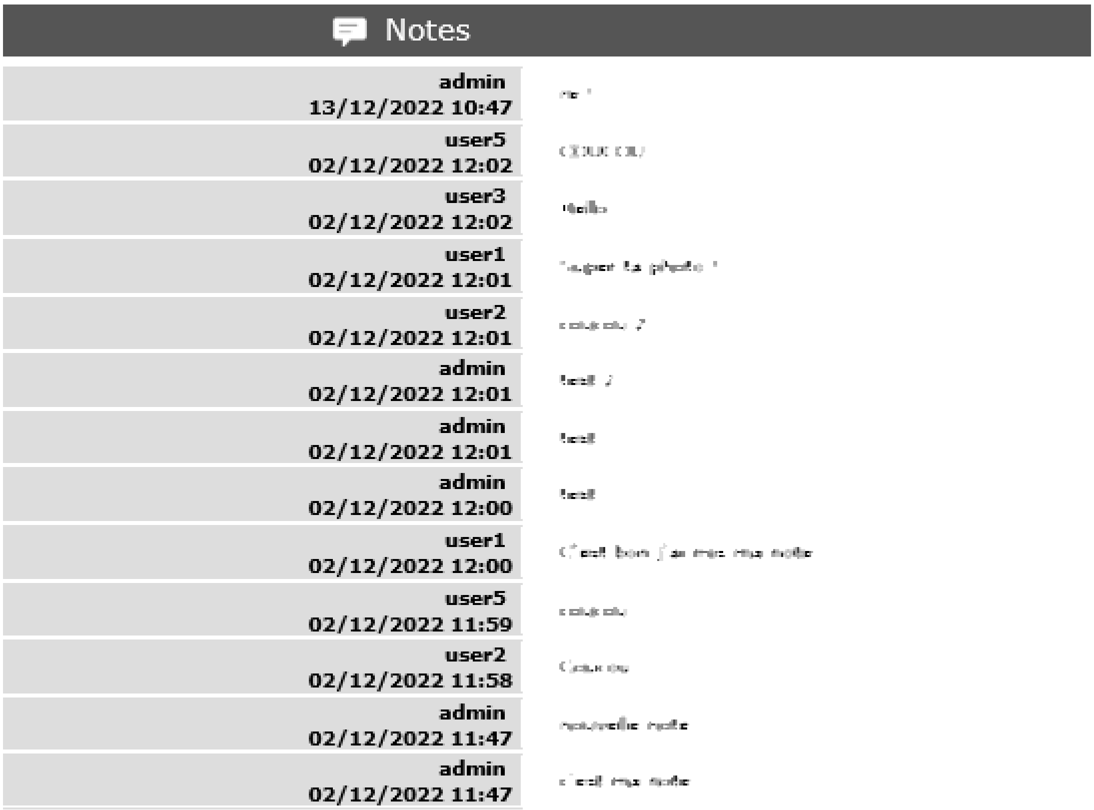


Fig. 10: Notes displayed by default in emails

${NOTE} allows you to display notes on a new table model.

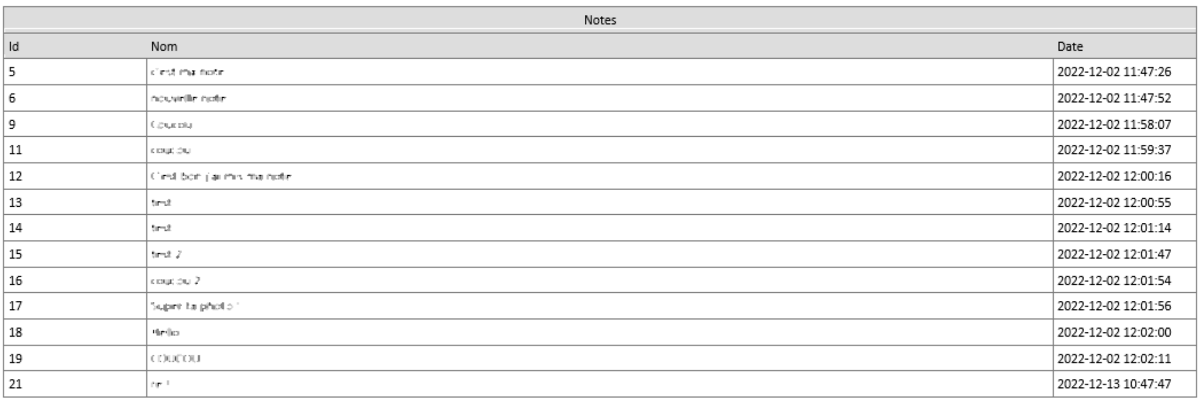


Fig. 11: Notes displayed in spreadsheet in emails

See also: *email template*

List quotations, commands and invoices on client

Display or not the list of financial elements related to the customer on the screen of the latter.

Please note that the parameter also exists on the user side. If the latter is not activated also then the financial elements will not be visible.

enable direct update of test case run

Display or not the list of financial elements related to the customer on the screen of the latter.

4.2.5 Tab References

References tab's sections

- *Format for reference numbering*
- *Document reference format*
- *Bill reference format*

Format for reference numbering

Sections for format references

Prefix format for reference

Allows to define reference formats for items of element, documents and bills.

Can contain prefix :

- {PROJ} for project code,
- {TYPE} for type code,
- {YEAR} for current year
- {MONTH} for current month.

Number of digits for reference number

Indicate the number of digits you want to appear in your reference.

Change reference on type or project change

Change the reference on type change of element will generate missing numbers in reference.

Document reference format

Sections for document format references

Document reference format

Format can contain :

- {PROJ} for project code,
- {TYPE} for type code,
- {NUM} for number as computed for reference,
- {NAME} for document name.

You can allow or forbid downloading locked files in this section.

Version reference suffix

Suffix can contain :

- {VERS} for version name.

Separator for draft in version name

Choose the sign for the separator of the draft.

Preserve uploaded file name

If yes, the file is downloaded with the name of original file.

If no, the document take the reference formatted name.

Forbid download of locked document

Forbid document download if yes is checked.

Bill reference format

Sections for bill format references

Invoice reference format

Reference format : can contain {NUME} for version name.

The {NUM} code can only be used for the document.

Number of digit for invoice number

Choice of the number of digits to display in an invoice.

4.2.6 Tab Configuration

References tab's sections

- *Product and component*
- *Versions*

Product and Component

This menu contains all the parameters for configuration management

Display Business features

Filter on date.

Display language in Product/Component (Version)

Enable language.

Display contexts in Product/Component (Version)

Enable contexts.

Display Tenders on Products, Components, Versions

Display a section to list linked Tenders on products, component, product version and component versions.

Include sub-products in structure

Include sub-products in display of product structure (flat or not).

Versions

This section allows you to manage more details in the behavior of the elements linked to the versions.

Display the start and delivery milestones

Display start and delivery milestones for product/component version and delivery dates in flat structure.

List of activity on component version

Display the list of activity.

Direct access to product / component full list

When selecting a component, we go directly to the full list (with filter capacity), without going through the pop-up window.

Automatic format of version name

Ability to choose a preformatted format for version names.

Separator between name and number

Choose the character of the separator for version names.

Auto subscription to versions

Suscription automatic to versions or components when you suscribe to product or component.

Types of copy of Component Version

You can choose between :

- Free choice
- Copy structure from origin version
- Replace the origin version with new copied one

Enable Product Versions compatibility management

Display compatibility section in product version details.

Display product version on delivery

Allows to link a delivery to product version.

Sort versions combobox in descending order

Change sort order for versions in combobox to have more recent first (descending on name).

Sort version composition and structure on type

Sort version composition and structure by type ascending and name descending.

Manage component on requirements

Manage component and target component version on requirements.

Manage component on change requests

Manage component and target component version on change resquests.

Do not add closed and delivered versions to a project

When adding a product to a project, do not add its closed and delivered versions.

Allow activities on delivered version

Include delivered products versions in target product version list for activities.

Automatically set component version if unique

Automatically set component version if there is only one component version of the selected component that is linked to the selected product version.

4.2.7 Tab Financial

References tab's sections

- *Input of amounts for expenses*
- *Input of amounts for incomes*
- *Automation of financial*
- *Revenue & work unit managment*

Input of amounts for expenses

Parameters for choosing the input method for expenditure amounts.

Input mode for amounts

Defined for expenses items if the amounts must be entered without taxes and calculated in with taxes or vice versa.

Input mode for invoice lines

Defined for expenses items if the total bill lines feed the total with or without taxes. The parameter is priority if there a bill lines.

Input of amounts for incomes

Parameters for choosing the method of entering income.

Input mode for amounts

Defined for incomes items if the amounts must be entered without taxes and calculated in with taxes or vice versa.

Input mode for invoice lines

Defined for icomes items if the total bill lines feed the total with or without taxes. The parameter is priority if there a bill lines.

Automation of financial

The Deferral of expenses option occurs during the automatic generation of an expense from an offer, order or invoice.

If the expense is linked to an offer, an order AND / OR an invoice, then this is carried over to the related elements. This update is recursive.

If the expense is generated from an invoice, it is reported on the order linked to the invoice and on the offer linked to the order.

Revenue and Work unit managment

Parameters used in the unit of work catalog.

Number of complexities

Parameter used to define the default maximum number used in the unit of work catalog.

Copy revenue into validated cost of activities.

Copy revenue into validated cost of activities.

Enable work command.

You link your activities managed by the work units to an order.

This will be decremented by units of work already carried out and invoiced. You can then invoice precisely for the work already done.

4.2.8 Tab Mailing

References tab's sections

- *Emailing*
- *Mail titles*
- *Automatic emails grouping*
- *Test email configuration*

Emailing

Parameters to allow the application to send emails.

You define the administrator's email with the possibility of choosing a different address for "from" and "reply to" and the name to display

You configure the SMTP serveur and port - the login name and password.

You can also define the sendmail path or the send method.

The maximum size not to be exceeded for sending emails is in bytes by default if you do not fill in the units.

You can use kilobytes (K), megabytes (M) and gigabytes (G) with integer value.

The size must be smaller or equal to php parameter "upload_max_filesize".

Tip: 1K will stand for 1024 bytes.

Mail titles

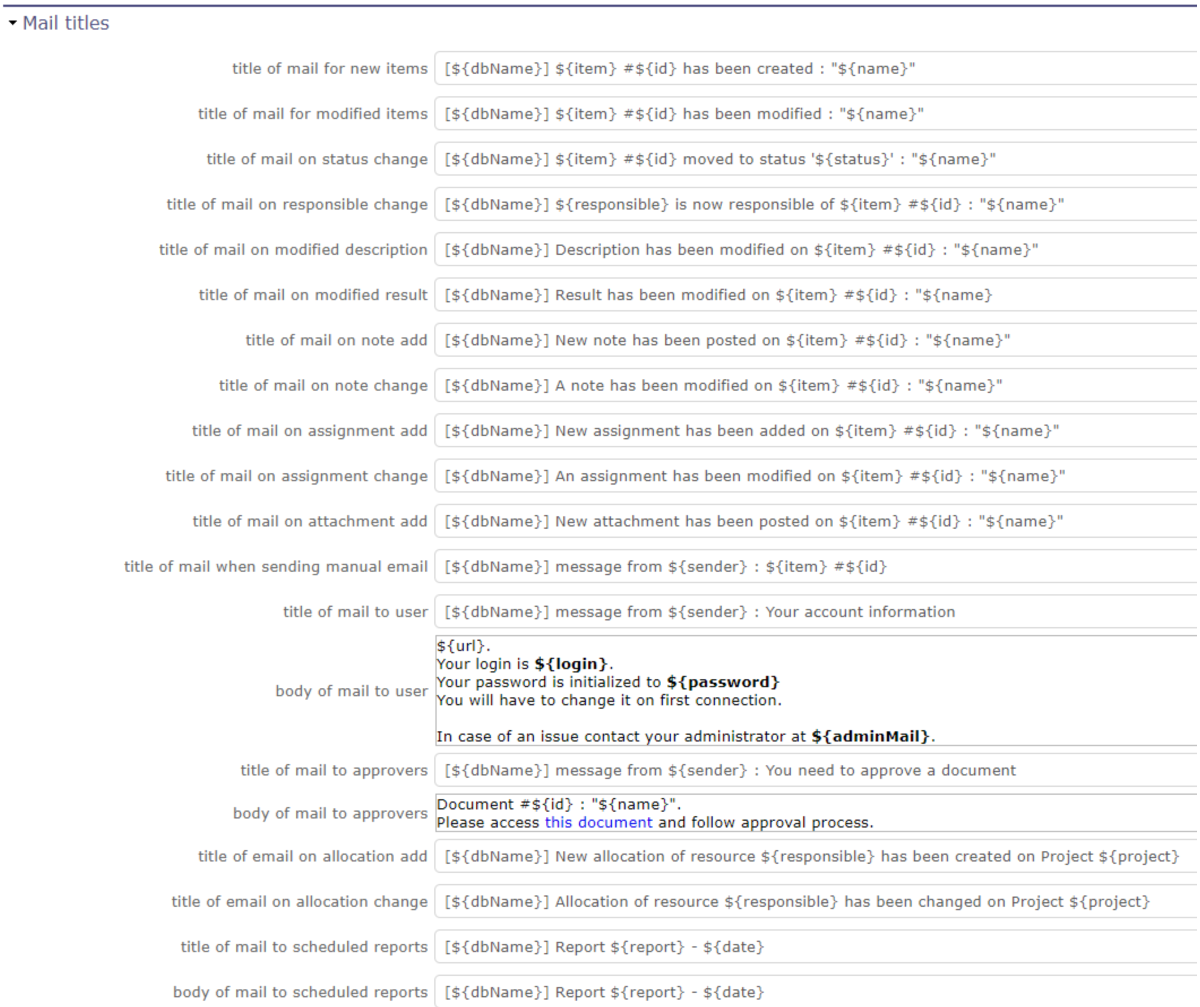


Fig. 12: Mail titles section

Parameters to define title of email depending on event.

See: *Automatic emails grouping*

It is possible to use special fields to call a function or data of the project.

See: *Special Fields*

Automatic emails grouping

Parameters to define if the email group is active or not.

Activate email grouping

When email grouping is enabled, automatic emails sent within the defined period are grouped into a single email.

For example when the status of an element has been modified several times in less than Xs then you will not receive an email for each change of state.

Grouping period (in seconds)

Defines the period (in seconds) during which if an email is send after another on same item.

Then emails are grouped into single one.

How to treat different formats

If grouped emails refer to different templates, you can :

- send all messages, one for each template
- Only send the last message
- Merge all messages and send a single email

You'll can see this email in the **email to send** screen in the Tools menu.

Test email configuration

You can test the settings of your email submissions.

Send email to

Sent a email to check sptm configuration.

Warning: This operation saves global parameters.

4.2.9 Tab Authentication

Authentication's sections

- *User and password*
- *LDAP Management Parameters*
- *Single Sign On SAML2*

User and password

Parameters to manage how the connection behaves

default profile on user creation

You can choose the default profile and password when you create a new resource/user/contact.

This profile can be changed on each project.

Password strength

You define the difficulty of your password.

Password length, if special characters or numeric characters are used.

Password min length

You define the length of your password.

Lock user after wrong tries

You can choose to block the user after x connection attempts.

Password validity (in days)

You can define the validy period of your password. After this period, you will have to renew your password.

Allow 'remember me'

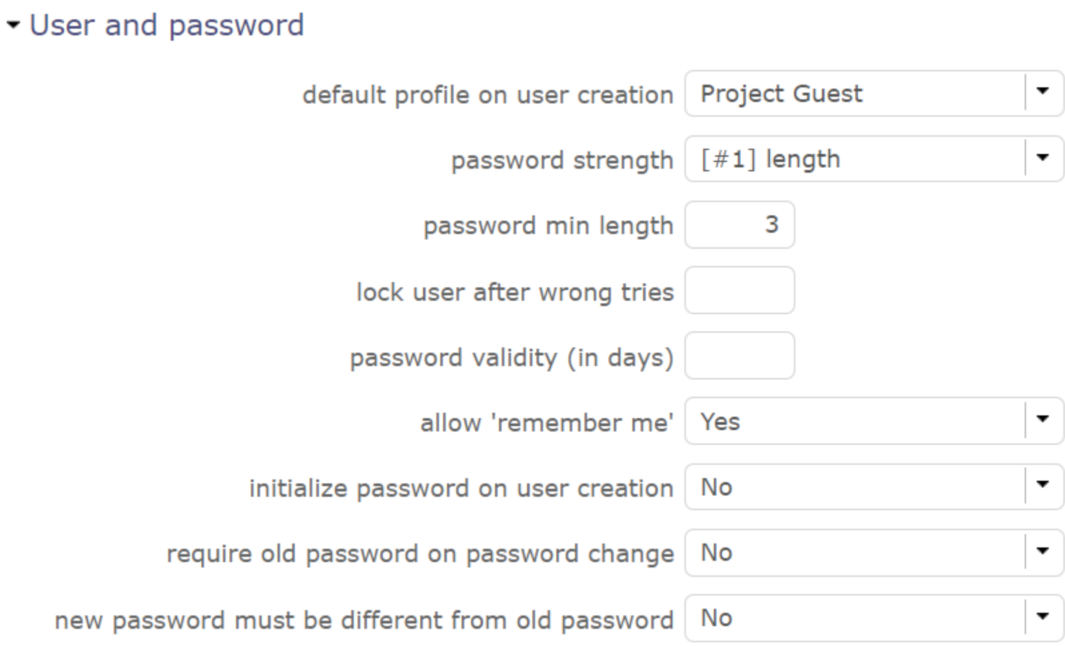


Fig. 13: Authentication screen

You can display or no the check box on the login screen “remember me”.

Initialize password on user creation

You can initialize password on user creation. The application will define a new password to random value.

You can reset all the password with the *multiple update fonction*

Require old password on password change

ProjeQtOr verify old password on password change.

New password must be different from old password

If you have a regular password change policy, you can set the option to prohibit the same password.

LDAP Management Parameters

All the necessary parameters for connecting your projeqtor instances with your corporate LDAP

Set the base dn, host, port, version…

Default profile for Ldap users, message on creation new user from Ldap,

Actions on LDAP user creation

Project to allocate automatically…

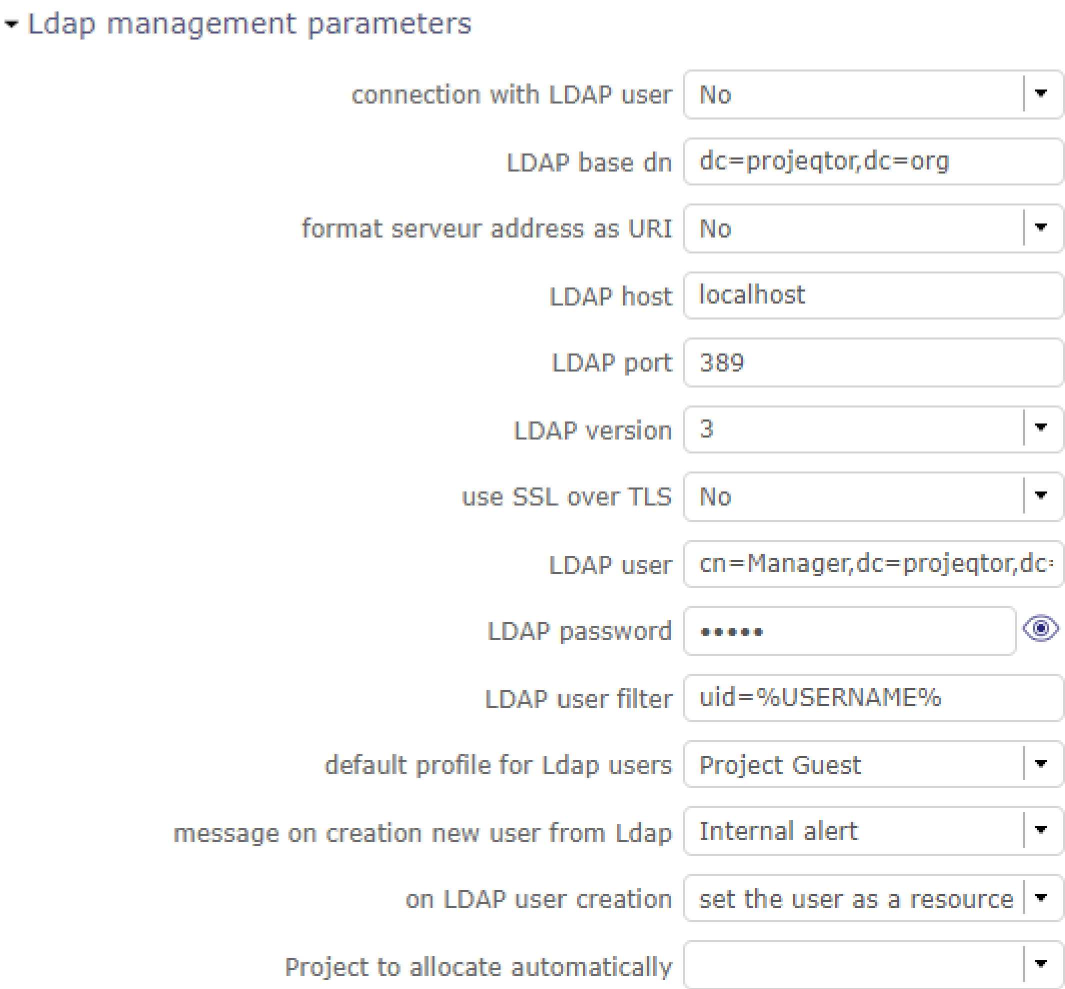

Ldap management parameters
connection with LDAP user
No
LDAP base dn
dc=projeqtor,dc=org
format serveur address as URI
No
LDAP host
localhost
LDAP port
389
LDAP version
3
use SSL over TLS
No
LDAP user
cn=Manager,dc=projeqtor,dc=
LDAP password
•••••
LDAP user filter
uid=%USERNAME%
default profile for Ldap users
Project Guest
message on creation new user from Ldap
Internal alert
on LDAP user creation
set the user as a resource
Project to allocate automatically

Fig. 14: LDAP

Single Sign On SAML2

Single sign-on is a method that allows a user to access multiple computer applications (or secure websites) by performing a single authentication.

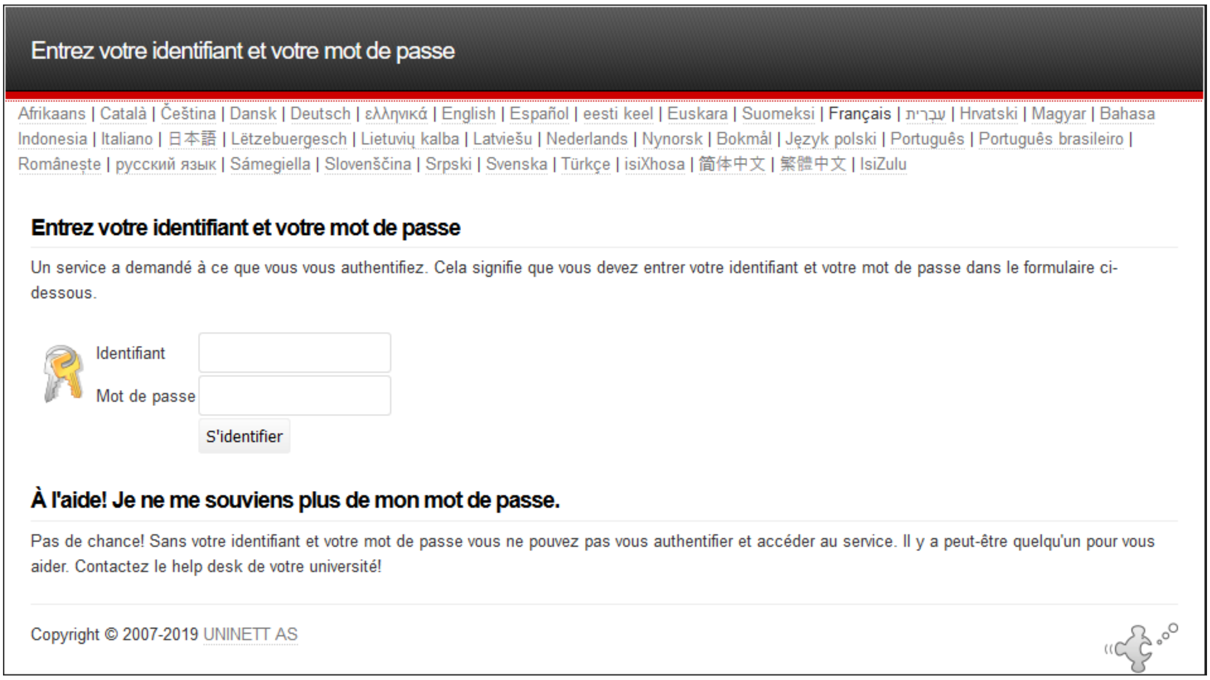


Fig. 15: With the single sign on you do not go through the login screen of projeqtor but by a screen dedicated to single sign-on

When connected to the SSO service, the service tells each application that the user is logged on.

This avoids having to connect to applications one by one.

In concrete terms, the site or service to which the user is trying to connect makes a request to the server or the identity provider's site. This one asks if the user is connected. If so, he transmits the information.

Depending on the protocol used, the two sites exchange keys, signatures and / or other information to verify the identity of the user.

When you want to disconnect from ProjeQtOr with the SSO method, the logout screen gives you several options.

- local disconnection of projeqtor. I do not leave my SSO session
- Internal reconnection: I reconnect to ProjeQtOr locally. I leave my SSO session. I should identify myself again
- SSO disconnect. I leave my SSO session. I should identify myself again

  Parameters

  This is an SSO connection via the SAML2 protocol

  - Set the Entity ID, the IDP certificate, the single sign on and logout…
  - Default profile for users, message on creation new user from SAML,
  - And some parameters for users

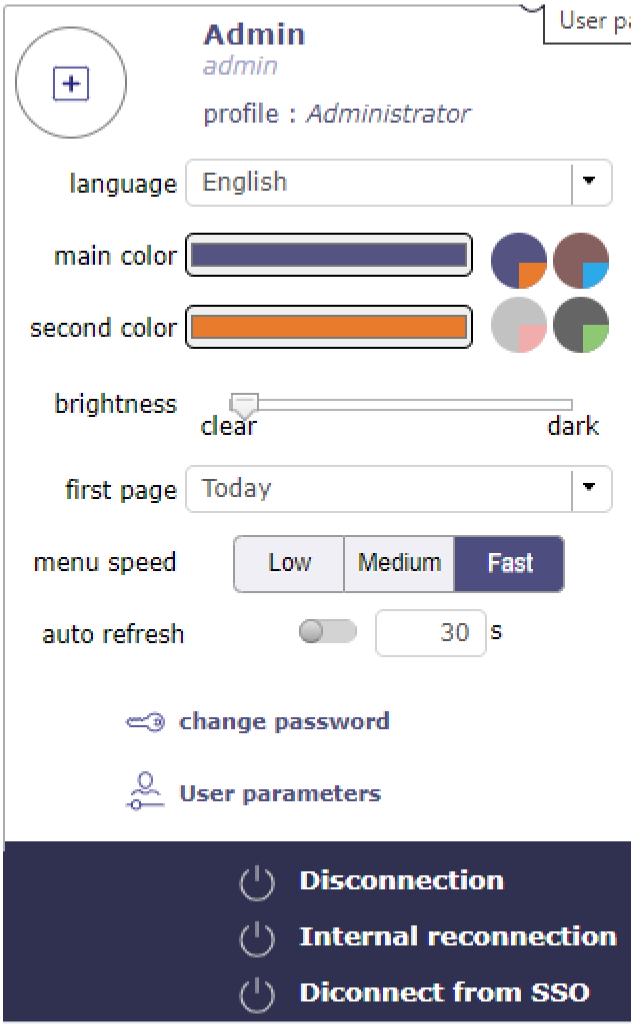


Fig. 16: Disconnection screen

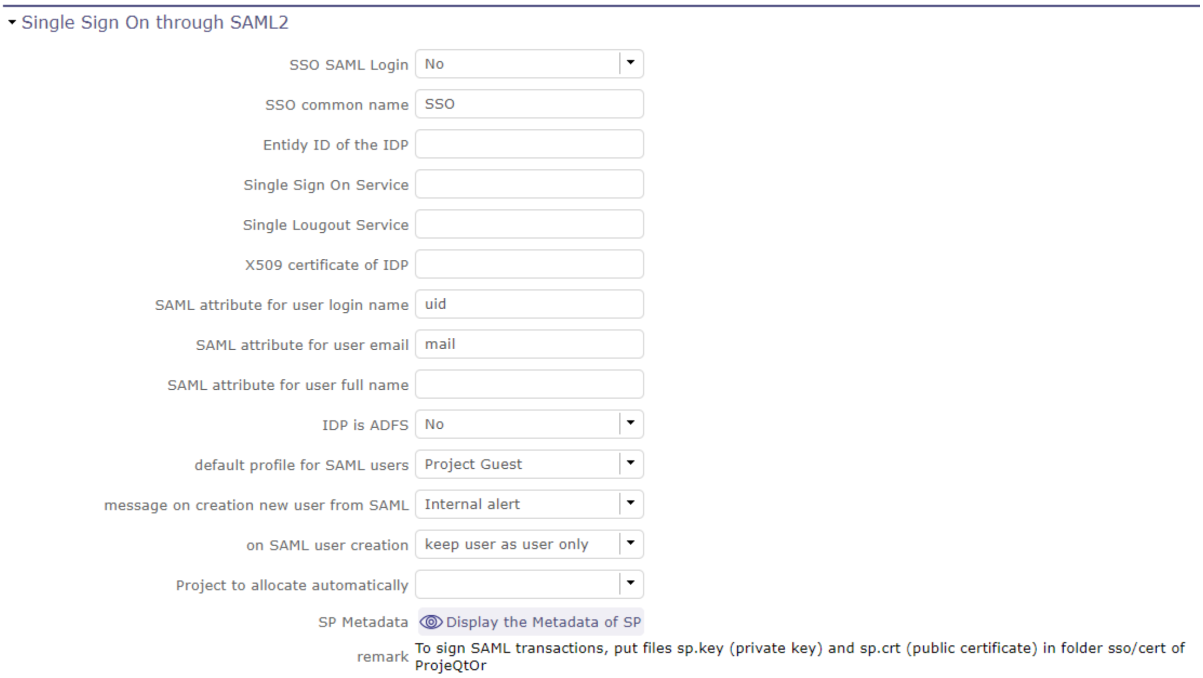


Fig. 17: Global parameters: LDAP

4.2.10 Tab Automation

Authentication's sections

- *Management of automated service (CRON)*
- *Automatic archiving of history*
- *Automatic import of files*
- *Automatic import of replies to emails*
- *Automatic planning calculation*
- *Generation of alerts for real work*

Management of automated service (CRON)

Parameters for the *Cron* process.

Defined frequency for these automatic functions

It will manage :

- **Alert generation:** Frequency for recalculation of indicators values.
- **Check alert:** Frequency for client side browser to check if alert has to be displayed.
- **Import:** Automatic import parameters as below.

Warning: **Cron working directory** should be set out of the path web..

Automatic archiving of history

This section allows you to manage the behavior of the history

Archive history older than (in days)

Determines how often your history is archived.

Start time of daily archiving

Choose the time at which the daily archiving will start.

Archive all history for idle items

Choose whether the history of closed items should be archived or not.

Automatic import of files

Automatic import settings for *cron* processes.

Warning: **Directory of automated integration files** should be set out of the path web.

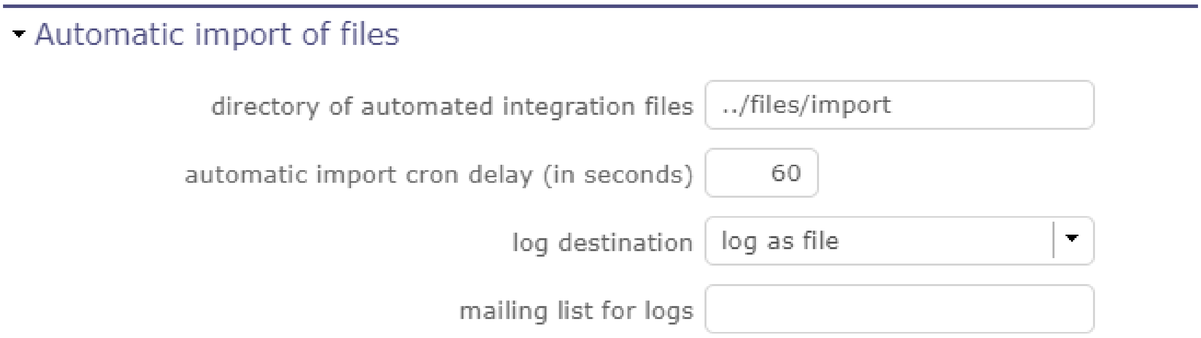


Fig. 18: Automatic import of files

Automatic import of replies to emails

- Defined parameters for the "Reply to" process
- It will manage connection to IMAP INBOX to retrieve email answers.

  Email input check cron delay (in seconds)

  Delay of -1 deactivates this functionality.

  Email reception

  When you have completed the IMAP settings for receiving emails, you receive your email with a new header. See the image below.

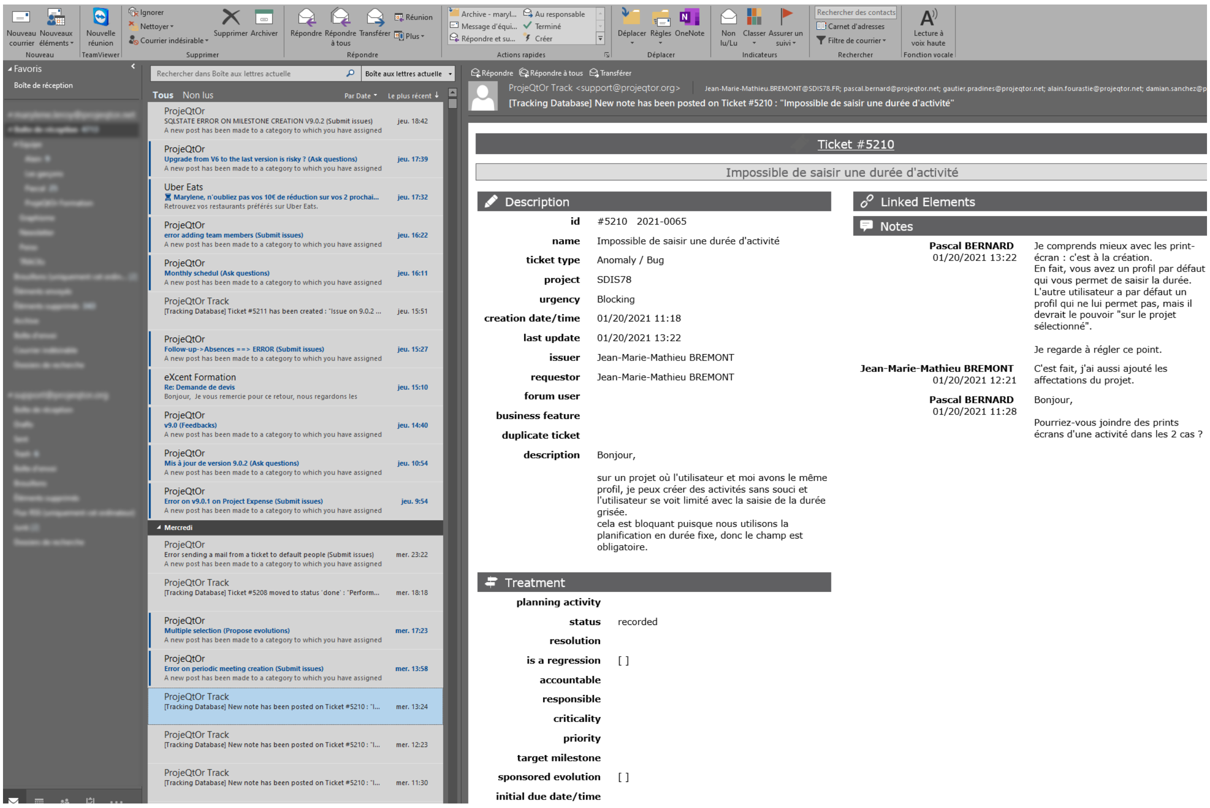


Fig. 19: receiving an email settings

You always find the name of the item that is related to your application. A single click takes you to the item page.

The line in the header tells you where your answer should be positioned to allow you to retrieve the response text in your ProjeQtor instance without the original message.

Signing start identifier

When you have completed the IMAP settings for receiving emails, you receive your email with a new header. See the image below.

The fields allows you to identify the beginning of your signature in order to avoid retrieving the signature in the response.

For example, enter, so that ProjeQtOr recognizes that your signature begins with this word. He will not take back everything behind.

Action after processed emails

You can determine what action to perform when receiving the email.

- Mark as read, which is the default
- Removal

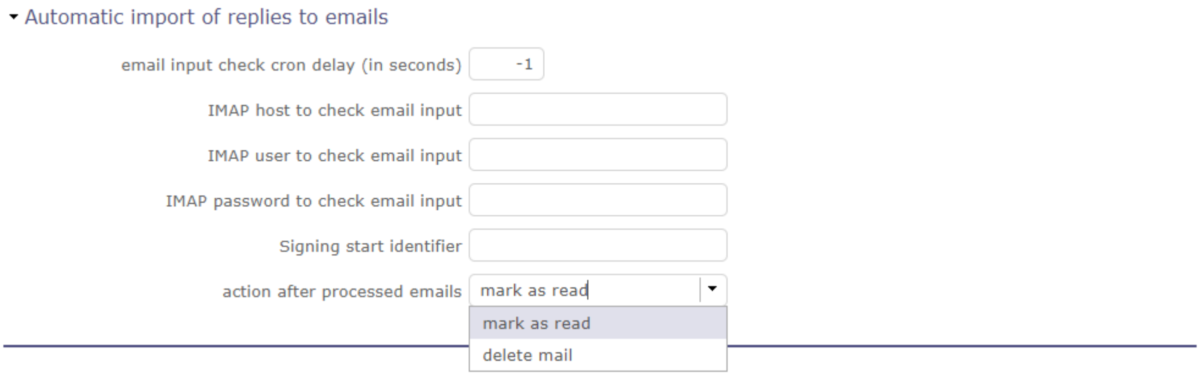


Fig. 20: Global parameter for automatic import for replies email

Note: IMAP host

- Must be an IMAP connection string.
- To connect to GMAIL input box, host must be: {imap.gmail.com:993/imap/ssl}INBOX
- You must set these parameters if you want to use the *Not receive his own mails* option in the user settings

Automatic planning calculation

Activated or desactived this feature by simple click

Differential calculation

Project planning is recalculated only for those who need to be. A data or more has been changed into the project so a new calculation is expected.

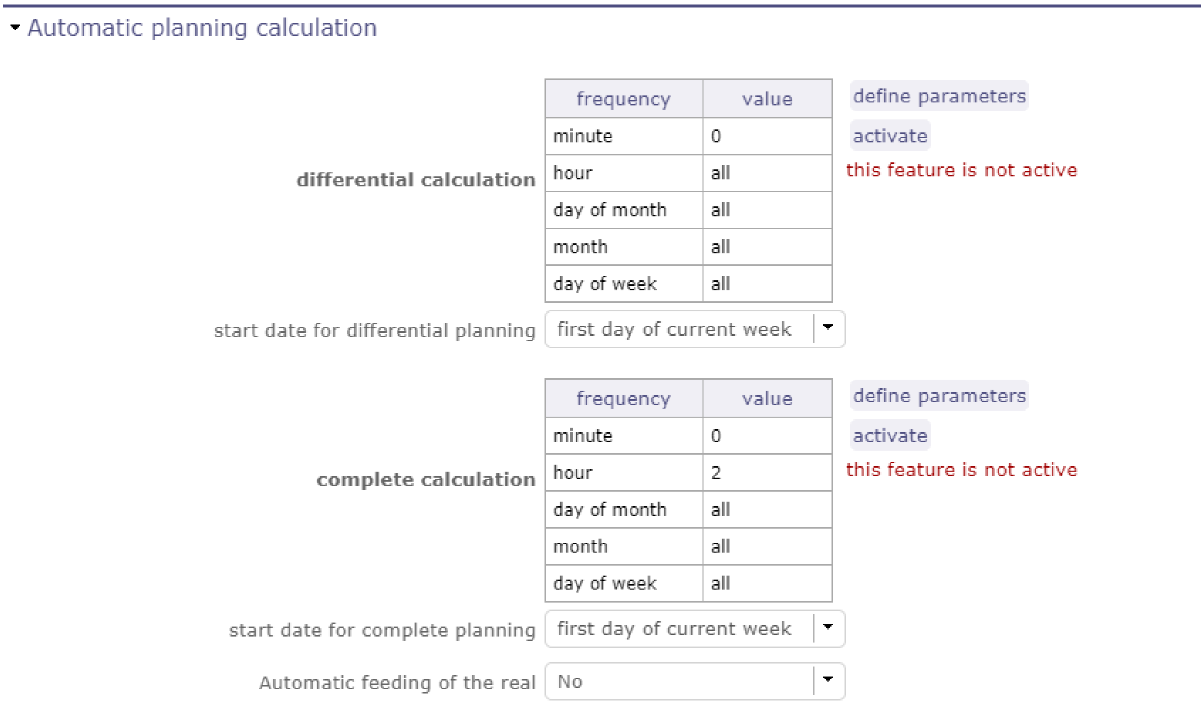
Complete calculation

All projects planning are recalculated.

Automatic feeding of the real

You automatically fill in the actual work from the scheduled work up to a given date.

The automatic calculation of projects from the day after this date is triggered.



The actual work is automatically entered from the scheduled work until the day before the start of the schedule calculation.

> **Warning:** For security, and to avoid overlapping with a manual input of reality, if the resource has reality for a given date, we do not copy the possible planned existing in reality.
>
> For each scheduled job found, if no job exists for the relevant resource on the date of the scheduled job, copies the scheduled job to an actual job.
>
> We will mark the actual work entered automatically (technical zone type label) to distinguish between automatic feeding and manual feeding.
>
> This area will not be processed for screen renderings, but will analyze any unexpected behavior.

Frequency

Select the frequency on the calendar by clicking on the button **defined parameters** and choose the schedule, day, month.

Start date for

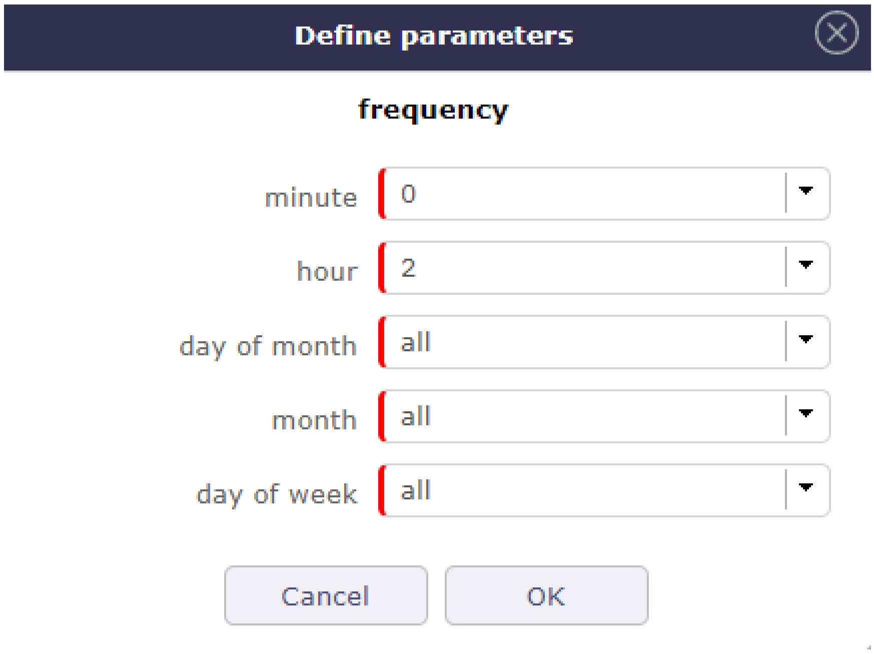
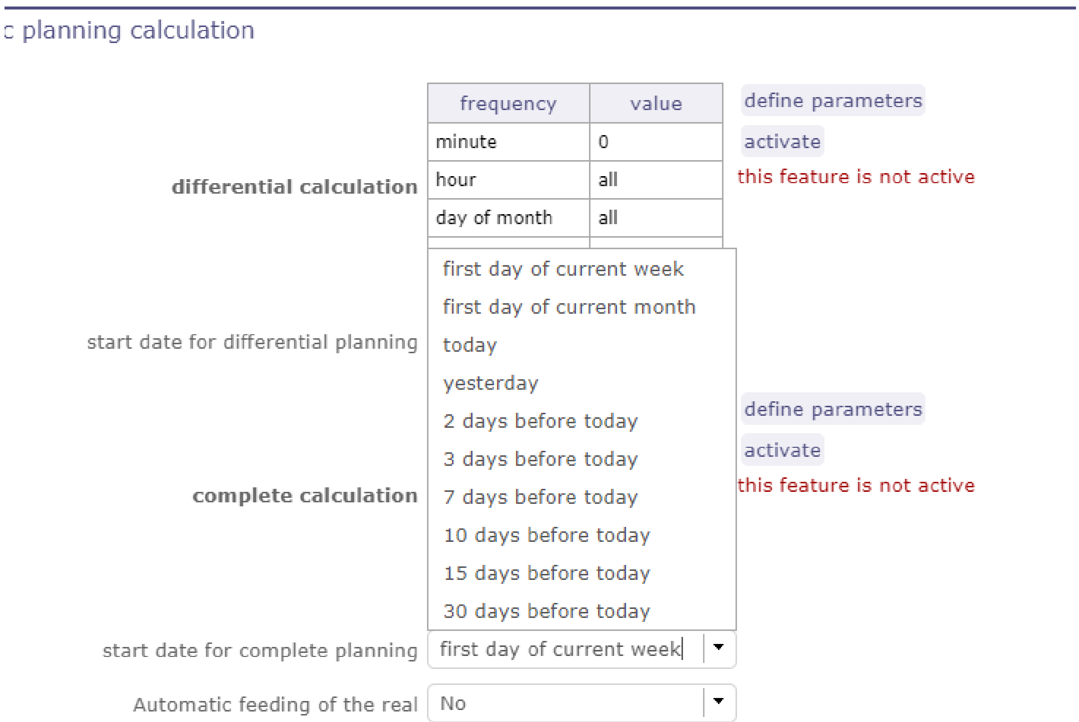


Fig. 21: Define parameters



Select when you want to recalculate project(s)according the date of today's date

Generation of alerts if real work is not entered

Specific settings for alerts based on a profile.

- An email is sent on the agreed date.
- Click on the button **Define Parameters**
- Select the frequency of the calendar with which the emails will be generated and sent to the profile.
- See: *Management of automated service (CRON)* to set the send frequency.

In addition to the sending frequency, you can refine the generation with several additional options.

Control input up to

Select when you want to be controlled: current day, previous day or next days.

Number of days to control

Choose how many days will be controled

Send alert to resource

Choose how alerts will be sent, Internal alert, email, both or none

Only incompletes imputation

The goal is to be able to send alerts on charges only if the entry is incomplete, not if it is greater than the capacity of the resource.

With the option checked, when generating alerts, an entry greater than the capacity of the resource does not trigger an alert.

Warning:

- All days of the week, open or off days are taken into account.
- Off days in real work allocation will not send you an alert.

4.2.11 Tab System

Authentication's sections

- *Files and directories*
- *Translation data*
- *Security - Message when a try is detected*
- *Miscellaneous*
- *PDF export*
- *SSL connection to database*

Files and directories

Definition of directories and other parameters used for Files and documents management.

Fill in the weight and the access paths to the storage of your documents and attached files.

> **Warning:** **Attachments Directory** and **Root directory for documents** Should be set out of web reach.
>
> **Temporary directory for reports** Must be kept in web reach.

Translation data

Parameters to define character sets, their encoding, their behavior … for saving files on the server.

Charset to save files on server

Keep empty for Linux servers, files names will be stored in UTF8.

For windows OS server, define charset as "windows-1252" (for western europe) or similar corresponding to your localization.

Time zone

Select your time zone.

Separator for CSV files

Choose the field separator for csv exports.

Export CSV to UTF-8 format

Preserve UTF-8 for exported csv files. If set no, will encode in CP1252 (recommended for windows in English and western Europe Languages).

Security - Message when a try to hack is detected

To secure the solution and avoid Cross Site Scripting type attacks, we have implemented CSRF token.

Configure the email that will be notified if a try to hack security flaw is detected.

Several possibilities of sending are configurable.

Miscellaneous

Settings for the update

Check for new version

Auto check (or not) for existing new version of the tool (only administrator is informed);

PDF export

Basic settings for PDF exports

Memory limit for PDF generation.

Size In MB. Too small can lead to PDF error but too big can crash the server

Font for PDF Export.

Freesans give great portability for non ANSI characters - Helvetica give smaller PDF files.

SSL connection to database

Allows to set up a secure SSL connection:

- SSL Key
- SSL Certification
- SSL Certificate Authority

Enter patch to corresponding files to enable SSL connection to the database.

> **Warning:** Take care that these files must exist and be valid SSL files.
>
> If values are incorrect, the application will not work any more, and you'll have to manually fix parameters in the database.

4.3 Special Fields

Special fields can be used in the title and body mail to be replaced

by item values :

- **${dbName}** the display name of the instance
- **${id}** id of the item
- **${item}** the class of the item (for instance "Ticket")
- **${name}** name of the item
- **${status}** the current status of the item
- **${project}** the name of the project of the item
- **${type}** the type of the item
- **${reference}** the reference of the item
- **${externalReference}** the *external reference* of the item
- **${issuer}** the name of the issuer of the item
- **${responsible}** the name of the responsible for the item
- **${sender}** the name of the sender of email
- **${sponsor}** the name of the project sponsor
- **${projectCode}** the project code
- **${contractCode}** the contact code of project
- **${customer}** Customer of project
- **${url}** the URL for direct access to the item
- **${login}** the user name
- **${password}** the user password
- **${adminMail}** the email of administrator

4.4 Administration Console

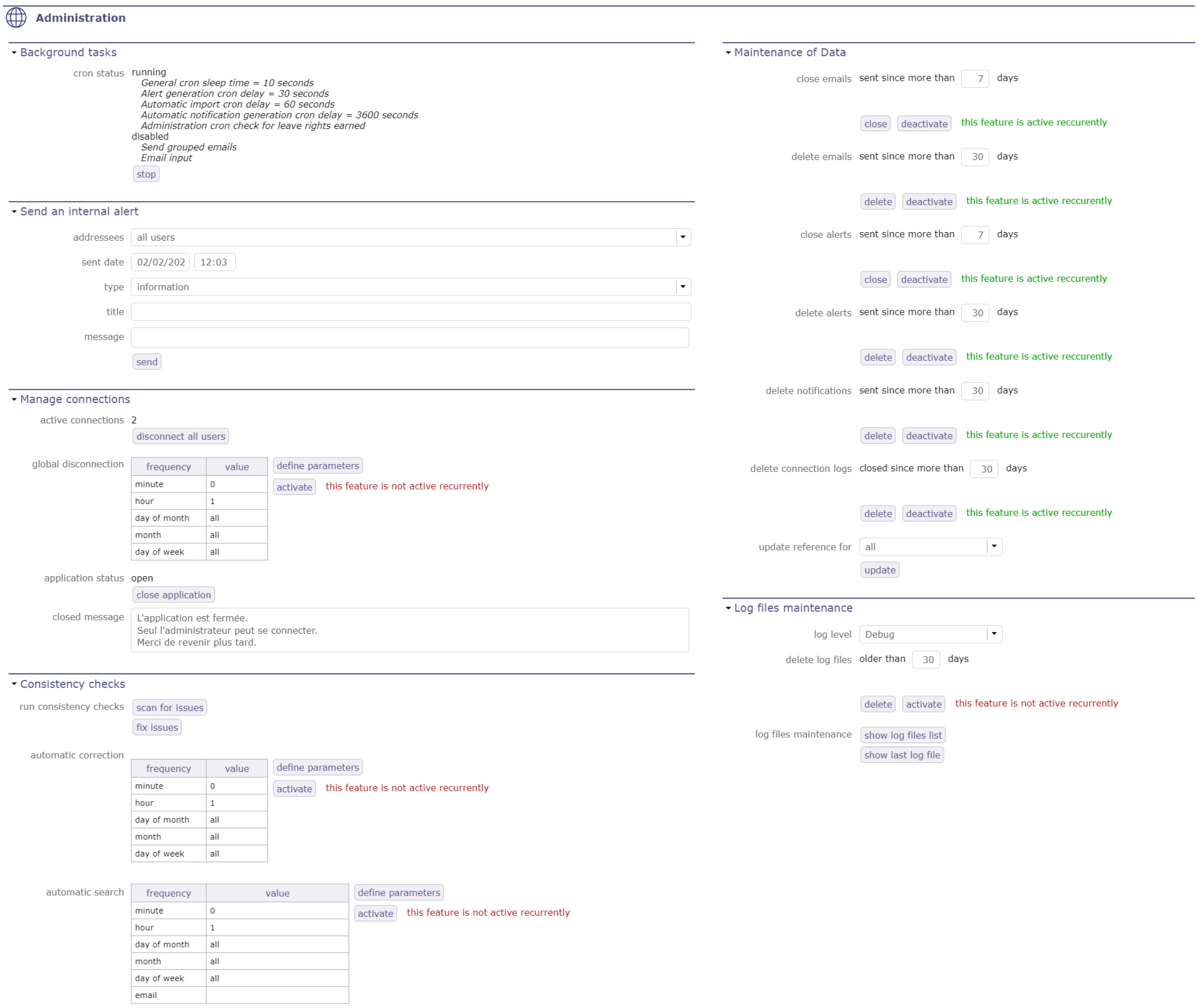


Fig. 22: Administration screen

Note: The screens described below are restricted to users with administrator profile.

Users with other profiles can not access it, whether display or access rights are granted or not.

Administration console allows to execute administration tasks on application.

4.4.1 Background tasks

the CRON

The *CRON* program starts and stops background jobs that process and periodically check indicators to generate the corresponding alerts, warnings or even automatic imports if necessary.

This program automatically runs scripts, commands, or software at a specified date and time, or a pre-defined cycle.

You can activate or deactivate CRON directly from the info bar. See: *The CRON button*

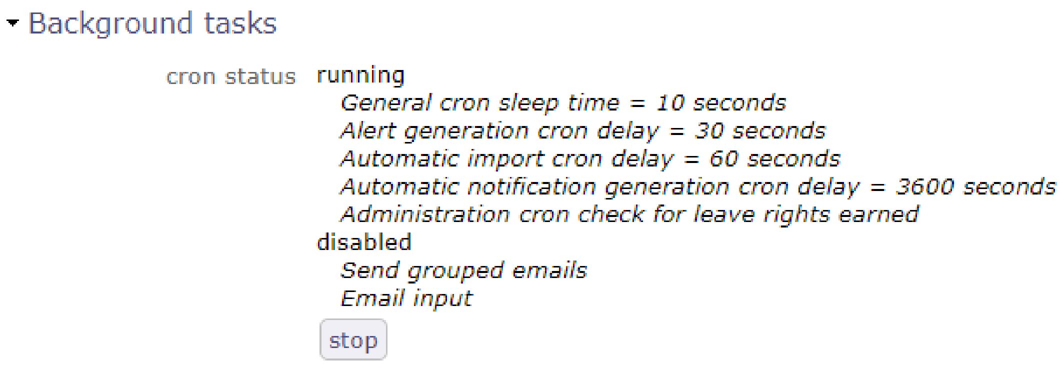


Fig. 23: Background tasks is running in Administration console

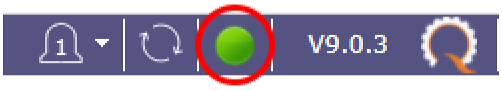


Fig. 24: CRON activation button

The history

Most manipulations and modifications are recorded in the history, such as validated and assigned dates, information on assignments to projects, assignments to activities, durations, but also all personalization information.

The history will not trace the creation and configuration of indicators, connection audits or the entry of work (imputation sheet).

On the other hand, in the case where the entry of the work leads to modifications on elements such as dates, durations… then this information will be well updated.

4.4.2 Internal alert

Allows to send an internal alert to users. It's a *background task*.

Internal alerts can be sent to users.

You can define a date and time for sending, specific adressees or all users, the type of message that users will receive: information, an alert or a warning …

This can be a good step to warn users before a temporary shutdown of ProjeQtOr for update for example.

An internal alert can be sent by the administrator or by monitoring indicators.

By the administrator

The administrator can send internal alert by administration console.

The message will be received by user via message pop-up.

Monitoring indicators

Monitoring indicators send only warning and alert message.

The message contains information that explains the alert:

- Item id and type.
- Indicator description.
- Target value.
- Alert or warning value.

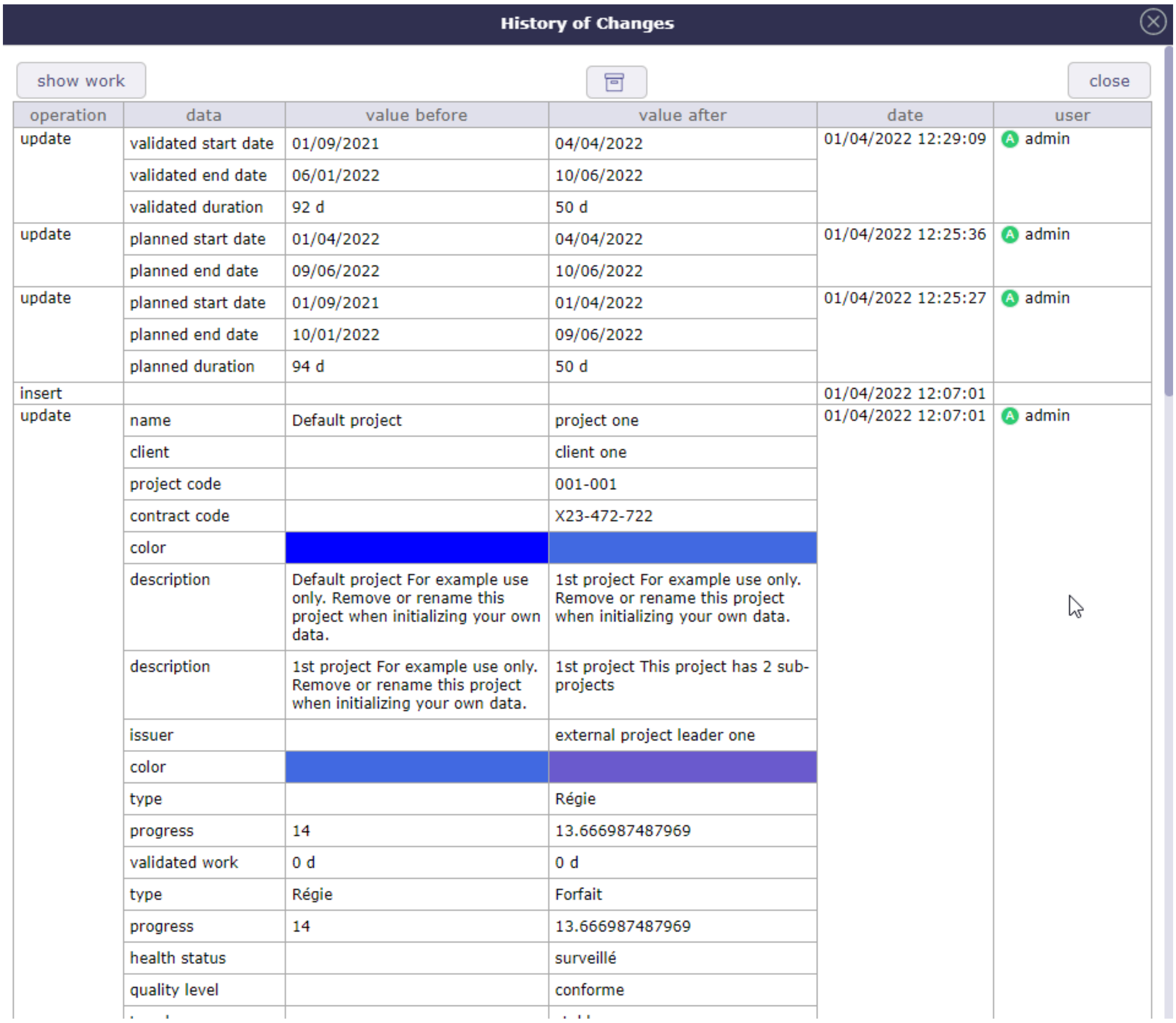


Fig. 25: Project's history

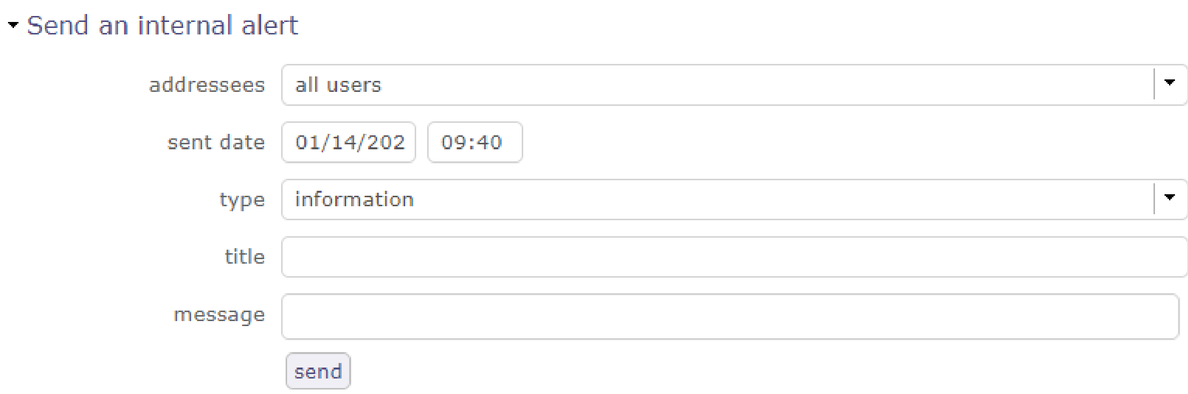


Fig. 26: Internal Alert

The indicators are defined in *Indicators screen* .

4.4.3 Manage connections

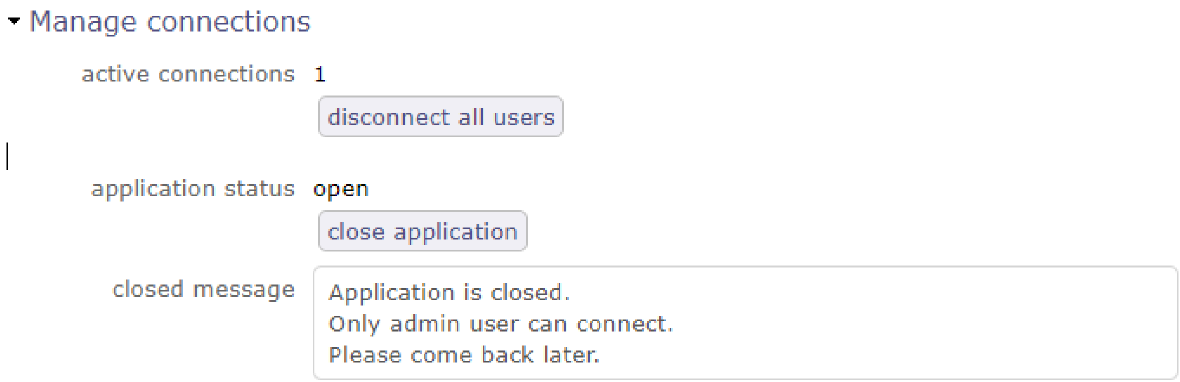


Fig. 27: Manage connections

Allows to force disconnection of active users and close the application for new connections.

Disconnect all users

- The button `Disconnect all users` allows to disconnect all connected users except your own connection.
- The application status is displayed below.
- Disconnection will be effective for each user when his browser will ckeck for alerts to be displayed.
- The delay for the effective disconnection of users will depend on the parameter "delay (in second) to check alerts" in *Global parameters* screen.

Open/Close application

- The button `Open/Close application`
- Allows to open and close application.
- When the application is closed the message below will appear on login screen.

4.4.4 Consistency check

Consistency check

- on the WBS sequence search for duplicates, sequence holes, incorrect order
- on the presence of one and only one line of "PlanningElement" for the planifiable elements
- on the consolidation of ticket work
- on consolidation of work on activities
- on assignments

You can program the search for the consistency check as well as its execution.

Set the desired frequency settings and activate the service.

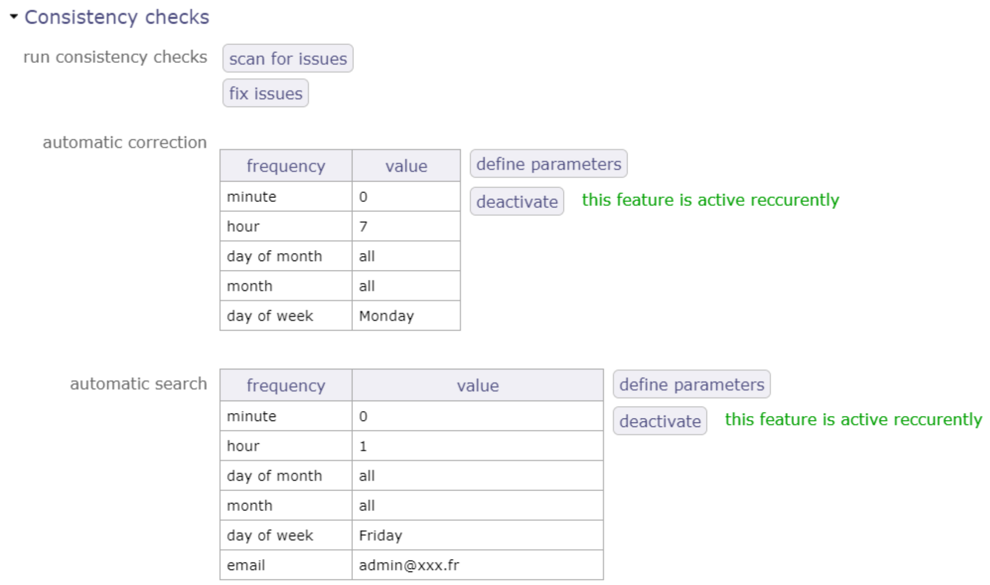


Fig. 28: consistency check

4.4.5 Maintenance of Data

The administrator has the possibility to:

- Close and delete sent emails and alerts.
- Delete history of connections.
- Updating references for any kind of element.

You can automate these cleanings by activating them using the corresponding buttons.

4.4.6 Log files maintenance

The administrator has the possibility to choose the level of the log files among debug, trace, script and errors.

- delete files on a given number of days.
- Show the list of logs
- Show the last logs list.

4.5 Module Management

The Module Management allows to choose the module(s) that will appear in the interface.

This enables or disables a consistent group of features.

This screen is then accessible via a dedicated menu in the Acces Right

The menu at the top of the page allows you to display all the modules or to display the modules corresponding to a part of the scope of the project management

When you have selected one of these menus, the modules are displayed below.

Click on a module to display its description, as well as the list of screens that will be activated or deactivated.

Disabling some modules will also hide reports and all related parameters.

Click on the checkboxes to enable or disable the module.

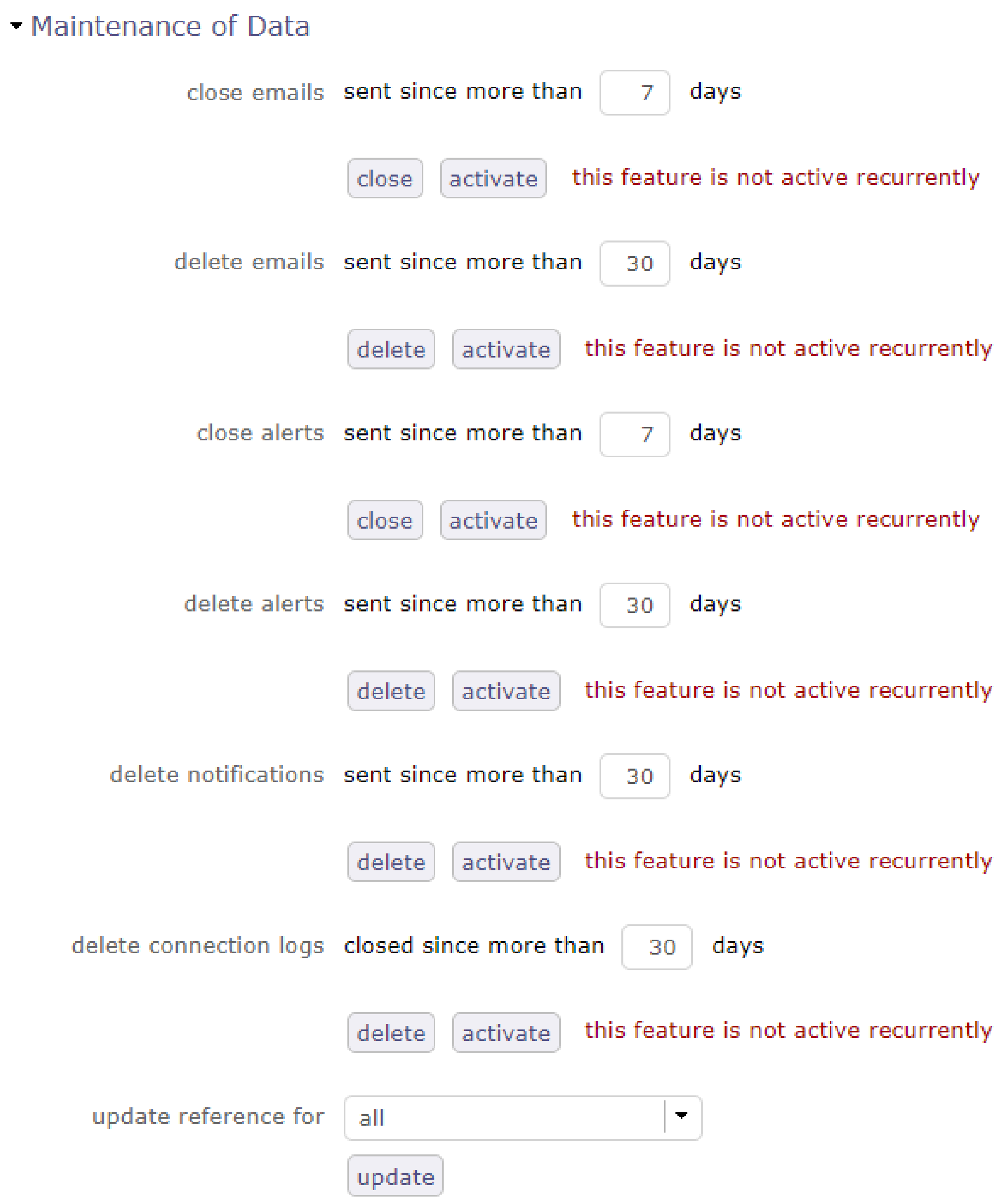


Fig. 29: Maintenance of datas

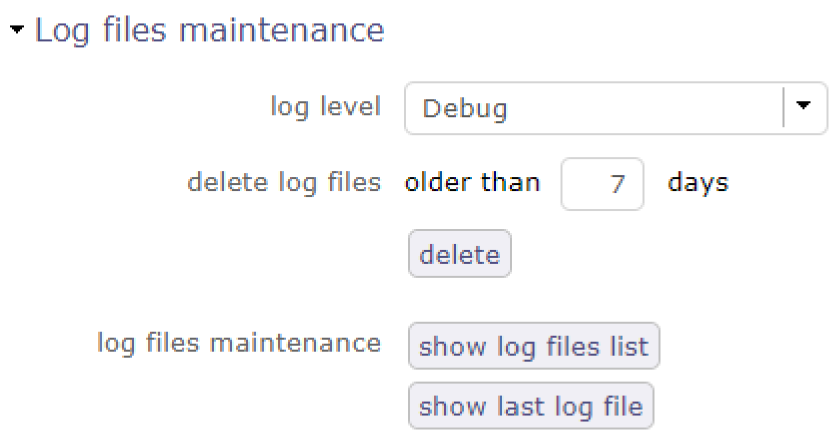
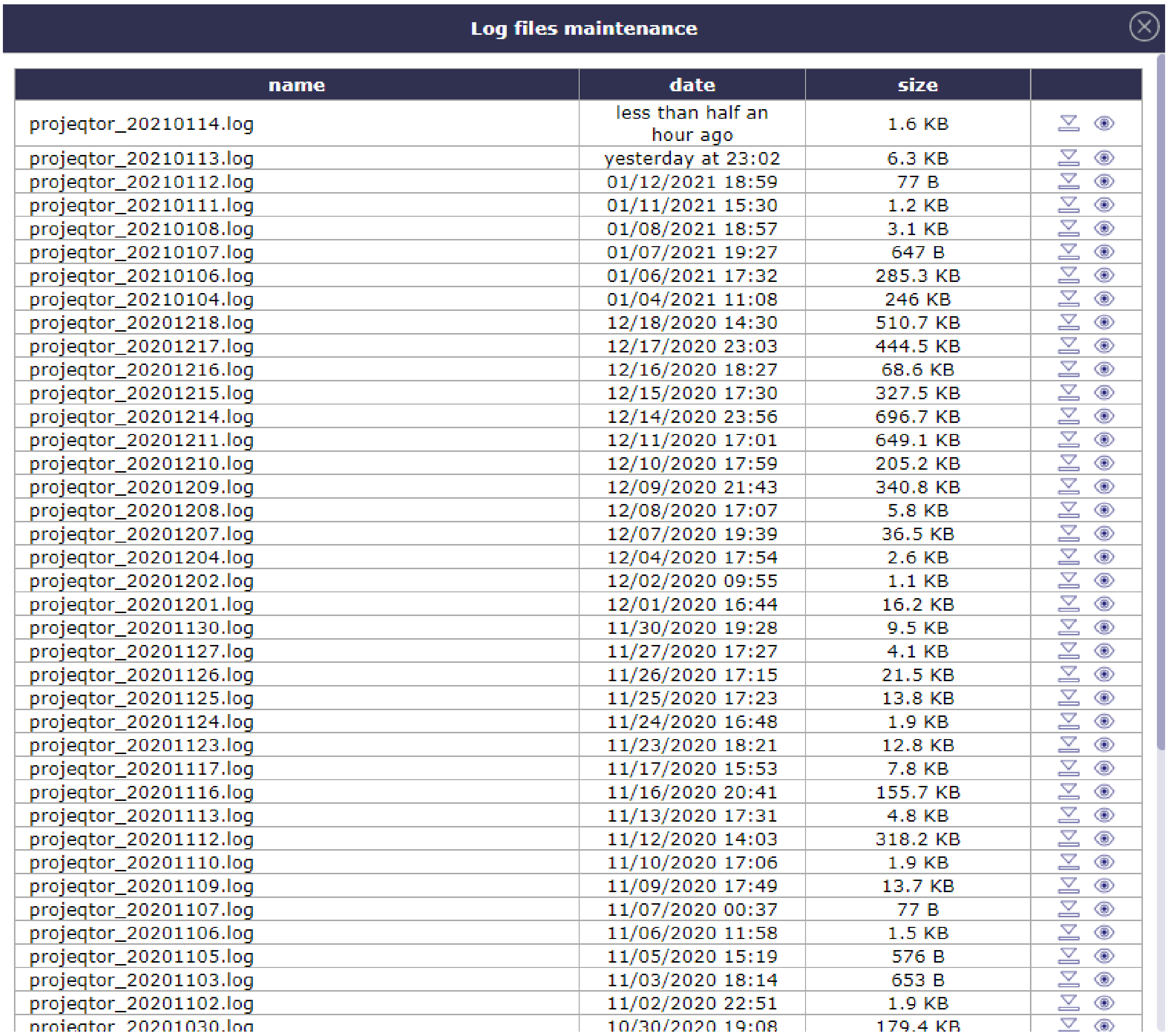


Fig. 30: Log files maintenance



Log files maintenance

name	date	size	
projeqtor_20210114.log	less than half an hour ago	1.6 KB	
projeqtor_20210113.log	yesterday at 23:02	6.3 KB	
projeqtor_20210112.log	01/12/2021 18:59	77 B	
projeqtor_20210111.log	01/11/2021 15:30	1.2 KB	
projeqtor_20210108.log	01/08/2021 18:57	3.1 KB	
projeqtor_20210107.log	01/07/2021 19:27	647 B	
projeqtor_20210106.log	01/06/2021 17:32	285.3 KB	
projeqtor_20210104.log	01/04/2021 11:08	246 KB	
projeqtor_20201218.log	12/18/2020 14:30	510.7 KB	
projeqtor_20201217.log	12/17/2020 23:03	444.5 KB	
projeqtor_20201216.log	12/16/2020 18:27	68.6 KB	
projeqtor_20201215.log	12/15/2020 17:30	327.5 KB	
projeqtor_20201214.log	12/14/2020 23:56	696.7 KB	
projeqtor_20201211.log	12/11/2020 17:01	649.1 KB	
projeqtor_20201210.log	12/10/2020 17:59	205.2 KB	
projeqtor_20201209.log	12/09/2020 21:43	340.8 KB	
projeqtor_20201208.log	12/08/2020 17:07	5.8 KB	
projeqtor_20201207.log	12/07/2020 19:39	36.5 KB	
projeqtor_20201204.log	12/04/2020 17:54	2.6 KB	
projeqtor_20201202.log	12/02/2020 09:55	1.1 KB	
projeqtor_20201201.log	12/01/2020 16:44	16.2 KB	
projeqtor_20201130.log	11/30/2020 19:28	9.5 KB	
projeqtor_20201127.log	11/27/2020 17:27	4.1 KB	
projeqtor_20201126.log	11/26/2020 17:15	21.5 KB	
projeqtor_20201125.log	11/25/2020 17:23	13.8 KB	
projeqtor_20201124.log	11/24/2020 16:48	1.9 KB	
projeqtor_20201123.log	11/23/2020 18:21	12.8 KB	
projeqtor_20201117.log	11/17/2020 15:53	7.8 KB	
projeqtor_20201116.log	11/16/2020 20:41	155.7 KB	
projeqtor_20201113.log	11/13/2020 17:31	4.8 KB	
projeqtor_20201112.log	11/12/2020 14:03	318.2 KB	
projeqtor_20201110.log	11/10/2020 17:06	1.9 KB	
projeqtor_20201109.log	11/09/2020 17:49	13.7 KB	
projeqtor_20201107.log	11/07/2020 00:37	77 B	
projeqtor_20201106.log	11/06/2020 11:58	1.5 KB	
projeqtor_20201105.log	11/05/2020 15:19	576 B	
projeqtor_20201103.log	11/03/2020 18:14	653 B	
projeqtor_20201102.log	11/02/2020 22:51	1.9 KB	
projeqtor_20201030.log	10/30/2020 19:08	179.4 KB	

Fig. 31: Log files list

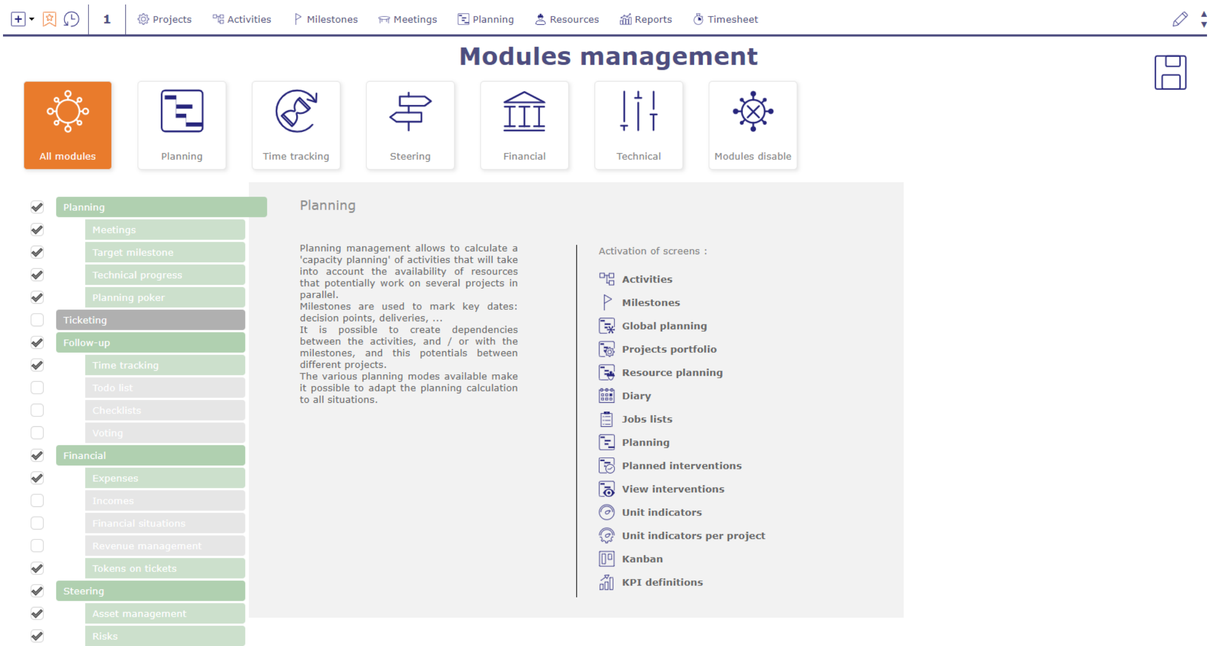


Fig. 32: Module management screen

Modules and sub-modules list

- **Planning**
  - Meetings
  - Target milestone
  - Technical progress
  - Planning poker
- Ticketing
- **Follow-up**
  - Time tracking
  - Todo list
  - Checklist
  - Voting
- **Financial**
  - Expenses
  - Incomes
  - Financial situations
  - Revenue management
  - Tokens on tickets
- **Steering**
  - Asset management
  - Risks
  - Requirements
  - Mail
  - Project analysis
- Product configuration
- Translation request
- **Human ressource**
  - Leaves management
  - Skill management
- Documents
- **Organizations**
  - Budgets on the organizations
- Cloned environments
- Activity stream
- Notifications.

Note: Each module can be installed independently.

4.6 Access Rights

This section allows the fine management of the rights as well as the management of the modules

4.6.1 Profiles

The profile is a group of rights. Each with specific access rights to the database.

Thus, each user is linked to a profile which defines the data that he can see and possibly manage.

See also: *Concept*

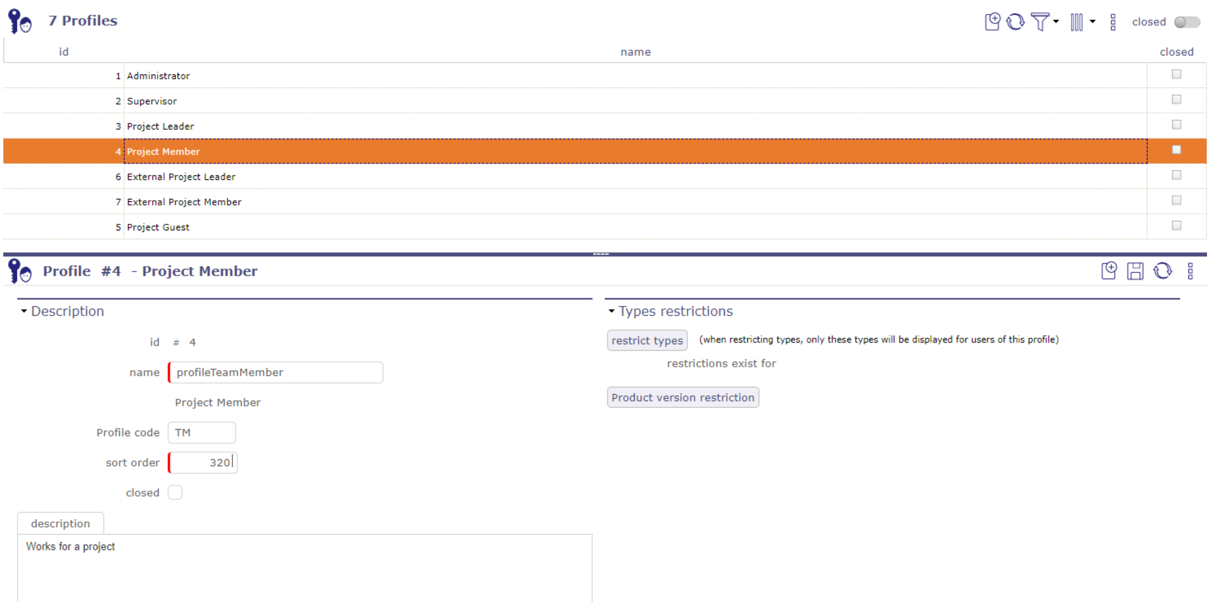


Fig. 33: Profiles screen

Value of Field "Name"

- The value of field "Name" is not the name displayed, but it is a code in the translation table.
- The value of field "Name" must be a significant name and must not contain spaces or special characters.
- The name displayed at right of the field is the translated name.
- when the new profile is created, it appears in the list of existing profiles in the list box.
- It remains between square brackets because it does not exist in *Translatable name*.

Tip: Ideally, the value of the field should start with "profile" to be easily identified in the translation table.

The restriction zone offers two types of restriction:

- By type based on ProjeQtOr elements (actions, activities, invoices, catalog . . .)
- By product versions

More details: *Restriction types*

Fig. 34: Profile description with translatable name

Table 1: Required Field

Field	Description
Id	Unique Id for the profile.
Name	Name of the profile.
Profile code	A code that may be internally used when generating emails and alerts.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that profile is archived.
Description	Complete description of the profile.

Field Profile code

- **ADM:** will designate administrator.
- **PL:** will designate project leader.

4.6.2 Access to forms

This settings screen allows you to define access to the element screens for each profile.

Users who have access to this screen cannot modify their own screen access rights.

The checkbox is read-only to make sure that at least one profile can always access it.

Only another profile with access to the screen will be able to uncheck this box.

- Click the checkbox to allow or revoke access to a profile screen.
- Click [+] to open all sections
- Click [−] to close all sections

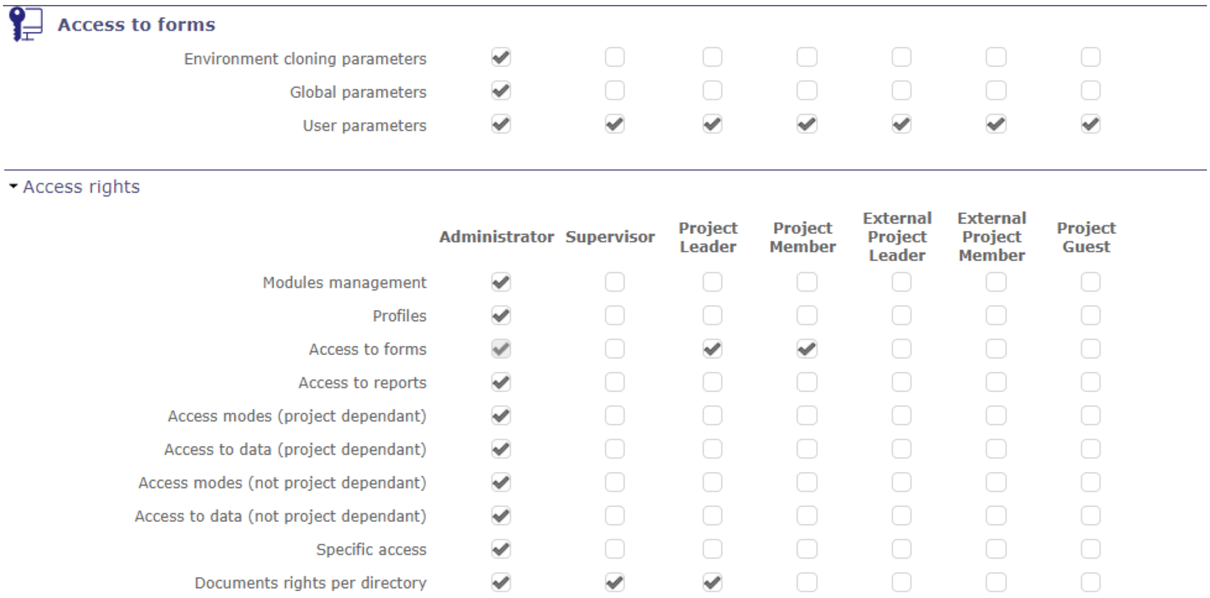


Fig. 35: Access to forms screen

4.6.3 Access modes

The access mode defines a combination of rights to Created, Read, Update or Delete items.

It's the CRUD RIGHTS

Each access is defined as scope of visible and/or updatable, that can be, by kind of elements.

Project dependant

By default, ProjeQtOr offers 10 different access modes.

Each access defines the visibility that can be applied by type of elements dependent on a project (activity, ticket, action, . . .).

You can choose from several levels of visibility for each CRUD entitlement.

- **No element:** No element is visible and updatable.
- **Own elements:** Only the elements created by the user.
- **Elements he is responsible for:** Only the elements the user is responsible for.
- **Elements of own project:** Only the elements of the projects the user/resource is allocated to.
- **All elements on all projects:** All elements, whatever the project.

Value of Field "Name"

- The value of field "Name" is not the name displayed, but it is a code in the translation table.
- The value of field "Name" must be a significant name and must not contain spaces or special characters.
- The name displayed at right of the field is the translated name.
- when the new profile is created, it appears in the list of existing profiles in the list box.
- It remains between square brackets because it does not exist in *translatable name*.

Tip: Ideally, the value of the field should start with "accessProfile" to be easily identified in the translation table.

Table 2: Required Field

Field	Description
Id	Unique Id for the access mode.
Name	Name of the access mode.
Read rights	Scope of visible items
Create rights	Scope of possibility to create items.
Update rights	Scope of updatable items.
Delete rights	Scope of deletable items.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that access mode is archived.
Description	Complete description of the access mode.

Not project dependant

The non-dependent elements of a project, such as organizations, parameters, lists of values, tools or even controls and automatisms can also be set with CRUD rights.

These elements must be visible. So the reading right is granted on a basic basis.

ProjeQtOr offers 5 different access modes where you can define creation, update and deletion rights.

- **Yes:** allows the right to …
- **No:** does not allow the right to …
- **Own elements:** Only the elements created by the user.
- **Elements he is responsible for:** Only the elements the user is responsible for.

You can then define a mode corresponding to the visibility rights that you wish to grant on each profile in the access to data not dependent on the project.

4.6.4 Access to data

This screen allows to set element access mode for each profile.

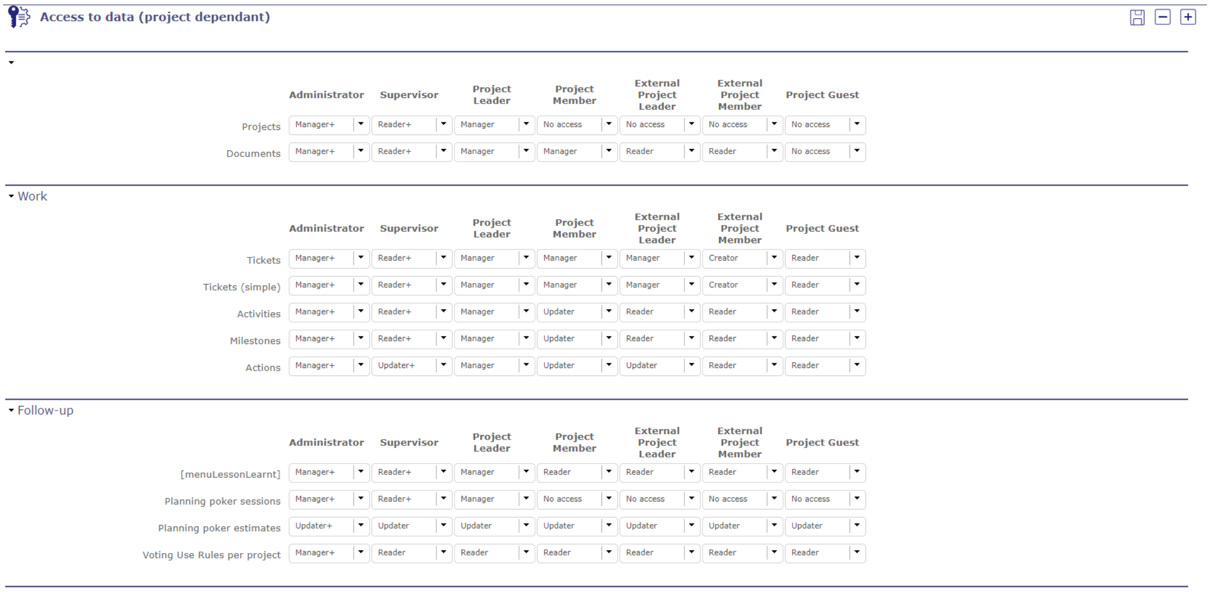
Allows to define scope of visibility and/or updating of data in elements for users and resources.

- Click on [+] to open all the sections
- CLick on [-] to closed all the sections

Project dependant

This screen is only for the elements reliant on a project.

For each element, selected the access mode granted to a profile.


Access to data (project dependant)

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Projects	Manager+	Reader+	Manager	No access	No access	No access	No access
Documents	Manager+	Reader+	Manager	Manager	Reader	Reader	No access

Work

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Tickets	Manager+	Reader+	Manager	Manager	Manager	Creator	Reader
Tickets (simple)	Manager+	Reader+	Manager	Manager	Manager	Creator	Reader
Activities	Manager+	Reader+	Manager	Updater	Reader	Reader	Reader
Milestones	Manager+	Reader+	Manager	Updater	Reader	Reader	Reader
Actions	Manager+	Updater+	Manager	Updater	Updater	Reader	Reader

Follow-up

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
[menuLessonLearnt]	Manager+	Reader+	Manager	Reader	Reader	Reader	Reader
Planning poker sessions	Manager+	Reader+	Manager	No access	No access	No access	No access
Planning poker estimates	Updater+	Updater	Updater	Updater	Updater	Updater	Updater
Voting Use Rules per project	Manager+	Reader	Reader	Reader	Reader	Reader	Reader

Fig. 36: Access to data (Project dependant) screen

Not project dependant

This screen allows to set for each profile, elements access rights. Allows to grant access rights (read only or write) to users, to data on specific elements. This screen is only for the elements not reliant on a project.

For each element, select the access rights granted to a profile.

Some features do not have a manager or are not linked specifically to a user profile, like messages, tools or even environmental parameters.

Certain access modes are therefore not offered in the drop-down lists on certain elements of this screen.

4.6.5 Access to reports

This screen allows to define report access for each profile. Users belonging to a profile can see the corresponding report in the report list. Reports are grouped by report categories

- Click on checkbox to permit or revoke access to the report for a profile.
- Click on [+] to open all the sections
- CLick on [−] to closed all the sections

4.6.6 Document rights per directory

You can define the access rights to documents according to the profile at each level of the document directory tree.

By default, all values are initialized for each existing directory from the existing values in the "Project-dependent access to data" rights screen.

4.6.7 Specific access

This screen groups specific functionalities options. Users belonging to a profile can have access to the application specific functions. Depending on options of functionality, allows to grant access rights, to define data visibility or to enable or disable option.

For each option, select the access granted to a profile.

Access to resource data

This section allows to:

- Defines who will be able to see and update *real work* for other users.
- Defines who can *validate work* for resource.
- Defines who have access on *Diary* for resources.
- Defines who, as a resource, can *subscribe to survey* for users.
- Defines who have access on *Reports* for resources.

Note: Validate real work: in most cases, it is devoted to project leader.

Work and Cost visibility

- This section defines for each profile the scope of visibility of work and cost data.

Assignment management

- This section defines the visibility and the possibility to edit assignments (on activities or else).

Display specific buttons

- This section defines whether some button, checklist, job list will be displayed or not (if defined).

  Display of combo detail button

  - This option defines for each profile whether the button  will be displayed or not, facing every combo list box.
  - Through this button, it is possible to select an item and create a new item.
  - This button may also be hidden depending on access rights (if the user has no read access to corresponding elements).

  Multiple update

  - Defines the possibility or not to change one or more criteria for one or more selected rows at a time

Planning access rights

- This section defines access for each profile to planning functionality.

Monthly consolidation of projects

- This section defines the right for each profile if it can validate and / or block the allocations of the resources of a project for a defined month.

Unlock items

- This section defines for each profile the ability to unlock any document or requirement.
- Otherwise, each user can only unlock the documents and requirements locked by himself.

Reports

- This section defines for each profile the ability to change the resource parameter in reports.

Financial

- This section defines for each profile the possibility of modifying the financial situations or of being able to automatically generate a project expense.

Specific update rights

- Defines for each profile the ability to manage all notes.
- Defines for each profile the ability to delete attached files.
- Defines for each profile the ability to force delete items.
- Defines for each profile the ability to force delete items with real work.
- Defines for each profile the ability to force close items.
- Defines for each profile the ability to update creation information in the header of the details area.
- Defines for each profile the ability to mention or not the components on a ticket.
- Defines for each profile the ability to update the left work on assigment section and timesheet.
- Defines for each profile the ability to work on tickets
- Defines for each profile the ability to manage the votes.
- Defines for each profile the ability to impose a layout on other users.
- Defines for each profile the ability to create tags on projects, tickets and activity.

Limit visibilty to resources

- By profil, allows to restrict or not the number of resources displayed, by organizations or own team, on resource lists.
- By profil, allows to restrict or not the number of resources displayed, by organizations or own team, on resource screen.

Limit visibility to organizations

- By profil, allows to restrict or not the number of organizations displayed, by organizations or own organization, on organization lists.
- By profil, allows to restrict or not the number of organizations displayed, by organizations or own organization, on organization screen.

4.6.8 Translatable name

For profiles and access modes, the value of field "Name" is translatable.

The field "Name" in screens *Profiles* and *Access modes* is not the name displayed, but it is a code in the translation table.

The name displayed at right of the field is the translated name.

The translated name depends on user language selected in *User parameters* screen.

Note: If translated name is displayed between square brackets [ ], then the value of field "Name" is not found in the translation table.

Translation table files

- In ProjeQtOr, a translation table file is defined for each available language.
- The files are named "lang.js" and are localized in a directory named with ISO language code.
  - For instance: ../tool/i18n/nls/fr/lang.js.

How to modify the translation file?

- You can edit file "lang.js" to add translation of new value or to modify the existing value translation.
- Or, you can download Excel file named "lang.xls", available on ProjeQtOr site. You can modify the translation tables of all languages and produce files "lang.js".

4.7 List of Types

Each element of ProjeQtOr can be typed at your convenience according to your profession or your field of activity. Each type is presented the same. A very simple description section, with different fields depending on the element, and a behavior section that will condition your future actions according to the parameters entered.

4.7.1 Behavior section

This section is common to several element types.

Allows to determine some GUI behavior, according to element types.

Description or Comments

- Box checked indicates the field *Description* is mandatory.

Responsible

- Box checked indicates the field *Responsible* is mandatory when the status to treatment of the item is "In progress".

Result

- Box checked indicates the field *Result* is mandatory when the status to treatment of the item is "done".

Flag status

- You can lock the macro status: In progress - Done - Closed - Canceled
- Those fields allow to determine whether the checkbox fields concerned are locked or not.
- If the box is checked then you will only be able to modify the macro status thanks to the workflow statuses.

No left work on done

- The plannable elements cannot be passed to status **done** if there is still left work.

Project

Lead Project

- The definition is made by the project type, you define that certain types of projects can not have activities, only subprojects or milestones.

Activity

activity on real time

- Possibility of managing activities on real time.
- See: *Global parameters* | *Assignement section*

No left work on done

- The activity cannot be passed to status **done** if there is still left work.

Todo list

- Checked box prohibits status change to completed if not all to-do list items are set to "completed"

Ticket

Resolution

- Box checked indicates the field **Resolution** is mandatory when the status to treatment of an item is **done**.

Lock solved

- Box checked indicates the field **Solved** is read only.
- The value of field must come from the field "Solved" defined in the selected resolution.

Todo list

- Checked box prohibits status change to completed if not all to-do list items are set to "completed"

Translation

Translation Request type

initial status of items

The initial state of the lines corresponds to the state of the request which will result in the automatic generation of the translation lines according to the languages recorded on your product or component version.

translation delay (nb days)

The translation deadline (in days) determines the deadline for the planned delivery date which will be calculated automatically from the creation of the request. This period is expressed in calendar duration and does not take into account non-working days.

Translation item type

status of generation of item

Corresponds to the state in which the rows will be created.

4.7.2 Types restrictions

Allows to limit values displayed in the list of values for each element type.

Restrictions can be defined for a project, a project type or a profile.

Note: Types restrictions section on Project screen

To display types restrictions section: Go to *Global parameter > Tab Activity > Controls and Restrictions Section* "allow type restriction on project" must be set to "Yes". Possibility to define more restrictions to a project against restrictions defined at the project type level.

Type restriction management

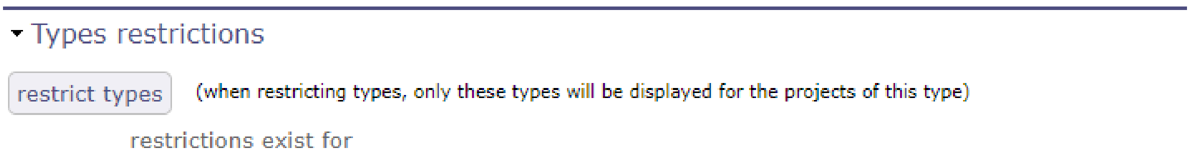
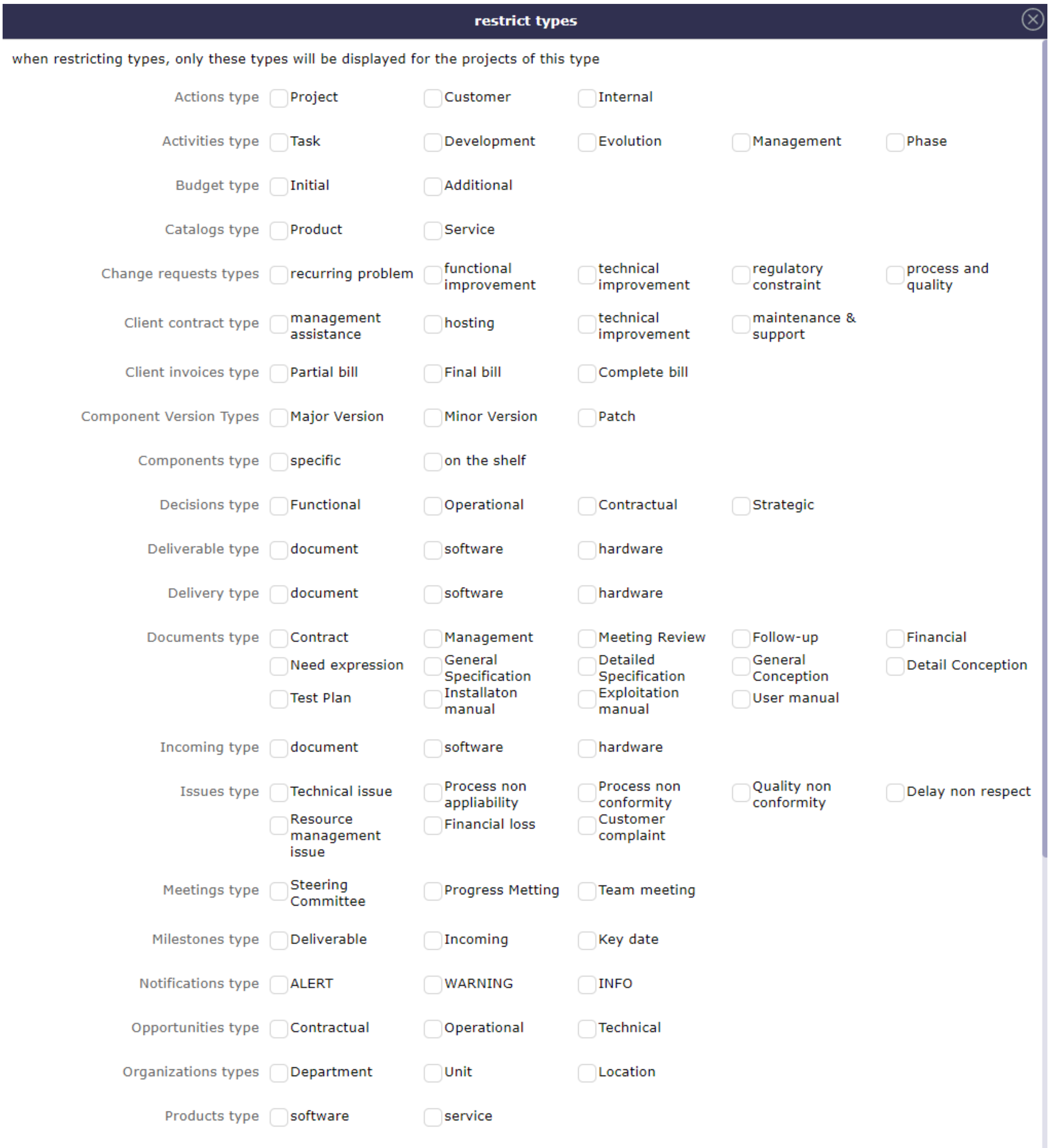


Fig. 37: Restrict types section

- Click on `Restrict types` button to display the dialog box.
- For each element type, select values that will be in the list of values displayed.
- By default, if no type of element is selected, all the values of the line will be displayed on each screen that will be affected.

Displays element type names where a restriction is applied

Reminder : It means too, no restriction for remainding element types on each dedicated screen.


restrict types
when restricting types, only these types will be displayed for the projects of this type
Actions type: Project, Customer, Internal
Activities type: Task, Development, Evolution, Management, Phase
Budget type: Initial, Additional
Catalogs type: Product, Service
Change requests types: recurring problem, functional improvement, technical improvement, regulatory constraint, process and quality
Client contract type: management assistance, hosting, technical improvement, maintenance & support
Client invoices type: Partial bill, Final bill, Complete bill
Component Version Types: Major Version, Minor Version, Patch
Components type: specific, on the shelf
Decisions type: Functional, Operational, Contractual, Strategic
Deliverable type: document, software, hardware
Delivery type: document, software, hardware
Documents type: Contract, Management, Meeting Review, Follow-up, Financial, Need expression, General Specification, Detailed Specification, General Conception, Detail Conception, Test Plan, Installaton manual, Exploitation manual, User manual
Incoming type: document, software, hardware
Issues type: Technical issue, Process non appliability, Process non conformity, Quality non conformity, Delay non respect, Resource management issue, Financial loss, Customer complaint
Meetings type: Steering Committee, Progress Metting, Team meeting
Milestones type: Deliverable, Incoming, Key date
Notifications type: ALERT, WARNING, INFO
Opportunities type: Contractual, Operational, Technical
Organizations types: Department, Unit, Location
Products type: software, service

4.7.3 Description section

Actions types

Action type is a way to define common behavior on group of actions.

Other sections

- *Behavior*

Table 3: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Activities types

Activity type is a way to define common behavior on group of activities.

Other sections

- *Behavior*

Table 4: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Default planning mode	Default planning mode for type.
Priority	Defined the priority of the activity type. It will be automatically applied in the activity management se
Color	Defined the default color for this activity type.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Asset types

Question type is a way to define common behavior on group of questions.

Other sections

- *Behavior*

Table 5: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Budget types

Budget types are a way to define the best budget for each project/activity.

Estimated budget, cash, investment, sale …

Other sections

- *Behavior*

Table 6: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Call for tender types

The types of calls for tenders make it possible to define the best procedure for launching calls with respect to the organization of your company:

the open, restricted tender, with minimum capacity requirements or pre-selection;

Other sections

- *Behavior*

Table 7: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Catalog types

Catalog types allow you to defune what type of item you produce or sell to your customers: products, services …

Other sections

- *Behavior*

Table 8: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Change requests types

The change request type is a way to define common behavior on a group of particular requests.

Several types are pre recorded: recurring problems, technical and functional improvement, regulatory constraint and process and quality.

Other sections

- *Behavior*

Table 9: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Client Bills types

Bill type is a way to define common behavior on group of bills.

Other sections

- *Behavior*

Table 10: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Client contract types

Client contract types are a way of defining the type of contract with a client.

Types of contract are already pre-registered: management assistance, hosting, technical improvement or Maintenance and support

Other sections

- *Behavior*

Table 11: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Client order types

Client order types allow you to define common order behaviors, such as billing

Other sections

- *Behavior*

Table 12: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Client payments types

customer payment type defines how the customer will pay the bill

Other sections

- *Behavior*

Table 13: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Client quotations types

Customer quote types allow you to define common behaviors on a quote group, such as the type of billing that will be applied

Other sections

- *Behavior*

Table 14: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Components types

Component type is a way to define common behavior to group of component.

Other sections

- *Behavior*

Table 15: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Component version types

Component version type is a way to define common behavior to group of Component version.

Other sections

- *Behavior*

Table 16: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Contexts types

Context types are used to define the environmental context to describe ticket or test case.

Only three context types exist, corresponding to the three selectable fields: Environment, OS and Browser.

You can only rename the types, not add nor remove any.

Note:

- Only the name of the context types can be changed.
- No new context type can be added.
- No context type can be deleted.

Other sections

- *Behavior*

Table 17: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Description	Description of the type.
Closed	Box checked indicates the type is archived.

Customers types

Customer type is a way to define different kinds of customers (prospects or clients).

Other sections

- *Behavior*

Table 18: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Decisions types

Decision type is a way to define common behavior on group of decisions.

Other sections

- *Behavior*

Table 19: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Documents types

Document type is a way to define common behavior on group of documents.

Other sections

- *Behavior*

Table 20: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Expenses details types

Expense detail type is a way to define common behavior and calculation mode on group of expense details.

Other sections

- *Behavior*

Table 21: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
Value / unit	Define calculation mode for the detail type.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Field Value / unit

- If unit is set and not value, this line will be imputable.
- If both unit and value are set, the line will be read only.
- Result cost will be the multiplication between each of the three non empty line values.

Other sections

- *Behavior*

Field	Description
Individual expense	Details type of individual expense.
Project expense	Details type of project expense.

Individual expenses types

Individual expense type is a way to define common behavior on group of individual expense.

Other sections

- *Behavior*

Table 22: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Issues types

Issue type is a way to define common behavior on group of issues.

Other sections

- *Behavior*

Table 23: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Meetings types

Meeting type is a way to define common behavior on group of meetings.

Note: Meeting type is also used for periodic meetings definition.

Other sections

- *Behavior*

Table 24: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Messages types

Message type is a way to define common behavior on group of messages (appearing on today screen).

Other sections

- *Behavior*

Table 25: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Color	Display color for messages of this type.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Milestones types

Milestone type is a way to define common behavior on group of milestones.

Other sections

- *Behavior*

Table 26: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Default planning mode	Default planning mode for type.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Opportunities types

Opportunity type is a way to define common behavior on group of opportunities.

Other sections

- *Behavior*

Table 27: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Order to Provider types

Vendor order types categorize the subject of the request: service or product

Other sections

- *Behavior*

Table 28: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Organization types

The type of organization allows you to define a common behavior on organizations.

Management of *Organizations* allows to edit the structure of the company in the frame of organizations

Other sections

- *Behavior*

Table 29: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	*Code of the project type.*
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Payments to provider types

Payment type is a way to define common behavior on group of payments.

Other sections

- *Behavior*

Table 30: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Planning poker session type

Planning poker session type is a way to define common behavior on group of planning poker.

Other sections

* *Behavior*

Table 31: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Products types

Product type is a way to define common behavior to group of product.

Other sections

- *Behavior*

Table 32: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Product version types

Product version type is a way to define common behavior to group of Product version.

Other sections

- *Behavior*

Table 33: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Project expenses types

Project expense type is a way to define common behavior on group of project expense.

Other sections

- *Behavior*

Table 34: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Projects types

Project type is a way to define common behavior on group of projects.

Code of the project type Some important behavior will depend on code of the project type.

OPE	Manual billed
OPE	Forfait
OPE	Régie
OPE	Régie forfaitisée
OPE	Interne
ADM	Administratif
TMP	Modèle
PRP	Proposale

OPE : Operational project

Most common project to follow activity.

All new types are created with **OPE** code.

ADM : Administrative project

Type of project to follow non productive work : holidays, sickness, training, . . .

Every resource will be able to enter real work on these projects, without having to be allocated to the project, nor assigned to project activities.

Assignments to all project task will be automatically created for users to enter real work.

These projects are not visible on Gantt type screens.

Some sections and fields are not visible or do not work on administrative projects like Paused, Fix planning or the minimum threshold.

TMP : Template project

These projects will not be used to follow some work.

They are just designed to define templates, to be copied as operational projects.

Any project leader (profile) can copy such projects, without having to be allocated to them.

PRP : Proposal project

These projects will not be used to follow some work.

This type of project makes it possible to define whether a project is strategically interesting to carry out.

Other sections

- *Behavior*
- *Types of restrictions*

Table 35: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	*Code of the project type.*
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Billing type	Will define billing behavior (see: *Incomes*).
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Provider bill types

There is a wide variety of invoice types. Each one is used in specific circumstances and requires the respect of protocols concerning their constitution and their emission.

You can create as many invoice types as you need.

Other sections

- *Behavior*

Table 36: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Provider tender types

Quote types allow you to organize and categorize the different offers received by your suppliers

Other sections

- *Behavior*

Table 37: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Providers types

Provider type is a way to define different kinds of providers.

Other sections

* *Behavior*

Table 38: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Questions types

Question type is a way to define common behavior on group of questions.

Other sections

- *Behavior*

Table 39: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Requirements types

Requirement type is a way to define common behavior on group of requirements.

Other sections

- *Behavior*

Table 40: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Risks types

Risk type is a way to define common behavior on group of risks.

Other sections

- *Behavior*

Table 41: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Supplier contract types

Supplier contract types are a way of defining the type of contract with a supplier.

Types of contract are already pre-registered: management assistance, hosting, technical improvement or Maintenance and support

Other sections

- *Behavior*

Table 42: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Test cases types

Test case type is a way to define common behavior on group of test cases.

Other sections

- *Behavior*

Table 43: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Test sessions types

Test session type is a way to define common behavior on group of test sessions.

Other sections

- *Behavior*

Table 44: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Default planning mode	Default planning mode for type.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Tickets types

Ticket type is a way to define common behavior on group of tickets.

Other sections

- *Behavior*

Table 45: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Translation item types

Translation lines also have the possibility of being typed. You can more easily compartmentalize your requests.

Assign a different workflow and behavior for each type of line.

Other sections

- *Behavior*

Table 46: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

Translation request types

You define the types of translation that you will use in your business.

This allows you to apply a different workflow and behavior for each type.

Other sections

- *Behavior*

Table 47: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

4.8 List of Values

Each screen in List of values allows to define your own values.

Then you will be able to select them in corresponding screens.

Note:

- By default, some lists are not visible on their corresponding screen like Languages in Product and Component screen.
- To use them you must enable their parameter in global parameters.

4.8.1 Budget orientation

The orientation of the budget

Section Description

Table 48: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.2 Budget Category

The orientation of the budget

Section Description

Table 49: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.3 Categories of project

Define your categories of project and you are able to select one in Project screen.

Section Description

Table 50: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.4 Criticalities

The criticality is the importance of an element to its context.

Risk and Opportunity

The criticality designs the level of impact the risk or opportunity may have to the project.

Ticket

The criticality is the estimated impact that the subject of the ticket may have for the product.

Section Description

Table 51: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of criticality.
Color	Color to display the criticality in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.5 Deliverable status

Define your deliverable status list and select it in Deliverable screen.

Section Description

Table 52: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of deliverable status.
Color	Color to display the deliverable status in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

- Add dates on deliverables to follow dates : initial, planned, real, validation

4.8.6 Deliverable weights

Define your deliverable weights list and select it in Deliverable screen.

That is useful to calculate weighting between different parameters in Reports->KPIs->KPI-deliverable-for-project screen.

Section Description

Table 53: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of deliverable weights.
Color	Color to display the deliverable weights in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.7 Delivery modes

The mode of delivery.

Section Description

Table 54: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

- Add dates on deliveries to follow dates : initial, planned, real, validation

4.8.8 Efficiencies

The efficiency measures the result of an action.

Section Description

Table 55: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the efficiency in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.9 Feasibilities

The feasibility defines the first analysis of implementation of a requirement.

Section Description

Table 56: Required fields

Field	Description
Id	Unique Id for this status.
Name	Name of this status.
Color	Color to display the feasibility in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this status is archived.

4.8.10 Functions

The function defines the generic competency of a resource which can be linked to a cost.

The costs entered here will not be taken into account directly in the functions table on the resources screen.

These are costs which are proposed by default but which can be modified when creating the function on the resources screen.

To modify the functions and costs on the resource screen you must go through the update resource cost function.

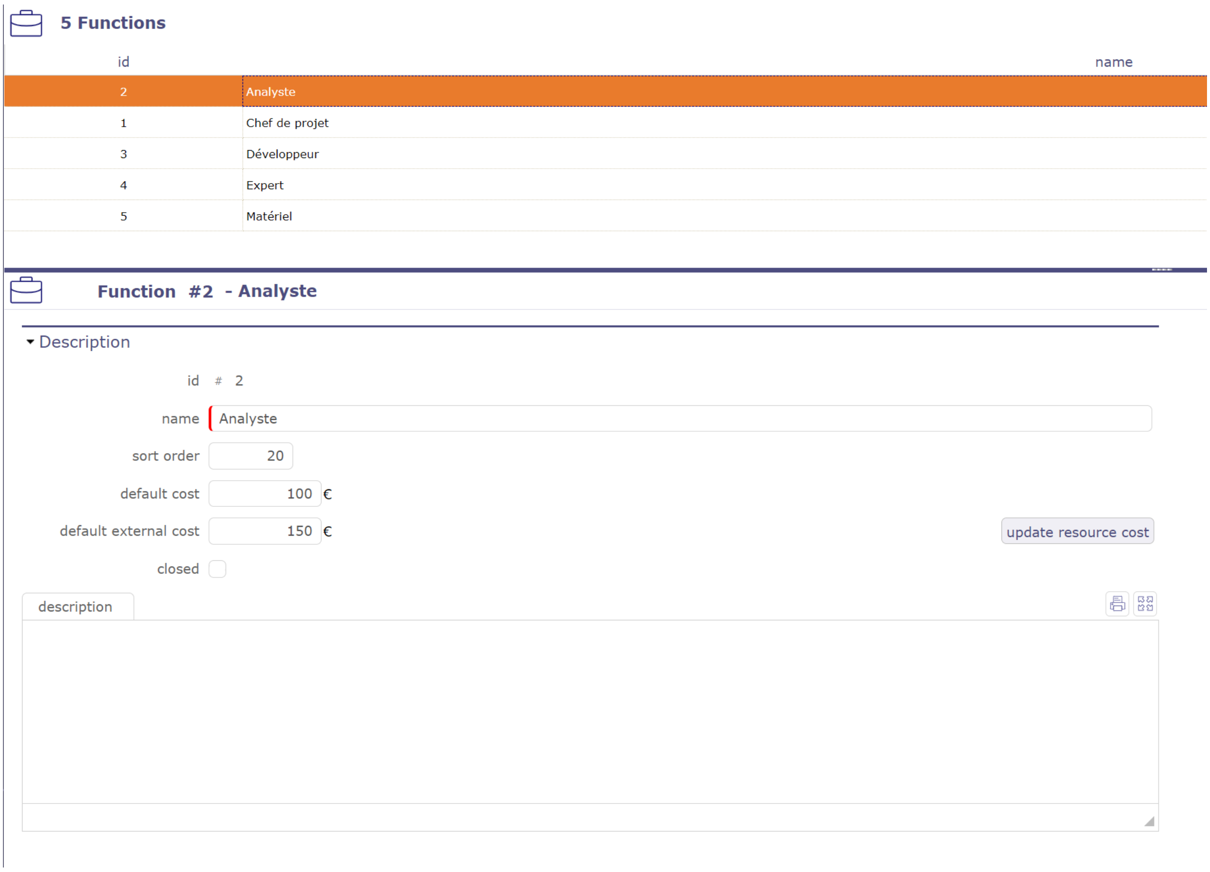


Fig. 38: Functions screen

Section Description

Table 57: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Default cost	Default cost of the function. Typically the cost to the business.
default external cost	Default external cost of the function. Typically the cost to the outsourced resource.
Closed	Flag to indicate this value is archived.
Description	Complete description of this value.

Internal and external cost

You can define two costs per function, one internal (existing) and one external (new).

When defining the cost of a resource, the proposed default cost should depend on whether the resource is external or internal:

If "is outsourced" is checked for the resource, the external cost will be assigned. Otherwise, it will be the internal cost

Update resource cost

You can roll up current costs to all resources from the cost of the function taking into account the external or internal criterion of the resource.

Click the **Update Resource Costs** button

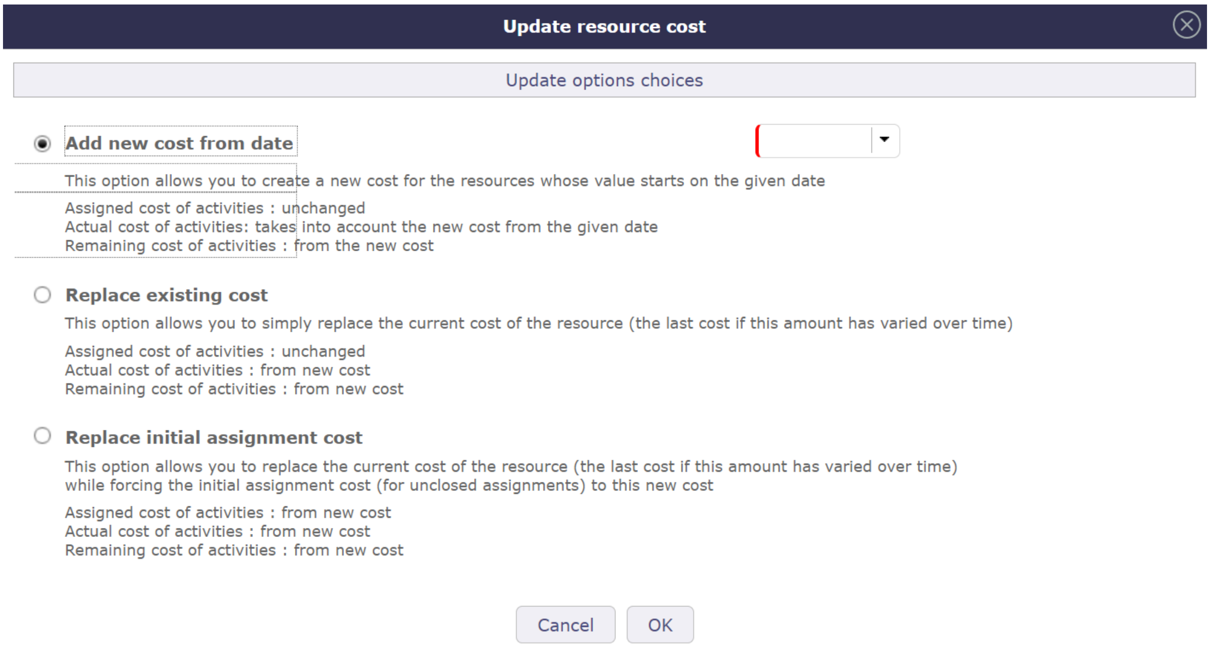


Fig. 39: Update resource cost

You have 3 options to perform this treatment. This will determine how assignments and activity costs will be updated.

Add new cost from date

This option allows you to create a new cost for the resources whose value starts on the date entered.

- The cost of assigned activities remains unchanged.
- The real cost of activities takes into account the new cost from the date you entered
- The left cost of activities takes the new cost.

Replace existing cost

This option allows you to simply replace the current cost of the resource (the last cost if this amount has varied over time)

- The cost of assigned activities remains unchanged
- The real cost of activities takes into account the new cost
- The left cost of activities takes the new cost

Replace initial assignment cost

This option allows you to replace the current cost of the resource (the last cost if this amount has varied over time) while forcing the initial assignment cost (for unclosed assignments) to this new cost.

- The cost of assigned activities takes the new cost
- The real cost of activities takes the new cost
- The left cost of activities takes the new cost

Note: In order to keep the initial functioning of the solution, during the migration, the external cost will be initialized with the same value as the internal cost.

Similarly, when entering the internal cost, the external cost will be initialized to the same value if it is empty. In order to allow the entry of an external cost at zero, this will only be done when entering it on the screen (no systematic update on the server side).

4.8.11 Health status

The health status is a manual indicator for the health of a project.

It defines in a visual way the global health of the project.

It is displayed on Today screen, for each project, as a Red / Amber / Green traffic light.

Section Description

Table 58: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the health status in element lists and on today screen.
Icon	Icon that can be displayed for this health status.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

Field Icon

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide)

4.8.12 Incoming status

Define your incoming status list and select it in Incoming screen.

Section Description

Table 59: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of incoming status.
Color	Color to display the incoming status in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

- Add dates on incomings to follow dates : initial, planned, real, validation

4.8.13 Incoming weights

Define your incoming weights list and select it in Incoming screen.

That is useful to calculate weighting between different parameters in Reports->KPIs->KPI-incoming-for-project screen.

Section Description

Table 60: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of incoming weights.
Color	Color to display the incoming weights in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.14 Intervention modes

Allows you to define and create your own list of interventions mode.

These values are used in the *planned interventions* screens and *view interventions*.

Section Description

Table 61: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Letter	Letter displayed on the intervention schedule and which refers to the corresponding intervention mode
Sort order	Number which defines the display order of intervention modes on the planned interventions and view interventions s
Closed	Flag to indicate this value is archived.

4.8.15 Languages

Allows to define and create your own languages list.

Then in Product or Component screen you can select your languages values.

Note: you have to active 'display language in Product/Component' in global parameters.

Section Description

Table 62: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of deliverable status.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.16 Languages skill level

You set the value for the skills of your translators.

These values will be applied to each of the languages known to the translator.

Note: you have to active 'display language in Product/Component' in global parameters.

Section Description

Table 63: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of deliverable status.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.17 Likelihoods

The likelihood is the probability of a risk or an opportunity to occur.

Section Description

Table 64: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of likelihood.
% value	Value in percent.
Color	Color to display the likelihood in element lists
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

Field % value

This field is used to calculate a reserve amount according to the likelihood of risk or opportunity.

4.8.18 Locations

Allows you to define and create your own list of locations, Sites, Cities, Countries … for the management of your IT infrastructure.

Section Description

Table 65: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.19 Measure units

The measure units.

Section Description

Table 66: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Plural of name	Plural form of name.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.20 Overall progress

The overall progress is a manual indicator for global progress of a project.

It defines in a visual way the global progress of the project, independently from work progress.

It is displayed on Today screen, for each project.

Section Description

Table 67: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.21 Payment deadlines

The payment deadline is stated on the bill.

Section Description

Table 68: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Number of days	Delay in payment (in days).
End of month	Flag to indicate that delay for payment is set at the end of month.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.22 Payment methods

The mode of payment.

Section Description

Table 69: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.23 Periods

Allows you to define and create your own list of periods. These are used to define the intervention periods in customer and supplier contracts.

Section Description

Table 70: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.24 Predefined situation

Section Description

Table 71: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Element	Type of element affected
Type	Name of the *Brands*
Sort order	Number which defines the display order of the finacial elements
Financial situation	The financial situation which will be taken into account
Closed	Flag to indicate this value is archived.

4.8.25 Priorities

The ticket priority defines the order to treat different tickets.

Section Description

Table 72: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of priority.
Color	Color to display the priority in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.26 Quality levels

The quality is a manual indicator for the conformity of a project to quality processes.

It defines in a visual way the global conformity of the project.

Section Description

Table 73: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the quality level in element lists and on today screen.
Icon	Icon that can be displayed for this quality level.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

Field Icon

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

4.8.27 Renewal

Allows you to define and create your own renewal type list. These values are used in the customer and supplier contract management screens.

3 values are pre-registered by default: never, tacit and Express See: *incomes*

Section Description

Table 74: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Closed	Flag to indicate this value is archived.

4.8.28 Resolutions

Allows to define different kinds of resolution for tickets.

Section Description

Table 75: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Solved	Box checked indicates the ticket will be automatically marked as "solved" when this resolution is selected.
Color	Color to display the resolution in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.29 Risk levels

The risk level measures the technical risk of implementation of a requirement.

Section Description

Table 76: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the risk level in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.30 Severities

The severity designs the level of negative or positive impact the risk or opportunity may have for the product.

Section Description

Table 77: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of severity.
Color	Color to display the severity in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.31 Status

The status is an important element of items lifecycle.

It defines the progress of the treatment of the element.

Some automations are implemented, depending on status definition, to set on items.

See: *Workflow*.

Assigned status

- This status indicates that you have assigned a resource to an activity.
- This can trigger the automatic status change when you assign a resource for the first time on a schedulable element of ProjeQtOr if the global parameter is activated.
- If the assignment is already present or if you use the automatic assignment of the project team then the change of status will not be effective
- See: *Status*

In progress status

- This status specifies that the treatment of item is supported.
- A *responsible* can be determined or required.

Paused status

- This state indicates that item processing is in a paused state.
- Used for the processing of certain elements (activity, tickets . . .)
- Allows you to exclude and purge the calculation from the schedule
- Recording these break times allows you to get more accurate treatment information

Done status

- This status specifies that the treatment of item is done.
- A *result* can be specified or required.
- It is possible to require a result when the status change to "done".

Closed status

- This status indicates that the item is closed.
- This article is archived and will no longer appear in the lists.
- You can display these items by checking the "closed" option at the top right of the screen

Cancelled status

- This status specifies that the item is cancelled.

Section Description

Table 78: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
In progress status	Defines whether 'In progress' flag is automatically set for this status.
Done status	Defines whether 'done' flag is automatically set for this status.
Closed status	Defines whether 'closed' flag is automatically set for this status.
Cancelled status	Defines whether 'cancelled' flag is automatically set for this status.
Color	Color to display the status in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

Consolidation of status changes

- We have a parameter which allows to auto set parent item status. It depends on children item status and available status in the workflow.

Note:

- Select YES 'auto set parent activity status' in global parameters to use it.
- If an activity changes to a "In progress" status, all parents move to the first "In progress" status available in the workflow.
- If an activity changes to a "done", "closed" or "canceled" status, moving of each parent to the first "done" or "closed" status according to the status of all its children.

Warning: If parents items status has not been changed auto, please check your controls like required fields.

4.8.32 Story point

Values for planning poker session cards are based on the Fibonacci sequence but with rounded values.

You can determine a number of cards and a value for each of them.

Each value is associated with a number of charging days.

This charge will be postponed after the vote on the element used for the user story (ticket, requirement, activity)

4.8.33 Tender status

Allows to define or create your own tender status list.

Tender status displayed on Tenders screen and in the table Submissions of tenders

Section Description

Table 79: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the status in element lists.
Waiting tender	Status information.
Tender received	status information.
Tender not selected	status information.
Tender selected	status information.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.8.34 Trends

The trend is a manual indicator for the global trend of project health.

It defines in a visual way the health trend of the project.

It is displayed on Today screen, for each project.

Section Description

Table 80: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Color	Color to display the trend in element lists and on today screen.
Icon	Icon that can be displayed for this trend.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

Field Icon

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

4.8.35 Urgencies

The ticket urgency is an element given by the requestor to indicate the quickness of treatment needed for the ticket.

Section Description

Table 81: Required fields

Field	Description
Id	Unique Id for this value.
Name	Name of this value.
Value	Value of urgency.
Color	Color to display the urgency in element lists.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate this value is archived.

4.9 Control Automation

The menu "controls and automatisms" allows to manage and parameterize efficiently and finely the triggering events as well as all that ensues from it … automatically.

Sending mails, changes of status, status, loading of notes …

4.9.1 Workflow

Concepts

- *Profiles definition*

A workflow defines the possibility to go from one status to another one, and who (depending on profile) can do this operation for each status.

Once defined, a workflow can be linked to any type of any item.

It is possible to define some mandatory fields on some status change (in the definition of type of item or through the Screen Customization plugin).

If a field is required for the transition from one status to another then you will be automatically redirected to the required field.

Regardless of the layout and presentation of your screens.

Select status

Click on to display the status list.

Choose the statuses to keep or hide by clicking on the checkboxes

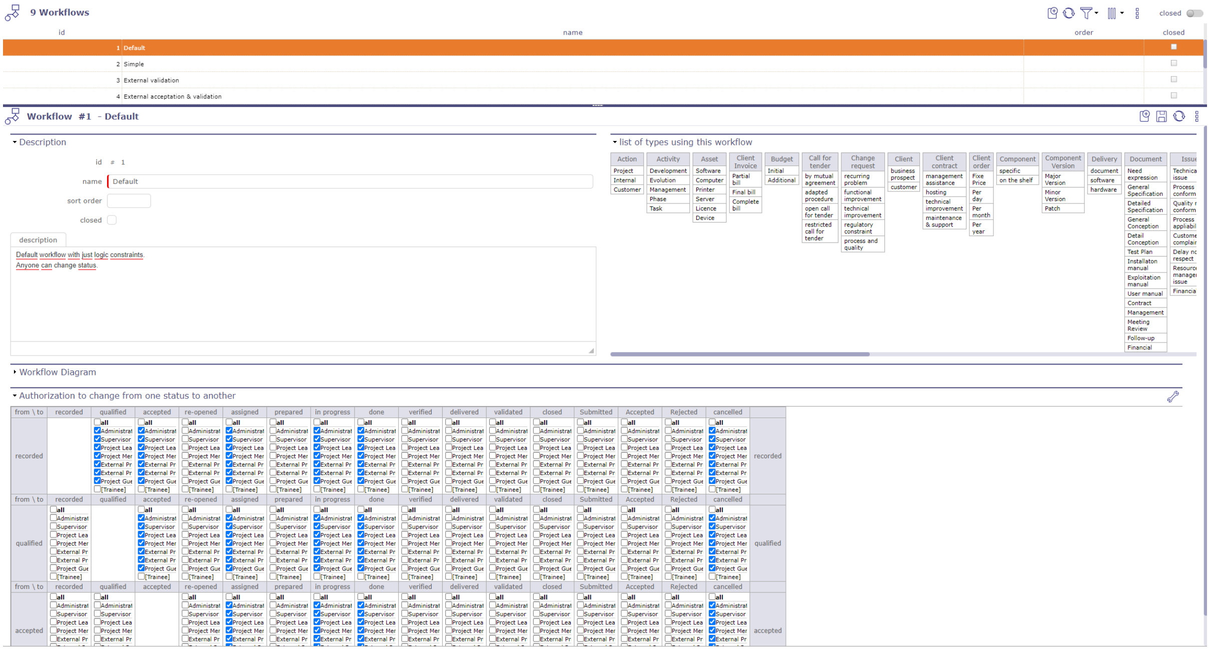


Fig. 40: Workflow screen

Section List of types using this workflow

List of all elements and objects related to this workflow

Section Workflow Diagram

The workflow diagram presents a visual representation of the workflow displaying all possible transitions (independently to profile rights).

Section Habilitation to change from a status to another

- The habilitation table helps defining who can move from one status to another one.
- Each line corresponds to the status from which you want to be able to move.
- Each column corresponds to the status to which you want to be able to go.
- It is not possible to go from one status to itself (these cells are blank).
- Just check the profile (or "all") who is allowed to pass from one status to the other.

Make sure that it is still possible to transfer an item from one status to another. Because it is possible to get stuck on a status.

Check the links so that there is still an outlet.

Fig. 41: Select or hide status

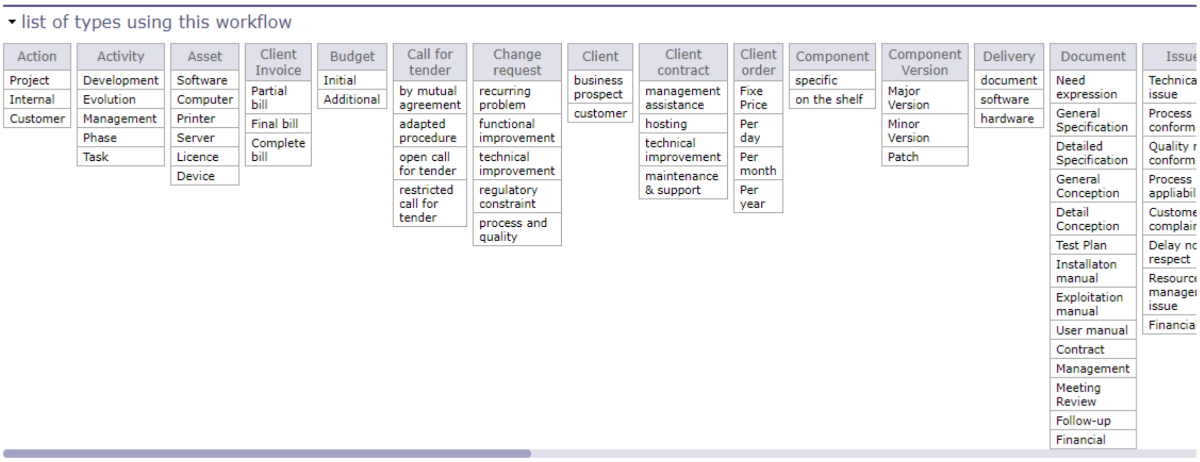


Fig. 42: List of types using this workflow

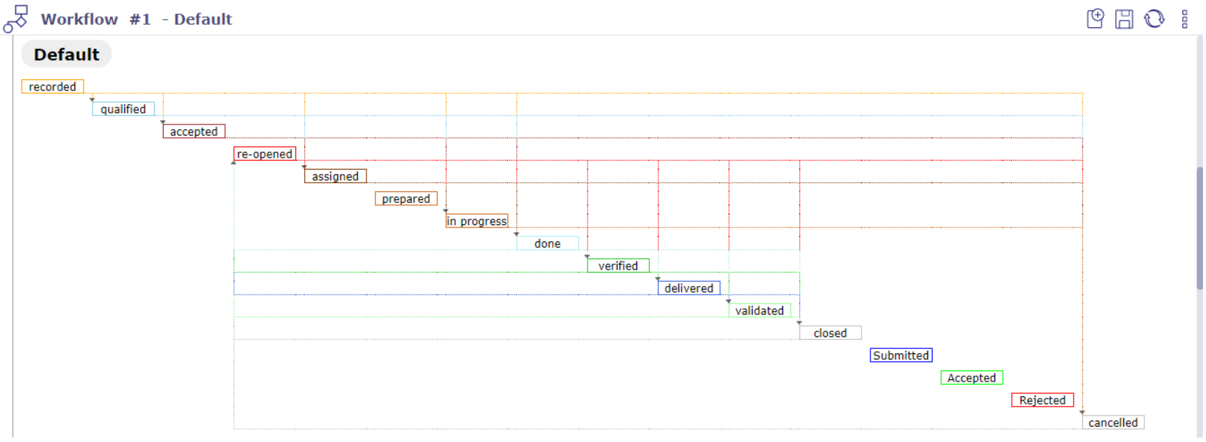


Fig. 43: Workflow Diagram

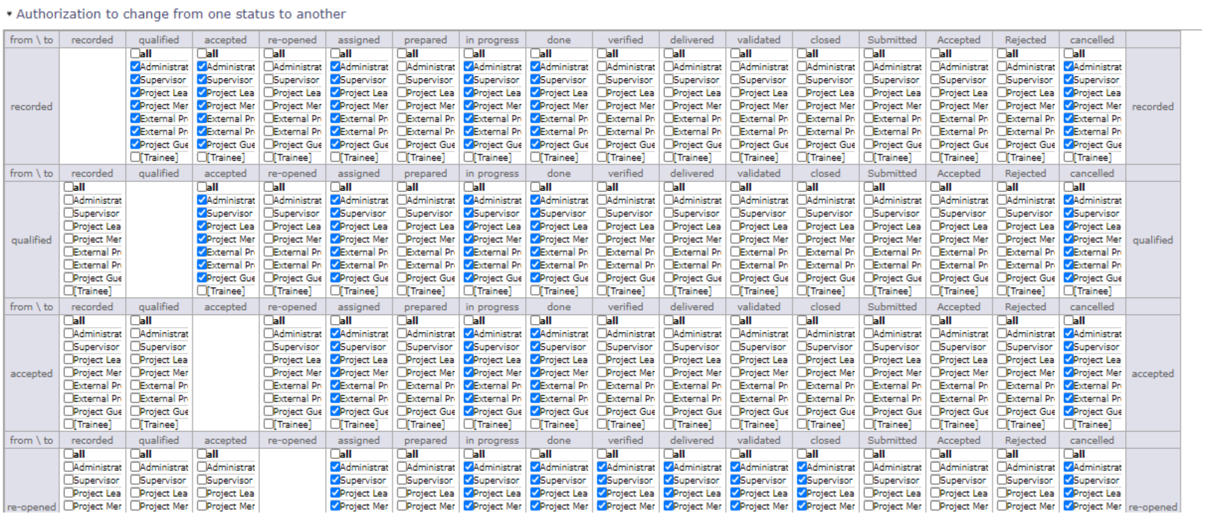


Fig. 44: Habilitation table

4.9.2 Email Templates

The user is able to format mails that are sent automaticaly on events.

See *Notifications on event*.

When using template, the standard email formating is replaced with selected one.

Just define your templates, and select it on the "Mail on Events"

Field element updated and type

- If not set, the template is valid for every type of the element
- If element is set, only these elements will be able to select the template
- if **element** and **type** are defined, only elements of the corresponding type will be able to select the model of mail

Specifics Tags on email template

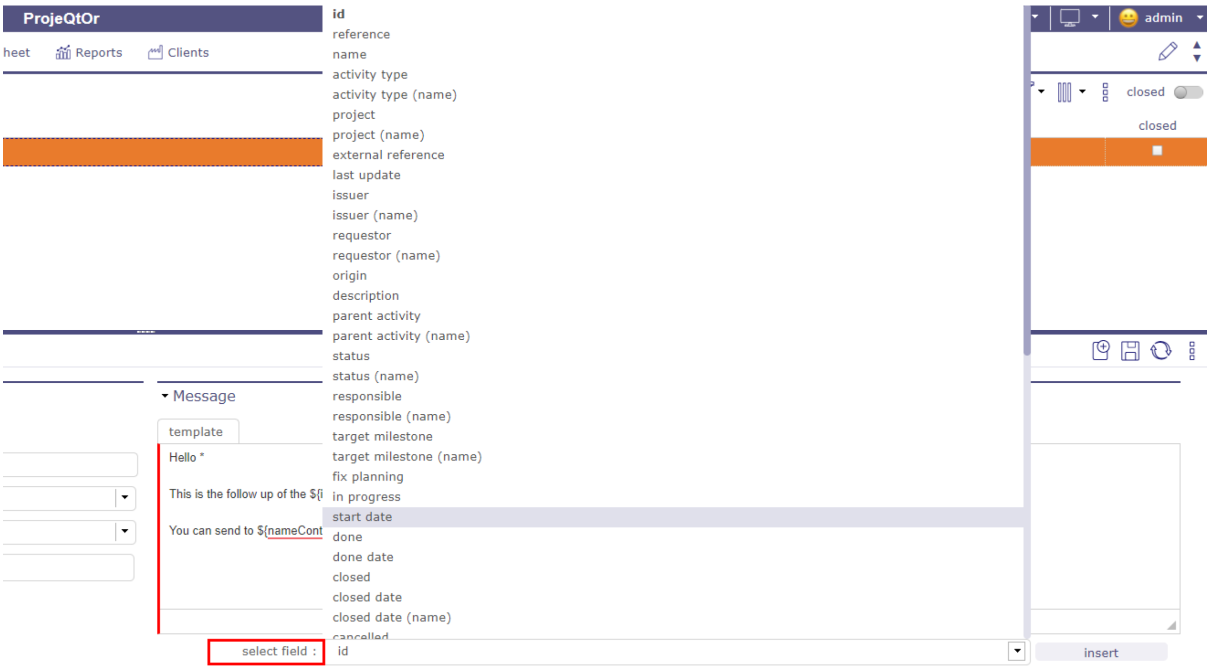


Fig. 45: Specific tags

In the model, the user can use any property of the subject and display it in the mail using specific tags.

you just need to use the tag $ {projectName} for the name of the project to appear and $ {idproject} to display the identification number of this one.

Tip: For properties referencing an external element, such as idXxxxx, use ${nameXxxxx}

Other tags are available as parameters for email titles

More details, see *Global Parameters*

Some specific tags can also be used

- ${item} : class of the item
- ${dbName} : display name of current instance
- ${responsible} : synonym for ${nameResource}
- ${sender} : name of user sending the email
- ${project} : synonym for ${nameProject}
- ${url} : url to get the direct link to the item
- ${goto} : display Class and Id of item, clickable to have direct link to the item

Attached files.

- ${allAttachments} : allow to add to your template all the attached files of the element
- ${lastAttachment} : allow to add the last attached files to the element

Warning: When sending all the files, the software retrieves the files one by one and this, in the order of insertion, from the most recent to the oldest attached file.
If the maximum size allowed does not allow all files to be sent, then the software will stop until the maximum size is reached.
If the last attached file saved in the software alone exceeds the maximum authorized size, then no file is sent.

This tags are available except in the mail title because they display a table

- ${HISTORY} : displays the last change of an object.
- ${HISTORYFULL} : display all the modifications
- ${LINK} : list linked elements to the item
- ${NOTE} : lists the element's notes in tabular form
- ${NOTESTD} : list notes in default format

the Tags selector

- A tag selector is available under the text fields.
- Choose the tag you want to insert.
- Click on `insert`
- The tag appears in the body of the text

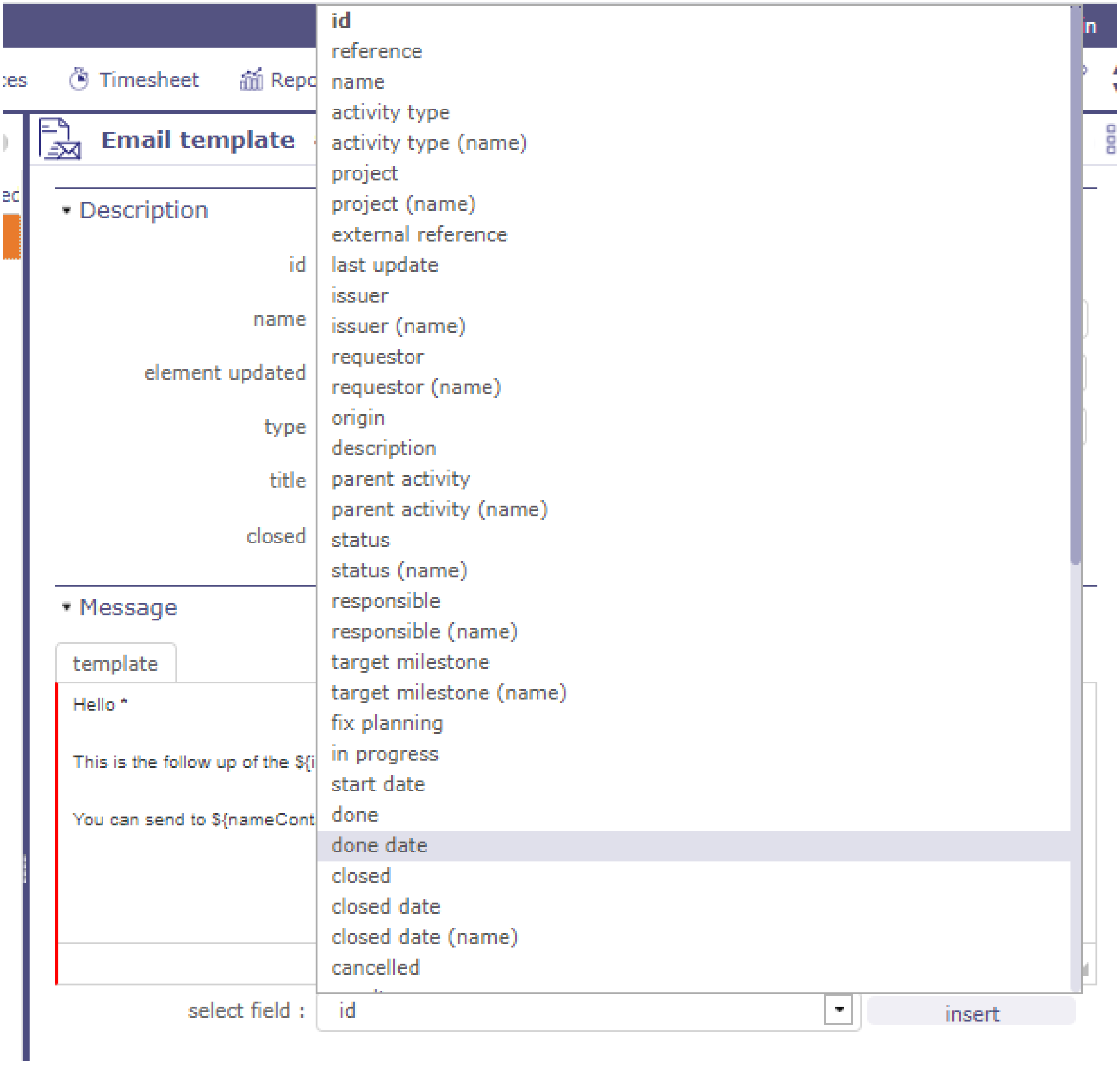


Fig. 46: Insert specific tags

4.9.3 Notifications on event

- The app is able to automatically send internal emails or notifications when an item is updated.
- Events are defined on an element and/or an element type.
- If the type field is not defined, the event is valid for each type of the element.

  for emails

  - The email message is formatted to show information about the item.
  - Selecting a template, will use the formatting from the template instead of the default standard formatting.
  - Email titles are defined in *Global parameters*.

  for notifications

  - you can use the notifications generated by your browser or the internal notifications of ProjeQtOr.
  - When opening the application in your browser, you will be offered an authorization message for the display of ProjeQtOr notifications.
  - After acceptance, notifications from your browser will replace internal notifications.
  - You will see notifications from your desktop even if you are not directly on the app.

> **Warning:** You must allow notifications from your browser in your operating system settings.
>
> The ProjeQtOr application must be running in the background to continue receiving notifications.

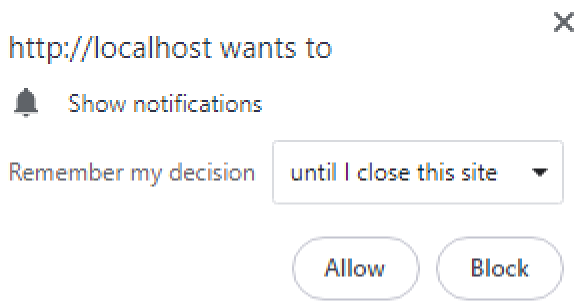


Fig. 47: browser message to allow notifications

Description section

In the description section you will detail what will be the levers to trigger the sending of an email.

Status is one of these levers. Positioning items in the chosen status will generate an email.

Or choose any other event in the drop-down list.

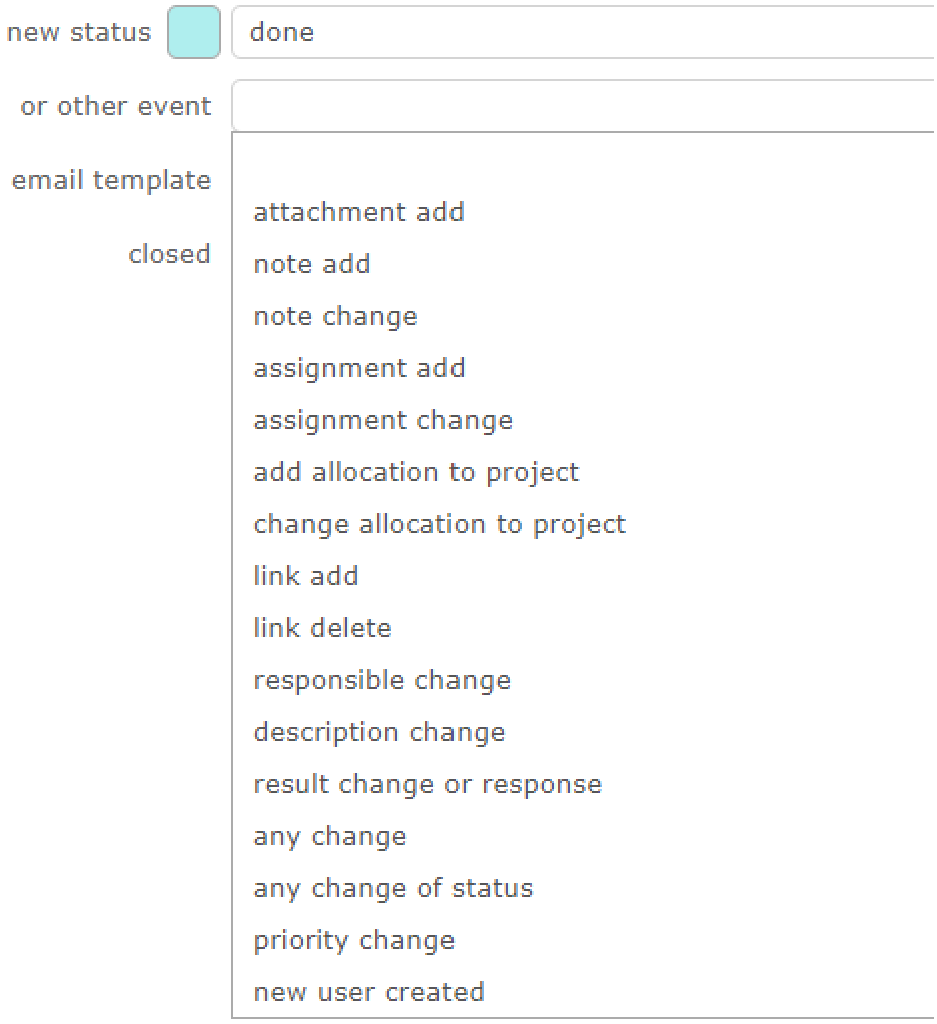


Fig. 48: Events list

Receivers Section

- List of addresses of the mails.
- The list is not nominative, but defined as roles on the element.
- Each addressee will receive mail only once, even if a person has several "checked" roles on the element.
- See: *Receivers list* for receivers detail.

Receivers list

Receivers can receive email and alert.

A description of receivers below.

Requestor

The contact defined as *requestor* on current item; sometimes appears as "contact" (on quotation and order, for instance) and sometimes have no meaning (for instance for milestone).

Issuer

The user defined as *Issuer*.

Responsible

The resource defined as *responsible*.

Project team

All resources allocated to the project.

Global project team

all the resources allocated to the project and those of the parent projects.

Project leader

The resource(s) allocated to the project with a "Project Leader" profile.

Project manager

The resource defined as the manager on a project.

Assigned resource

All resources assigned.

Other

Provides an extra field to manually enter email addresses.

If "other" is checked, an input box is displayed to enter a static mail address list.

Several addresses can be entered, separated by semicolon.

4.9.4 Delays for tickets

It is possible to define a default delay for tickets, for each ticket type, each ticket urgency and for each status.

Note: On creation, the due date will automatically be calculated as creation date + delay.

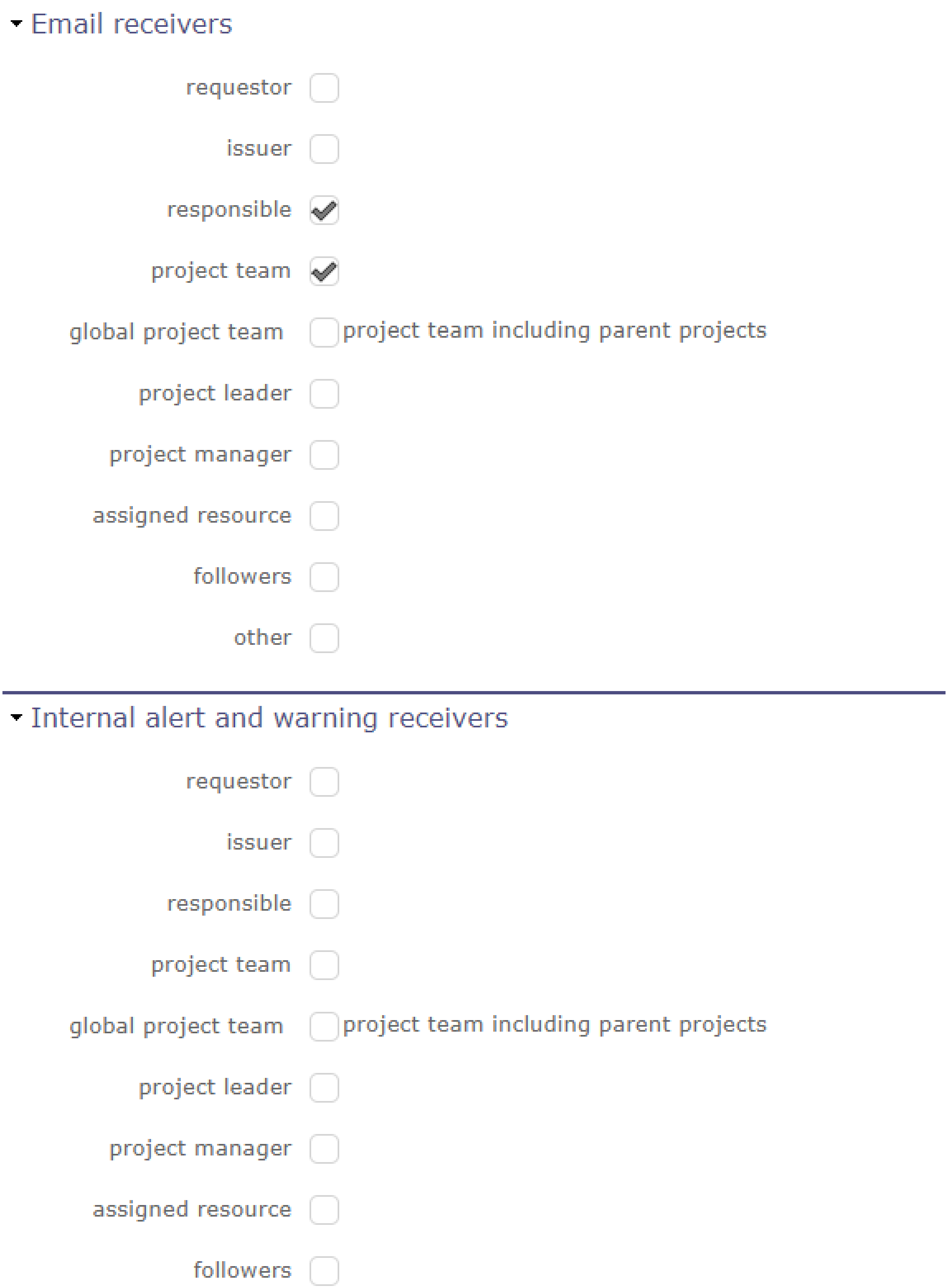


Fig. 49: Receivers section

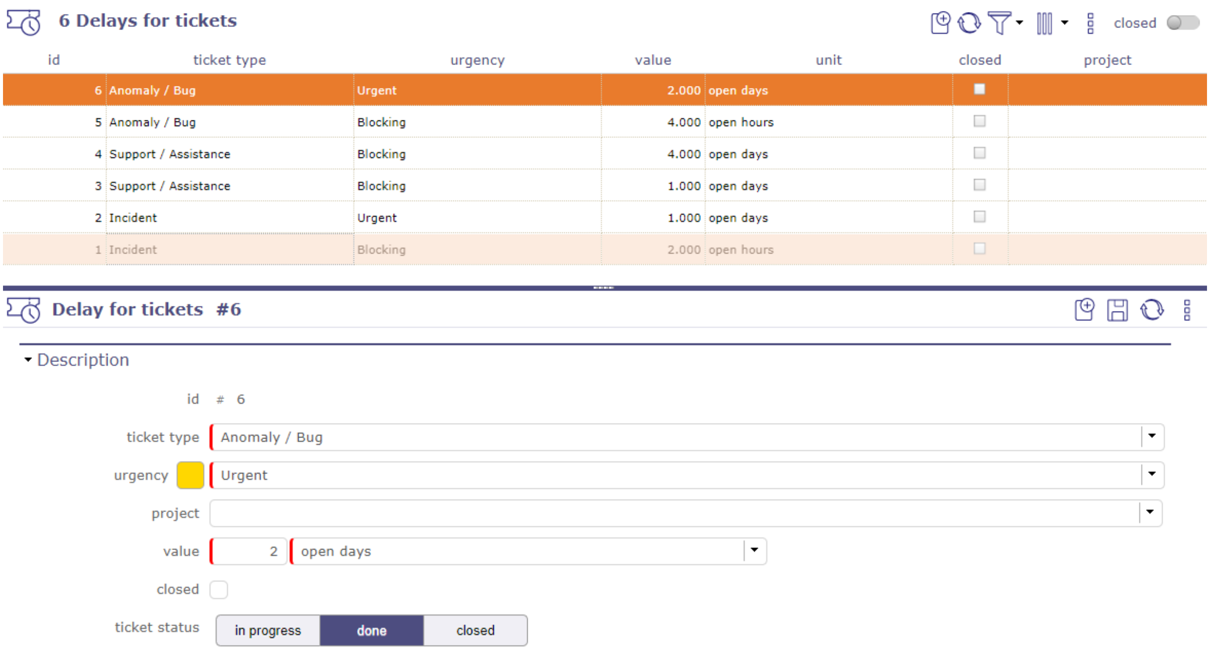


Fig. 50: Delays for tickets screen

Section Description

Table 82: Required field

Field	Description
Id	Unique Id for the delay definition.
Ticket type	Ticket type the delay applies to.
Urgency	Urgency of ticket the delay applied to.
Project	The project on which the delays will be applied.
Value	Value of delay.
Closed	Flag to indicate that delay definition is archived.

Field Value

Unit for the value can be

- **Days:** simple calculation as days
- **Hours:** simple calculation as hours
- **Open days:** calculation excluding days off

  weekends and days off defined on "calendar"
- **Open hours:** calculation only on the "standard open hours" defined in *Global parameters* screen.

Ticket status

You determine what the status of the ticket will be for the timeframe you create.

For the same ticket, you can have 2 days to take charge of it, 1 day to process it and 1 day to close it.

4.9.5 Unit indicators

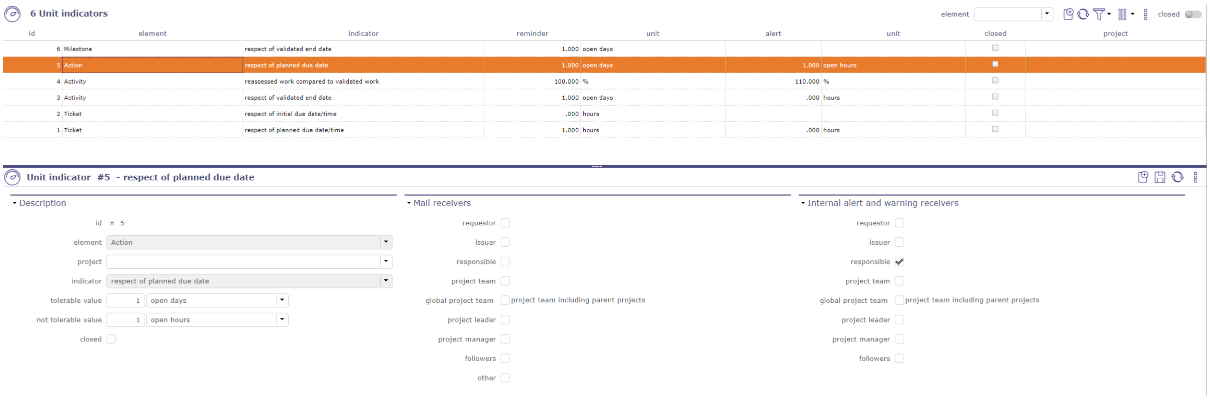


Fig. 51: Indicators

It is possible to define indicators on most elements. You can set the indicators on:

- actions
- activities
- customer invoices
- customer invoice exchanges
- customer orders
- customer quotes
- individual expenses
- issues
- meetings
- milestones
- supplier orders
- projects
- project expenses
- supplier invoices
- supplier offers
- questions
- requirements
- risks
- payment deadlines to suppliers
- test sessions
- and finally the tickets

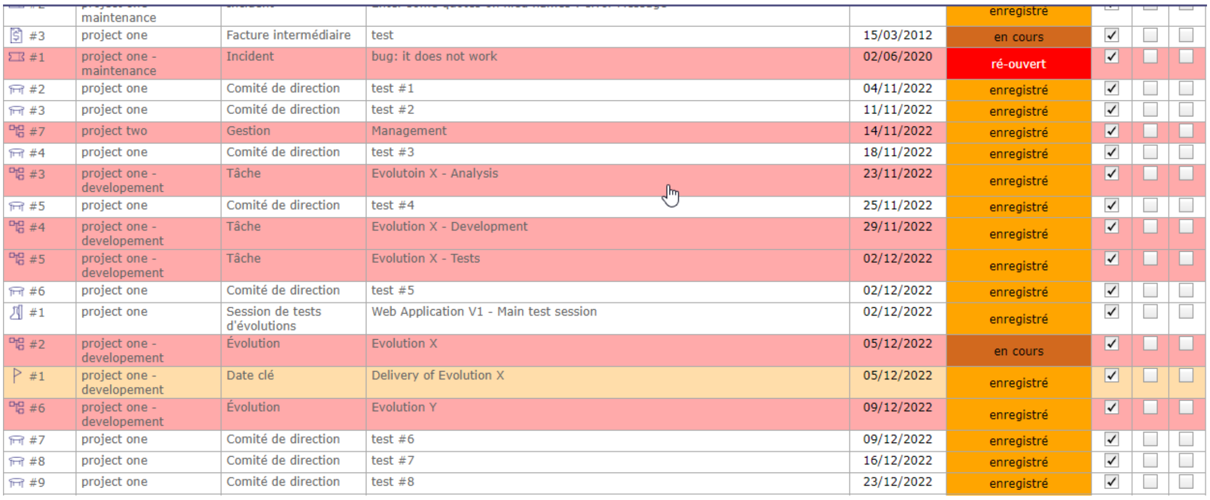
Depending on type of elements the type of indicators that can be selected in list differs.

Some indicators are based on delay (due date), some on work, others on cost.

For each indicator, a warning value and an alert value can be defined in days or hours (working or not).

Indicator display

On the Today screen, on the item summary lists, a color code is applied to the line if the item is subject to an indicator and is concerned by the alert values entered.



	maintenance				enregistré
#3	project one	Facture intermédiaire	test	15/03/2012	en cours
#1	project one - maintenance	Incident	bug: it does not work	02/06/2020	ré-ouvert
#2	project one	Comité de direction	test #1	04/11/2022	enregistré
#3	project one	Comité de direction	test #2	11/11/2022	enregistré
#7	project two	Gestion	Management	14/11/2022	enregistré
#4	project one	Comité de direction	test #3	18/11/2022	enregistré
#3	project one - developement	Tâche	Evolutoin X - Analysis	23/11/2022	enregistré
#5	project one	Comité de direction	test #4	25/11/2022	enregistré
#4	project one - developement	Tâche	Evolution X - Development	29/11/2022	enregistré
#5	project one - developement	Tâche	Evolution X - Tests	02/12/2022	enregistré
#6	project one	Comité de direction	test #5	02/12/2022	enregistré
#1	project one	Session de tests d'évolutions	Web Application V1 - Main test session	02/12/2022	enregistré
#2	project one - developement	Évolution	Evolution X	05/12/2022	en cours
#1	project one - developement	Date clé	Delivery of Evolution X	05/12/2022	enregistré
#6	project one - developement	Évolution	Evolution Y	09/12/2022	enregistré
#7	project one	Comité de direction	test #6	09/12/2022	enregistré
#8	project one	Comité de direction	test #7	16/12/2022	enregistré
#9	project one	Comité de direction	test #8	23/12/2022	enregistré

Fig. 52: Color code applied to lines whose elements are subject to indicators

On the screen of an element subject to the indicators and whose values enter the alert zone, an icon is displayed in front of the description of the element.

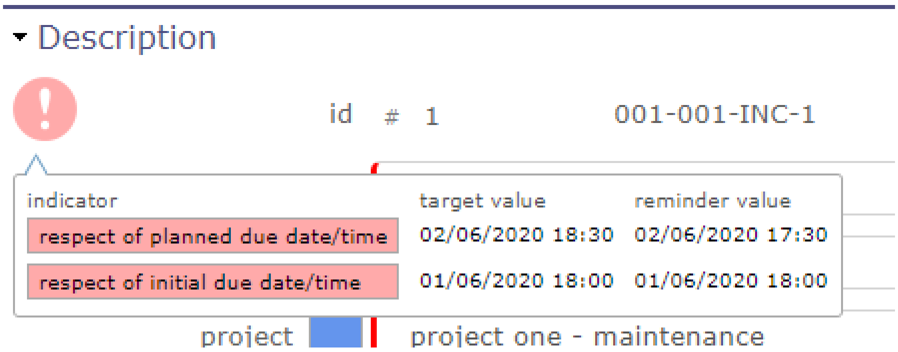


Fig. 53: display of the indicator and the values applied to the element

When you hover over the icon, the raised indicator on that item is displayed along with reminder and alerts values.

Mail receivers

- List of addresses of the mails.
- The list is not nominative, but defined as roles on the element.
- Each addressee will receive mail only once, even if a person has several "checked" roles on the element.
- See : *Receivers list* for receivers detail.

Internal alert and warning receivers

- List of addresses of the internal alert.
- The list is not nominative, but defined as roles on the element.
- See : *Receivers list* for receivers detail.

4.9.6 Predefined notes

The predefined note set the possibility to define some predefined texts for notes.

When some predefined notes are defined for an element and / or type a list will appear on note creation.

Selecting an item in the list will automatically fill in the note text field.

Section Description

Table 83: Required field

Field	Description
Id	Unique Id for the predefined note.
Name	Name of the predefined note.
Element	Kind of item (Ticket, Activity, …) for which this predefined note will be proposed on note creation.
Type	Type of element for which this predefined note will be proposed on note creation.
Closed	Flag to indicate that delay definition is archived.
Text	Predefined text for notes.

Field Element

If not set, predefined note is valid for every element type.

Field Type

If not set, predefined note is valid for every type of the element.

4.9.7 Checklists

It is possible to define checklist forms for each element or each type of element.

When a checklist form exists for a given element, the checklist is available only for the element.

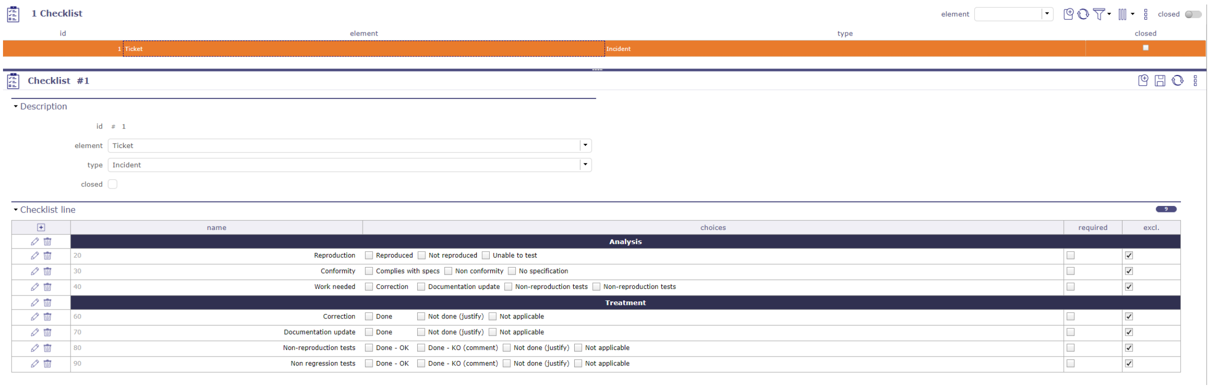


Fig. 54: Checklist screen

Section Description

Field	Description
Id	Unique Id for the checklist definition.
Element	The elements the checklist applies to.
Type	Type of the elements the checklist applies to.
Closed	Flag to indicate that checklist definition is archived.

Section Checklist lines

A checklist is built from checklist lines.

- Click on to create a new checklist line.
- Click on to update an existing checklist line.
- Click on to delete the corresponding checklist line.

Tip: Details of dialog box

- Each line has a name, an order and up to 5 check choices.
- A line with no check choice will be displayed as a **section title**.
- Name and Choices have 2 fields :
  1. Displayed caption.
  2. Help text that will be displayed as tooltip.
- Checks can be exclusive (select one will unselect others) or not (multi selection is then possible).

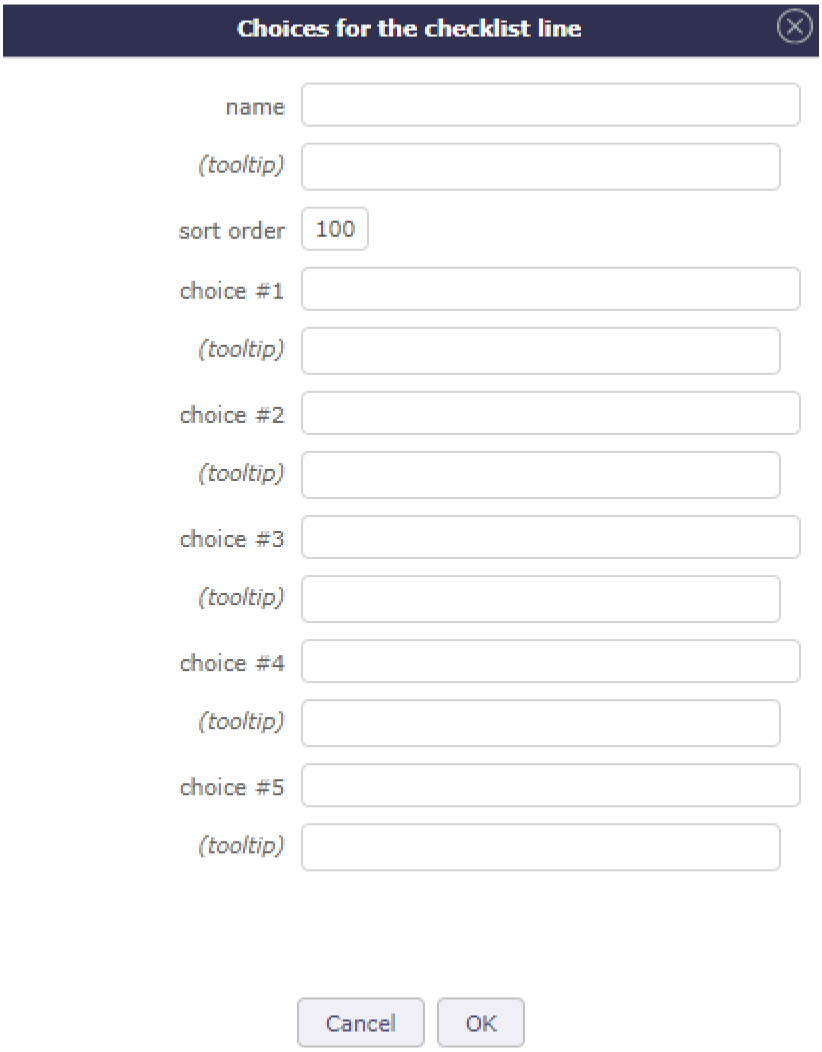


Fig. 55: Choices for the checklist lines

4.9.8 KPI definitions

A performance indicator or key performance indicator (KPI) is a type of performance measurement.

It is possible to define Kpi on incomings and deliverables items.

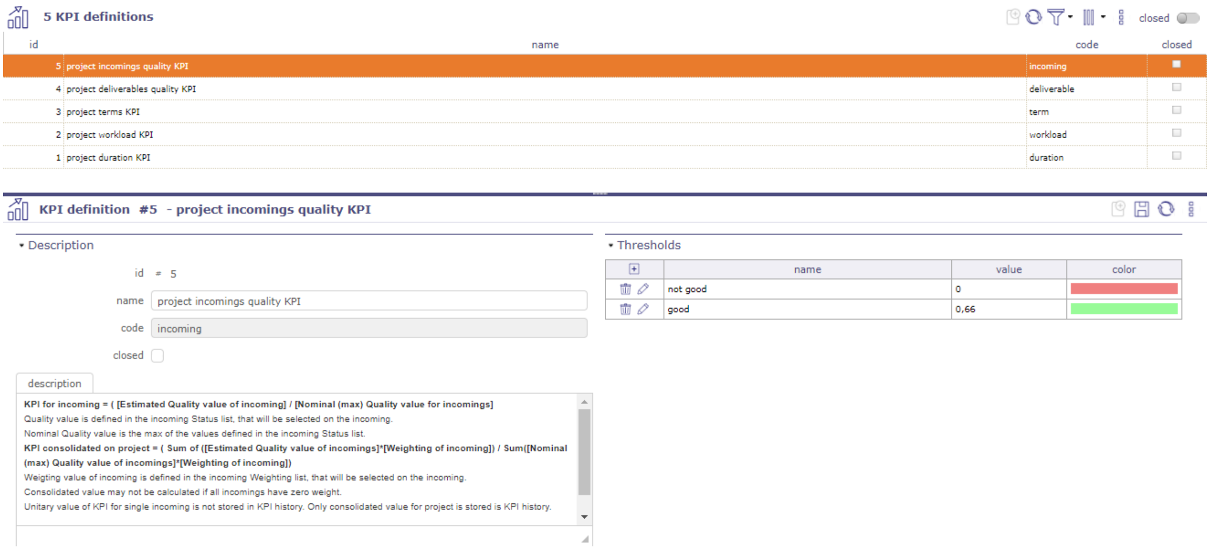


Fig. 56: KPI Definition screen

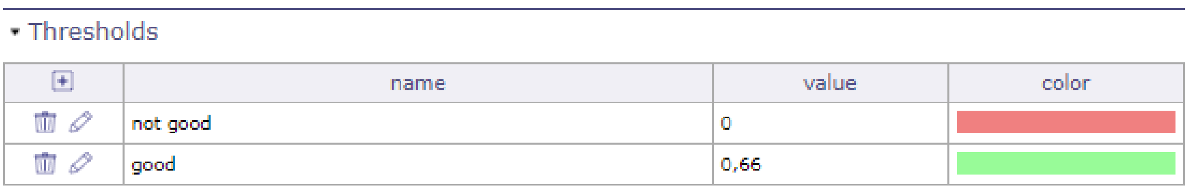
Section Description

Warning: Description integrates the formula used to calculate the KPI.

Section Tresholds

It is possible to attributes tresholds lines to KPI.

- Click on  to create a new JobList line.
- Click on  to update an existing JobList line.
- Click on  to delete the corresponding JobList line.



Note: Keep in mind KPI is an indicator of performance at project level (opposite to indicator which is calculated at item level).

To display the indicator, use Kpi report. See: *Reports*

Fig. 57: List of KPI Reports

4.9.9 JobList

The JobList can be used for each item or item type

It is generally used to detail an activity or a ticket.

It also acts as an indicator to monitor compliance with date values thanks to the lead time of tasks.

Section JobList lines

A JobList is built from JobList lines.

- Click on to create a new JobList line.
- Click on to update an existing JobList line.
- Click on to delete the corresponding JobList line.

Task anticipation delay .

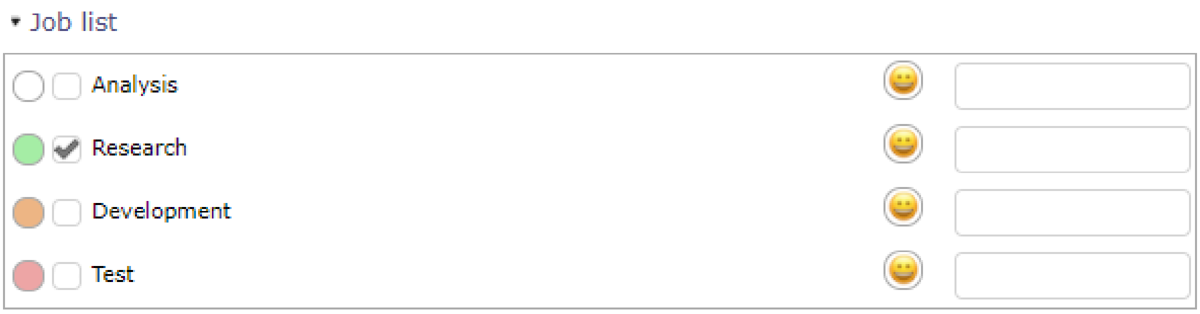


Fig. 58: Joblist colors anticipation delay

- This deadline is fixed for each step created in the joblist. It works with planned dates. It is not compulsory.
- A color code allows you to anticipate these dates
  - **White:** Without anticipation delay
  - **Green:** Check the box to indicate that this step has been completed. The dot turns green.

- **Orange:** You enter the anticipation period
- **Red:** you have exceeded this deadline

4.9.10 Notifications

You must activate the notifications module to display the corresponding screens

This system allows you to generate notifications or according to very "powerful" rules (defined as "where" clauses).

Note: ProjeQtOr offers 2 systems to generate alerts or reminders: definition of notifications and manual notifications from the tools menu

see: *Notifications*.

Notification definition in control and automation menu allows you to create notifications about events

Notification System

If it is generated by the notification system, it is linked to an element of the system (Action, Invoice, . . .).

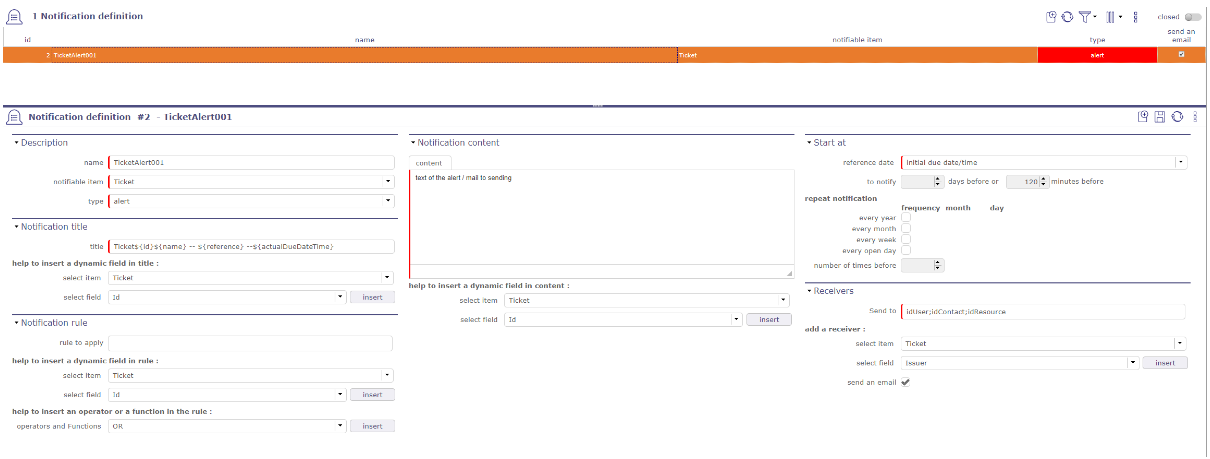


Fig. 59: Notifications system screen

Creation

The definition of notification generation is based on the following:

- The title that can contain the field values of the notifiable element or its sub-elements
- The element of the system that determines the notification, called "Notifiable Element" (notifiable)
- The type of notification (Alert, Warning, Information)
- The notification rule notifying the elements related to the generation of a notification
- The content may also contain the field values of the notifiable element or its sub-elements.
- The date (referred to as the reference date) at which the notification must be generated. This is one of the dates of the notifiable item that is not the creation date.
- The generated notification receivers. Fields of the notifiable element or its sub-elements that refer to users.
- The choice to send, or not, to all the sending of emails at the same time as the notifications.

Section Description

This section briefly describes the type of notification

Its name, its type: alert, information or warning as well as the notifiable element.

Section Notification title

This section allows you to give a title to your notification.

This title will be the object of the programmed mail if you tick the box **send an email** in the receivers section

You can add dynamic fields with **help to insert a dynamic field in the title**

The title of the notification can therefore contain fields of the "notifiable" object and its linked elements via an idXXX.

where XXX is the name of the linked item.

Select an object and / or a field and click the Insert button so that the dynamic field with the correct syntax fits directly in the title, where the cursor is.

In this case, the syntax must be: *#{the name of the field}* …

Tip: #{billId} - Invoice not paid - Sent on #{sendDate} If the rule (see below) of the instruction on the invoice of 'billId' 2019-12-30-0001 whose sending date is 30-12-2019 then the title of the notification will be:

2019-12-30-0001 - Invoice not paid - Submitted on 12-30-2019

Section Rule to apply

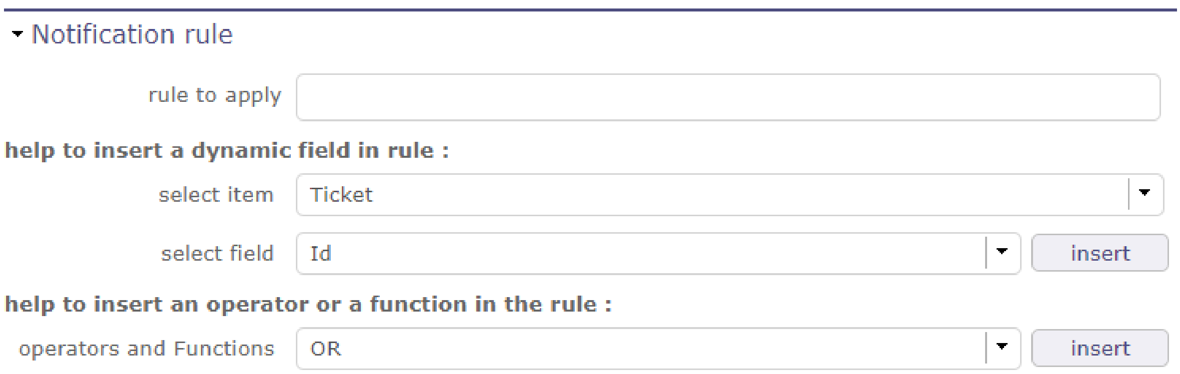


Fig. 60: Notifications rules

This rule determines which instance of the item will generate a notification.

The syntax is the one we take for a WHERE clause in an SQL statement.

Tip: Scheduling a notification for all invoices where the amount has been paid = total amount AND project name 'ACME'

#{paymentAmount} < #{fullAmount} AND #{idProject.name} = 'ACME' AND isnull (#{paymentDate})

Note: The rule to apply is not mandatory. If the rule is empty, then only the reference date is used to determine whether or not a notification is generated.

In addition to choosing a dynamic field, you can choose to use an operator or function with the following elements:

Notification content

This section is mandatory

You can also add dynamic fields with **help to insert a dynamic field in content** in the same way as in the description section

Section Start as

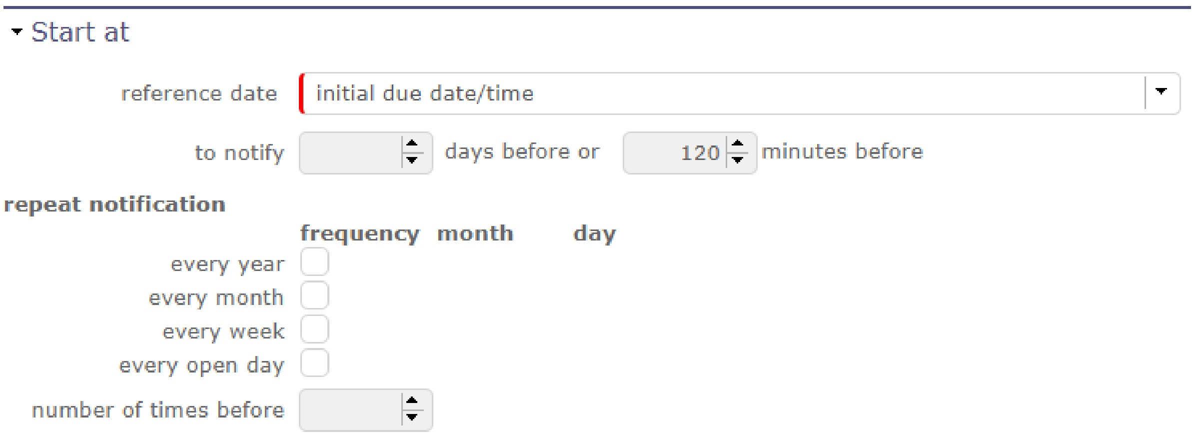


Fig. 61: Start as section

this section allows you to program the frequency of the notification display

The reference date

- Date on witch will be generate the notification (minus the number of days or minutes programmed before)
- Notify before: This is a number of days before the notification date for which the notification is to be generated
- This field is mandatory

Example "delivery expected date" is selected.

For all deliverables that do not follow the previous rule, a notification will be generated if the delivery date is not respected.

Every year

- If the year is checked, the generator is a notification every year to the month and the day of the reference date
- If the year is checked, the month and day filled, then it is a birthday. The reference date will not be used.

Every month / Week / Open day

- Is selected, responsive notifications will be generate monthly / weekly or each open day

Receivers

These are the types of people who are notified.

The syntax is as follows: One of the words in the "Help Authorized Recipients"

section separated by a ';

The following items allow you to choose the type of remitter.

If `Sent e-mail` checked, an e-mail will be generated even if the notification for each type of person has been defined.

See also:

Global Parameters *Management of automated service (CRON)*

Gives in seconds, the time interval between two generations of notification (and the Cron system is active)

and between two the refresh of notifications on the HMI.

Note: The authorizations

The access rights for the 'notification' menu were given to the 'standard' projeqtor profiles (idProfile = 1 to 7) with the CRUD rights reader only

The access rights for the 'notification definition' menu have been given for the administrator profile (idProfile = 1)with the CRUD rights modifiers

---

Notification and the IHM

After logging in, a message generated after "Login accepted" that tells you that you have unread notifications:

Display of unread notifications

It is done at 2 levels on the main screen:

- Bottom right A notification icon appears as soon as a notification is not intended for the user.

  Clicking on the icon gives direct access to the notifications screen.

- In the secondary menu

A tree whose title indicates the number of unread notifications intended for the user.

This tree has the following levels:

- Level 1: The types of notifications
- Level 2: The trigger for notifications
- Level 3: The Notification Definition to Product Notifications
- Level 4: The id of the element that generated the notification. Allows direct access to the item.

The icon allows you to refresh notifications without waiting for the scheduled update.

The icon provides direct access to the notifications screen.

Numbers indicate the number of unread notifications

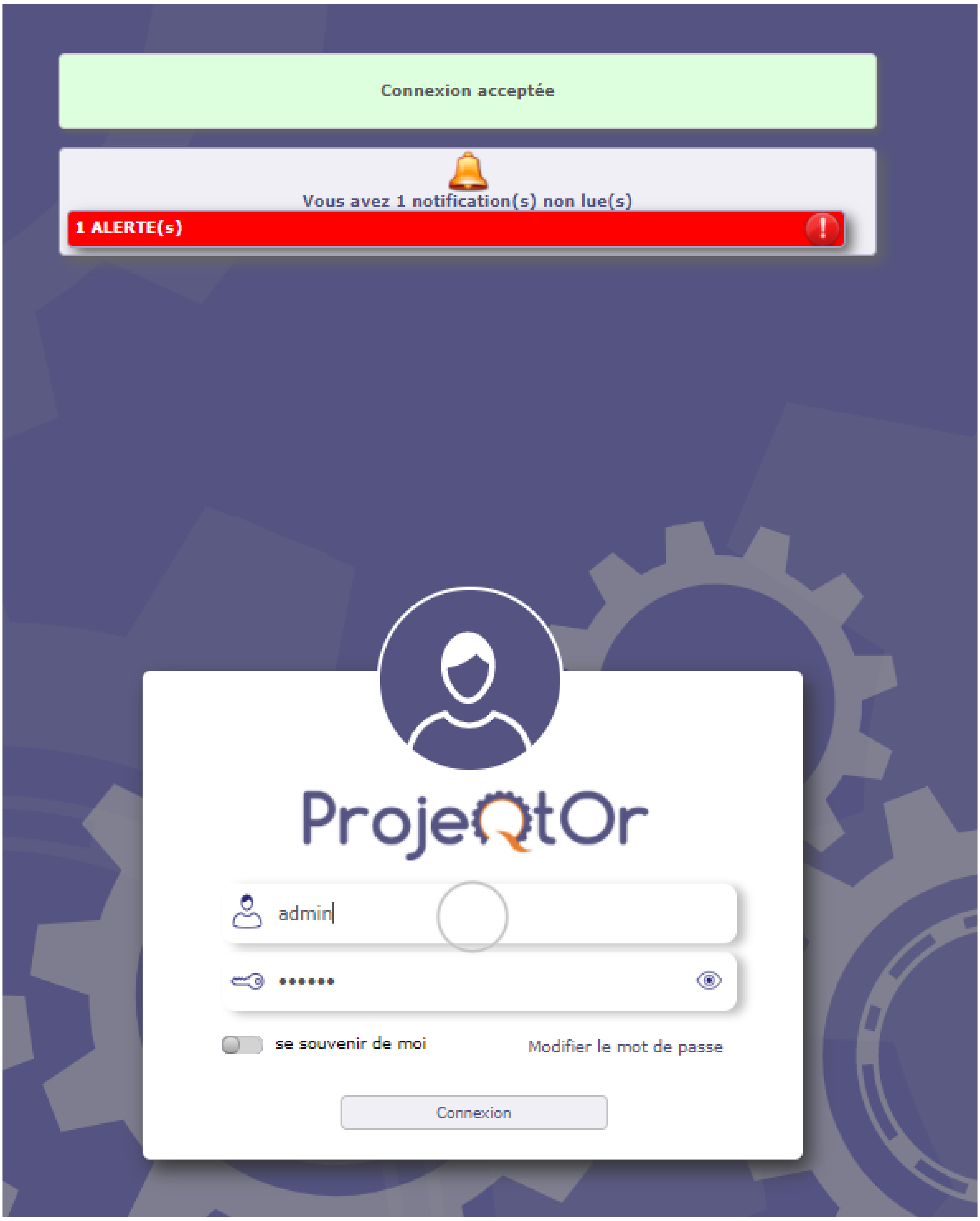


Fig. 62: Notification on the login screen

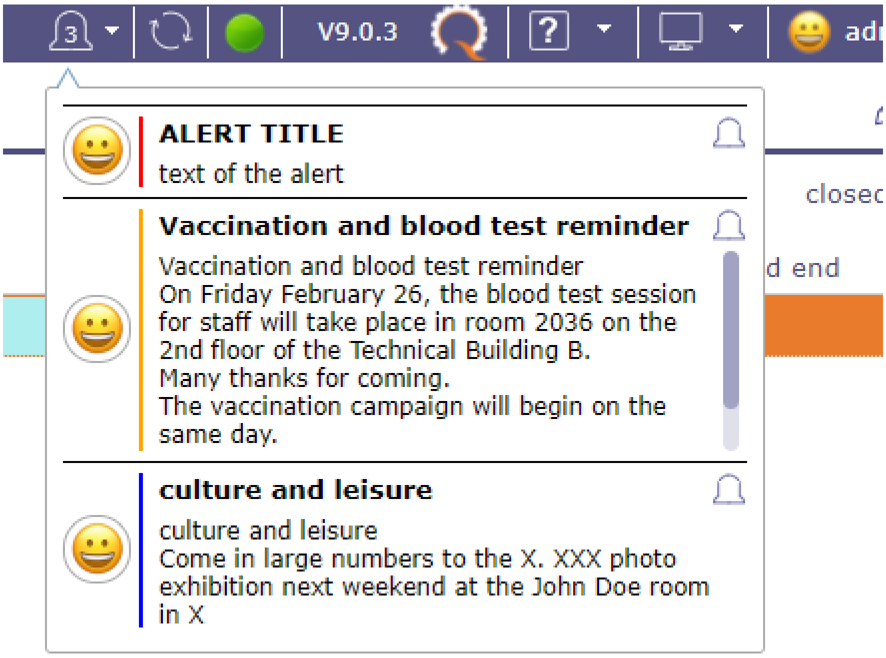


Fig. 63: Notifications

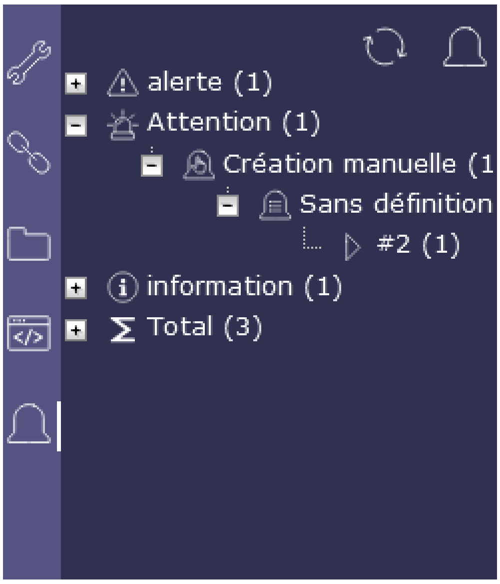


Fig. 64: Notifications

4.10 Tools

4.10.1 Emails sent

Users can have a look at the list of the automatic emails sent.

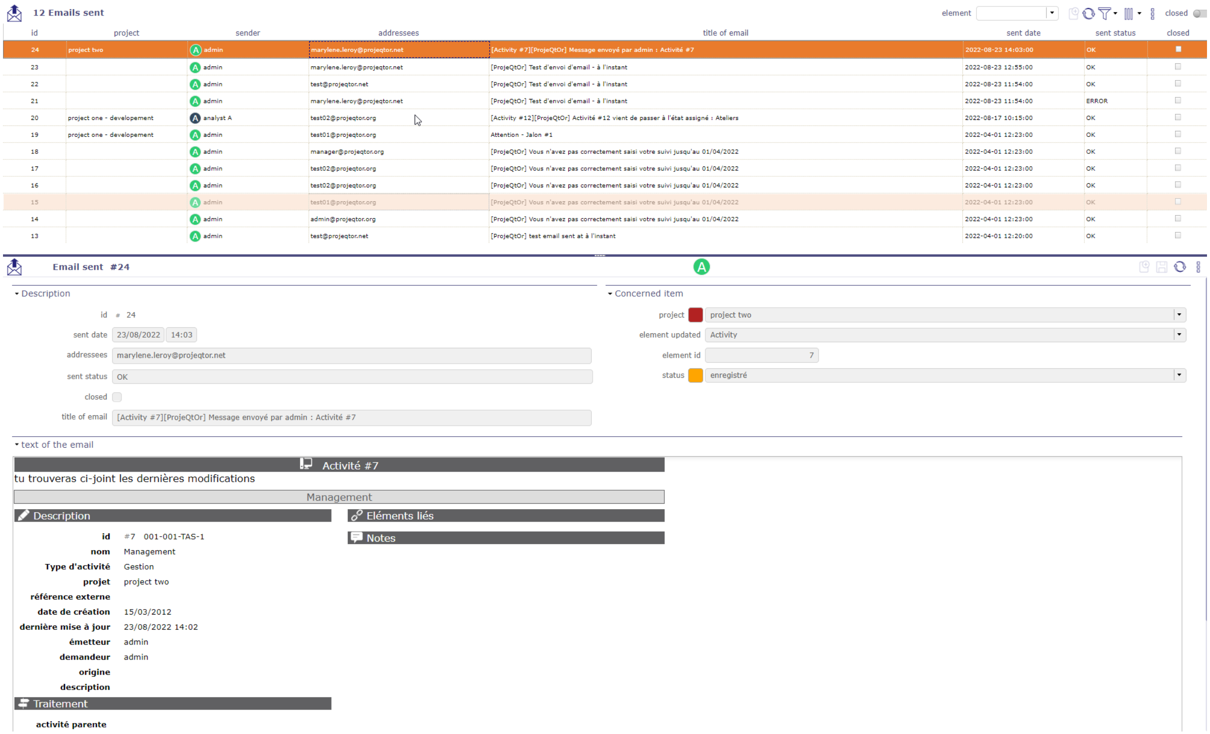


Fig. 65: emails sent screen

All the information about the email, including the status showing whether the email was correctly sent or not.

You can see in the activity feed of the item the trace of the sending of the corresponding email with the subject and the text of the message.

4.10.2 Emails to send

You must enable the Activate email grouping option in the *global parameters*

The programmed emails will be grouped in this screen before their automatic sending based on the period entered in the global parameters

4.10.3 Scheduled report

In reports, you can schedule sending emails for accurate reports.

You can get the list and details of this programming on this screen

Click on Button to cancelled the programmation

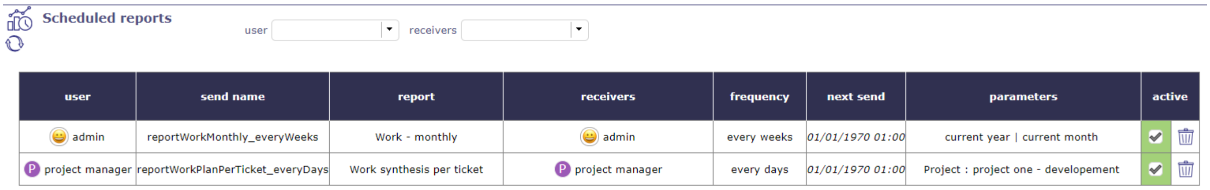


Fig. 66: Scheduled report screen

See: *Report Sending programmation*

4.10.4 Alerts

Users can have a look at the alerts sent.

By default, administrators can see all the alerts sent, and other users only see their own alerts.

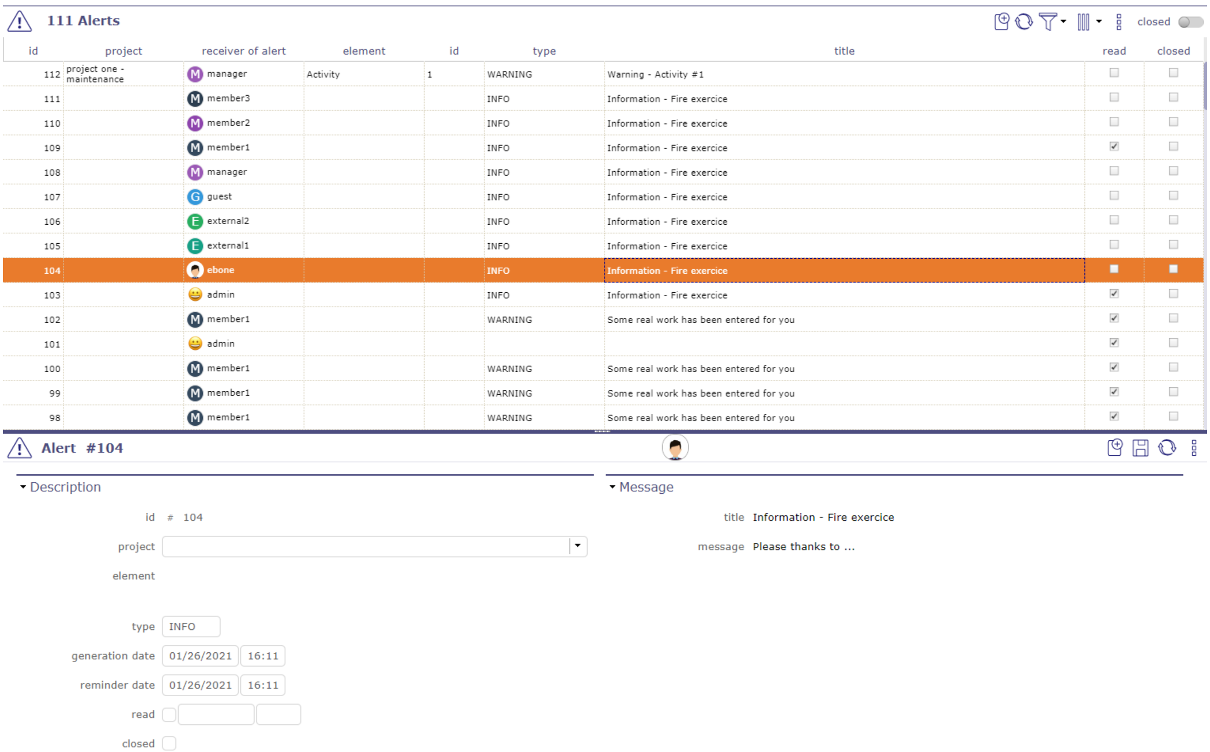


Fig. 67: Alert screen

Button Mark as read

The button is available if the user alert is not tagged “read” yet.

4.10.5 Messages

Concepts

- *Profiles definition*

You can define some message that will be displayed on the login and today screen.

Section Description

Table 84: Required Fields

Field	Description
Id	Unique Id for the message
Title	Header of the message
Message type	Type of message
Sart Date	Date when the message begins
End Date	Date when the message ended
Message	Complete text of the message

Detail section

You can apply visibility filters.

- by profile
- by project
- by organization
- by team
- per user

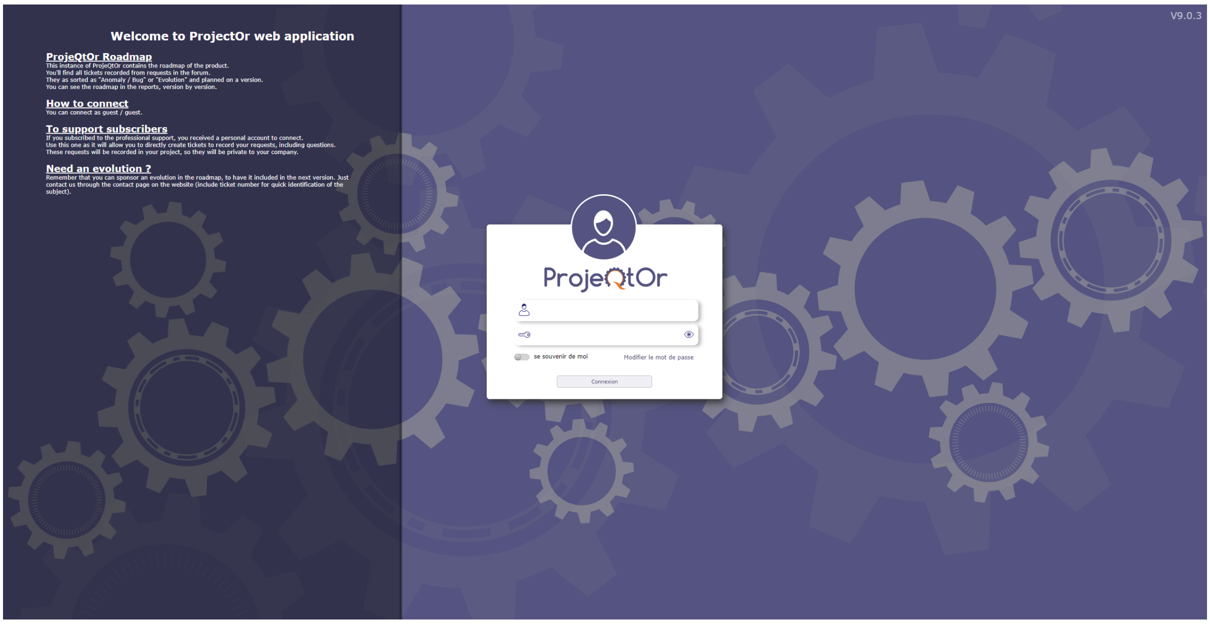


Fig. 68: Login screen with message

Check the "Show on login screen" box to see your message on the login screen.

4.10.6 Legal notice

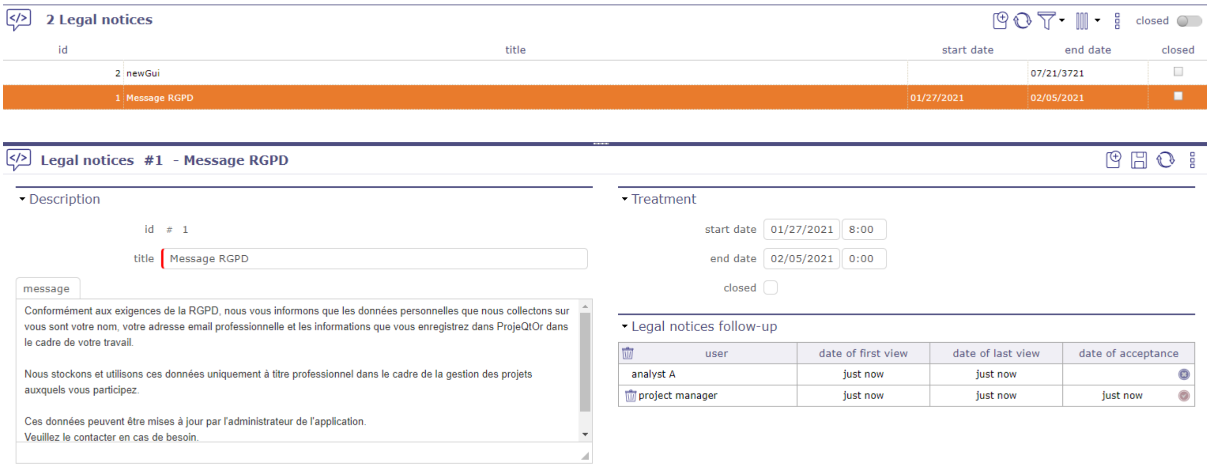


Fig. 69: Legal notice screen

The General Data Protection Regulation (GDPR) governs the processing of personal data in the territory of the European Union.

Above all, this involves informing people about what you do with their data and respecting their rights. As a data controller, or as a processor, you must take measures to ensure that this data is used that respects the privacy of the persons concerned.

You can define a "legal" message that will be displayed when you log in from the home screen.

For this message to disappear, it must be scrolled to the read confirmation button.

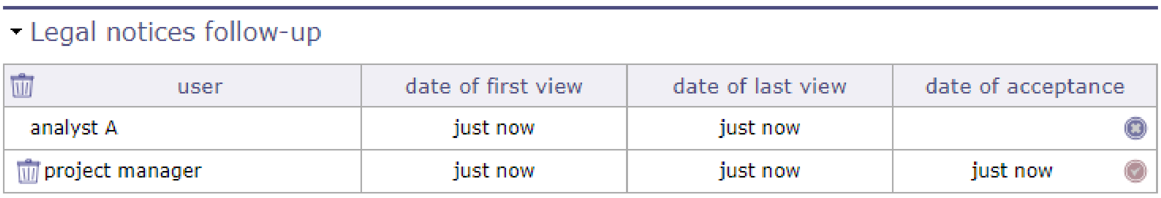


Fig. 70: Legal notice screen

This allows you to have a real-time follow-up of the users who have confirmed the reading of this message.

Note: What is the GDPR?

The abbreviation GDPR stands for "General Data Protection Regulation" (GDPR). The GDPR governs the processing of personal data in the territory of the European Union.

The legal context adapts to follow developments in technologies and in our societies (increased use of digital technology, development of online commerce, etc.).

This new European regulation is a continuation of the French Data Protection Act of 1978 and strengthens the control by citizens of the use that may be made of data concerning them.

It harmonizes the rules in Europe by offering a unique legal framework to professionals. It helps to develop their digital activities in the EU based on the trust of users.

Visit the CNIL web site here

4.10.7 Import data

Imports data from CSV or XLSX files.

How to do

1. Select the element type from the list.
2. Select file format (CSV or XLSX).
3. Select the file.
4. Click on **Import data** button to start importing.

Report of the import

- Data that is not imported because not recognized as a field appear in grey text in the result table.
- Data that are voluntarily not imported (because must be calculated) appear in blue text in the result table.

Import users

- The password field must be cut and pasted from the database because it is encrypted.
- If you enter some readable password, the users will not be able to connect.

Warning:

- If you want to create new users **don't put any id** because if id already exists, it will be overridden by the new (with possibility to erase admin user…).
- Always keep in mind that your import may have some impact on administrator user.
- So be sure to keep an operational admin access.

Importing document versions

- Two ways to import document versions:
  - by describing only the version, with its standard fields.
  - by describing the document and the version (the name of the fields of the version will be followed by '(DocumentVersion)', or its translation into the current language).

Note: CSV import

- **The CSV import file may also include :**
  - 'importFile' field that will give the link to the version file (this file will have to be reachable by the PHP server).
  - 'target' field that can be set to 'DELETE' (the file to be imported is deleted after import) or a directory name (the file to be imported is moved to this directory after import) or nothing (the file to be imported is not modified).

File format

The content of the imported file must fit the element type description.

To know the data that may be imported, click on the  button.

Names of columns

- The first line of the file must contain the name of the fields.
- Names of columns can contain spaces (to have better readability).
- The spaces will be removed to get the name of the column.

Tip:

- Look into the model class. The names are the same.

Date format

- Dates are expected in format "YYYY-MM-DD".

Data import process

Operations are performed, depending on whether the element type, the column or the column value.

Column Id

You may or may not add an "id" column in the file.

Column "id" exists and "id" is set in a line

- The import will try to update the corresponding element, and will fail if it does not exist.

Column "id" does not exist or if "id" is not set in a line

- The import will create a new element from the data.

Linked tables

For columns corresponding to linked tables ("idXxxx"), you can indicate as the column name either "idXxxx" or "Xxxx" (without "id") or the caption of the column (as displayed on screens).

Numeric value

- If the value of the column is numeric, it is considered as the code of the item.

Non numeric value

- If the value of the column contains non numeric value, it is considered as the name of the item, and the code will be searched for the name.

Columns with no data

- In any case, columns with no data will not be updated.
- Then you can update only one field on an element.

Clear data

- To clear a data, enter the value "NULL" (not case sensitive).

Planning elements

- Insertion into "Planning" elements (activity, project), automatically inserts an element in the table "PlanningElement".
- The data of this table can be inserted into the import file.

Tickets

- Do not import the value of "real work" on tickets, even if it is specified in the import file.

Automatic import

Imports can be automated.

Files placed on a defined directory will automatically be imported.

Note:

- Automatic import parameters must be set in *Global parameters*.
- Background task must be started by *Administration Console*.

The files must respect some basic rules.

File name format

- File name format is : "Class"_"Timestamp"."ext"
- Example of import file name: Ticket_20131231_235959.csv

  Class

  - The type of item to be imported (Ticket, Activity, Question, …).

  Timestamp

  - Timestamp defined to be able to store several files in the directory.
  - Format is free.
  - The recommended format is "YYYYMMDD_HHMMSS".

  Ext

  - File extension, representing its format.
  - Valid extensions are CSV and XLSX.

File format

- The files must follow the ProjeQtOr *File format*.
- Files must be full and consistent.

Tip:

- The files should not be directly created in the import folder.
- They must be created in a temporary folder and moved afterwards.

Import process

- Correctly imported files are moved to a "done" sub folder of the import folder.
- If an error occurs during import of a file, the full file is moved to "error" sub-folder of the import folder, even if there is only one error over many other items correctly integrated.
- You can get the result as a log file and/or email summary.

4.10.8 Cloned Environnement

You can duplicate the complete environment (data and code) to form a simulation environment.

Important: The CRON program must be started and running so that the simulation request can be taken into account and can be generated.

Administration of simulation requests

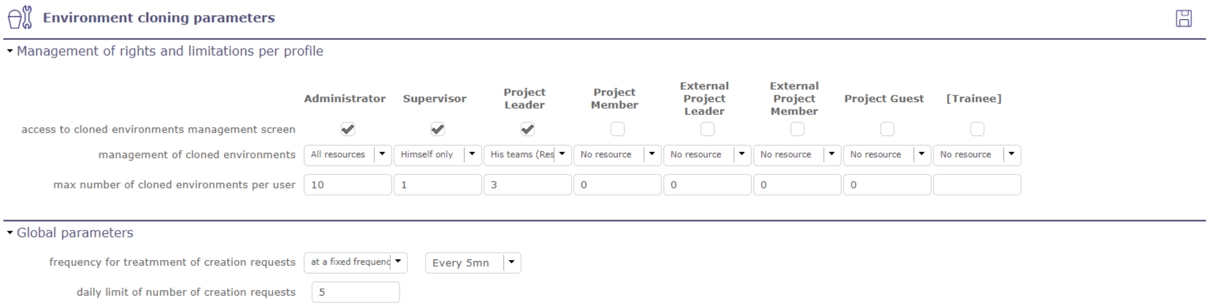


Fig. 71: Cloned environment parameters

This parameters are also be accessible from simulated environments.

Click on  on the Simulation Management screen

Management of rights and limitations per profils

Definition of profiles that have the right to create a simulation.

You can limit the number of total simulations per profiles.

This limitation can have some advantages:

- Avoid saturating the server.
- Force users to clean up their files.
- Limit performance degradation caused by the creation of a simulated environment

The removal requests are decremented. If the limits are reached, the request screen to create a simulated environment is blocked.

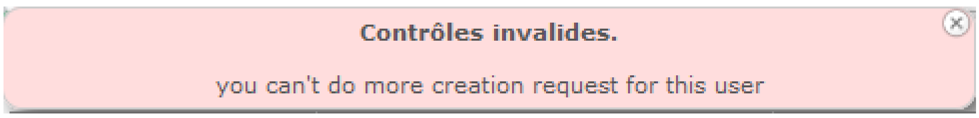


Fig. 72: Example of a invalid request due to too much creation request.

Sequencing of the creation of simulations

The time required to create a simulation space may vary. Depending on your database, your servers or even if several requests are generated simultaneously. It is an operation which can take time. That is why you can set frequencies for creation requests.

- **Fixed frequency**

  Analyzes creation requests at regular intervals and starts the generation of simulation environment as soon as a request is encountered.

- **At a given time**

  In order to avoid any slowing down of the database, you can program the generations of the spaces at a specific time of the day. This allows these to be programmed outside working hours.

Copying datas

It is necessary to copy the code and the data because the simulations created in a version could no longer be compatible with the code of the main instance that has migrated.

The creation of a simulation instance is a heavy process for the server: duplication of code, duplication of data…

That's why when generating your simulation space, not all data is copied.

Is not copied

- Archived data (closed)
- Update history
- Attached documents and files

Copy of the code

- Disabling all automation and notifications.
- Update the simulations table to record the actual creation:
  - Date and time of actual creation,
  - Flag "available environment"
  - Instance access URL

The cloned Environment managment

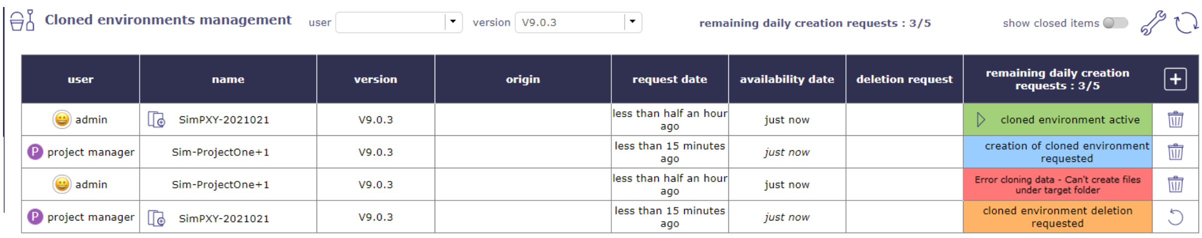


Fig. 73: Cloned environment managment

This screen allows you to manage your queries for new simulation environments, to follow them or to request the deletion of a particular simulation.

You can also track requests from other users based on your profiles and your rights.

Generating a simulation environment

To request the creation of a new simulation area, click on

A pop up will appear allowing you to make your request.

Identify the profile making the request, name your space (required) and confirm your request by clicking on OK

The simulated databases will always have a name prefixed by simu_ followed by the name of the simulation.

Dates

- Creation dates: Indicate precisely the date on which you made your request for simulation space.

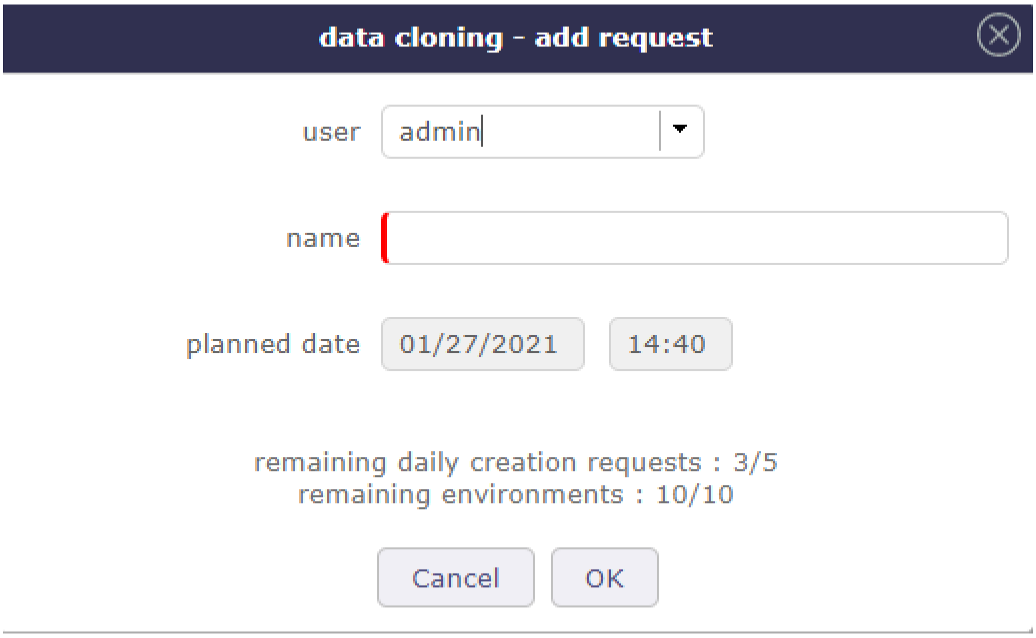


Fig. 74: Add request

- Availability dates: Indicates the date on which your space was actually generated. They are indicated to you when your request is taken into account.
- Delation dates: Indicates the date on which your space will be completely deleted. The simulation space must actually be generated for the deletion request status to appear. If the database is in the request phase and therefore not yet generated, then the deletion is immediate and the deletion request status does not appear..

Color code

- **Blue:** Request being created
- **Orange:** Warning (delete request)
- **Red:** Error creating the environment (path, rights . . .)
- **Green:** Environment creates

Go to the cloned Environment

When your simulation is ready, green status, you can open your cloned environment. Click on ▷ to launch the environment.

A new tab opens with a new ProjeQtOr session. Authenticate yourself, you can start working in your environment.

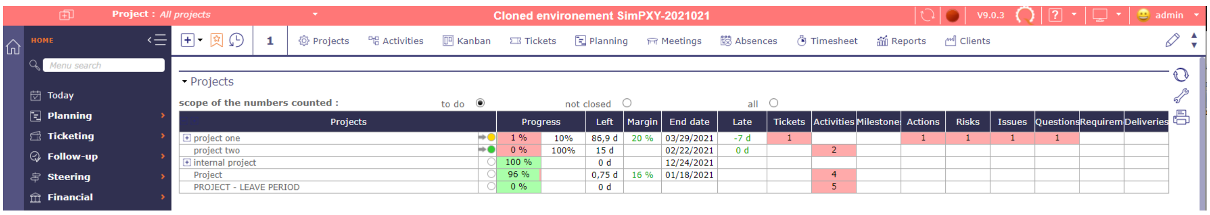


Fig. 75: Cloned environment session

The instance area turns red when you are in a simulation space.

Not all screens or functions will be accessible in this space.

For example, you will not be able to request and create a new simulation space in your cloned environment.

Copy a cloned Environment

You did a successful simulation on one of your cloned environment.

You want the copy to run other tests but without touching the simulation.

Just copy this environment.

The origin of the copy will then be indicated in the list with a shortcut to access it.

Deleting a simulation environment

Deletion requests are stored in the simulation table.

They are processed in the same process as creations, but always with priority to free up space before allocating new resources to new instances.

Tip: To avoid overly broad rights management and server invasion problems, all simulations (code) will be placed in a "simulation" directory outside of the main ProjeQtOr directory.

Thus, if the main instance is accessible via the url "projeqtor.xxx.fr", the simulations will be accessible via the url "projeqtor.xxx.fr/simulation/nom_de_simulation".

4.10.9 Notifications

You can defined manually notifications in this screen.

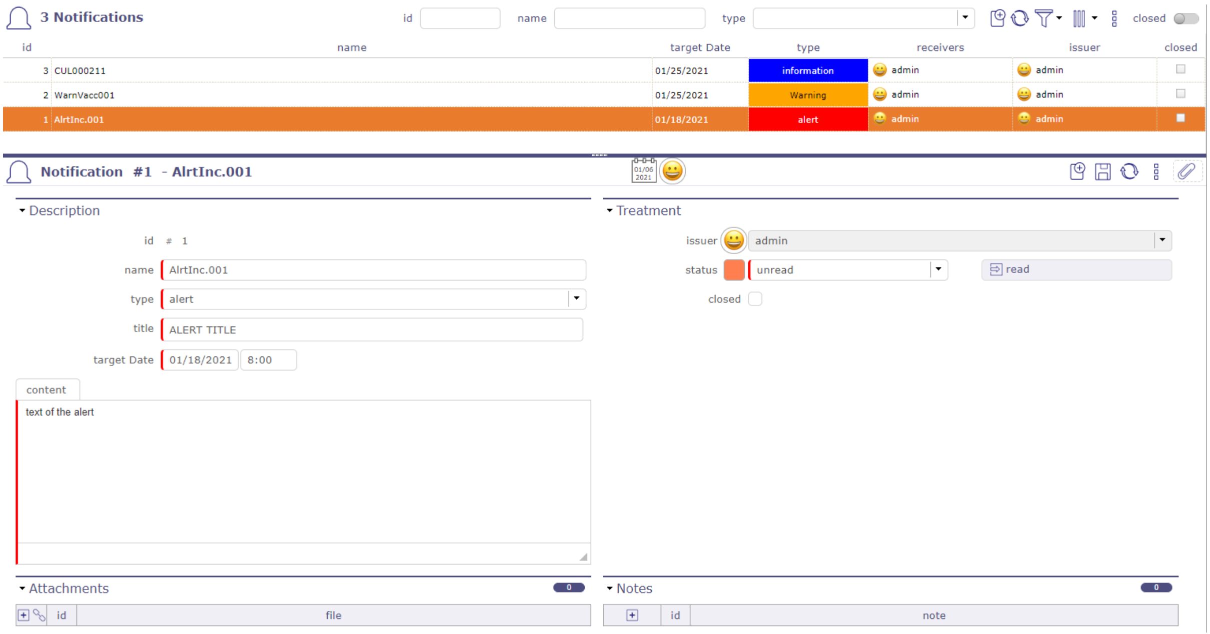


Fig. 76: Notifications

You receive notifications as soon as you authenticate on the login screen

When you are logged in, you have a reminder at the top of the screen.

You have the number of unread notifications

Hover over it for the list of notifications to appear

A slight color line in front of the name indicates the type of notification

- Red = alert
- Blue = information
- Yellow = warning

Click on the name of the notification to display its detail screen.

You can also display the notification in the part below the menu.

See: *Secondary menu - Notifications section*

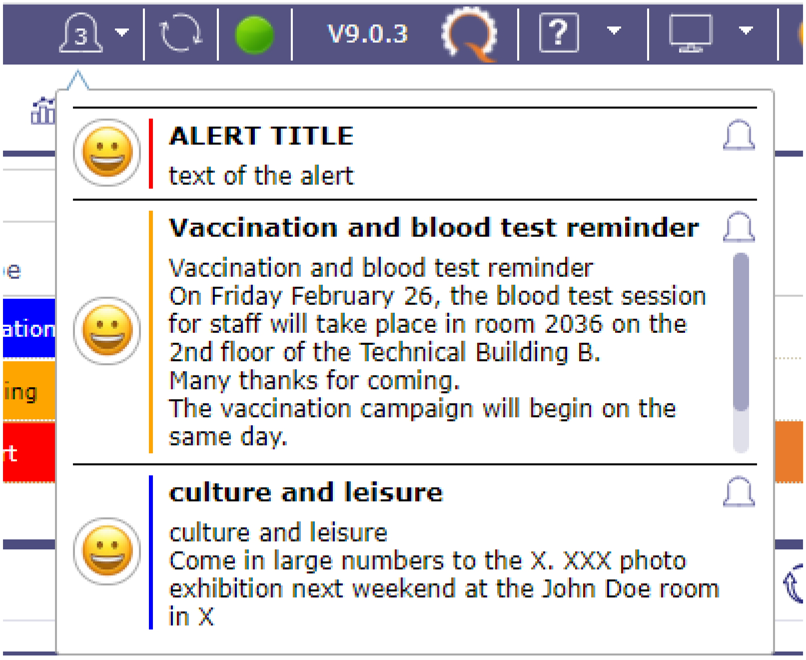
Click on an unread notification for discover the details.

- The first icon indicates the type of notification
- **the second icon indicates how the notification was created**
  - System Notification
  - Manual Notification
- The third icon indicates if the notification has a definition. see: *Notification System*
- Click on the fourth icon for display the detail of the notification

Note: Type of alert

- type information


Connexion acceptée
Vous avez 3 notification(s) non lue(s)
1 ALERTE(s)
1 ATTENTION(s)
1 INFORMATION(s)
ProjeQtOr
admin
se souvenir de moi
Modifier le mot de passe
Connexion

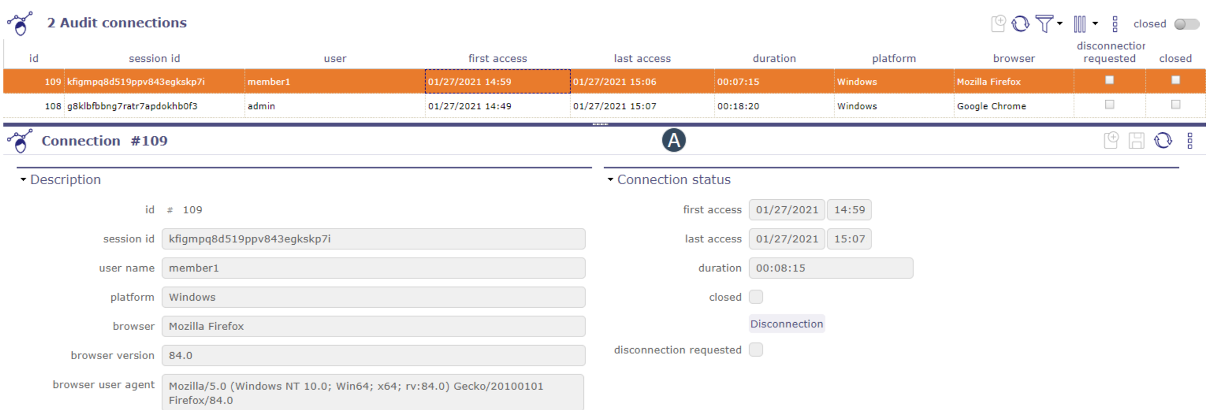


- type Warning
- type alert
- sum - Records all the type

4.10.10 Audit connections

Audit connection proposes a view of "who is online".

you can know which platform the user has logged on to, his browser and dates of his first and last access, as well as the duration of the connection



Note: The administrator has the possibility to force the disconnection of any user (except his own current connection, see: *admin-console*.

CHAPTER

FIVE

GRAPHICAL USER INTERFACE

ProjeQtOr provides a very rich user interface.

It may be frightening at first glance because of the very numerous elements it provides, but once you'll get familiar to the structure of the interface you'll discover that it is quite simple as all screens have the same frames and sections always have simular structure and position.

5.1 Graphical User Interface

ProjeQtOr interface is divided into several areas.

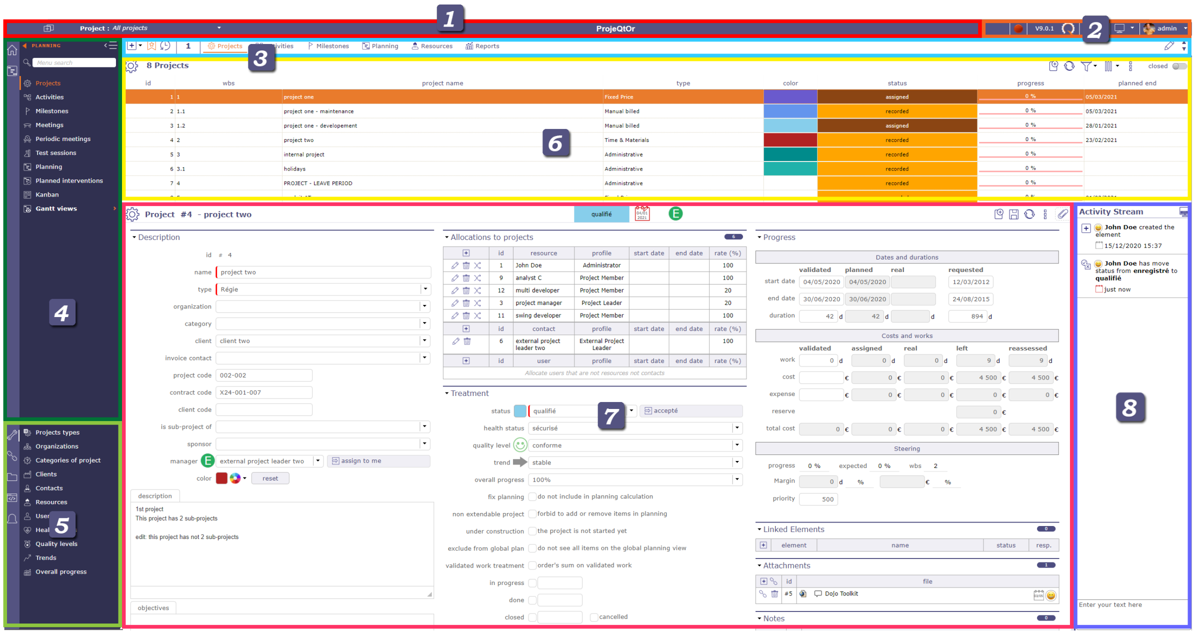


Fig. 1: Overview graphical user interface screen

Interface areas:

1. *Top bar*
2. *Infos bar*
3. *Custom Menu*
4. *Menu*
5. *Secondary menu*
6. *List Area*
7. *Details area*
8. *Activity Stream*

Note: Area separation

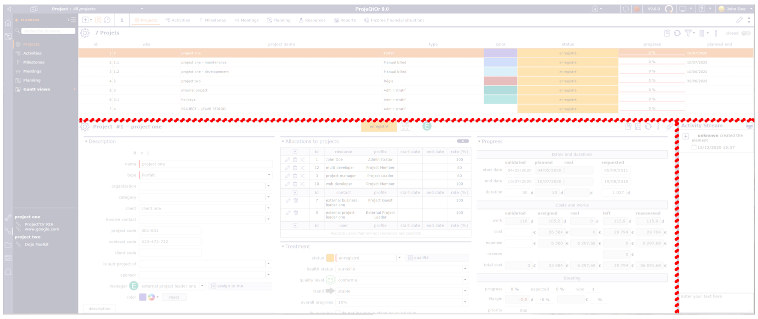


Fig. 2: The splitters allow resizing areas in the interface. The position of splitters is saved and retrieved on each connection.

5.1.1 Top bar

Interface areas:

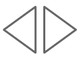
1 *Navigation buttons*

2 *New tab*

3 *Project selector*

4 *Instance name*

1 Navigation buttons

The navigation buttons  give access to previous and next pages in the history.

The Ajax technology used by ProjeQtOr makes it possible to refresh the data while preserving the structure of the solution.

This is why you will lose the session to projeqtor if you use the navigation of your internet browser.

2 Button New tab

The new tab button  allows to open a new tab within the same session.

When you open a tab on your browser, it opens a new session of ProjeQtOr.

For the browser to open the tab as a result of the first session you must go through our navigation system.

When you are already connected to a session, a screen indicates this to you.

Click on the button to reconnect from this tab or leave this one to recover the current session.

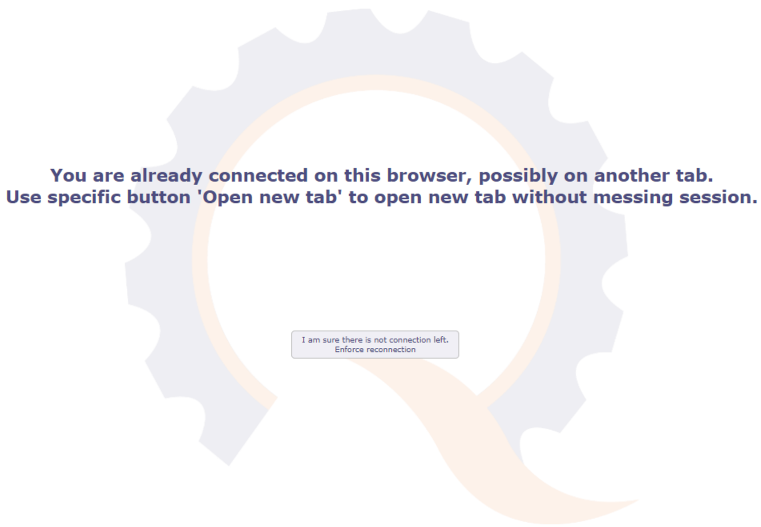


Fig. 3: already connected

Project selector

Fig. 4: Project selector

Allows to select the project to work on.

Limited visibility of all elements of the selected project, including sub-projects if applicable.

Definition of the “default” project for new elements.

Visibility only of favorite projects in other lists.

Note: User parameter

default project Defines the project that will be selected and display by default into the project selector

See: *User parameters - section automation*

Project selector parameters

Click on  to display the project selector parameters dialog box.

3 tabs allow you to adjust certain aspects of the selector**

- Selector format
- Favorites
- and others…

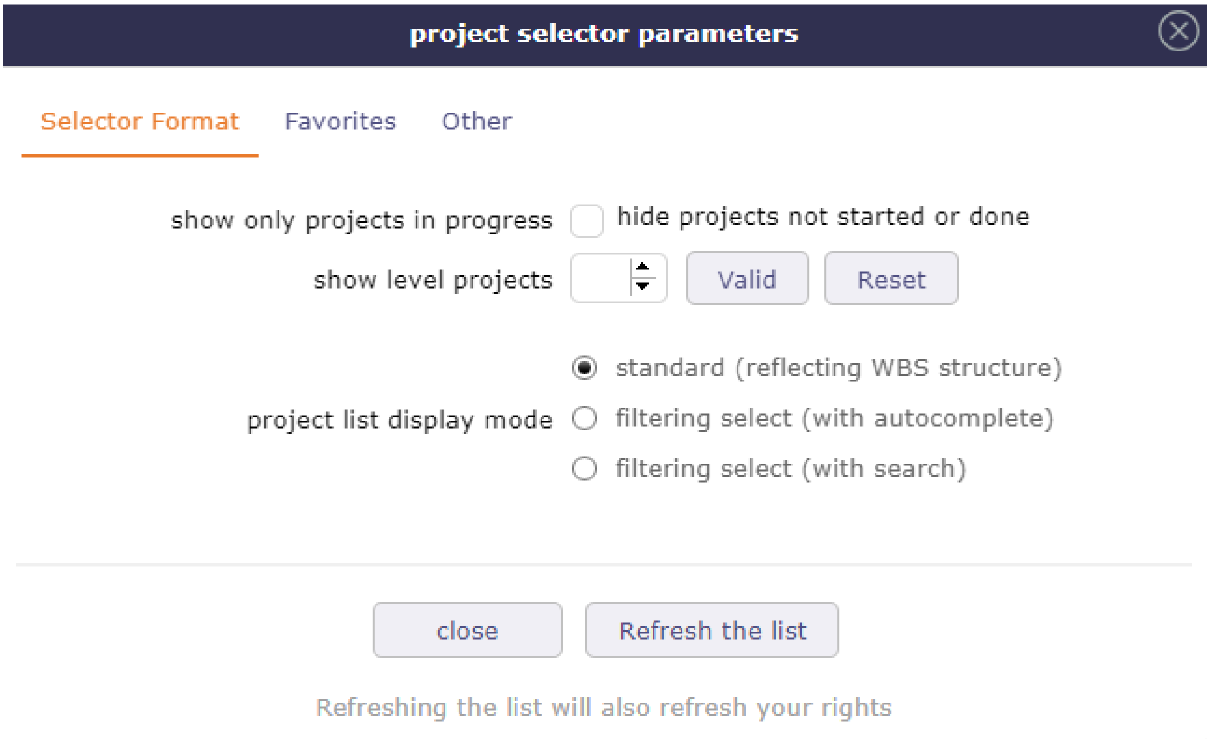


Fig. 5: Dialog box - Project selector parameters

Selector format

In the format tab of the selector, you choose how the elements are displayed in the list.

Display the projects in progress

This option allows to display only in the list of the project selector, the projects with the macro state in progress.

Show level projects

It is possible to choose the number of sub-projects displayed in the project selector.

Project list display mode

ProjeQtOr offers the possibility to display the list of projects in different ways.

Standard reflecting WBS structure

- List of project and sub-project are displayed according to WBS structure.
- This is the only presentation mode where you can create favorites lists.
- You can choose to display multiple projects by checking the corresponding boxes.

Filtering select with autocomplete

- List of project and sub-project are displayed according to entered text.
- Search criteria works in a "starts with" mode
- Autocompletion is active
- Compatible with favorites, but you can no longer create a list.

Filtering select with search

- List of project and sub-project are displayed according to search criteria.
- Search criteria works in a "contains" mode

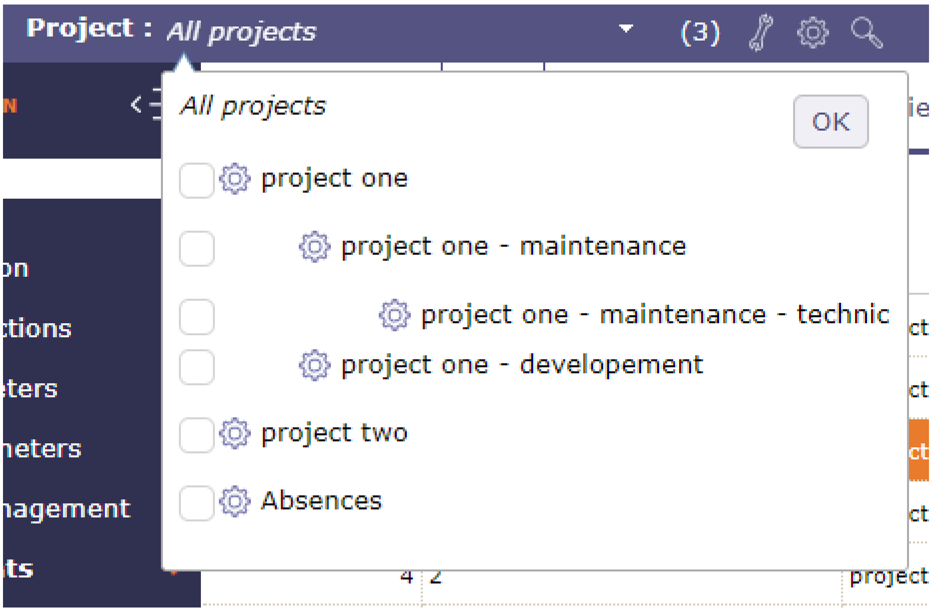


Fig. 6: Projects Selector with level display

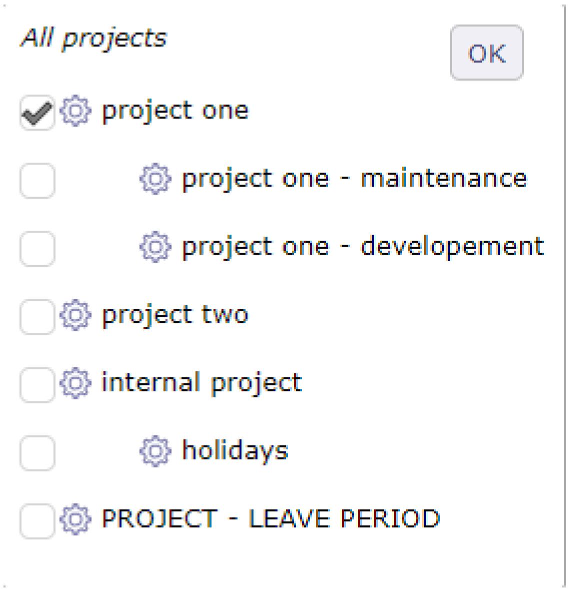


Fig. 7: Project list display mode standard

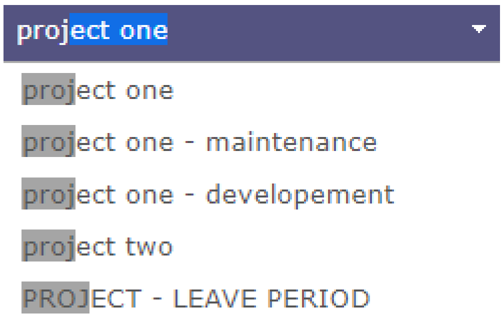


Fig. 8: Filtering select with autocomplete

- Autocompletion is **not** active
- Compatible with favorites, but you can no longer create a list.

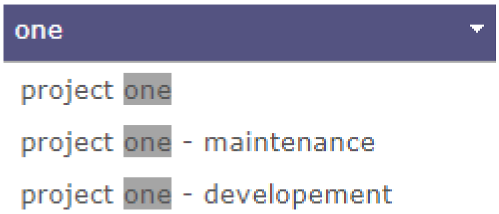


Fig. 9: Filtering select with search

Favorites project

Favorites for Project Selector

You can create several favorites project list.

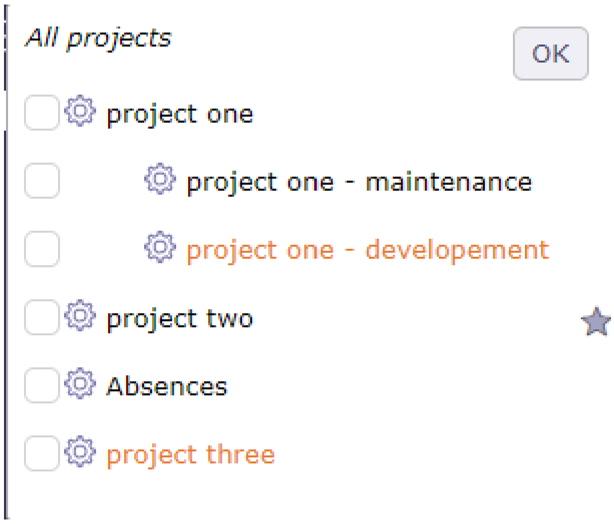


Fig. 10: project selector favorites

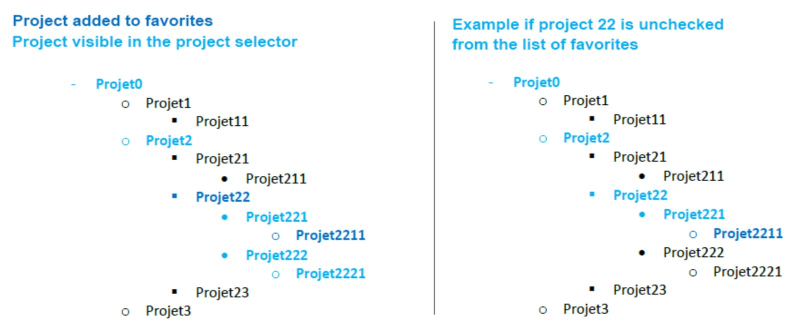
- Click on the displayed to the right of the project to select the project to add to your favorites list.
- You can only create a favorites list from the layout representing the WBS structure in the previous tab. See: *Standard display mode*.
- The lists are however compatible with all presentation modes
- Each selection is highlighted with the secondary color of your session
- Click on to to be able to save your list.
- Name the liste of favoris
- Click on to save your list
- The list is stocked in the Saved favorite list table.
- when a project favorites list is selected it is highlighted in the secondary color of your session.
- When the list of projects is limited to favorites, we also display recursively:

Fig. 11: Favorites list in project selector

- visible parents of favorite projects

> **Warning:** Be careful, we do not necessarily go back to the root but to the highest "visible" parent project. For example, if we have a structure P1=>P1.1=>P1.1.1=>P1.1.1.1, if a CP is assigned to P1.1, it does not see P1, by checking P1.1.1.1 by favorite, we display P1.1 and P1.1.1 but not P1)

- The visible subprojects of favorite projects whether they are favorites or not.

> **Warning:** Same remark as above on the limit of visibility.
>
> 
>
>
> Fig. 12: Example display for project selector favorites

- When the list of the project selector is restricted to favorites, deselecting a favorite project makes it disappear (refreshing the selector).
- When a favorites list is enabled, "all projects", is replaced with "all favorite projects". You can limit your list of favorites or display them in their entirety by clicking on this option. This will

be the display default.

Enter the Archive Mode

This option allows you to show te closed items.

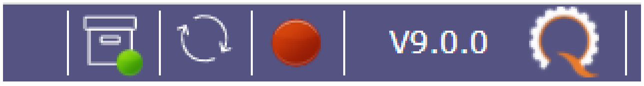
When archive mode is active, then icon is displayed in the top bar. Click on it to stop the process.

Archive mode allows you to see closed projects in the project selector.

To display closed projects in the list area of the projects screen switch the button "closed".

This button is not visible when the archive mode is Off.

Only the administrator can see this button permanently.



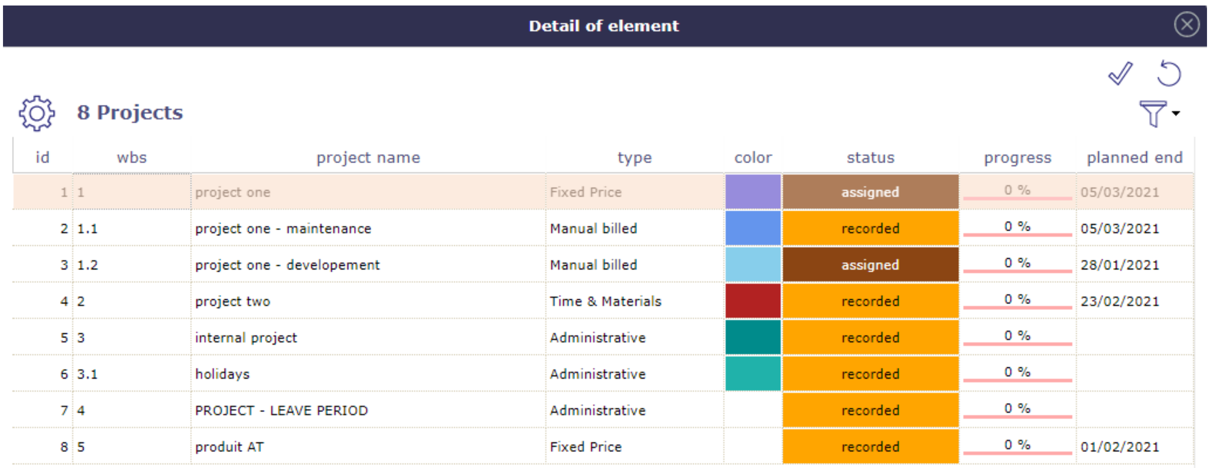
When Archive mode is active, Projects lists on report parameters show closed projects.

Selector of the current item

- Click on the button to select current project in the project selector.
- Click once, from any element to display in the selector the project linked to the element.
- Double click to display all projects again

Project selector search

Click on to search projects and subprojects from any screen with the same search functions as on the projects screen



id	wbs	project name	type	color	status	progress	planned end
1	1	project one	Fixed Price		assigned	0 %	05/03/2021
2	1.1	project one - maintenance	Manual billed		recorded	0 %	05/03/2021
3	1.2	project one - developement	Manual billed		assigned	0 %	28/01/2021
4	2	project two	Time & Materials		recorded	0 %	23/02/2021
5	3	internal project	Administrative		recorded	0 %	
6	3.1	holidays	Administrative		recorded	0 %	
7	4	PROJECT - LEAVE PERIOD	Administrative		recorded	0 %	
8	5	produit AT	Fixed Price		recorded	0 %	01/02/2021

Fig. 13: Project selector search window

Instance name

you can rename the name of the ProjeQtOr instance via the global parameters in the View tab.

See: *Tab Display*

5.1.2 Infos bar

Interface areas:

1 *CRON button*

2 *Version button*

3 *About menu*

4 *Display layout*

5 *Session menu*

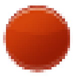
1 CRON button

The CRON activation button allows you to quickly see if your CRON is launched or not.

The button is only visible for Administrator profile.

 the CRON is running

 In request for closure. The next refresh turns it red.

 the CRON is stopped

Click on the button to start or stop CRON in the same way as on the Administration page.

See: *Background tasks*

2 Version button

Displays the version of ProjeQtOr installed

Click on the button to access the site of ProjeQtOr.org

3 About menu

This menu allows you to have access to real-time information with a notification system for news.

Fig. 14: About menu

The button 

sends you to the forum of the ProjeQtOr site in order to post the possible anomaly.

Links

The links indicated allow you to display:

- the software manual,
- the manual page concerning the keyboard shortcuts taken into account in ProjeQtOr,

- the version information on the external libraries used in ProjeQtOr.

News

Find all the information about ProjeQtOr in real time.

Hover over the desired information with the mouse to preview it.

Click to view full information.

A navigation system allows you to consult all the information.

Access

Access ProjeQtOr's plugin store and forum summary with just one click.

Screen layout

The layout of the screens allows you to choose how you want to display the ProjeQtOr interface

The arrangement not chosen appears in gray

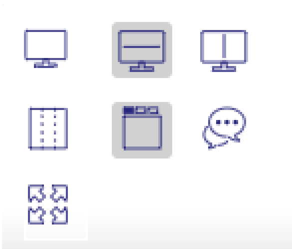


Fig. 15: Screen layout

Many modes are available!

switched mode

Allows to enable or disable switched mode that allows to switch between list and detail windows. Window selected is displayed in "full screen" mode.

Hidden window are replaced by a gray bar. Click on the gray bar to switch between windows.

Horizontal layout - vertical layout

You have all the screens of the application in horizontal or vertical mode.

You can uniquely arrange your screens by using the display icon in the *list box*

Horizontal mode shows the list box at the top of the screen and the details box at the bottom.

Vertical mode shows the list box on the left of the screen and the details box on the right.

Mode List

Column mode corresponds to the historical presentation of ProjeQtOr, where the different parts making up the details area are displayed in one, two or three columns

Mode Tab

The sections present in the columns are dispatched under tabs with the tab mode.

Show/Hide Activity Stream

Show or hide globally (on all screens), the notes area for each element.

To display notes only on a specific screen, choose from the details area toolbar.

See: *Activity stream*

See: *Tools details area*

Full screen mode

With this mode, you make your browser invisible, the menus, navigation bar, buttons … are hidden. You can enjoy your ProjeQtOr instance in full screen mode.

Session menu

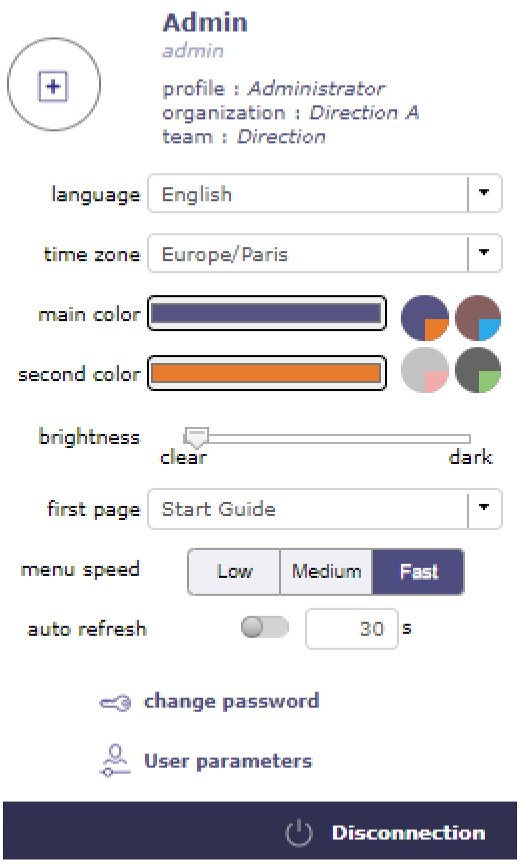


Fig. 16: Session menu

The connection window offers some settings and information at user level.

Profile

The profile section tells you:

- The common name in the software
- The connection identifier
- The profile assigned in the software with this account
- The organization to which the user belongs
- The team to which the user belongs

You can assign a profile picture in the *user parameters*.

interface Parameters

This section allow you to choose and modify at your leisure:

- the language of your personal session

- the time zone is automatically entered according to the settings of your computer
- the colors of your personal interface
- The brightness level for the background of the screens
- the home page which will be displayed when you log in
- The speed of the main menu animation
- the time in seconds for automatic list refreshing

Two buttons offer you direct links to:

- the page to change your password
- user settings page

And it is in this window that you end your session using the disconnect button.

These changes only impact your session and will apply over the global settings defined by your administrator.

Interface colors

You choose two colors which will be declined thanks to subtle colorimetric games throughout the software.

The main color corresponds to the color that will be displayed in the background of the menus, title and separation elements.

The secondary color is applied for everything related to selection, navigation or position.

Color discs

These discs are shortcuts for applying a color scheme. Basic four color discs are available including one with the original colors of ProjeQtOr.

The other three discs are suggestions on our part. You can display your colors by saving them in the global settings on the Display tab. The next time you reconnect, the last color disc will have your colors.

brightness

Adjust the background brightness of your interface.

The brighter the brightness, the more white the background will be, move the cursor to dark to obtain the gray interface background.

Menu speed

You determine how the menu behaves as you navigate through it. When you set to fast then the animation between the menus will hardly be visible anymore.

Auto refresh

Item list boxes can refresh automatically.

Choose how often list boxes are automatically refreshed.

5.1.3 Custom Menu

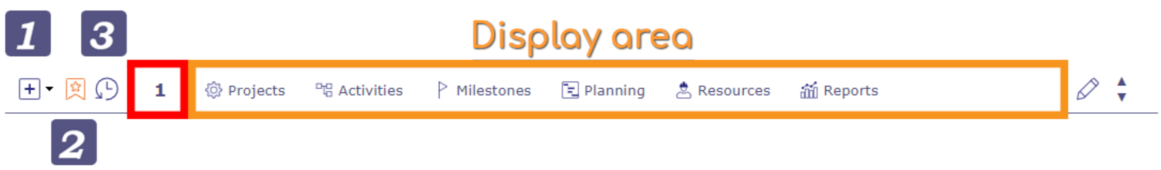


Fig. 17: Bookmarks Bar

Interface areas:

1 *New element*

2 *Bookmarks*

3 *Recents*

1 New element

This button allows you to quickly create a new element from any screen.

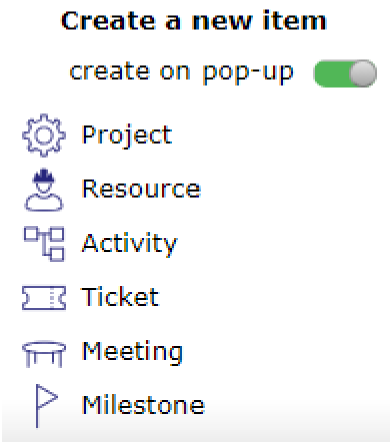


Fig. 18: Create a new element

You can create:

- a project
- a resource
- an activity
- a ticket
- a meeting
- a milestone

The switch button “create on pop-up” allows you to define how to initiate the creation.

If the button is activated, a pop-up opens over the current screen on the screen of the element you want to create.

If the button is disabled, you go directly to the screen of the element you want to create.

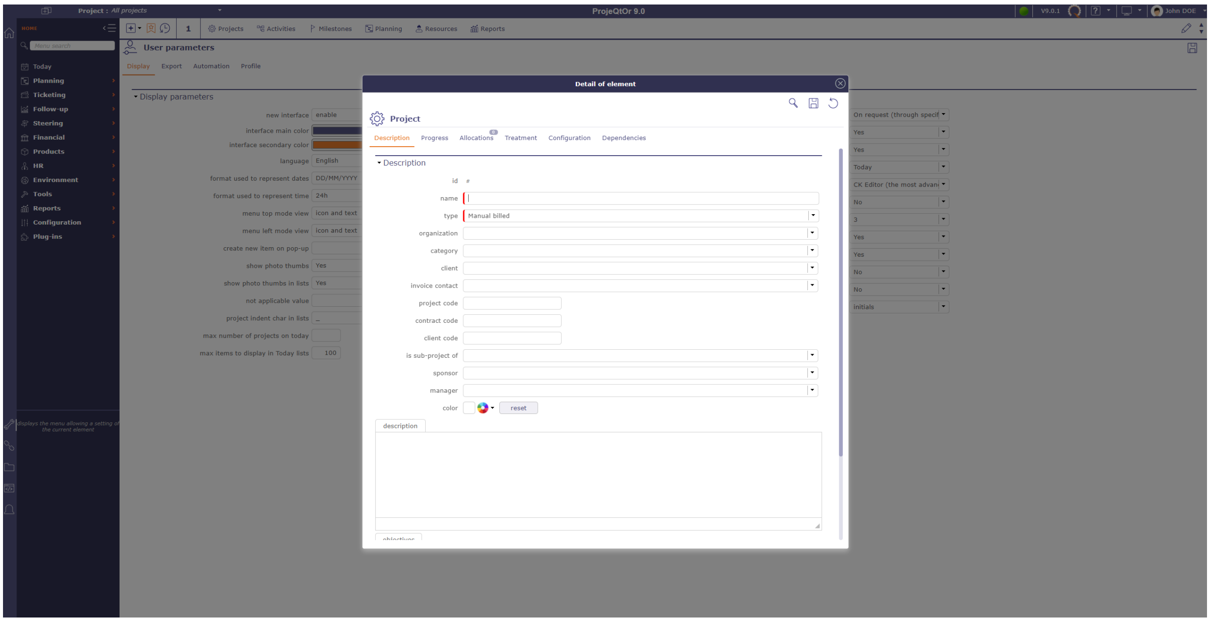


Fig. 19: Create a new element

2 Bookmarks

you can mark certain screens and organize them in the favorites bars to create a personalized menu.

You can create up to 5 favorite bars.

Click on  to display in the display zone the list of screens of the elements that you have put in favorites.

Fig. 20: Display bookmarks

Right clicking on the display area allows you to display and organize the 5 favorite bars and choose how to display them.

 Bookmarks text

You view bookmarks in text mode only

 Bookmarks icon

You display bookmarks in icon mode only

 Bookmarks icon and text

You display bookmarks with icon and text

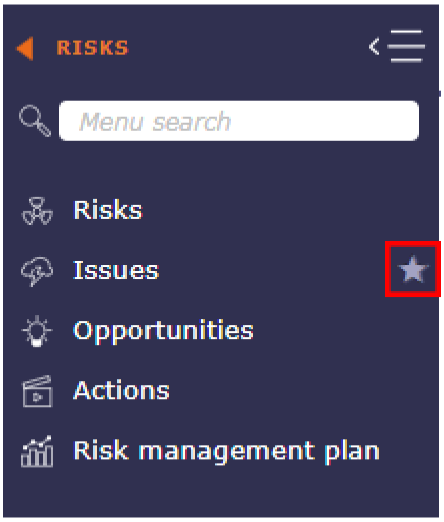
The number displayed corresponds to the number of the favorites bar on which you are.

To change bookmarks bar, use your mouse wheel when you are positioned on the bar.

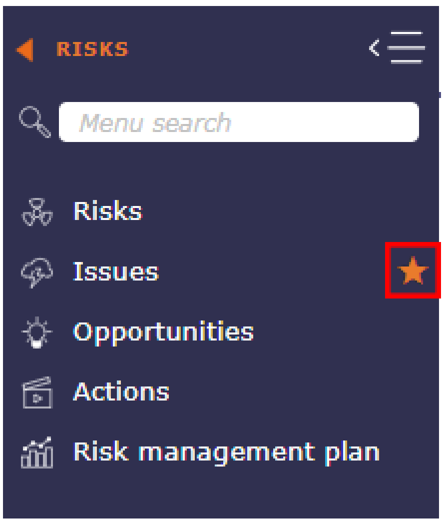
Or click on the up and down navigation arrows at the right end of the bar.

Add, Organize and remove bookmarks

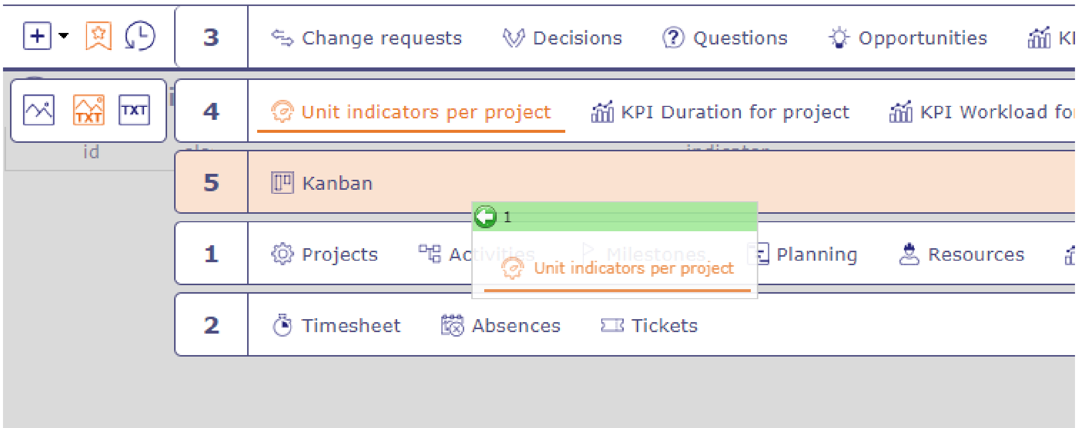
To add a bookmarks, click on the star to the right of each menu screen



The star is filled with the secondary color of your interface once added to the favorites bar

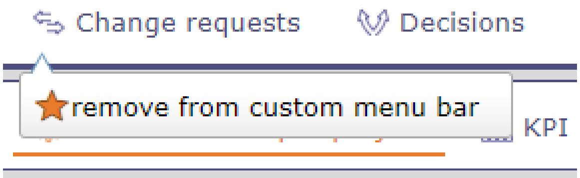


To organize your favorites, right click on the bar or click on  to display your 5 bars, then click and drag and drop the screens to the desired bars.



A green bar tells you that you can drop the favorites from your screen, a red bar tells you that it is impossible.

To remove a bookmark, right click on the bookmark and clik on the button remove from the custom menu bar



You can put the same bookmark on several bars. `Ctrl click` on the favorite and drag and drop to another bar.

The favorite will be duplicate.

Recents bar

The recent screens bar allows you to keep in memory the screens you have browsed since the connection. It acts like a kind of limited history.

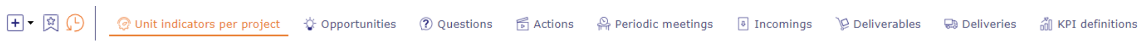


Fig. 21: Recent bar

Indeed, the number of recent screens depends on your screen resolution. for example: between 12 and 16 screens displayed for a 2K screen and between 6 and 10 for an HD screen.

5.1.4 Menu

Interface areas:

1 *Main menu*

2 *Section indication*

3 *Breadcrumb*

4 *Show / Hide menu*

5 *Search menu*

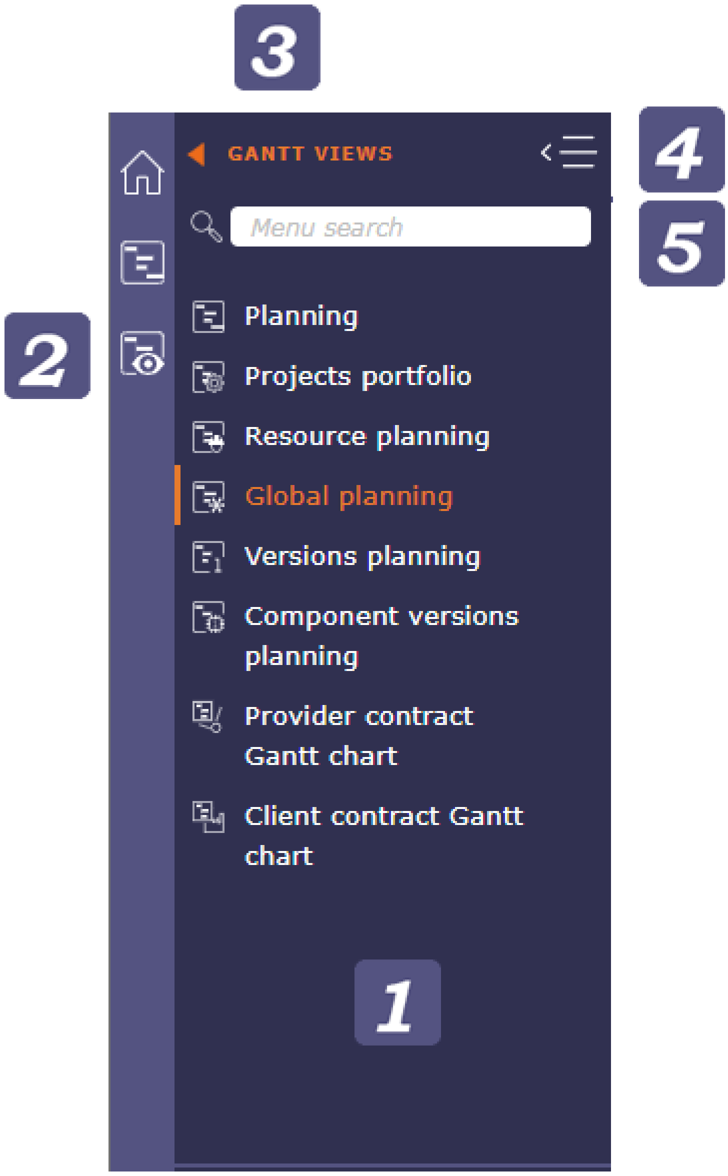

3
GANTT VIEWS
4
Menu search
5
2
Planning
Projects portfolio
Resource planning
Global planning
Versions planning
Component versions planning
Provider contract Gantt chart
Client contract Gantt chart
1

Fig. 22: Menu

1 Main menu

The menu takes up the overall scope of project management. Each section represents a part of this perimeter.

The menu is designed to highlight the main screens in each section. These are often the screens most used by project management professionals.

The secondary screens appear under sub-menus and the navigation is deeper.

2 Section indication

When browsing, each time you select a section or subsection, the icon corresponding to the latter is displayed in this area.

3 Breadcrumb

Breadcrumb generally refers to the breadcrumb trail of website navigation.

This item tells the user where they are in the menu hierarchy.

In ProjeQtOr, the Breadcrum shows you the previous section of the one where you are.

By clicking on the breadcrumb, you return to the mother section, until you reach the reception.

4 Show / Hide menu

Click on to hide the menu

Click on to bring up the menu

5 Search menu

You have the possibility to do a search directly in the menu.

The search takes into account the name of the element screens, but also certain tags, which do not know how to be enriched.

The search also allows you to display the reports related to the keywords entered in a separate section.

When you click on a screen resulting from your search, the screen is displayed but you do not change the section in the menu, which allows you to return at any time to the screens of the section where you were.

To return to your section after a search, click the reset icon in the search field.

5.1.5 Secondary Menu

The secondary menu can be seen as the right hand side of the menu.

It allows you to display a lot of information about your project, your navigation or your organization.

Interface areas:

1 *Parameters*

2 *Links*

3 *Repertory and Document*

4 *Console*

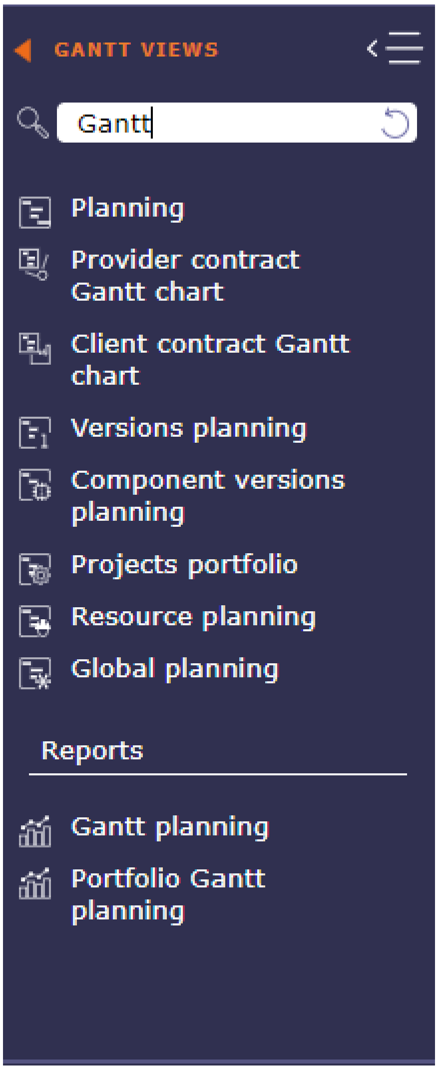


Fig. 23: Search performed with the tag GANTT

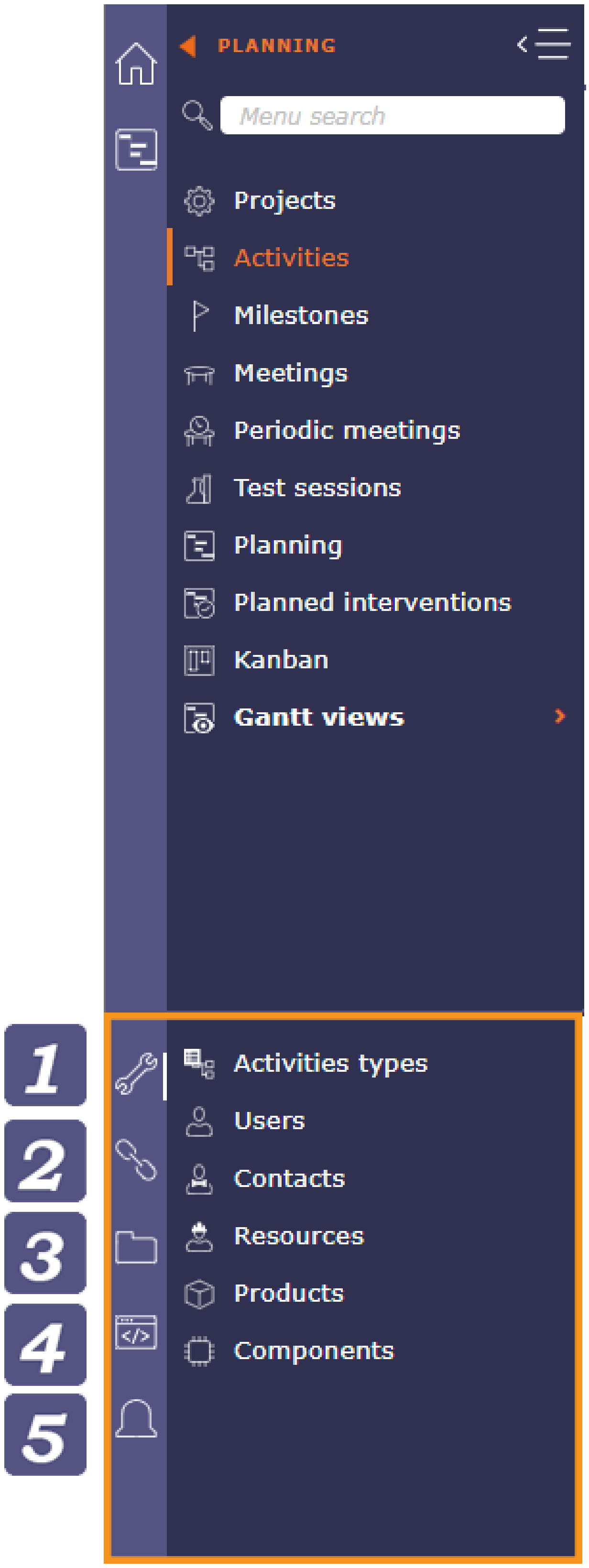

PLANNING
Menu search
Projects
Activities
Milestones
Meetings
Periodic meetings
Test sessions
Planning
Planned interventions
Kanban
Gantt views
Activities types
Users
Contacts
Resources
Products
Components
1
2
3
4
5

Fig. 24: Menu

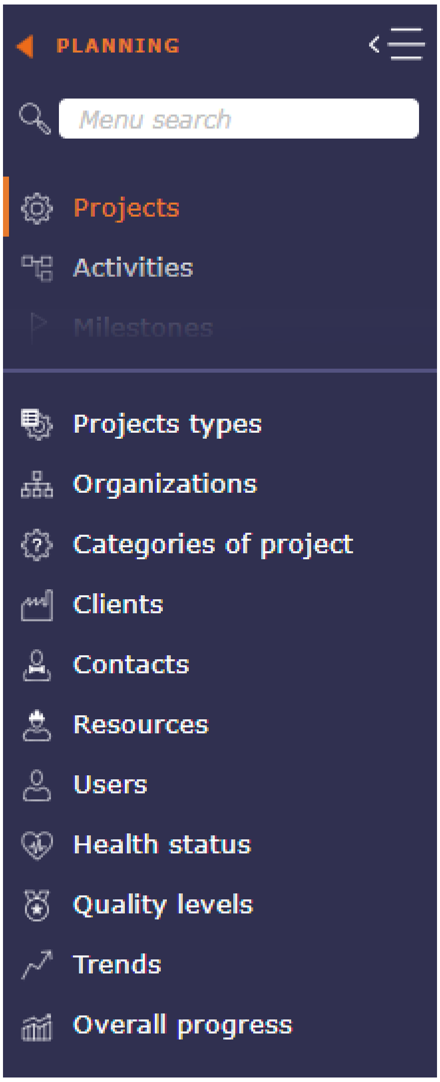
Notifications

Parameters

the parameters displayed in the secondary menu are linked to the selected screen.

In the example above, the user selected the Activity screen. We then see that the parameters are in direct correlation with the activities.

If the user selects the project screen, then the parameters will be adapted for those.



Links

Display hyperlinks to remote web pages.

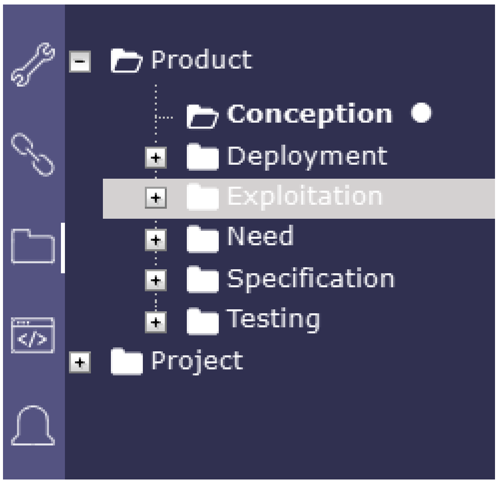
These links are defined as hyperlink attachments on projects.

Links displayed here depend on the selected project.

3 Repertory and Document

Document directories give direct access to documents contained in the directory.

See also: *Document directories* screen.

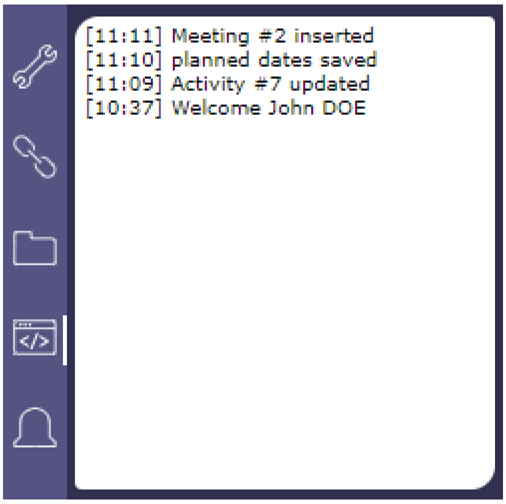


4 Console

Displays information about main actions: insert, update, delete.

The timestamp indicates when the action was done.

Warning: Messages displayed here are not stored and will be flushed when user logout.



Notifications

In the secondary menu

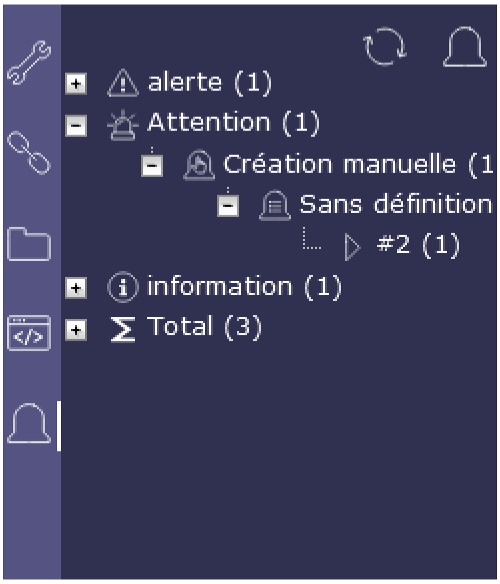


Fig. 25: Notifications

A tree whose title indicates the number of unread notifications intended for the user.

This tree has the following levels:

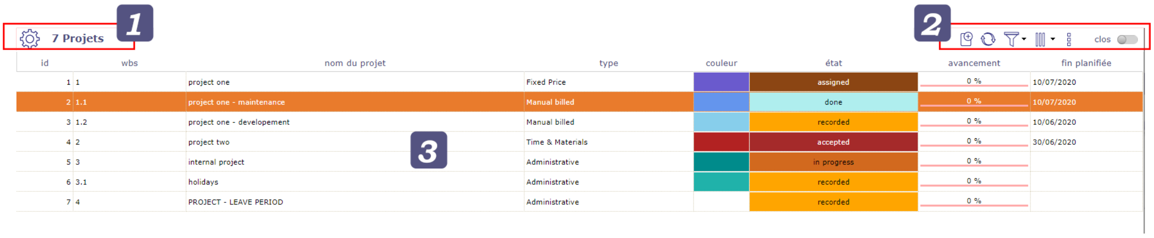
- Level 1: The types of notifications
- Level 2: The trigger for notifications
- Level 3: The Notification Definition to Product Notifications
- Level 4: The id of the element that generated the notification. Allows direct access to the item.

The icon  allows you to refresh notifications without waiting for the scheduled update.

The icon  provides direct access to the notifications screen.

Numbers indicate the number of unread notifications

5.1.6 List Area



Interface areas:

1 *Element identifier*

2 *Tools*

3 *Items list*

1 Element identifier

Displays the element name and the count of items in the list.

Each element is identified with a distinctive icon.

Click a column header to sort the list on that column (first ascending, then descending).

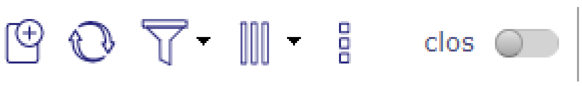
Sorting is not always on the name displayed.

If the sorted column is linked to a reference list with sort order value, the sorting is executed on this sort value.

Sorting on the “Status” allows to sort values such as defined in the workflow.

Click on a line (any column) will display the corresponding item in the detail area.

2 Tools



- Click on to create a new element
- Click on to refresh the list
- Click on *to automatically refresh the list*
- Click on *to apply many filters*
- Click on *to organize the columns*
- Click on to open the sub-menu
- Click on to print the list area as it appear on the window
- Click on *to export the list area to PDF*
- Click on *to export the list area to CSV*

- Click on *to open the multiple update*
- Click on *to display this screen vertically or horizontally only*

Swith the button clos to make appear all the In progress element

Automatically refresh the list

Item list boxes can refresh automatically.

Choose in the connexion menu how often list boxes are automatically refreshed.

See: *Session menu*

The filters

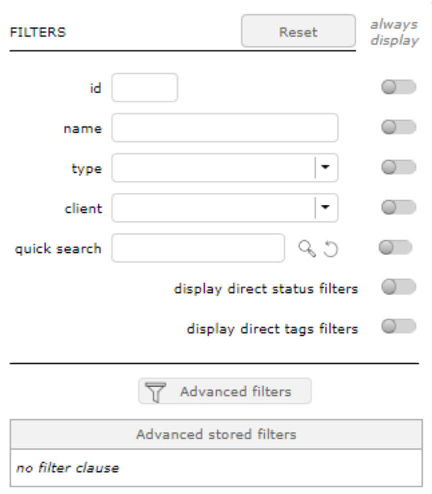


Fig. 26: Filters windows

The first filters offered are basic filters.

The rapid filters

You can choose to always display them in the toolbar of the list box by activating the switch button.

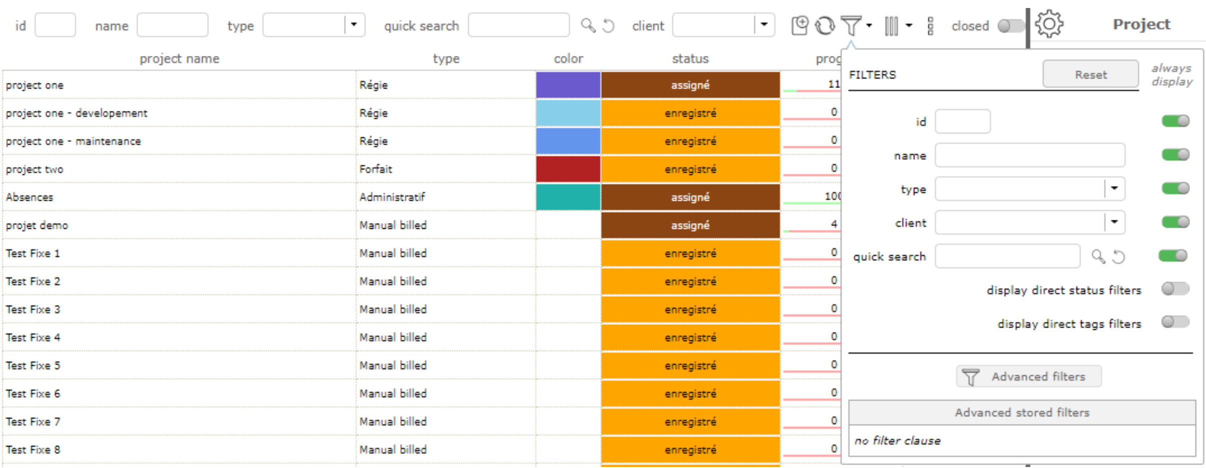


Fig. 27: Filters always visible

You can choose to always display them in the toolbar of the list box by activating the switch button.

You can restrict the display:

- by ID
- by name
- by type

The Quick search

fill in the quick search field then click on the magnifying glass to launch the search in all the available fields of the list box AND details.

Click the reset button to clear your search and restore the original display.

Note: Accents are not taken into account

Status filters

Switch the button **display direct status filters**

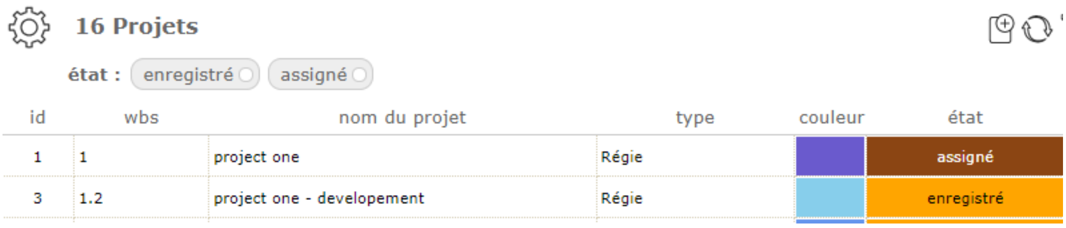


Fig. 28: Status filter

Only existing status are visible if their are used.

Choice one of them and the item list will be filter.

This is a quick filter list by status.

Tags filters

Switch the button **display direct tags filters**

Fig. 29: Tags filter

Only existing status are visible if their are used.

Choice one of them and the item list will be filter.

This is a quick filter list by status.

The advanced filters

Click on the button to display the advanced filters window.

Several sections are available

Active filter

Define the clauses of filter or sort in "Add a filter or sort clause".

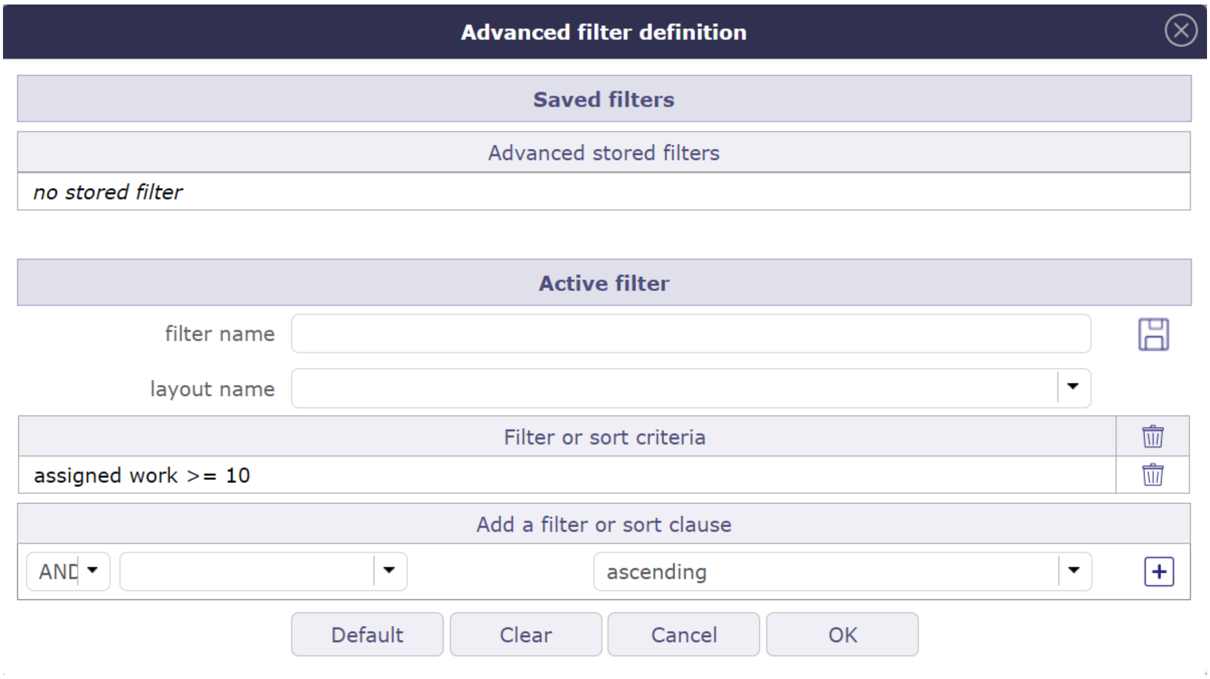


Fig. 30: Advanced filters definition

Select the name of the field, the operator and the value to the clause.

- Click on to add additional criteria.
- Name the filter to save and click on for later reuse.
- Choose a particular layout to apply the filter. The chosen layout will be displayed with the filter applied directly.
- Click on to filter the filter list.
- Click on OK button to apply the filter.
- Click on Cancel button to revert to previous filter.
- Click on Clear button to reset the active filter.

  Logical operator

  Possibility to select the logical operator OR between the criteria of a filter instead of AND.

  Applies logical operator with preceeding criteria (by default AND).

  Be careful, operator AND is applies before OR.

  Dynamic value

  When the selected value is dynamic, then you do not select anything in the list.

  The value will then be entered when the filter is called and will be fully activated when the filter is chosen.

Saved filters

This section allows to manage saved filters.

- Click on a saved filter to retrieve its definition.
- Click on from a saved filter to delete it.

- Click on to reorganize the filters.
- Click on to shared a filter with your employees

When your collaborators share filters, they appear below the list of saved filters.

Click on the list to display all filters and their author.

Fig. 31: Shared filters

List of filters

The filter list allows to select a stored filter.

To see the filter list, move the cursor over the advanced filter icon.

- Click on the filter name to apply.
- Click on **no filter clause** to reset the filter.

The columns

You can define which columns you want to display in the list area for the selected item.

The identifier and the name of the selected element are mandatory fields. They cannot be removed from view.

The display of columns can be defined by and for the user or it can be applied by default for a particular user.

- Use the switches to select or deselect the columns to display.
- Click on OK button to apply changes.
- Click on Reset button to reset the list to its default format.
- Click on " To Manage" button to save column layouts.

The applied definition will be automatically retrieved at the next connection.

Column order

You can move columns using the handles in front of the column name. Click drag to where you want to drop it.

You can move columns directly from the list area.

Click on the column to move and drag and drop where you want it. The icon shows you with an arrow where the column will be placed

Column size

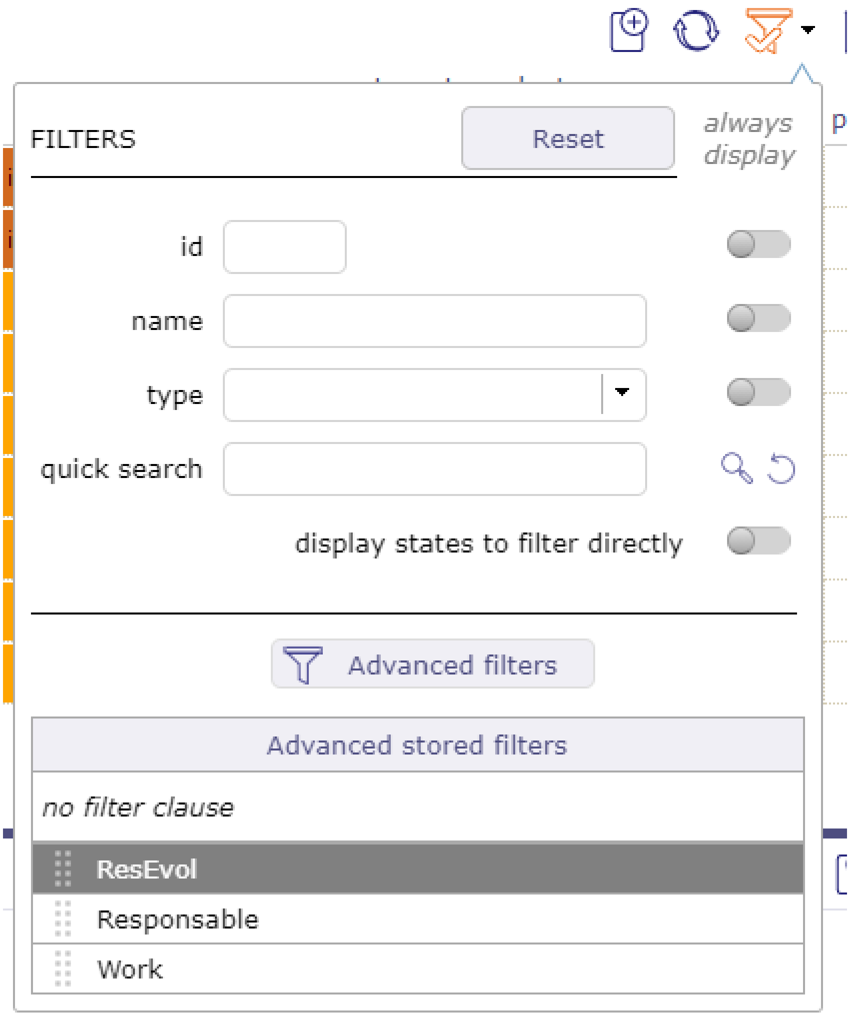


Fig. 32: List of filters

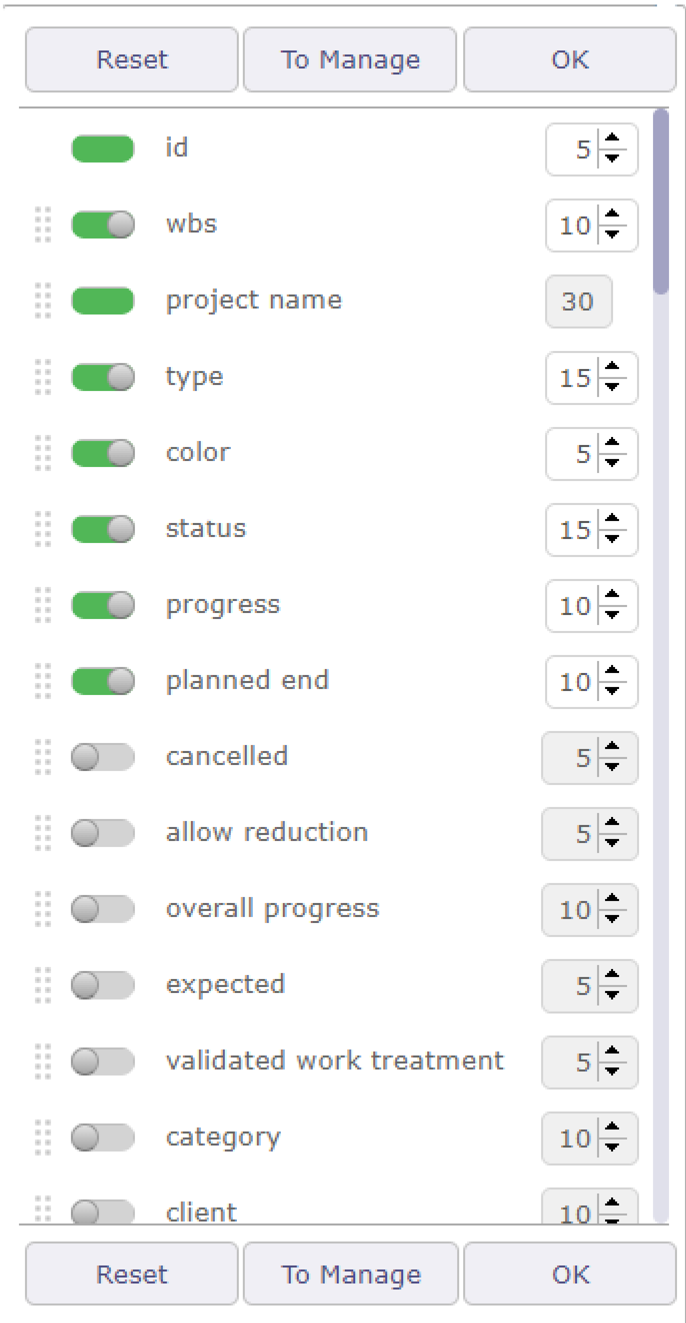


Fig. 33: Columns Organizer

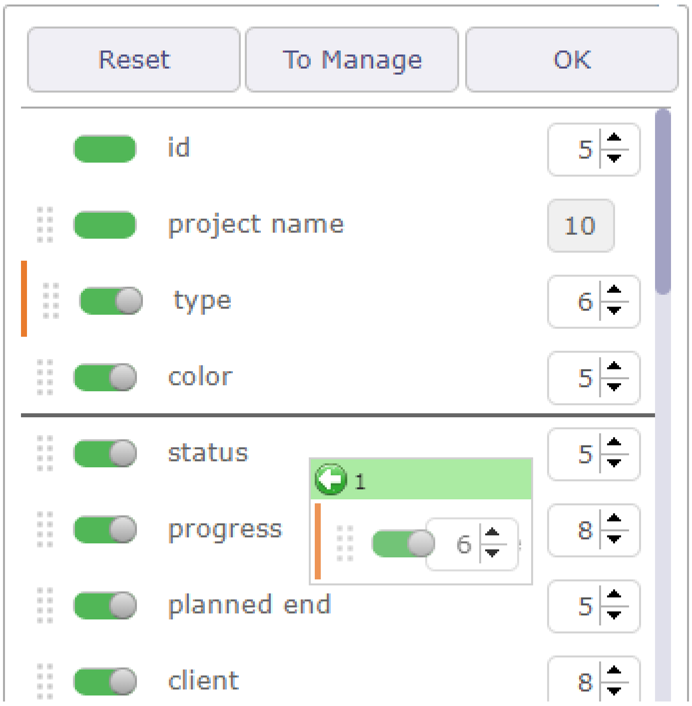


Fig. 34: Drag and drop to move columns

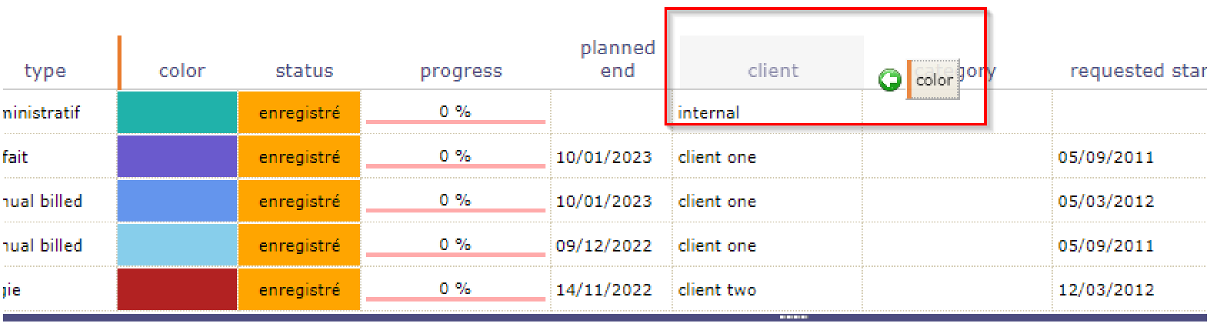


Fig. 35: Dragged and dropped on list area columns

Use the arrows to the right of the column name to increase or decrease the column width.

The width is in % of the total width of the list. The width of the field is automatically adjusted so that the total width of the list is 100%.

The minimum width is 10% and the maximum width is 50%.

You can also position your mouse between two columns and drag to change the width of the selected column.

Important: Total width greater than 100%

- The total width should be limited to 100% maximum.
- The overrun will be highlighted next to the buttons.
- This may cause strange display, across page width, list, reports and PDF export, depending on the browser.

Columns layout

You can save different column layouts according to your needs for the same element.

- Start by selecting the columns you want to put in one of the saved layouts.
- Then, click on the "To manage" button to open the pop-up to save the current layout.

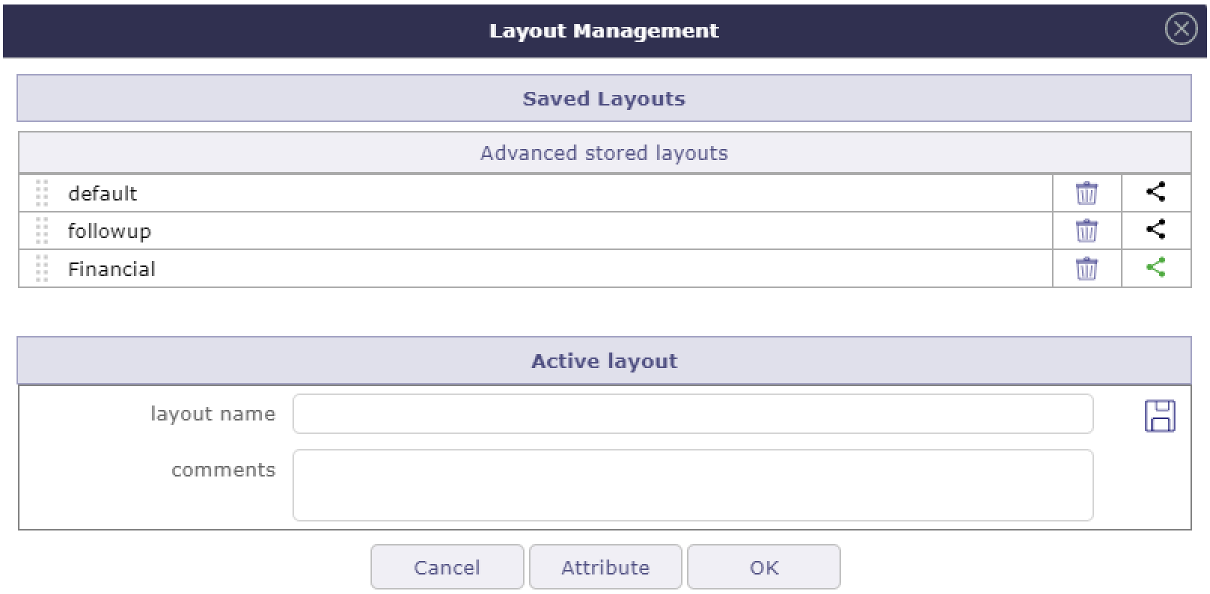


Fig. 36: Layout Management window

- Name the layout and click on to save your layout to the list of advanced stored layouts
- Click on to delete a layout
- Click on to share the saved layout.
- Click on the name of the layout to select it and display the columns relating to it in the list area.

Shared layout

Shared layouts will be visible in the layout management pop-up.

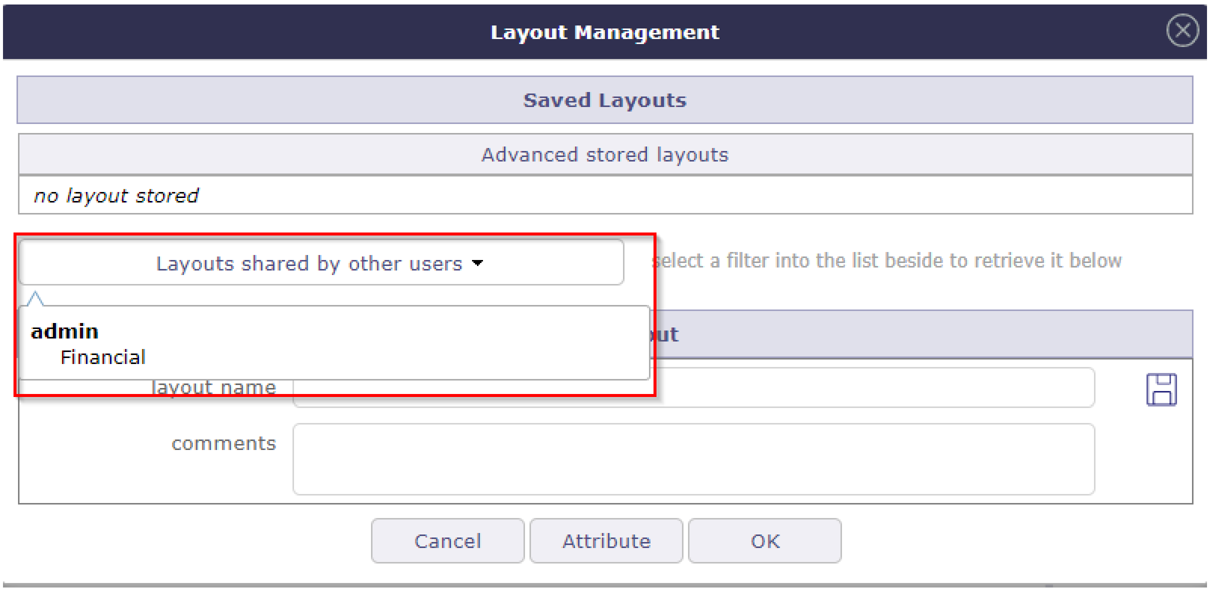


Fig. 37: Shared layout drop-down list

Each layout is presented under the name of the user who created and shared it

Assign layout

You can assign a layout to one or more users depending on your rights.

Select the layout you want to assign by clicking on the handle in front of the name.

Click on the “attribute” button to assign a layout to a user.

Drag and drop from left to right the users who will be assigned the layout

It is possible to register selected users in a group.

Name the group in this dedicated field “save a group”.

Click on to save the group.

Click on to delete the group

Once saved, you can retrieve the groups from the “remind group” dropdown.

Options

Switch the options you are interested in to reapply this layout to each new connection or to assign the selected layout to each new user

---

Note: See the *acces right*

PDF Export to PDF format

Allows to export data of list to PDF format.

Export contains all details and links between tasks.

Export can be done horizontally (landscape) or vertically (portrait) in A4 and / or A3 format with high quality of details

- Click to expand the pop up to full screen

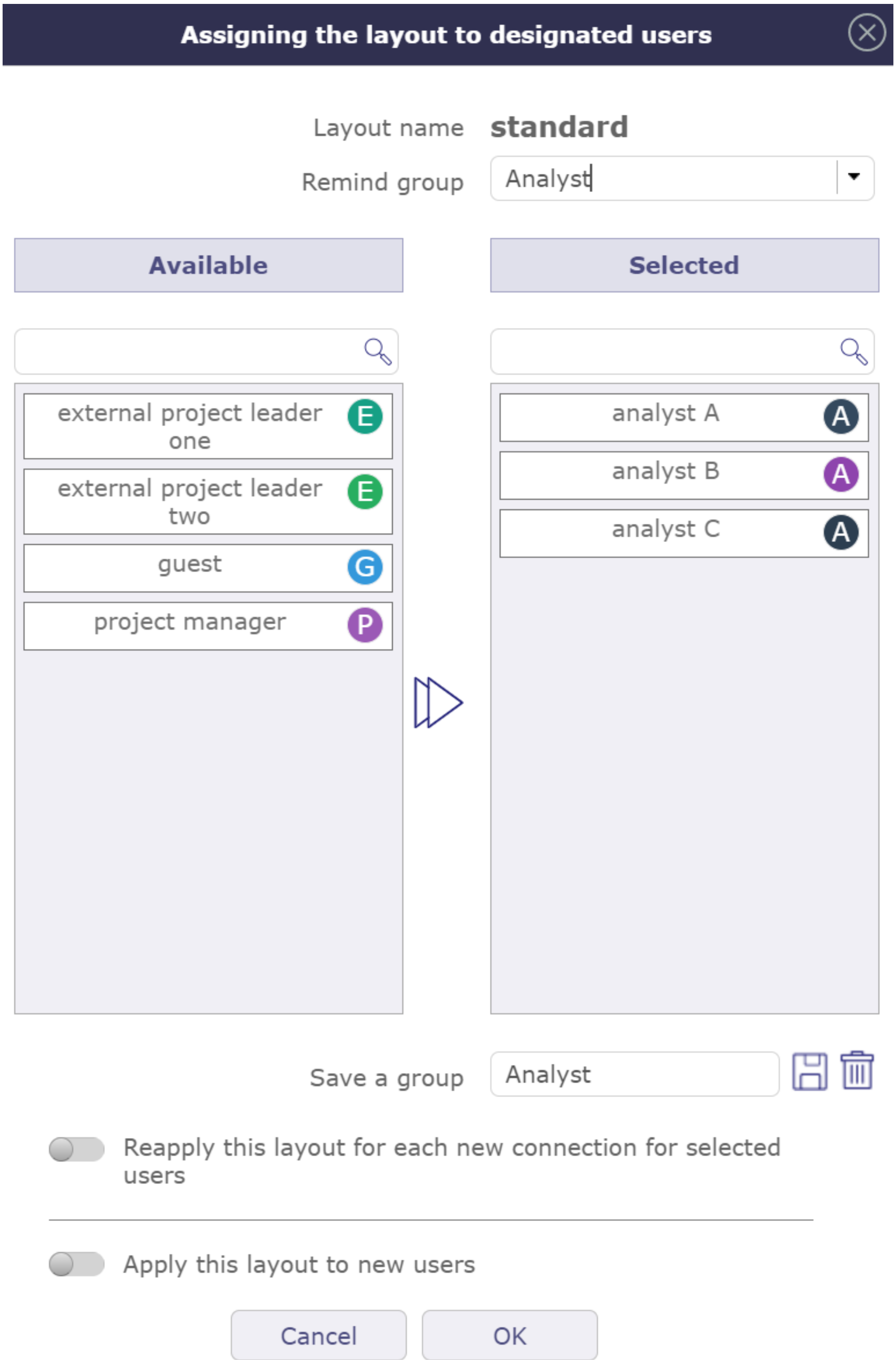


Fig. 38: Assignment popup for a layout

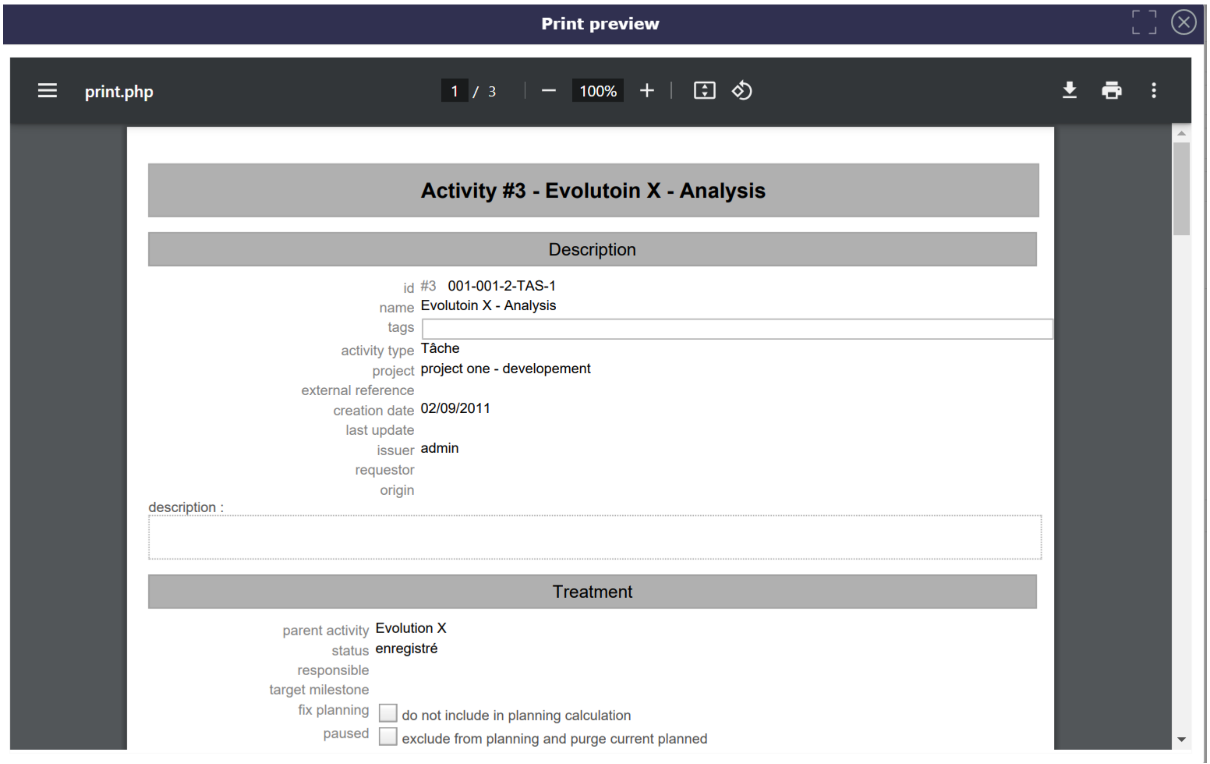


Fig. 39: Pop Up Print PDF

Export to CSV format

This functionality allows to export data of list in a CSV file.

The fields are regrouped and presented in the order as they appear in the item description.

- Click on **OK** button to export data.
- Click on **Cancel** button to close the dialog box.

The export definition is defined for each user.

The same definition can be applied in the next export.

- Use the checkbox to select or unselect all fields.
- Click on **Select list columns** button to restrict selected fields to the ones that are currently displayed in the list.
- For fields that reference another item, you can select to export either the id or the clear name for the referenced item.
- Box checked indicating that HTML tags in a long text field will be kept during export.

Note: Import Datas

The active filter defined will be applied to export data.

The CSV exported files can directly be imported through the import functionality.

See: *Import data*

Multiple update

Allows to update several items in one operation.

Fig. 40: Dialog box - Export

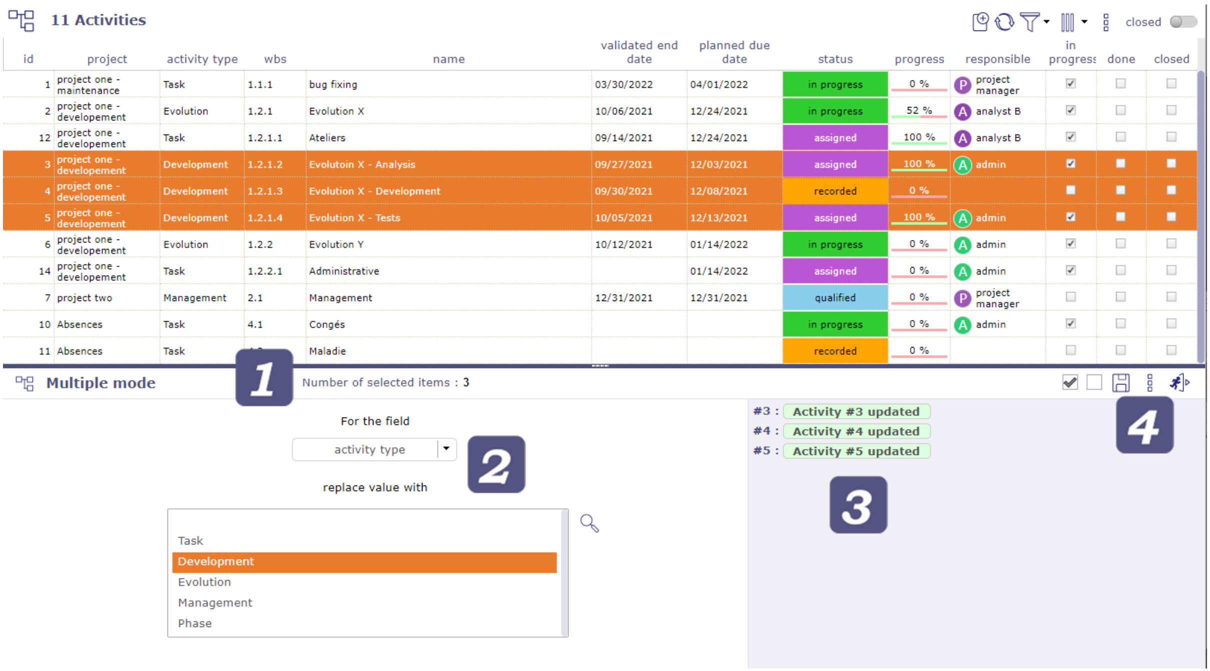


Fig. 41: Multiple mode item selection

Click the items in the list box to select them.

- Shift click to select consecutive items
- Click ctrl to select non-consecutive elements
- The fields that can be updated depends on the selected element.
- The editable fields are sorted in alphabetical order.

Number of selected item

Indicates the number of objects selected in the list area.

Fields choices

Choose in the list the field which must be modified on the selected objects.

When the control is chosen, a list of choices corresponding to the field is displayed.

Then choose the new value of the field.

Click on to apply the new value.

Note:

- Target milestones can be modified with "multiple update" tickets and activity screens
- You can bulk close items that do not have status (assigned, closed, recorded . . .) as resources
- The passwords of all users can be reset at the same time:
  - On the users screen, In the update area, click on the Reset button.
  - An email will be send to the selected users.

Items list

View in this list the operations carried out.

In green the operation is successful and the modification is applied.

In red, an error has occurred, the modification is not applied.

Buttons

- Click on to select all the element in the list area
- Click on to unselect the selected element in the list area
- Click on to apply the modifications
- Click on to access the deletion
- Click on to quit the multiple update mode

Item list

The list displays all items in the same categories and are clickable.

Click on an element to display its detail.

Right click on an element to access the element's context menu.

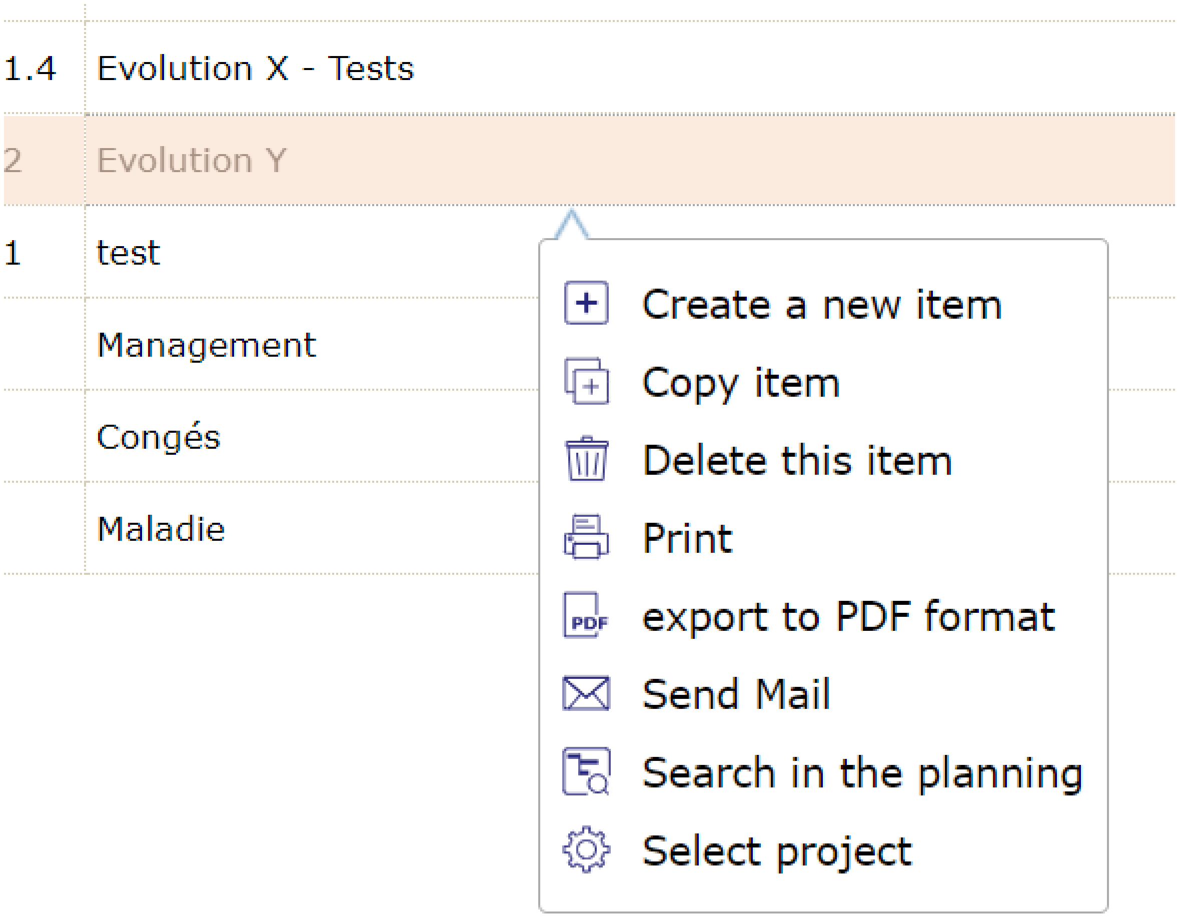


Fig. 42: Element's context menu

5.1.7 Details Area

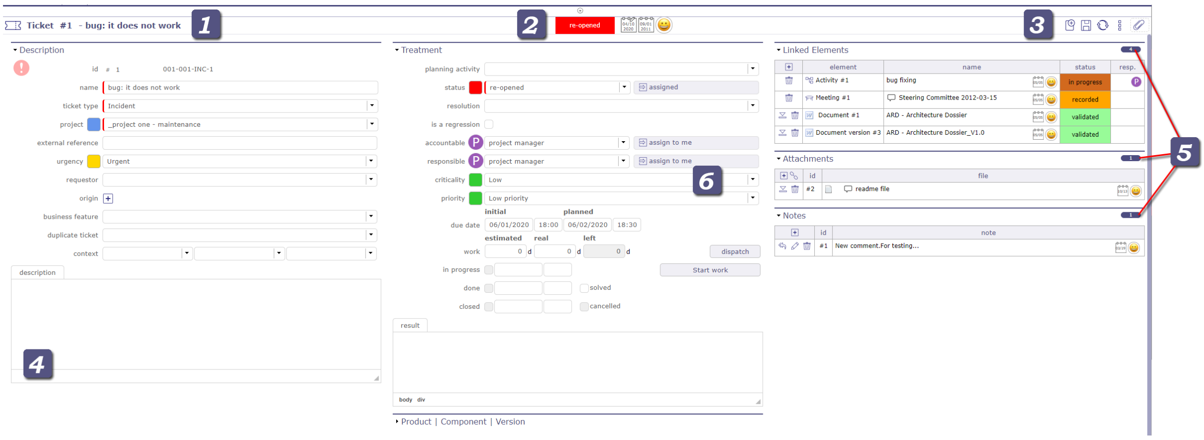


Fig. 43: Details Area

Interface areas:

1 *Item identifier*

2 *Creation information*

3 *Buttons*

4 *Description*

5 *Sections*

6 *Special fields*

1 Item identifier

Identifies the item with the element type and the item id and name.

Each element is identified with a distinctive icon.

2 Creation information

You can see at a glance the status, update and creation information of the element.

- First calendar shows the date of update.
- Second calendar indicates the creation date of the element.

  Calendars appear in red when the modified or created date is today's.

  They appear in yellow when this date is yesterday.

  and in gray when the date is older

The thumbnail corresponds to the creator of the element

See: *Thumbnails*

Note: Administrator can change this informations.

Buttons

Details windows buttons

- *Hide Details element*
- *Create new item*
- *Save the changes*
- *Refresh the display*
- *Copy the current item*
- *Delete the item*
- *Search planning*
- *Cancel changes*
- *Print the details*
- *Export to PDF format*
- *Export to PDF and attach file*
- *Send details*
- *Subscribe detail*
- *Activity Stream*
- *Show history*
- *Show checklist*

> **Warning:** Some buttons are not clickable when changes are ongoing.
> When changes are ongoing, you cannot select another item or another menu item.
> Save or cancel ongoing changes first.

Hide details

This icon is visible on the views of the gantt chart in order to hide the details when it is set to vertical display.

Create a new item

Depending on the screen of the selected item, create a new item in that category.

Save the changes

Save the changes of the current item.

Or use shortcut key `ctrl-s` to save the changes on the current item.

Refresh the display

Allows you to refresh the details windows of the selected element

Copy item

The copy tool allows you to copy an element with multiple options.

You can select only certain information, such as the structure of the project, the meetings, the links or even the attached files and certain elements of the scope…

The information to be copied is different depending on the item selected.

The new item has the copied status by default. the last option allows you to copy the project with the "saved" status directly. In the global settings, planning tab > automation section > you can set this option definitively for each copy. If yes, the box will be automatically checked with each copy.

When copying the project, the data of the closed resources are not copied.

When an element is copied into another element (for example as an estimate copied into an order) an automatic saving of the copy options is carried out. These options will then be offered to you when you make a new copy of the same type.

The last saved options for the last type of element copied will be offered when copying again to a new type of element that has not yet been used.

The copy element with a field with the "unique" attribute automatically adds the extension (1) to respect uniqueness. The number increments with each copy of the same element.

The options displayed in dialog box depends on whether the element is simple or complex.

> Simple element
>
> Simple element (environment parameters, lists,…) can only be copied "as is".
>
> Complex element
>
> Complex element (projects, tickets, activities, financial documents …), it is possible to copy them into a new kind of elements.
>
> For instance, it is possible to copy a Ticket (the request) into an Activity (the task to manage the request) or meeting, periodics meetings as well as test sessions.
>
> For Projects and Activities, it is also possible to copy the hierarchic structure of activities (sub-projects, sub-activities and plannable elements).
>
> Select the elements you want copied from the initial element.

Delete the item

To delete the selected element.

Basically, some items cannot be deleted. For example, if actual work has been saved on an activity. The latter, as well as the project on which it depends, cannot be deleted.

To be able to delete these elements, go to the *Access Rights* menu in the *Specific access* and choose YES in can force the deletion of the actual work in the "specific update rights" section.

Search in the planning (Gantt view)

When you are on a scheduleable element (ticket, activity, milestone, etc.) click on the schedule search icon to automatically access the schedule by targeting the previously selected element.

If the element is closed on the Gantt view then the display will automatically open the parent activity or subproject.

Undo the change

The button is clickable only when changes are ongoing.

Allows you to undo changes made to the current element

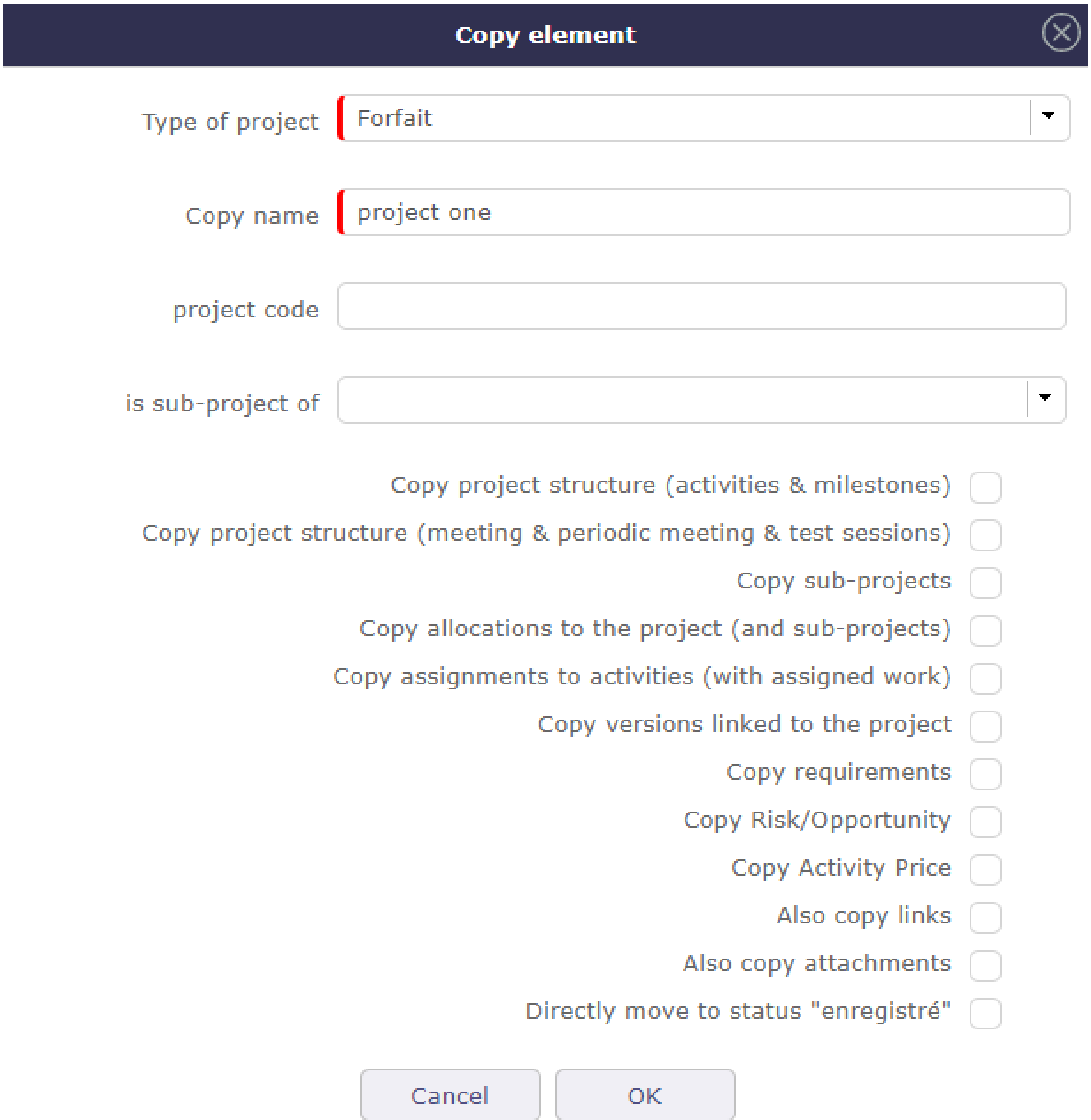


Fig. 44: Copy project

Print the details

To obtain a printable version of the details of the current element.

Export to PDF format

To get a printable version of the details in PDF format.

Export to PDF format and attach files

Allows to export the data of the selected element in PDF format and once generated, attaches the file in the section of the attached files of the element.

The export contains all the details and the links between the tasks.

Export can be done horizontally (landscape) or vertically (portrait) in A4 and/or A3 format with high quality details

Email detail

Allows to send an informative email to defined recipients list.

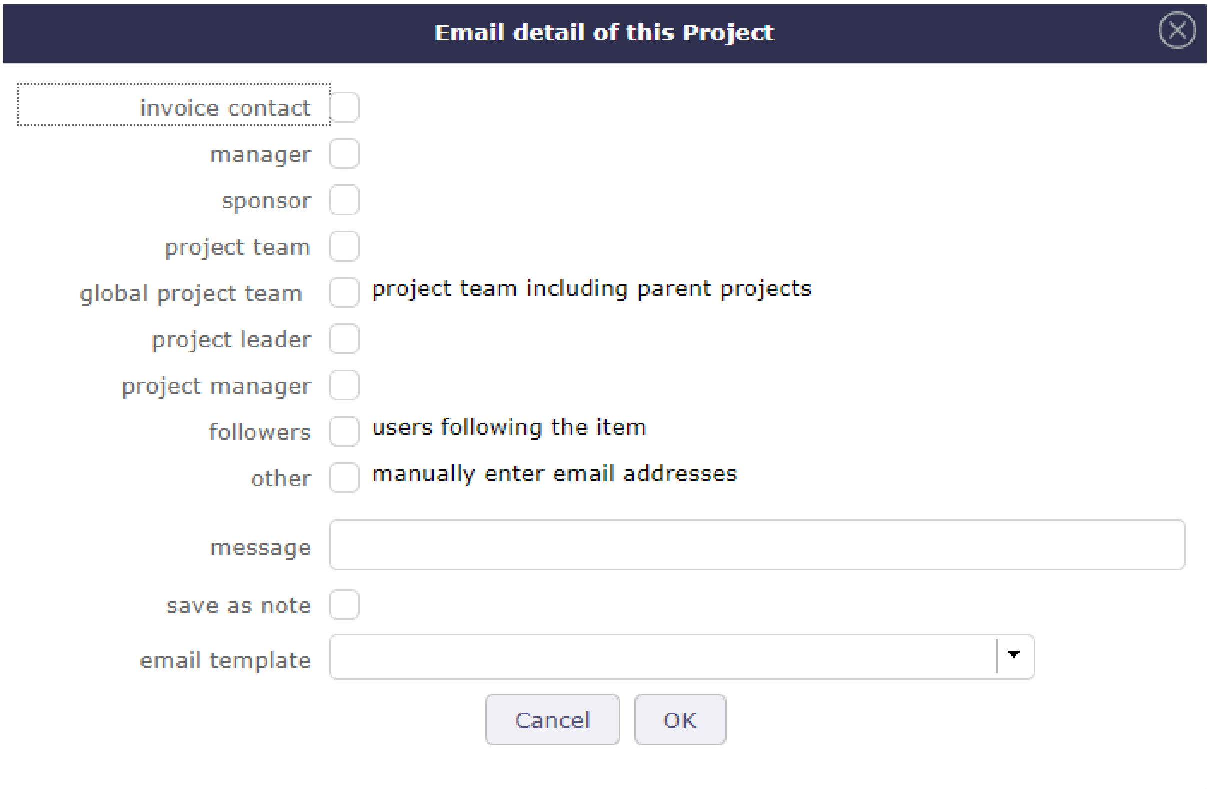


Fig. 45: Email details dialog box

The list is defined according to the role of the recipient.

See: *ProjeQtOr roles*

Flag on the role checkbox to define the recipients list.

Checkbox other

Flag on the checkbox other to manually enter email addresses.

When sending an email, the address (es) entered in "other" remains in memory and will be proposed during the next mailing

Use commas or semicolons to separate addresses.

Message

The message that will be included in the body of the email, in addition to a complete description of the item.

Save as note

Flag on to indicate the email message will be saved as a note.

Email Template

You can choose an email template even without having predefined it in the settings.

To create and view templates. See *Email Templates*.

Files to attach to email

Attachments for the item appear in the attachment table. If the item has no files attached then the table is not visible.

The maximum size of attached files must be entered in the global parameters in the Mailing tab. The size indicated is in bytes unless you indicate otherwise. see: *Global parameters*

When you check a file to send the size of the latter is displayed at the top right of the table.

- If several files are selected, then the total size of these files is calculated and displayed.
- If the total size

Subscribe detail

Allows to subscribe to tracking of an item.

This icon is checked when you subscribed .

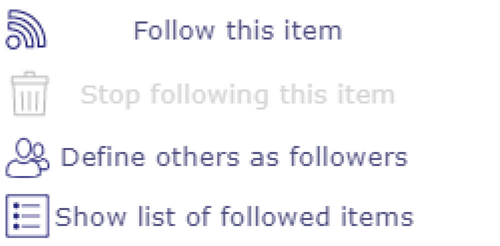


Fig. 46: Subscribe detail

When a user "subscribes" to the project, he will receive notifications "to subscribers" for all elements of the project

Ability to subscribe a third party user to the tracking of an element (according to configurable rights).

You can drag the name of selected ressources and drop them on the right column for subscribe them.

Display of list of followed items

You can view the list of followed items in two ways:

- click on the button "View the list of subscriptions" in the subscription menu
- In the user settings of the *Automation section*, click on the "show list of followed items" button.

Note: email

Possibility to send an email to users following the item

When unitary sending detail or on automatic sending or on indicator.

contacts

You can see the items followed by your contacts

Fig. 47: Suscribe for other

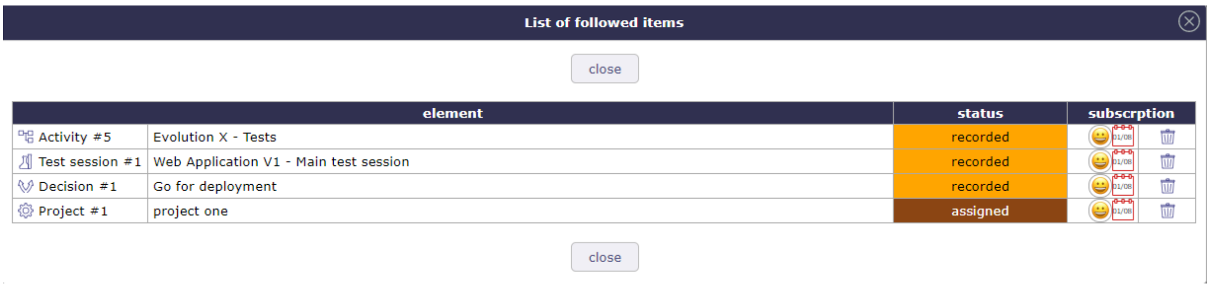


Fig. 48: Display list of followed items

see: *Contacts*

Activity Stream

This icon allows you to display the Stream activity in a unique way on the selected element.

Unlike the Activity Stream icon in the Display layout menu which activates it globally on all screens.

The last position of the activity stream is always saved.

See: *Activity Stream*

History of changes

All the changes items are tracked.

They are stored and displayed on each item.

On creation, just an insert operation is stored, not all the initial values on creation.

Table 1: Fields of changes

Field	Description
Operation	The operation on the item (insert or update).
Data	The field modified.
Value before	The value of the field before the update.
Value after	The value of the field after the update.
Date	Date of change operation.
User	Name of the user who operated the change.

Displaying the history of changes

- The user parameter "Display history" allows to define whether the history of changes appears in a section or in a dialog box.
- If the value "On request" is set, the button appears on the detail header window.
- Click on to display the history of changes.
- If the value "Yes" is set, the "Change history" section appears in the detail window.

Show/Hide work

- This button allows to show or hide work changes done in "Real Work Allocation".
- For section "Change history" the display of work is defined in user parameter "Display history".

Show / hide the checklist

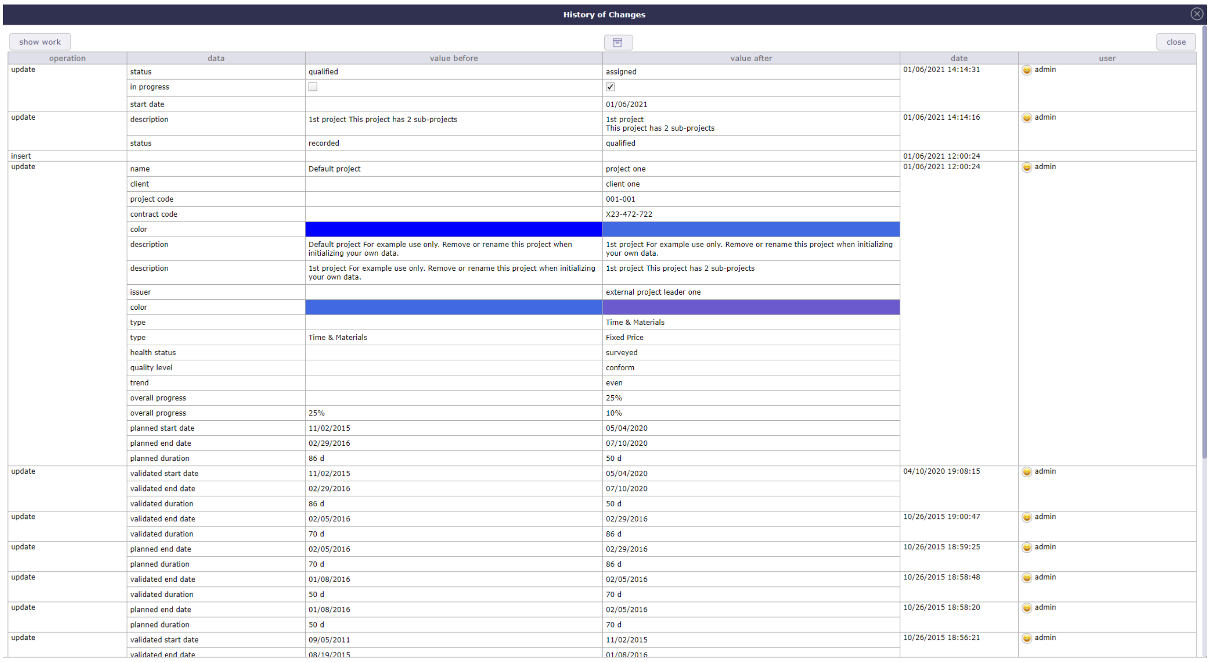
This button is only displayed if the "display checklist" parameter in the user settings is set to "on request" status

More details: *Checklists*

Drop file area

This area allows to add an attachment file to the item.

- Drop the file in the area.
- Or click on the area to select a file.



History of Changes

show work close

operation	data	value before	value after	date	user
update	status	qualified	assigned	01/06/2021 14:14:31	admin
	in progress	☐	☑		
	start date		01/06/2021		
update	description	1st project This project has 2 sub-projects	1st project This project has 2 sub-projects	01/06/2021 14:14:16	admin
	status	recorded	qualified		
insert				01/06/2021 12:00:24	
update	name	Default project	project one	01/06/2021 12:00:24	admin
	client		client one		
	project code		001-001		
	contract code		X23-472-722		
	color				
	description	Default project For example use only. Remove or rename this project when initializing your own data.	1st project For example use only. Remove or rename this project when initializing your own data.		
	description	1st project For example use only. Remove or rename this project when initializing your own data.	1st project This project has 2 sub-projects		
	issuer		external project leader one		
	color				
	type		Time & Materials		
	type	Time & Materials	Fixed Price		
	health status		surveyed		
	quality level		conform		
	trend		even		
	overall progress		25%		
	overall progress	25%	10%		
	planned start date	11/02/2015	05/04/2020		
	planned end date	02/29/2016	07/10/2020		
	planned duration	86 d	50 d		
update	validated start date	11/02/2015	05/04/2020	04/10/2020 19:08:15	admin
	validated end date	02/29/2016	07/10/2020		
	validated duration	86 d	50 d		
update	validated end date	02/05/2016	02/29/2016	10/26/2015 19:00:47	admin
	validated duration	70 d	86 d		
update	planned end date	02/05/2016	02/29/2016	10/26/2015 18:59:25	admin
	planned duration	70 d	86 d		
update	validated end date	01/08/2016	02/05/2016	10/26/2015 18:58:48	admin
	validated duration	50 d	70 d		
update	planned end date	01/08/2016	02/05/2016	10/26/2015 18:58:20	admin
	planned duration	50 d	70 d		
update	validated start date	09/05/2011	11/02/2015	10/26/2015 18:56:21	admin
	validated end date	08/19/2015	01/08/2016		

Fig. 49: Dialog box - History of changes

Description

In this section many fields are informative.

However, it contains some crucial information for creating the element: the name and type.

Some fields and functions in this section can be disabled, such as tags. And others have complex behaviors like description with an edit field

Tags Management

This is a way to display a list of tags allowing rapid filtering of project, activity and ticket elements

You can enter as many tags as necessary on the dedicated line under the element name.

- To validate the entry, click on the enter key.
- An autocompletion system is available if the tag already exists or if the entry contains the same letters as an existing tag.
- Click the down arrow on your keyboard to display the full list of existing tags
- switch to the enable position to display the tags in the list box.
- You can display the existing tags on the list area
- Use tags to filter the list display based on the selected tags.

Text editors

Text editors are available for editing of long text fields like description, results, notes, …

Selection of text editor can be done in User and Global parameters screens.

CK Editor

The most advanced web editor.

Spell checker available with this text editor.

Possibility to deactivate the SCAYT spell checker. It can be modified by each user in user parameters.

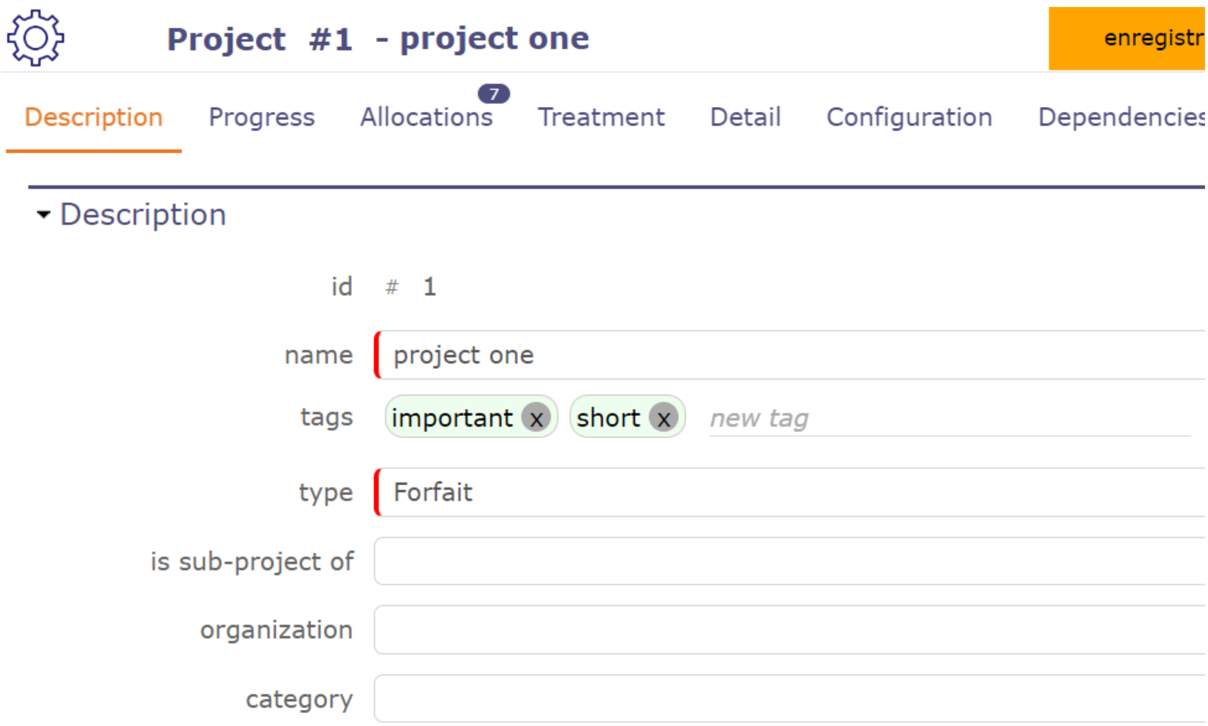


Fig. 50: Tags area

CK editor inline

As CK Editor.

Activated only when needed.

Note:

- CK editor inline height, keep the size of CK editor.
- Click on the text zone to display toolbar.
- Can not use it in fullscreen mode.

Plain text editor

- Conventional text input.
- Text zone is extendable.

Sections

- The fields are regrouped under a section.
- All sections can be folded or unfolded, clicking on the section title.

  Columns

  The sections are organized in columns.

  Number of displayed columns can be defined in user parameters.

  Common sections

  Some sections are displayed on almost all screens. (See : *Common sections*)

  Item count in the list

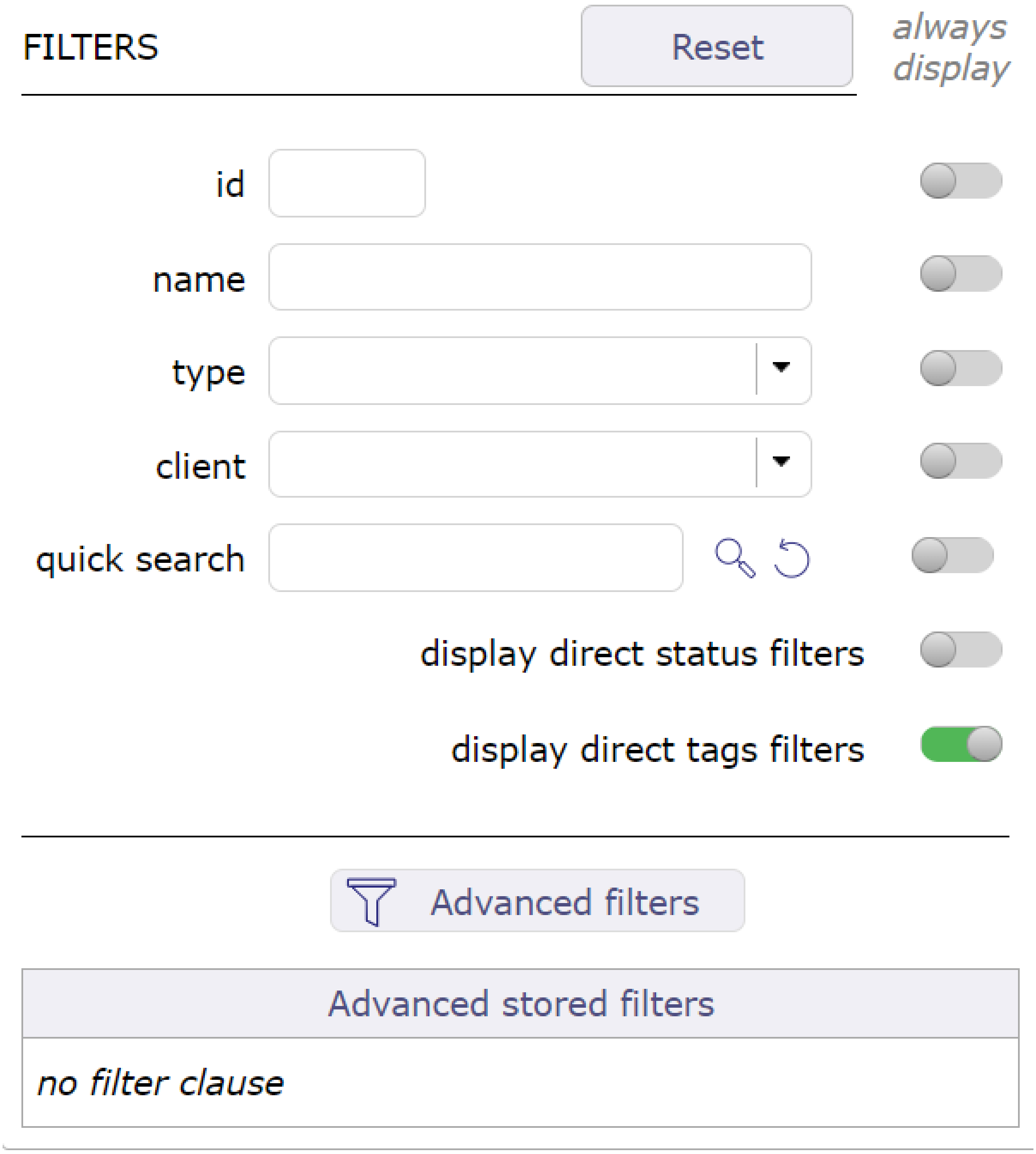


Fig. 51: Filter to display tags

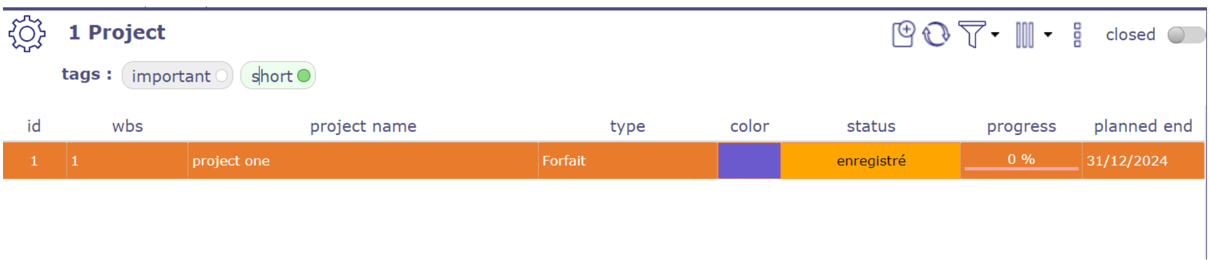


Fig. 52: Tags displayed

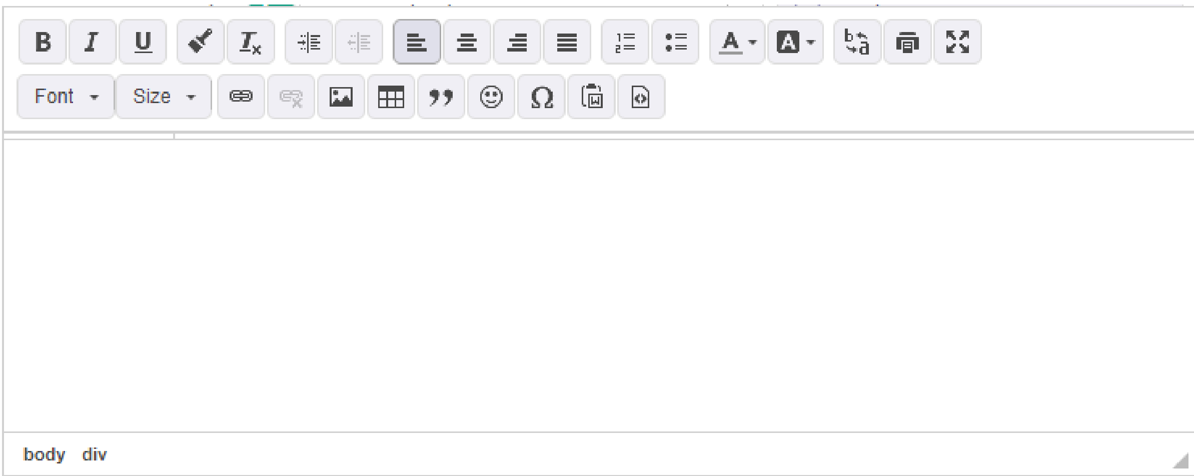


Fig. 53: CK Editor - Ability to resize the CK Editor height, the size is saved

When the section contains a list, the item count is displayed at right of the header.

Fig. 54: Header section

Thumbnails on items in the list

Thumbnails are displayed on item row to present field values in graphical format.

See: *Thumbnails*.

Go to selected item

In a list, possibility to go directly to an item by clicking on its fields.

Cursor change to on clickable fields.

Special fields

Accelerator buttons

ProjeQtOr provides you with shortcut buttons allowing you to more easily and quickly manage the information in the fields.

Move to the next status

This button allows to skip to the next status without having to open the list. The next status is defined by the workflow linked to the type of element.

Fig. 55: Move to next status

The mouse tracking over this colored button allows to show the workflow.

It is possible to define events when a state passes.

If a field is required for the transition from one state to another then you will be automatically redirected to the required field.

Regardless of the layout and presentation of your screens

Assign to me button

This button allows to set the current user in the related field.

Combo list field

Combo list field allows to search, view or create item associated with the field.

The access to view or create item depends on your access rights. Some buttons can be not available.

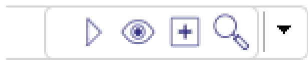
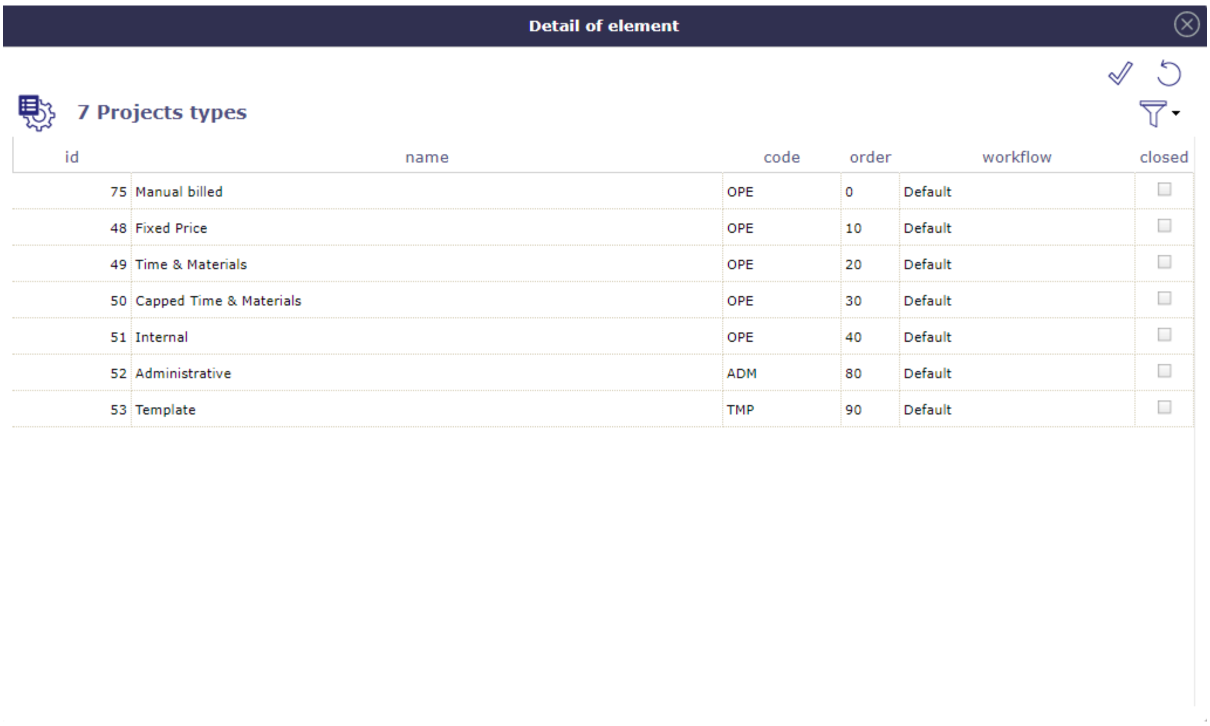


Fig. 56: Combo list

- Click on will directly go to the selected item.
- Click on to display the details of the selected item.
- Click on to directly add a new element corresponding to the selected field.
- Click on to search for an element among those existing corresponding to the selected field.


Detail of element

7 Projects types

id	name	code	order	workflow	closed
75	Manual billed	OPE	0	Default	
48	Fixed Price	OPE	10	Default	
49	Time & Materials	OPE	20	Default	
50	Capped Time & Materials	OPE	30	Default	
51	Internal	OPE	40	Default	
52	Administrative	ADM	80	Default	
53	Template	TMP	90	Default	

Fig. 57: Dialog box - Item search

- Click on to re-select an item.
- Click on to close the dialog box.

- Click on to filter the items list

Some elements is possible to select several items, use `Control` or `Shift`.

Origin field

The origin of an element has no impact on it.

This is a memo, pure information.

It can be filled in automatically during a copy or manually.

Fig. 58: Origin field

- This field allows to determine the element of origin.
- The origin is used to keep track of events (ex.: order from quote, action from meeting).
- The origin may be selected manually or automatically inserted during copying an element.

  Origin element

  - Click on to add a orgin element.
  - Click on to delete the link.

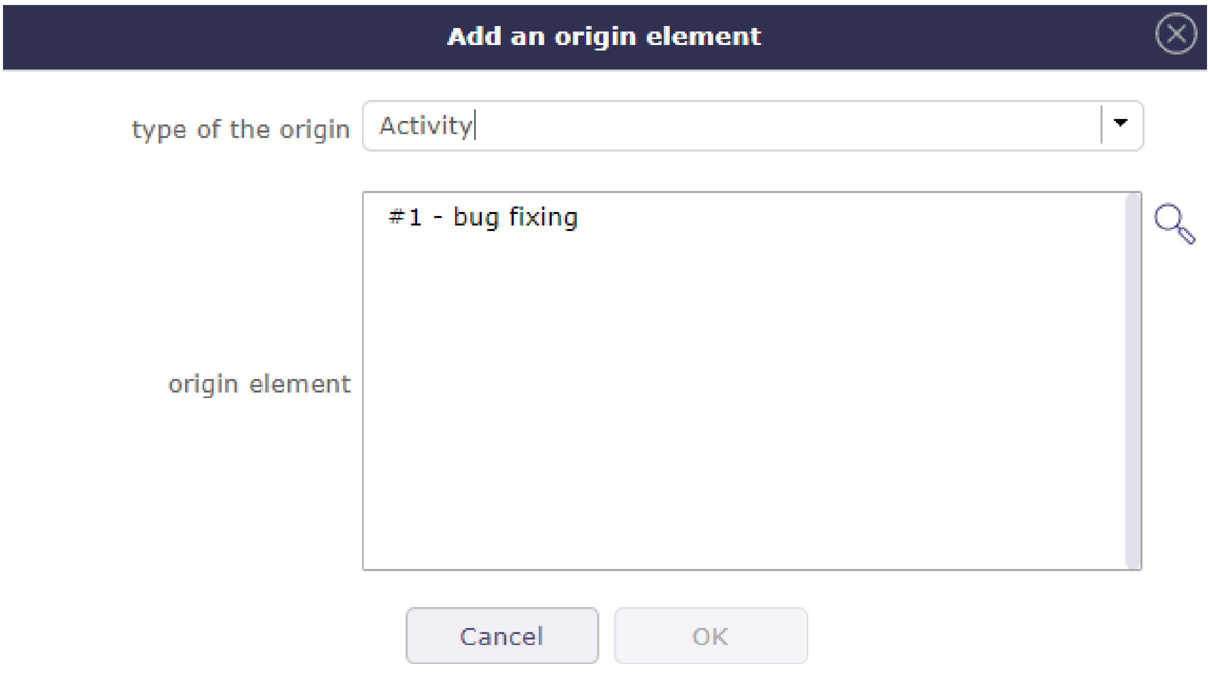


Fig. 59: Add an origin element

  - Choose the type of element from the drop-down list.
  - Select the item from the corresponding list

Set color field

- This field allows to set the color of an item.
- Used to differentiate items in list or report.
- Click on list of colors to select.
- Click on “Reset” button to erase.

Fig. 60: Set color field

- Displays a colored circle for field colorable.
- Some list of values has a field to define a color.
- A color is defined for each value.

Thumbnails

Thumbnails are a graphical representation of the field value.

Date

- Displays the date of creation or update of the item.
- Move cursor over thumbnail to display the date.

The Item have been created or updated today.

The Item have been created or updated recently.

Default view.

User

- Portrait of the user. Displays if it has created or updated an item.
- If no photo is saved, an icon will automatically be generated.
- The letter is chosen according to the real name. This is his initial.
- Move the cursor over the thumbnail to display the user’s name and photo in its original size.
- The user who does not have a photo automatically obtains a thumbnail with the first letter that makes up the real name.

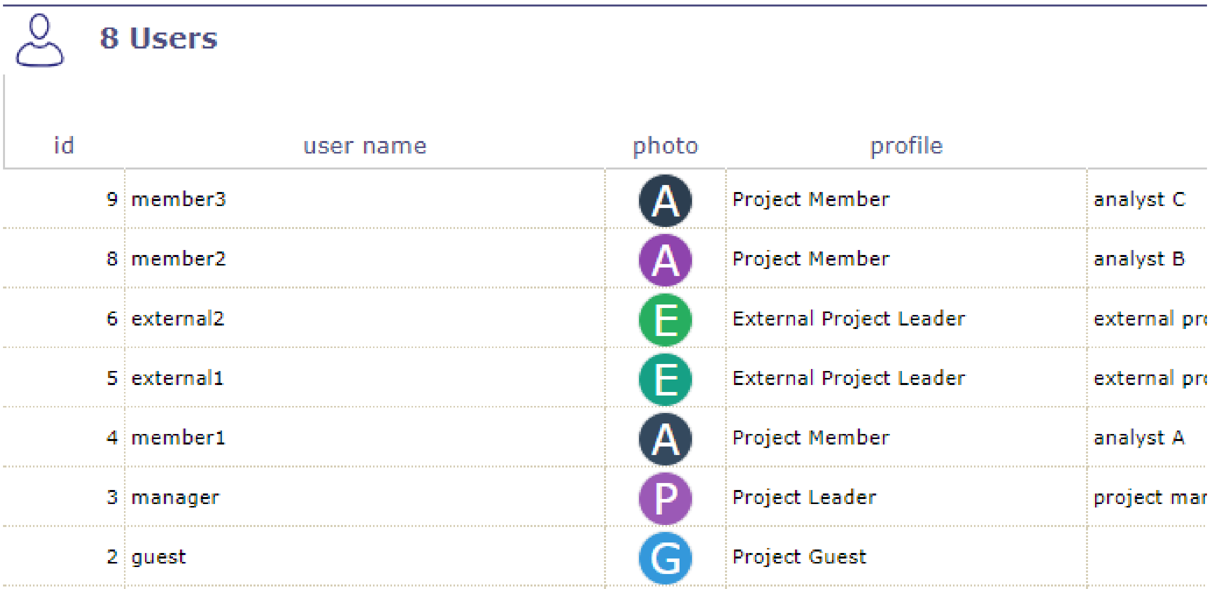
Comment

- Indicates a comment or description is defined.
- to add a new note or comment
- Move cursor over thumbnail to display text.

Privacy

Indicates the visibility level defined in a note or attachment.

- Private contents.
- Visible to team.



8 Users

id	user name	photo	profile	
9	member3	A	Project Member	analyst C
8	member2	A	Project Member	analyst B
6	external2	E	External Project Leader	external pr
5	external1	E	External Project Leader	external pr
4	member1	A	Project Member	analyst A
3	manager	P	Project Leader	project mar
2	guest	G	Project Guest	

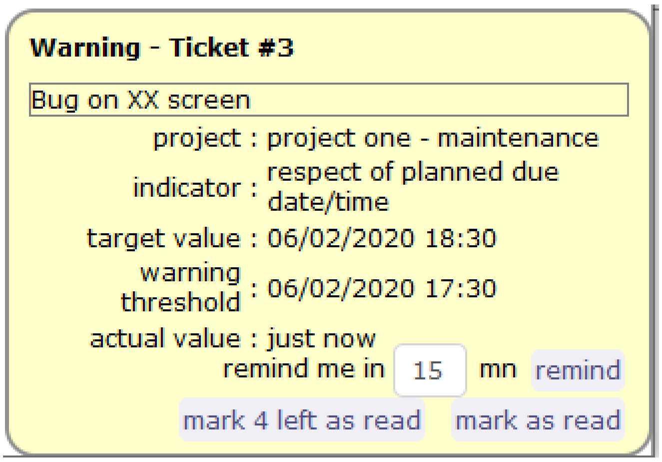
Fig. 61: list of users without personal photo

Message pop-up

Users may receive messages pop-up, displayed on the bottom right corner of the screen.

Three kinds of message may be displayed:

- Information
- Warning
- Alert



Action on message pop-up

Three possible actions:

- Select to remind you in a given number of minutes (message will close and appear again in the given number of minutes).
- Mark it as read to definitively hide it.
- Mark as read all remaining alerts (the number appears on the button).

Note: On *Alerts* screen, the user can read the alert messages marked as read.

Alert on detail window

On indicatorable items, you may see a small icon on top left of the detail of the item.

Just move the mouse over the icon to display, which indicator has been raised.

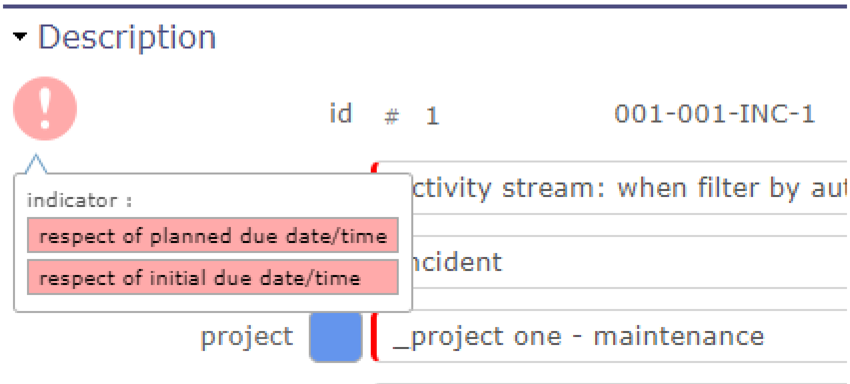


Fig. 62: Alert on detail window

Alert on Today screen

Just move the mouse over the red line to display, which indicator has been raised.

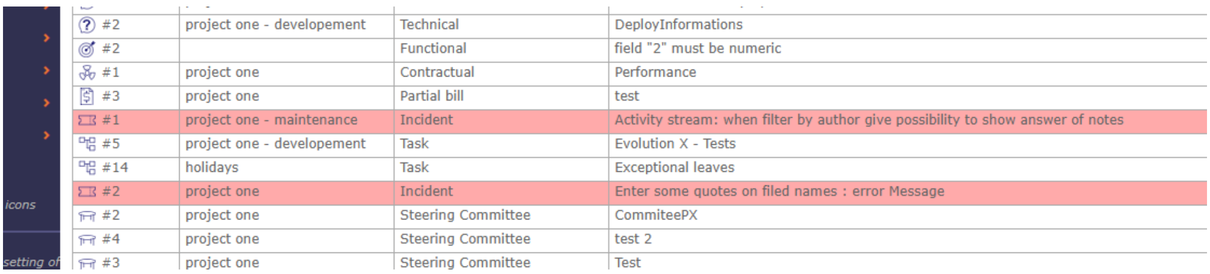


Fig. 63: Alert on Today screen

5.2 Common sections

Some sections are displayed on almost all screens in the detail area.

All manipulations on an element must be saved to move to another element.

If you do not save them, a message asks you to confirm either the saving, to cancel the modifications, or to continue the modifications on this same element.

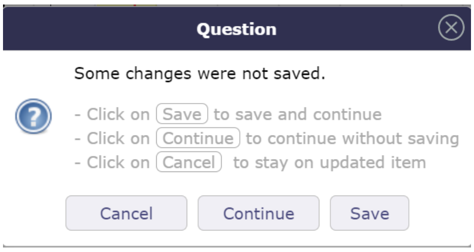


Fig. 64: Back up, cancel or continue on your data

- The "enter" key will save the changes
- The "esc" key will cancel the message and you will continue editing on the current element

Those sections allows to set information or add information to an item of the element.

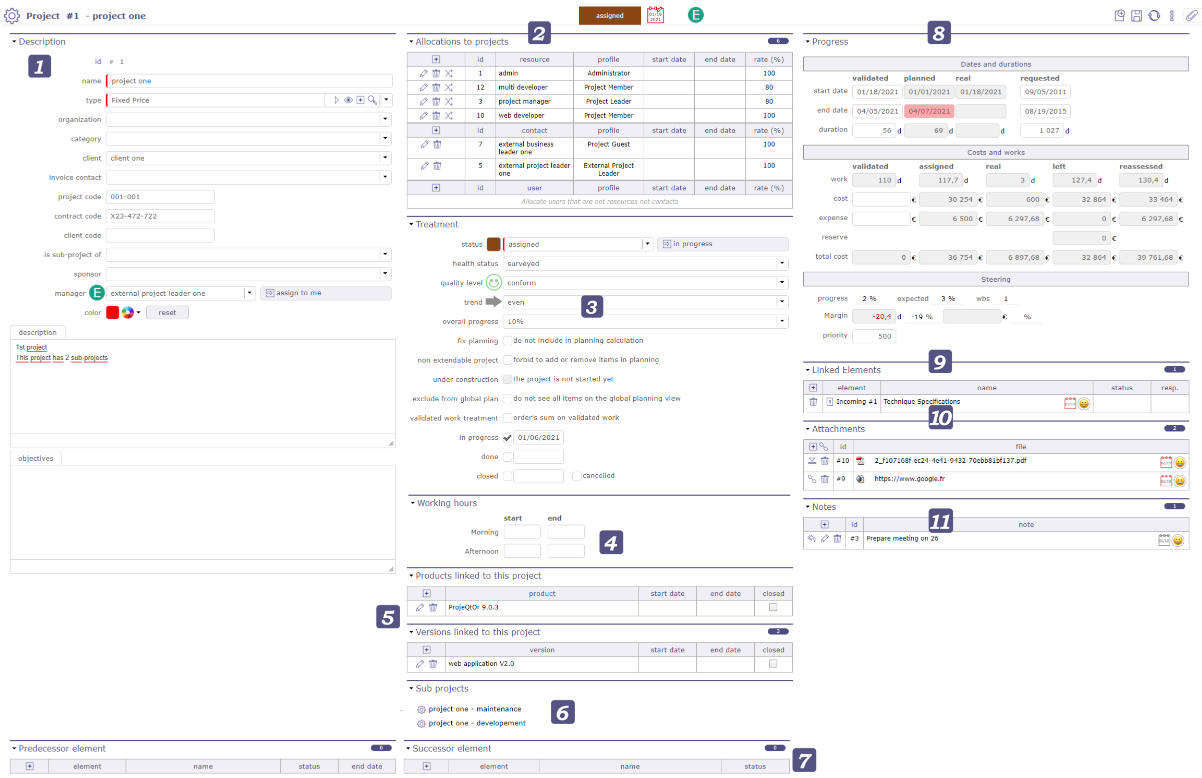


Fig. 65: A view of ProjeQtOr's global interface

Interface areas:

- *Description section*
- *Allocations section* [Project]
- *Assignment section* [Activity]
- *Treatment section*
- *Configuration*
- *Sub-Project and Sub-Activity*
- *Predecessor and Sucessor*
- *Progress section*
- *Linked Elements section*
- *Attachments section*
- *Notes section*

5.2.1 Description section

This section allows to identify items of the element.

Each element has its own description section. The description fields are not the same depending on the element or even its type.

Most of the fields available for each element offer the possibility of having a search view and an accelerator to access other elements.

Status filters

Switch the button **display direct status filters**

Fig. 66: Status filter

Only existing status are visible if their are used.

Choice one of them and the item list will be filter.

This is a quick filter list by status.

Tag management

For project, activity and ticket elements, you can use a tag system.

This involves being able to enter keywords which will allow you to restrict the display of your lists by clicking on the desired tags.

Open the filters to allow the display of tags directly on the element title bar.

See: *Combo list fields*

Click on tle field to display the existing tags.

You can also use the up and down arrows to display and move through the drop-down list of already existing tags.

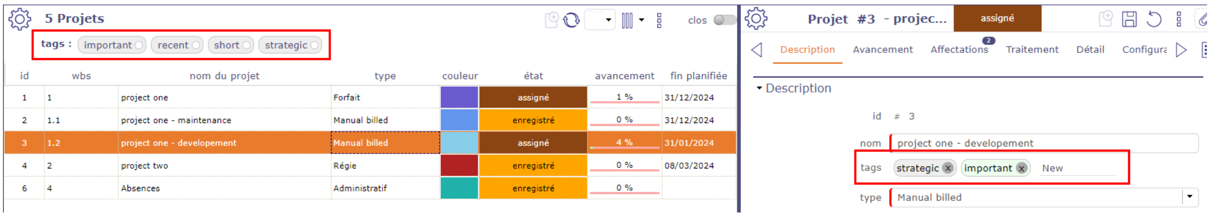
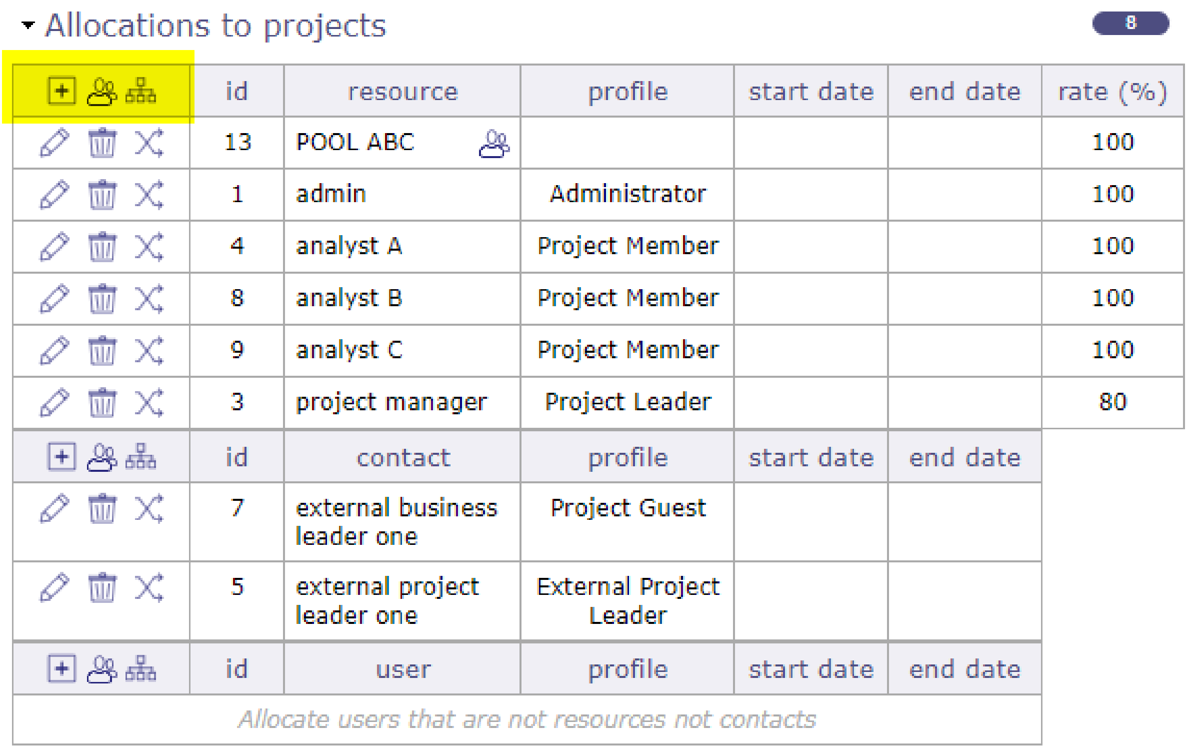


Fig. 67: Tags management

5.2.2 Allocations section



Allocations to projects

	id	resource	profile	start date	end date	rate (%)
	13	POOL ABC				100
	1	admin	Administrator			100
	4	analyst A	Project Member			100
	8	analyst B	Project Member			100
	9	analyst C	Project Member			100
	3	project manager	Project Leader			80

	id	contact	profile	start date	end date
	7	external business leader one	Project Guest		
	5	external project leader one	External Project Leader		

	id	user	profile	start date	end date
Allocate users that are not resources not contacts					

Fig. 68: Allocation section

This section allows to manage resource allocation to projects.

Concepts

- *Profiles definition*
- *Allocation to project*

Field	Description
Id	Unique Id for the allocation.
Resource	Name of the allocated resource.
Profile	Selected profile. Determine the profile on this project. A resource can have a different profile on each of the projects to which it is assigned.
Start date	Start date of allocation. The software will take these dates into account for the work calculation.
End date	End date of allocation. The software will take these dates into account for the work calculation.
Rate	Allocation rate for the project (%).

- Click on to create a new allocation.
- Click on to allocate a team on the project
- Click on to allocate an organization on the project
- Click on to update an existing allocation.
- Click on to delete the corresponding allocation.
- Click on to *replace resource* on the corresponding allocation.

Closed allocation are indicated with a gray background.

An alert is generated when deleting self allocation

The contact and users sections only display those who only have this role.

A special icon is placed on resource rows representing a pool of resources.

Click on the resource name to go directly to the selected resource.

Allocation rate

The allocation rate on the resource calculates the percentage of allocation to be taken into account for the planning according to the calendar of the resource.

For example, if the resource has a standard France calendar, then the resource works 5 days a week.

- His assignment rate on the project is 100%, the resource can be scheduled without a ceiling and can possibly work on this project up to 5 days a week.
- His assignment rate on the project is 50%, so the resource can be scheduled for a maximum of 2.5 days per week on this project.
- His assignment rate on the project is 20% so the resource can be scheduled for a maximum of 1 day per week on the project

Replace resource

- Replace resource on an allocation: all tasks assigned will be transferred to the new resource with assigned and left work.
- Work done on tasks still belongs the old resource.

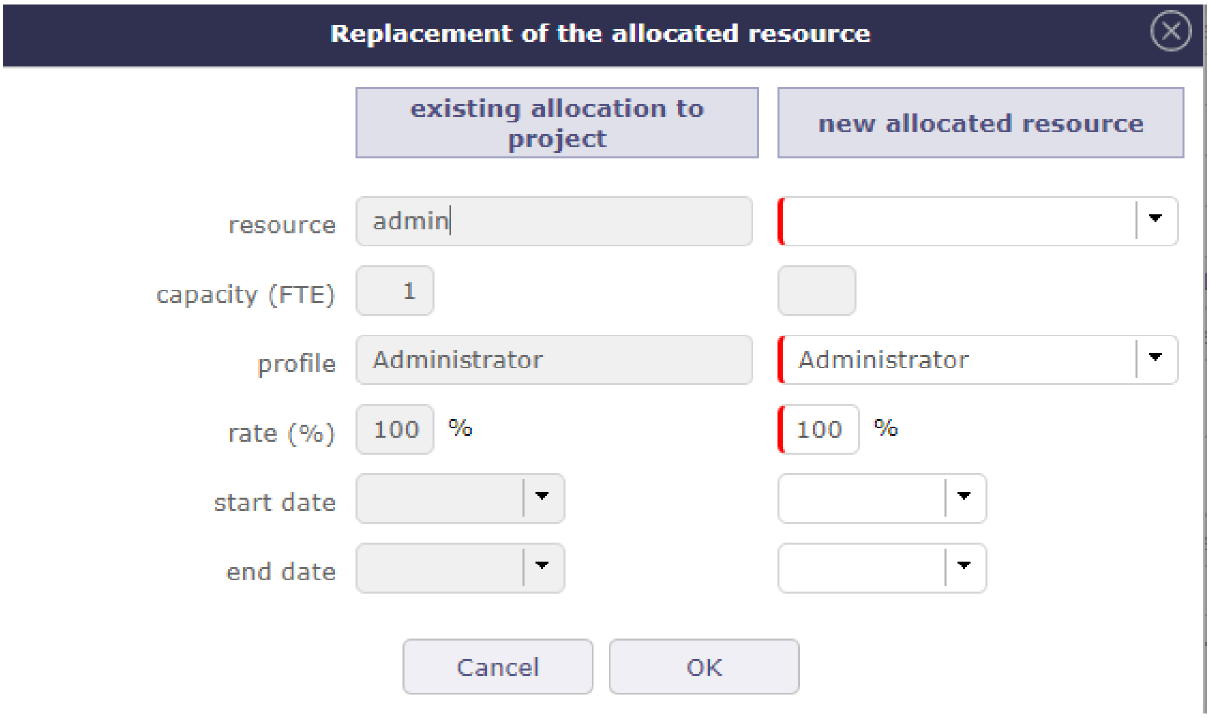


Fig. 69: Replace allocation dialog window

Table 2: Replace allocation dialog box - Required field

Field	Description
Resource	Resource list.
Capacity (FTE)	The capacity of the resource selected
Profile	Profile list.
Rate	Rate (in %) of the allocation to the project
Start date	Start date of allocation
End date	End date of allocation

5.2.3 Assignment section

Concepts

- *Resource function and cost*
- *Period & Rate selection*

This section allows to manage assignment of resources to tasks.

Assigning a resource to a task allows you to define its function on the latter and its daily cost (if defined when creating the resource) according to the workload you assign to it.

A screen dedicated to assignments is available to display all assignments combined.

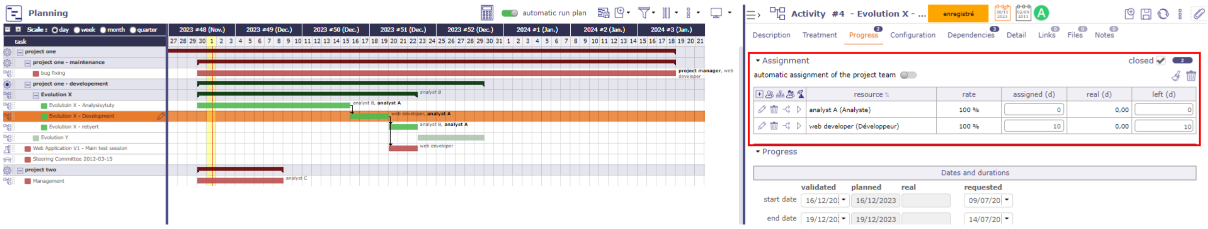


Fig. 70: Activity page with table of assigments

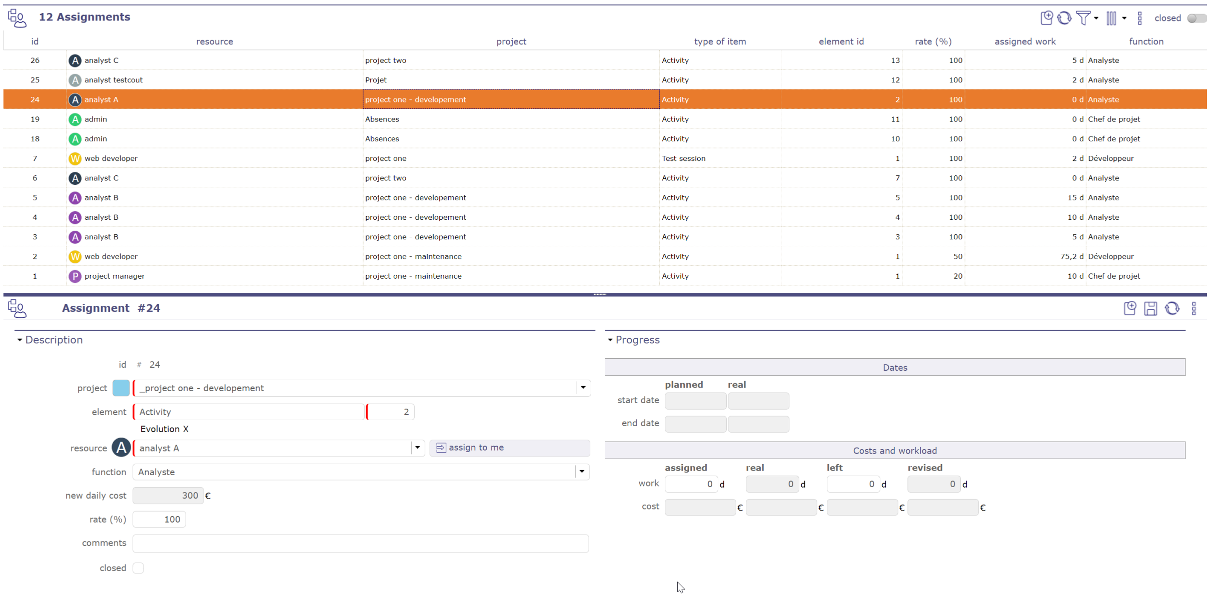


Fig. 71: Assignment screen

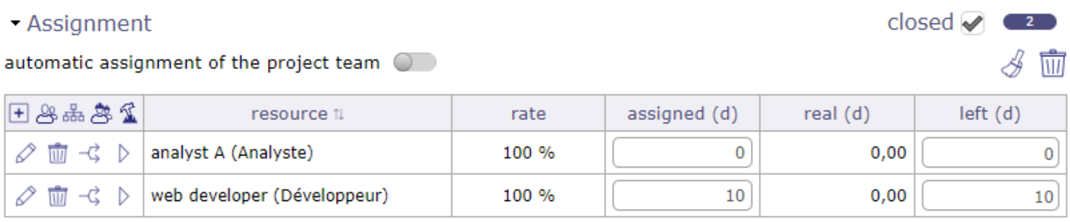


Fig. 72: Assignment section

Table 3: Fields of assignment list

Field	Description
Resource	Name of the resource assigned to the task.
Rate (%)	Rate planned for this resource to the task.
Assigned	The work initially planned for this resource to the task.
Real	Sum of work done by this resource to the task.
Left	Remaining work to this resource to complete the task.

- Only project resources can be assigned to project tasks.
- The responsible is added in the assignments automatically if no resource is assigned (global parameter)
- If actual work exists for an assignment, it cannot be deleted.

  On the table

  - Switch automatic assignment of the project team

    When you toggle this button, the project allocations are automatically added to the assignment table. If a new allocation is made later, then the list of assignments is updated automatically. If a resource is deleted or closed from the allocation then it will be automatically closed from the assignments.

  - Click on to delete the assignments without assigned work
  - Click on to delete all the assignments

  In the table

  - Click on to assign a new resource.
  - Click on to assign an entire team to the activity
  - Click on to assign an entire organization to the activity
  - Click on to assign a pool of resources to the activity
  - Click on to modify the assignment.
  - Click on to delete the assignment.
  - Click on to divide the assignment (two equal parts between two resources)
  - Click on to go directly to the allocation sheet for this resource. You may have this button at the top of the assignment area if you are assigned to the item yourself.
  - Click on the name of the resource to access the details on the resource screen.
  - The closed assignments are displayed on a gray background.
  - A special icon is placed on resource rows representing a pool of resources.
  - A resource can be assigned in the table without having a workload.
  - A resource that defers a task because it does not have the necessary availability and its planned assignment date is greater than the committed date then the remaining assigned work field turns red for this resource.

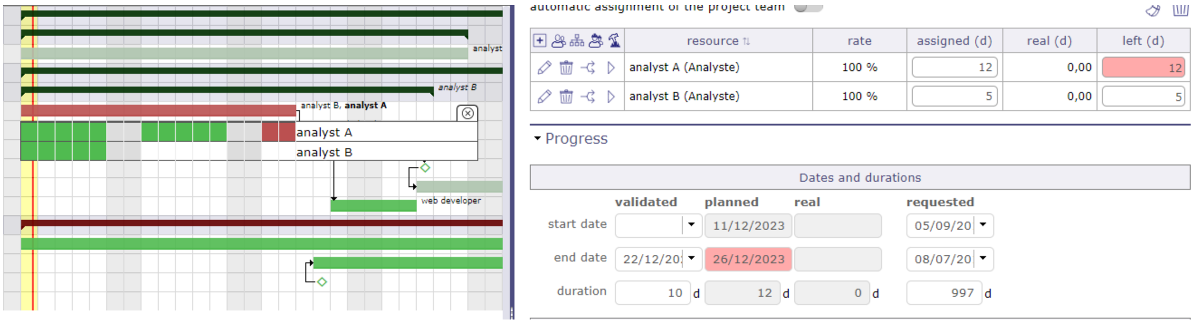


Fig. 73: Planned assignment date is greater than the validated date

Add a new assignment

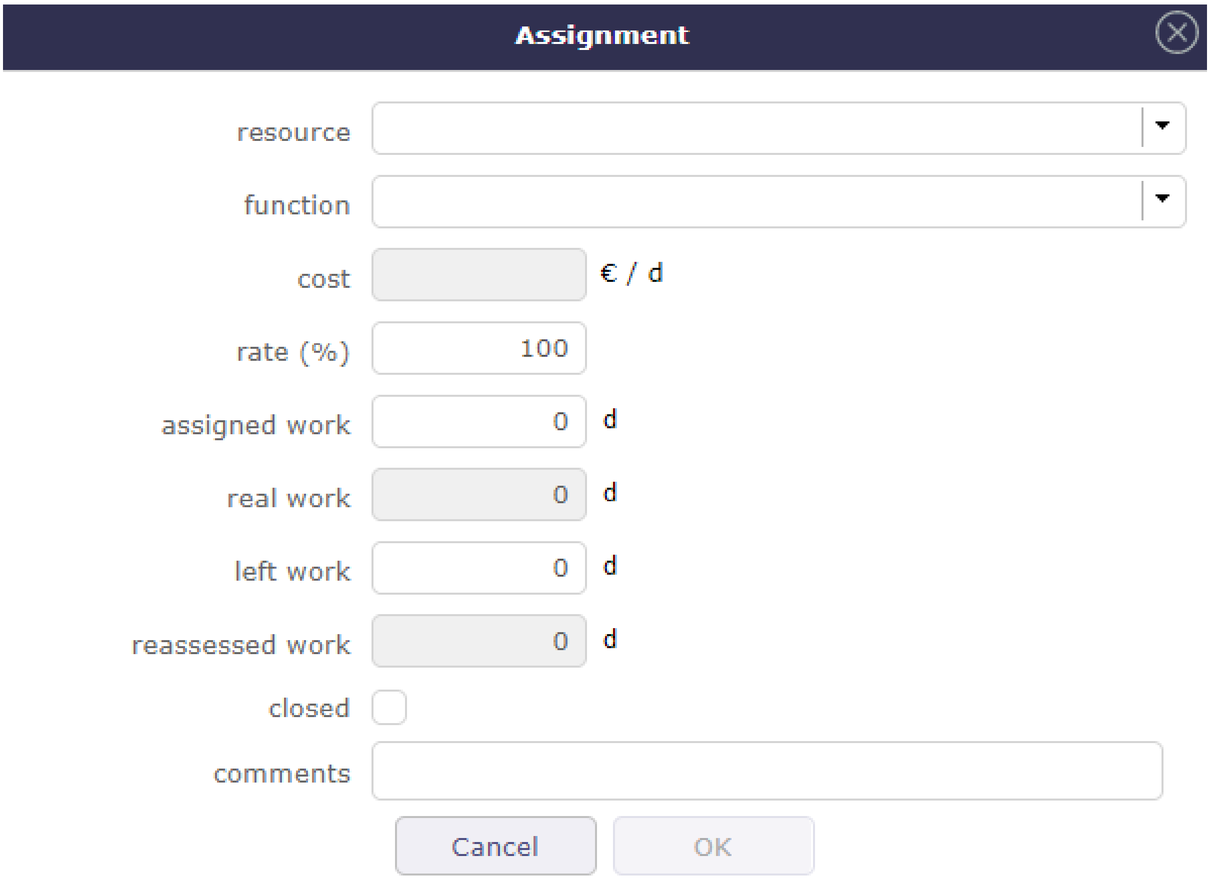


Fig. 74: Assignment dialog box

Table 4: Fields - Assignment dialog box

Field	Description
Resource	Resource list.
Function	Function list. The main function defined for the resource will be display first.
Cost	Daily cost defined for the resource and its function.
Rate	The max rate (%) to plan the resource on the task by day.
Assigned work	The work initially planned for this resource to the task.
Real work	Sum of work done by this resource to the task.
Left work	Remaining work to this resource to complete the task. .. code:: [Left work] = [Assigned Work] – [Real Work]
Reassessed work	The new total work planned to complete the task. [Reassessed work] = [Real Work] + [Left Work]
Comments	Any comment on the allocation. When a comment exists, will appear on the assignment list, and on the de

Assignment rate

The assignment rate on the resource calculates the percentage of assignment to take into account for the planning according to the FTE of the resource.

For example, if the resource has an FTE of 1 then the resource works the whole day.

- Its assignment rate on the activity is 100%, the resource may be planned without a ceiling and may possibly work full days on this project.
- Its activity assignment rate is 50%, so the resource can be planned for a maximum of 0.5 per day.
- Its assignment rate on the activity is 20% so the resource can be planned 0.2 per day at most.

Multiple assignment to a task

- A resource can be assigned more than once to a task.
- Allows to assign the resource to the same task with a different function (different daily cost).
- Allows to add extra work without modifying initial assignment.

Automatic assignment to a task

You can automatically assign the entire project team (all the resources assigned to the project) to a given activity.

This assignment is dynamic, when you add a resource to the project it is automatically added to the activity.

- Switch the button to automatically assign the ressources of the project to the activity.
- The entire project team will be added to the assignment table.
  - We only take into account the resources assigned directly to the project of the activity, not the parent project,
  - The allocation must not be closed
  - The assignment function is the default function of the resource
  - Rated load is zero
  - Assignment rate is 100%

Important: Only Resources assigned to the project are assigned, not users or contacts who are not also resources.

- If you remove a resource from the assignment, that resource is not removed from the project.

- Automatic assignment does not generate duplicates. If a resource already exists in the assignments, its assignment is not duplicated.
- On the other hand, if the assignment is closed it will be reopened (if the activity is not itself closed).
- If the allocation of the resource on the project is deleted or closed then the assignment on the activity is automatically closed so that resources can no longer be attributed to the activity even if the resource has work remaining.

Note: When this option is unchecked, the assignments will not be deleted (there is no way to know if the assignment was generated dynamically or manually). Only the automation for newly assigned Resources will be disabled.

Recurrent mode assignment

The recurring planning mode is the only mode that, by default, covers the entire duration of the project.

If the project is lengthened, then the task in recurring mode will lengthen accordingly.

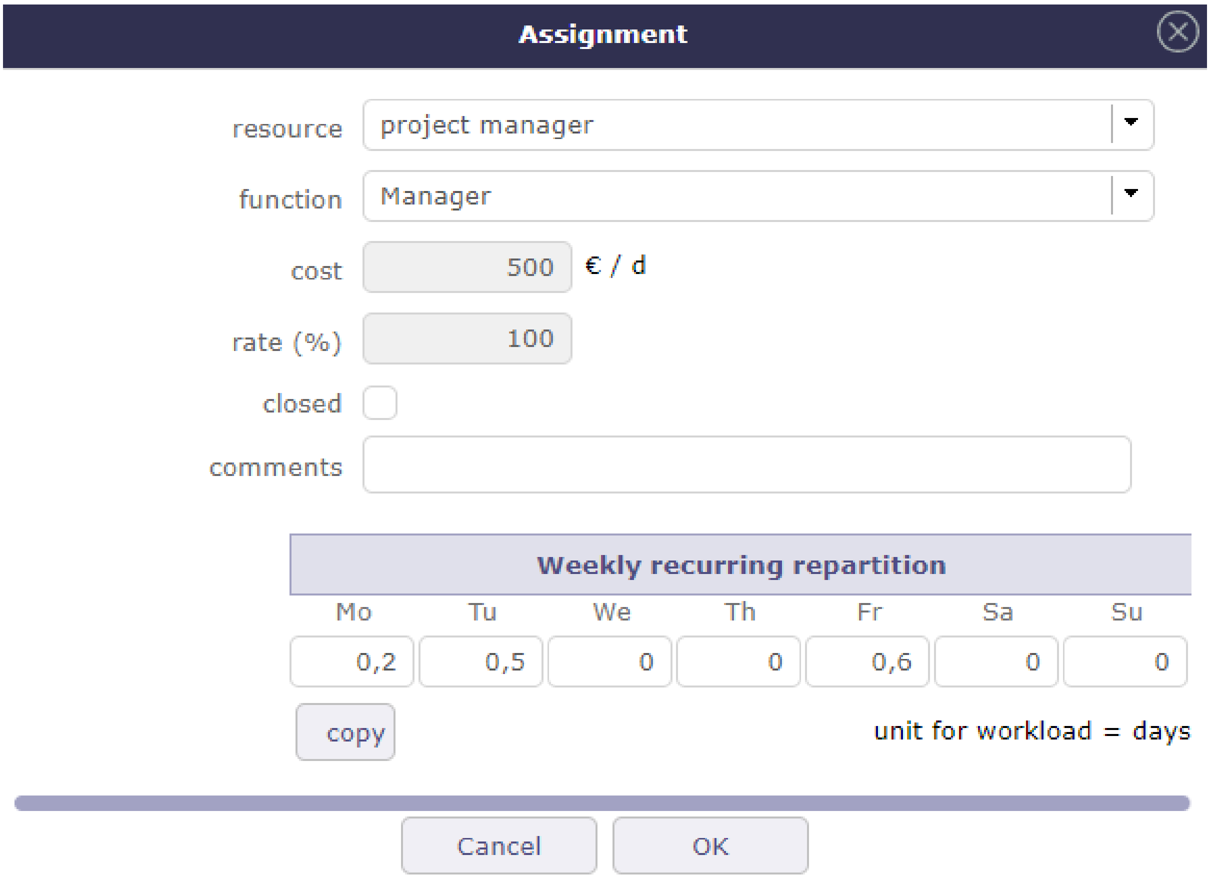


Fig. 75: Recurring assignment

During the assignment, you distribute the workload of your resource on a weekly basis.

You can enter a different value for each day of the week.

The `copy` is an accelerator to copy the entered value on Monday every other day.

The total load will be calculated after validation according to the duration of your project and the assigned times.

> **Warning:**
>
> - It is a priority planning method.
> - Using this mode can add a significant workload!.

Planned Interventions assignment

The assigned workload is no longer determined but will be entered on a calendar which can be clicked, per half-day.

See: *Planned interventions assignment*

Display Manual planning calendar

- Click on to add a new assignment.
- To see the workload distribution table, select the resource and confirm. Then click on the edit button.
  - If the assignment already exists, click directly on the .
  - The calendar will then be displayed in the assignment window..
- The display starts in the current month and spans the next six months.
- Each box is divided into two half days. The assigned work is then automatically the sum of the selected half-days.

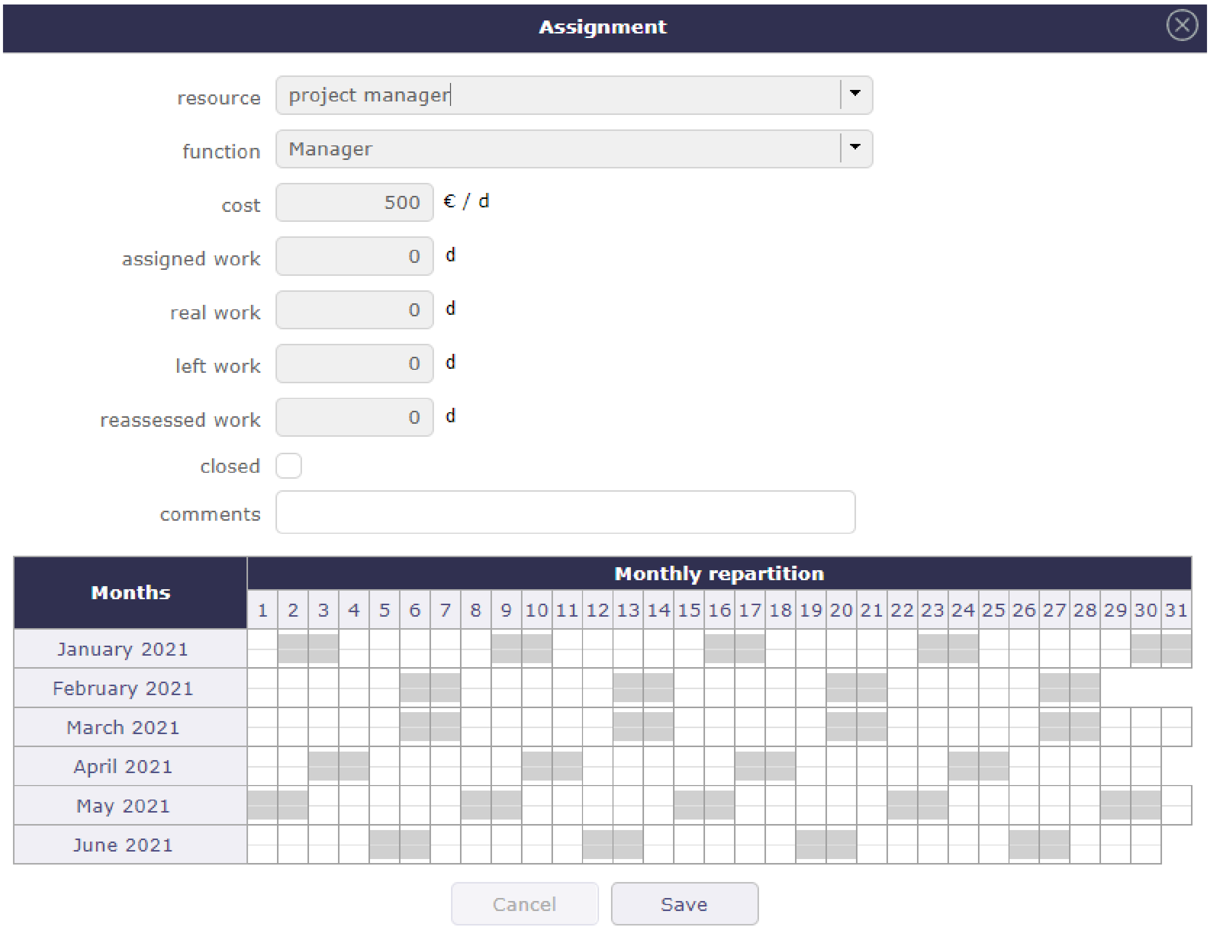


Fig. 76: Assigment with the Manual planning mode

The workload saved in this window will be displayed to the *planned interventions* screen.

Distribution of the workload for a new assignment

- click on a box to enter a workload.

  Depending on the *global parameter*, this workload will be either planned work or real work.
- Each day is represented by two half-days (am and pm)
- You can plan for the 6 months following the date of the assignment
- The half-days filled in will be visible on the screen of planned interventions
- Save this data with the save button

Activity on real time

When you check the activity option at the time spent on an activity then several fields will no longer be accessible and a recalculation of the load will be carried out:

- Recalculation of the rated load = revised load when modifying the remainder to be done
- Recalculation of the remainder to be done = rated load - actual load when changing the assigned load. This is the existing operation in all cases
- Prohibition to modify the assigned load to a value lower than the actual load. You will then have a blocking message

5.2.4 Treatment section

This section contains information on the treatment of articles, ie on the life and progress of the element.

It usually contains status information, macro reports, situations or those responsible for the work of this element.

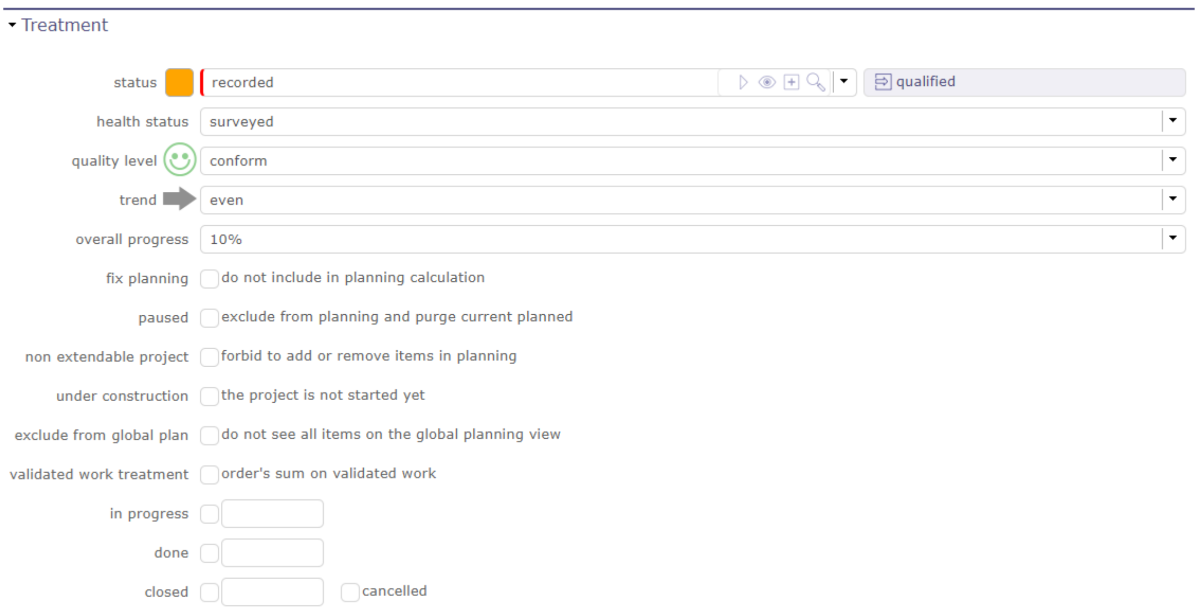


Fig. 77: Treatment section for project

Depending on the item, this section may display different fields.

All the lists in this section are customizable.

Project tracking settings

This part of the section allows you to follow your project in a more visual way.

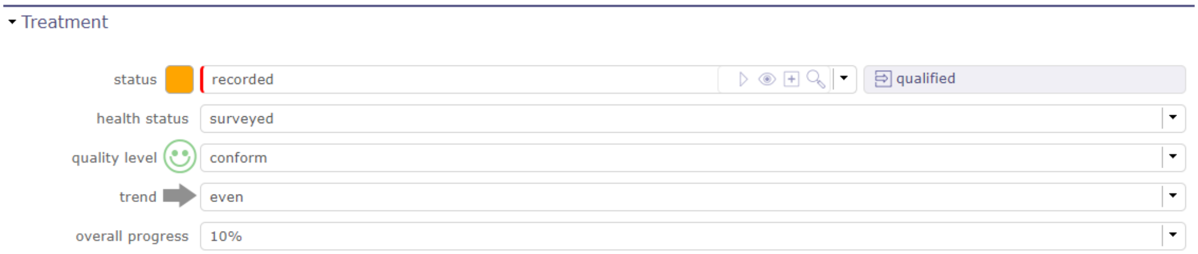
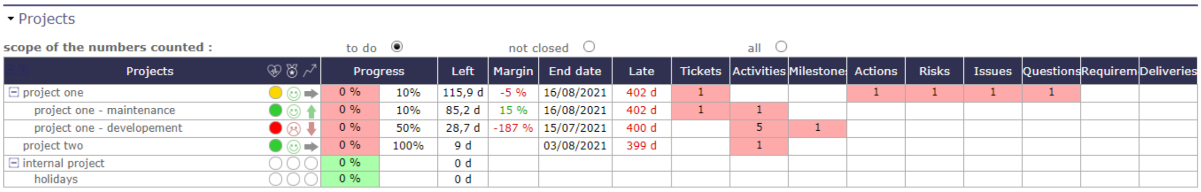


Fig. 78: Project tracking settings

On the Today screen, you can see this informations in the scope of the numbers counted in the Project Section.



Projects	Progress		Left	Margin	End date	Late	Tickets	Activities	Milestones	Actions	Risks	Issues	Questions	Requirem	Deliveries
project one	0 %	10%	115,9 d	-5 %	16/08/2021	402 d	1			1	1	1	1		
project one - maintenance	0 %	10%	85,2 d	15 %	16/08/2021	402 d	1	1							
project one - developement	0 %	50%	28,7 d	-187 %	15/07/2021	400 d		5	1						
project two	0 %	100%	9 d		03/08/2021	399 d		1							
internal project	0 %		0 d												
holidays	0 %		0 d												

Fig. 79: scope of the numbers counted in the project section on Today screen

Macro status

The macros states work thanks to levers.

Several states are populated directly based on the information you record.

in progress

The field is filled in when you fill in the first charge on your timesheet.

Please note, the date recorded in the in progress field is the date on which the charge is entered and not the day on which it is entered.

Done

The field is filled in when you fill in the last charge on your timesheet.

The remaining time MUST therefore be at 0 for this field to be completed.

Closed

The field is filled in when you close an element.

On activities, meetings, test sessions, and poker sessions that are closed, the “show closed” option for the assignment is always considered enabled.

Cancelled

The field is filled in when you cancel the element via the status of your workflow

Other options

ProjeQtOr offers you several options to build your projects, protect them, or even pause them depending on the hazards you may encounter.

Fix planning

- The project is never re-calculated.
- It means the planning will always be the same whatever you do on other projects.

Important: This may lead to dependencies unconsistency.

Paused

- Available on projects and activities.
- The planning is never recalculated.
- Unlike “fix planning”, the current planning for the project is erased.
- This is used to postpone the project to an undetermined date.

Non extendable project

- You can’t add new elements to this project,
- You can’t delete elements from this project.
- You can’t move elements from/to this project.

Under construction

- The resource don’t see it on timesheet.
- The alerts are not generated
- Emails are not sent.

Exclude from global plan

- Do not show the **not plannable** items for this project on the global planning view.
- This means that only “standard” planning items will be displayed. Excluding actions, decisions, deliveries…

Validated work treatment

- Activates treatment of the validated work based on the sum of the work of the project orders.
- Otherwise it will be calculated on the sum of the validated work of the activities

5.2.5 Working hours

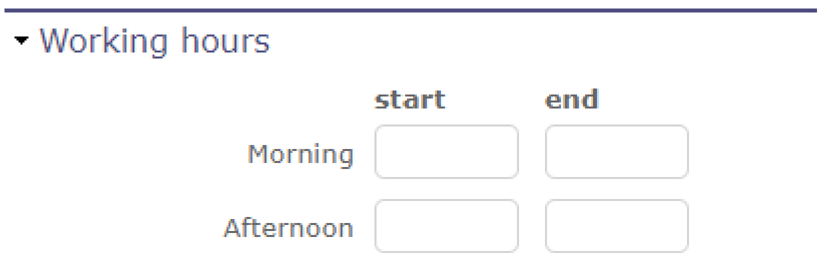


Fig. 80: Working hours section for the project

Section visible if you have enabled the global setting to apply working hours to projects.

You can enter different times for each project.

These times will then be used for the automatisms using the delays.

See: *Global parameters*

See: *Delay for tickets*

5.2.6 Configuration section

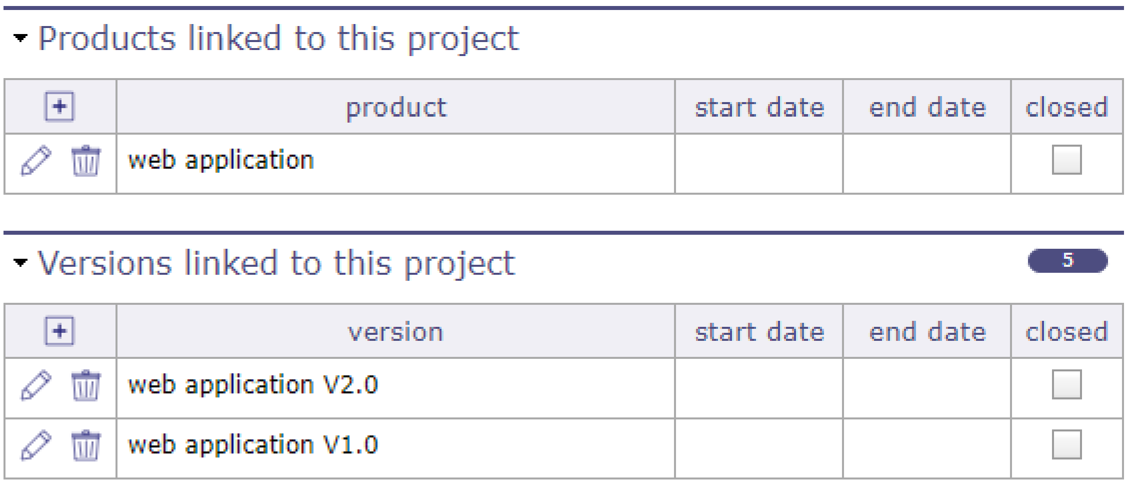


Fig. 81: Configuration section

You can view the products and product versions related to this project.

Click on the product name or product version to go to their respective screens.

See: *Configuration Management*

5.2.7 Progress section

This section allows all at once, define planning and follow-up the progress.

All planning elements have a progress section.

Description of the different sections is grouped by the planning elements that have common fields and behavior.

Progress data are displayed in the same format, **but according to the planning element, fields can have another meaning or behavior.**

Below is the definition of the different columns that make up the Progress section.

Dates and duration

The dates and durations section allow you to record and display different time information on your element.

Click on the field to display the calendar.

When you hover over a filled date field, then a cross on the upper right side of the field allows you to erase its contents.

When the field is empty, nothing is displayed.

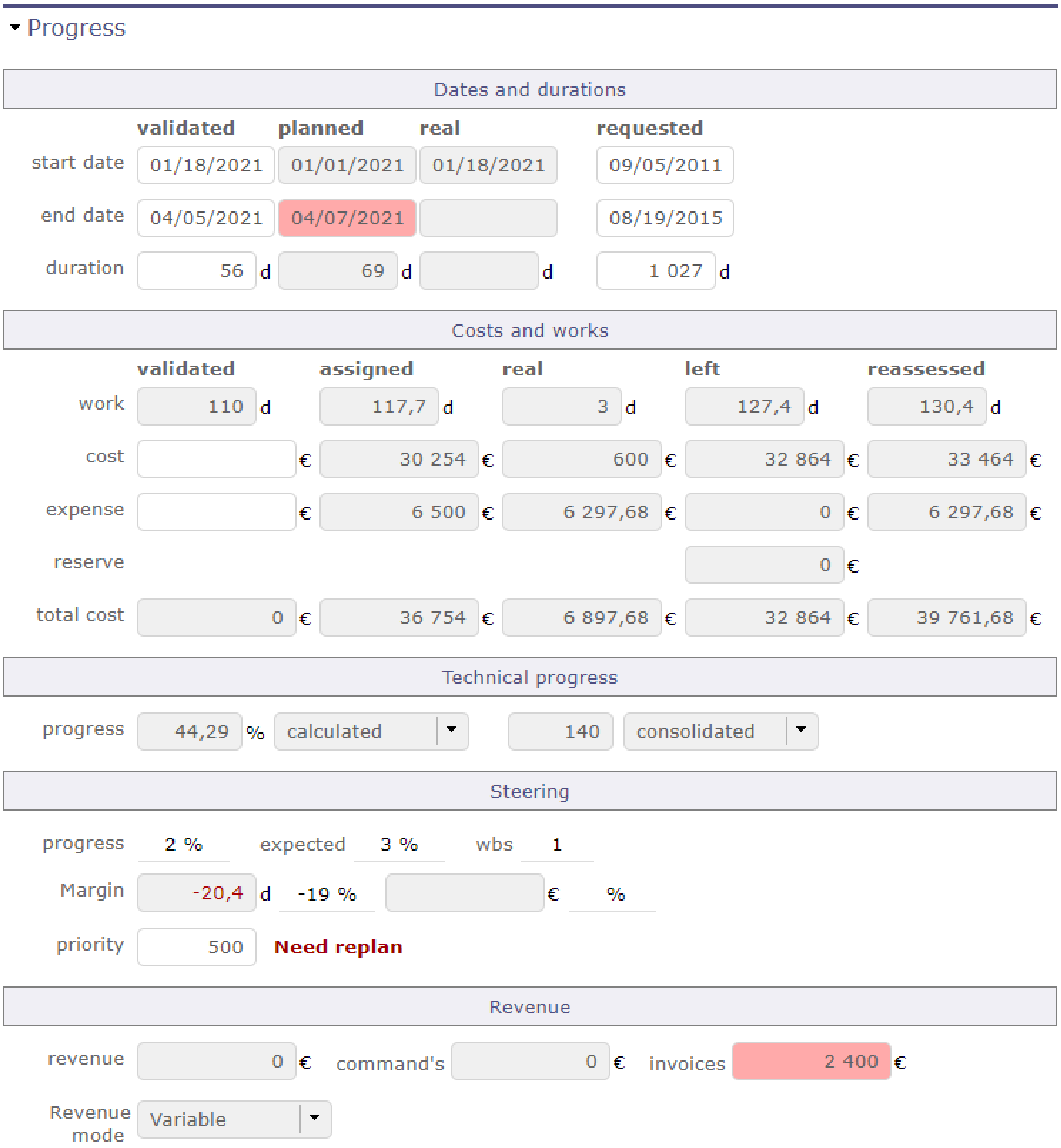


Fig. 82: Progress section

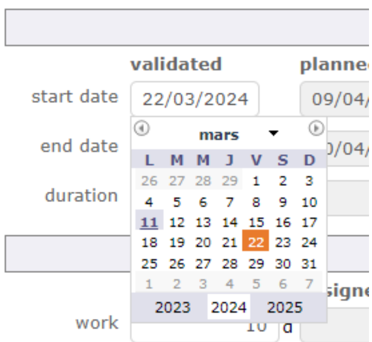


Fig. 83: Display the calendar

Fig. 84: Erase the date

Validated

Validated dates are used for:

- Define the input parameters according to the selected planning mode - See: *Planning mode*
- Define the initial due dates as a reference in order to check any drifts in your project.
- Set a deadline by which the work must be completed. You will be able to compare your validated dates with the planned dates of the software to follow the possible drifts of your projects.
- Directly on the project screen, without any other constraint, determines the start of planning for it.
- Are inherited from successors or parents when the *task prioritization* option is selected and indicated in italics

Planned

Planned dates can be defined with:

Requested or validated dates

The planned dates can be initialized with validated dates or requested dates (whether validated dates are not specified).

Planning calculation

The planned dates are determined during the planning calculation.

The planning calculation is done according to tasks assigned to resources and their predecessors.

Note: Planning mode "Fixed duration"

The planned dates of tasks will be calculated depending on their predecessors and their specified duration.

Warning: Planned dates of parent element

At parent element level, dates are adjusted with the first planned start date and the last planned end date from all sub-elements.

The planned start date is adjusted to the real start date when work began.

The planned dates are calculated by the software. You do not have the possibility to change these dates manually.

These dates are calculated according to the many constraints that you have defined (FTE, Rates, Dependencies, Charges, priorities, availability . . .).

Delay display

If the dates entered in the validated dates are lower than the dates calculated by the software - the planned dates, then the planned end date box is red as well as the bar of the Gantt chart corresponding to the element.

This then reflects a possible delay.

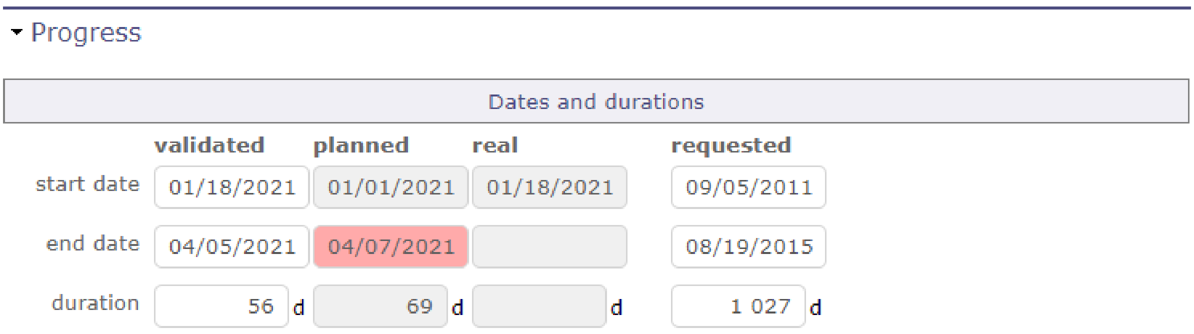


Fig. 85: The planned dates are greater than validated dates

Real

These are the dates of work actually carried out. The work actually charged

The real start date is set when work began (In progress).

The real end date is set when no more remaining work (done).

Note: Real dates of parent element

The real start date will be propagated to parent elements up to project.

The real end date for parent element will be initialized, when all sub-element have been completed.

The real work is actually being done. It is filled via the timesheet screen.

The items containing actual work cannot be deleted.

To enable this, you must first remove the actual work or configure the forced deletion in the *specific access*.

Requested

Allows you to define forecast dates. These are generally the dates agreed with your client or the beneficiary of your activity..

Unless they are the only indicated, these dates have no impact on the planning.

If no validated date is specified and no constraints are applied then they can initialize the planned dates.

Duration

The durations correspond to the number of days between the start and end dates.

These are always integer values, without decimals!

They are calculated automatically.

But you can also enter a start date and a number of whole days, the end date will be automatically calculated.

Costs and works

The cost of resources is calculated thanks to the workload allocated to each resource on the tasks.

You must fill in a function associated with a daily cost for your resources.

See: *Function and cost* on the resources screen

Validated

Allows to define scheduled work and budgeted cost of resources.

> **Work**
>
> This value is used for calculation of the expected progress and project margin (work).
>
> **Cost**
>
> This value is used for calculation of project margin (cost).

Note: Project

The values of work and cost can be initialized with the sum of total work and amount of all project orders.

See: *Incomes*

Assigned

Sum of planned work assigned to resources and estimated cost.

Real

Sum of work done by resources and cost incurred.

Left

Sum of estimated remaining work to complete tasks and ensuing costs.

Left work should be re-evaluated by resource while entering the real work on real work allocation screen.

Left work can also be changed on assignment, at project management level.

Reassessed

Sum of resource total work that will be needed from start to end and the ensuing costs.

```
[Reassessed] = [Real] + [Left]
```

Work on tickets

- Sum of work done on tickets and costs is included in work of activity linked through the "planning activity" of tickets.
- Sum of work done on tickets that don't link to any activity will be integrated in the work of the project.

Expense tracking

This section is used by Project.

See: *Project reserve*

Validated (Expense)

Allows to set the budgeted cost of project expenses.

This value is used for calculation of project margin (cost).

Assigned (Expense)

Project expenses planned.

Sum of "planned amount" for all expenses on project.

Real (Expense)

Project expenses committed.

Sum of "real amount" for all expenses on project.

Left (Expense)

Project expenses not committed yet.

Sum of "planned amount" for expenses for which "real amount" is not defined yet.

Reassessed (Expense)

Spending projections.

Sum of Real + Left

Left (Reserve)

Project reserve.

Note: Total columns

Total is the sum of resources cost, expenses and reserve of their corresponding column.

Technical Progress

The Technical Progress section allows you to display an advancement in units of work.

Warning: To display the technical progression section, which corresponds to an advancement in Unit of Work, you must position the option in the global parameters.

See: *Global Parameters*

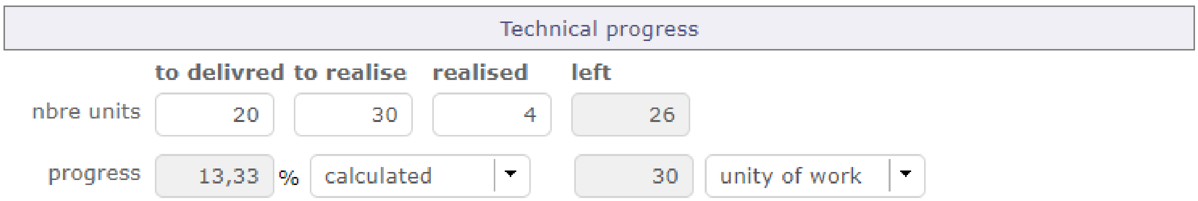


Fig. 86: Technical progress section

The section technical progress is displayed on **Project** and **Activity** screen.

You determine the number of units of work to be performed on the activity.

The progress and the rest will be consolidated towards the father project and / or the mother activity.

You can display the progress of completing your work units directly on the Gantt bars in the same way as the actual work.

See: *Other options: checkbox for display*

Number of units

As for the dates and durations, you can enter several values for the realization of your units of works.

To delivred

Number of units to be delivered.

To realise

Number of units to be produced.

Realised

Number of units actually produced.

Progress

For advancement in unit of work, you can choose the way so it will be evaluated.

Calculated

Progress as a percentage is calculated by software.

Manual

You define yourself the progress of the realization of your units of works.

Weight

The weight defines a certain importance on the realization of these units.

It determines how the calculation of the progress of the work units will be calculated and consolidated.

If items have weight = 0, instead of not calculating consolidate technical progress, calculated with weight = 1 for all items.

Manual

You enter a value manually according to the unit of work to be done.

Unity of work

It is the number of units to deliver or to realize.

Steering

Progress

Percentage of actual progress.

Calculated by the sum of the work done divided by sum of work reassessed.

```
[Progress %] = [real work] / [reassessed work]

= [real work] / ( [real work] + [left work] )
```

Expected

Percentage of expected progress.

Calculated by the sum of the work done divided by scheduled work.

```
[Expected %] = [real work] / [validated work]
```

WBS

Hierarchical position in the global planning.

Priority

Allows to define priority to a project or activity.

By default, the value is set to "500" (medium priority).

1 being the highest priority and 999 the lowest priority.

See: *Planning priority*.

See: *Steering section for activity*

Color

You can set a color on an element.

This color will be displayed on the bars of the Gantt chart.

Steering section Activity

Advancement

You can monitor the effectiveness of the progress of your project based on the data entered upstream on the validated dates.

Planning mode

Used by Activity & Test session.

Depending on the planning mode selected, the calculation of your planning will not be executed in the same way.

- See *Concepts*
- See *Planning modes*

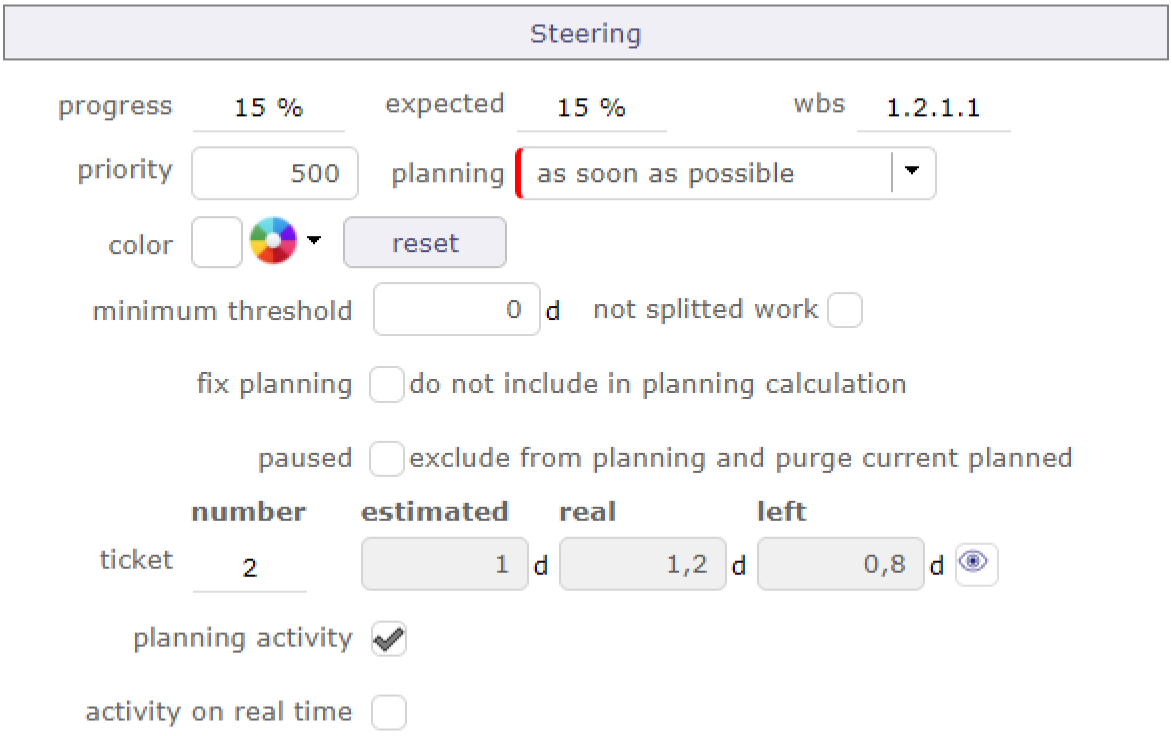


Fig. 87: Steering section on activity screen

Minimum threshold

When this value is set, the activity will only be scheduled on the day that the daily availability will be greater than or equal to this threshold.

You also have the option to add a new property to a "not splitted work" task.

This will require defining the minimum work to be allocated each day and thus filling in the minimum threshold field

Planning will require finding consecutive days with at least the given value possible.

See: *Minimum threshold*

Fix planning

Fix planning will avoid the recalculation of planning for an activity.

To fix the project see: *Treatment section*

Paused

When an activity is paused, it is never recalculated.

Unlike **fix the planning**, the current schedule for the project is purged.

This amounts to postponing the activity to an undetermined date.

When this option is checked, the option **fix the planning** is automatically checked.

Activity on real time

When you check the option **possibility of managing activities on real time** in the global parameters>Tab Planning>Planning then the validated load becomes read-only and the calculation of the validated load equals the revised load.

The option can be disabled manually even if it has been set to the activity type.

The option is incompatible with activities managed by "Work Units" (turnover module).

The field will then not be visible and the "Unit of work", "complexity" and "quantity" fields will be hidden if the "activity over time" option is activated.

It will therefore be necessary to deactivate the option to make these fields reappear.

Planning activity

Planning activity field allows to link the ticket with a planning activity

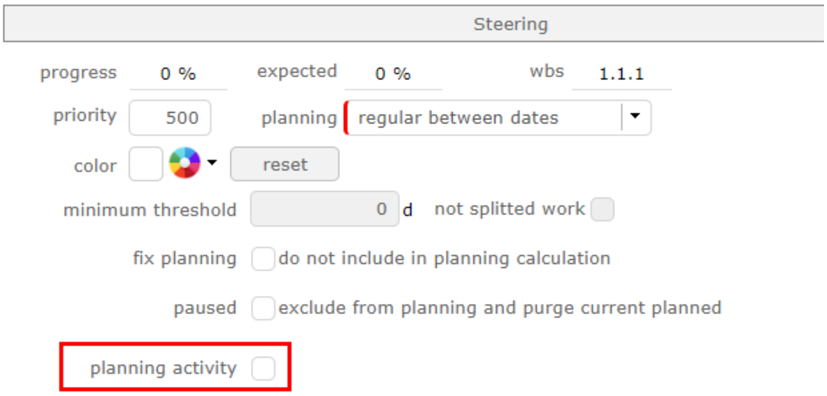


Fig. 88: Planning activity

An option is available to identify all activities as planning activities.

If the option is enabled then the checkbox disappears from the activity interface and all activities can be selected from the ticket drop-down list.

Ticket

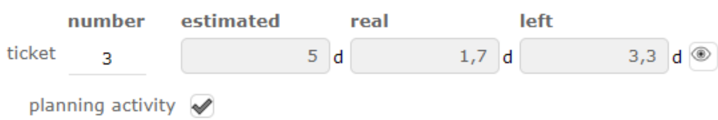


Fig. 89: Attached tickets

Allows tracking of tickets attached to the activity throught the "planning activity" field of tickets.

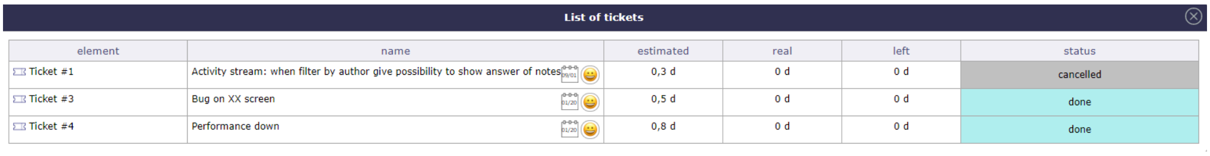
The Estimated field will be highlighted when the sum of estimated work on the tickets is higher than the planned work on the activity.

Fig. 90: Estimated time greater than the time to book for the activity

The Left field will be highlighted when the sum of remaining work on the tickets is higher than the remaining planned work on the activity.

Show tickets attached

- Click on to show ticket list attached to the activity.
- Click on a ticket name to directly move to it.



List of tickets

element	name	estimated	real	left	status
Ticket #1	Activity stream: when filter by author give possibility to show answer of notes	0,3 d	0 d	0 d	cancelled
Ticket #3	Bug on XX screen	0,5 d	0 d	0 d	done
Ticket #4	Performance down	0,8 d	0 d	0 d	done

Fig. 91: List of tickets

Steering section Project

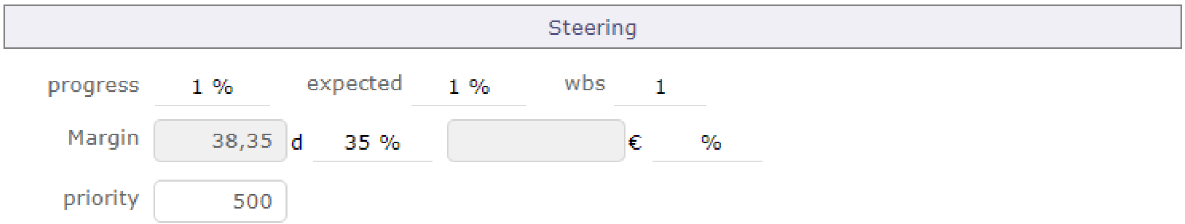


Fig. 92: Steering section on Project screen

Margin

The margin is only displayed in the control section of the project screen.

Margin (work)

Used by Project.

Calculated by the scheduled work minus the sum of work reassessed.

```
[Margin] = [Validated work] - [Reassessed work]

[Margin(%)] = ([Validated work] - [Reassessed work]) / [Validated work]
```

Margin (cost)

Calculated by the budgeted cost (resource & expense) minus the total of reassessed cost.

```
[Margin] = [Validated cost] - [Reassessed cost]

[Margin(%)] = ([Validated cost] - [Reassessed cost]) / [Validated cost]
```

Progress section Milestone

Fig. 93: Steering section on milestone screen

This section allows to define planning and follow progress on a milestone.

Requested

Allows to define the initial due date for the milestone.

Have no impact on planning.

Validated

Allows to define the due date at which the milestone must be completed.

Planned

Defined according to the selected planning mode.

Fixed milestone

- Planned due date is the value from validated due date field.
- The milestone will not move, and may have successors.

Floating milestone

- Calculation of planned due date takes into account dependencies with tasks.
- The milestone will move depending on predecessors.

Real

Determined when the status of the milestone is "done".

Planning mode

Fixed milestone

Floating milestone

Note: A milestone has no duration, so there are no start and end dates for a milestone, just a single date.

WBS

Hierarchical position of the milestone in the global planning.

Color

You can set a color on a milestone.

This color will be displayed on the bars of the Gantt chart.

Progress section Meeting

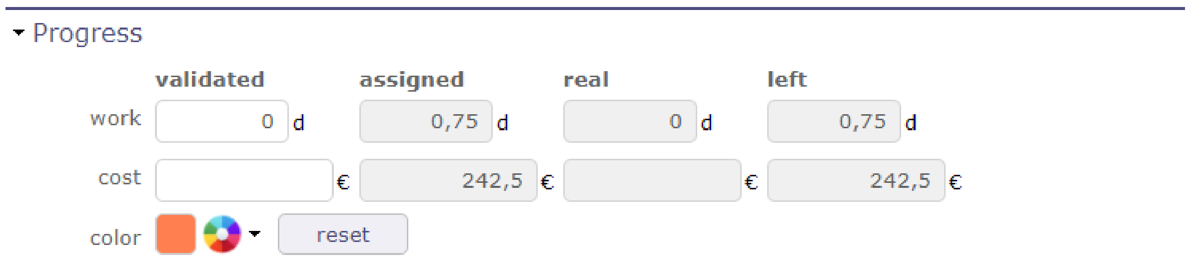


Fig. 94: Steering section on meeting screen

This section allows to define priority and follow progress on a meeting.

Validated

Allows to define scheduled work and budgeted cost.

Used to consolidate validated work and cost to the project.

Assigned

Sum of planned work assigned to attendees and the planned cost.

Real

Sum of work done by attendees and the cost.

Left

Sum of planned work remaining and the remaining amount.

Color

You can set a color on a meeting.

This color will be displayed on the bars of the Gantt chart.

5.2.8 Sub-Project and Sub-Activity

On the projects screen, this section allows you to display the sub-projects and their status linked to the selected one.

Click on the name of the sub-project to access its dedicated screen.

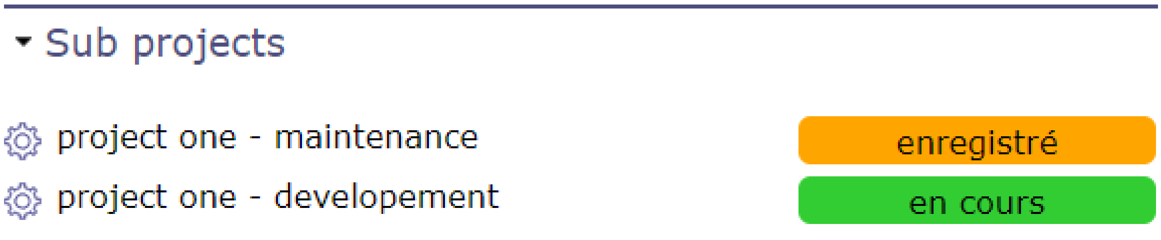
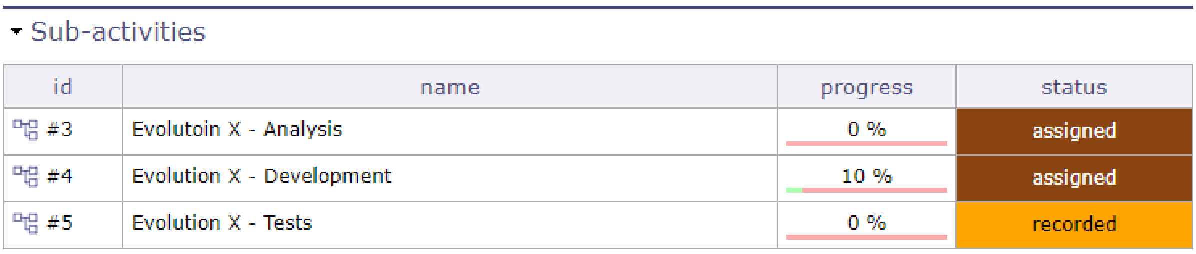


Fig. 95: Display of sub projects

In the same way, you can display on the activities screen, the sub-activities linked to the selected activity.

Click on the name of the sub-activity to access its dedicated screen.


Sub-activities

id	name	progress	status
#3	Evolutoin X - Analysis	0 %	assigned
#4	Evolution X - Development	10 %	assigned
#5	Evolution X - Tests	0 %	recorded

Fig. 96: Display of sub activities

5.2.9 Todo list

You can create subtasks or steps for the selected items.

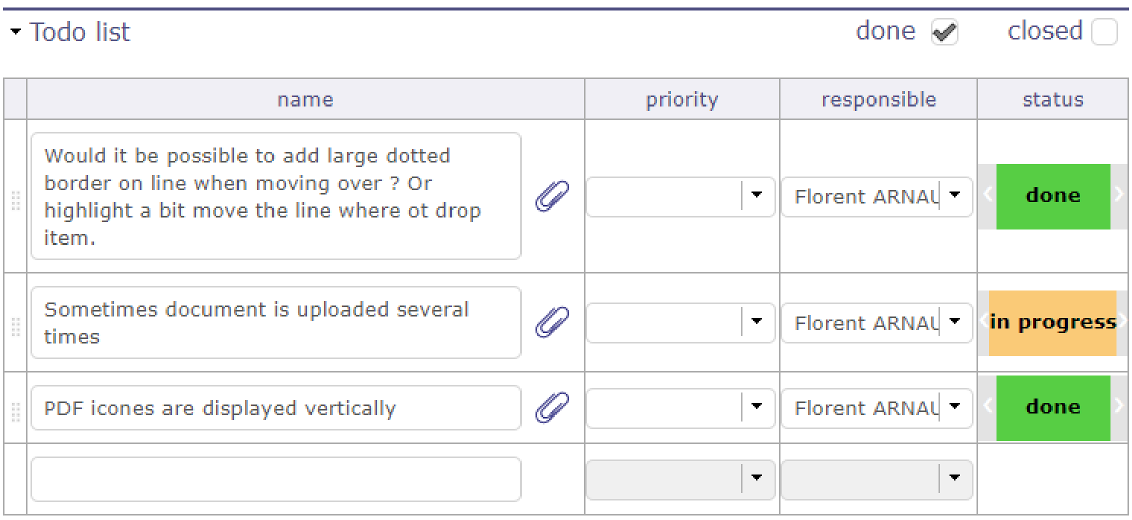


Fig. 97: Todo list

- For each completed line, a new line appears after. You can register up to 4000 characters
- You can specify the urgency, the person in charge and the state of the point to be treated.
- You can close a point to be addressed. It disappears from the lists. Display it again using the “closed” switch button.
- You can reorganize the list using the handles in front of the name of the point to be processed.
- To delete a line, completely delete the text and validate after the deletion popup.
- If the element has a manager defined, then it is automatically filled in as manager for each line created
- If the behavior of the item type was defined with the parameter “todo list required on done status” then the change of status to done is impossible if the items of the to-do lists are not all set to “done”.
- the todo list is an element who can be copied in the copy options of an activity.

Todo list screen

- A screen dedicated to the point to be treated is available in the steering menu.

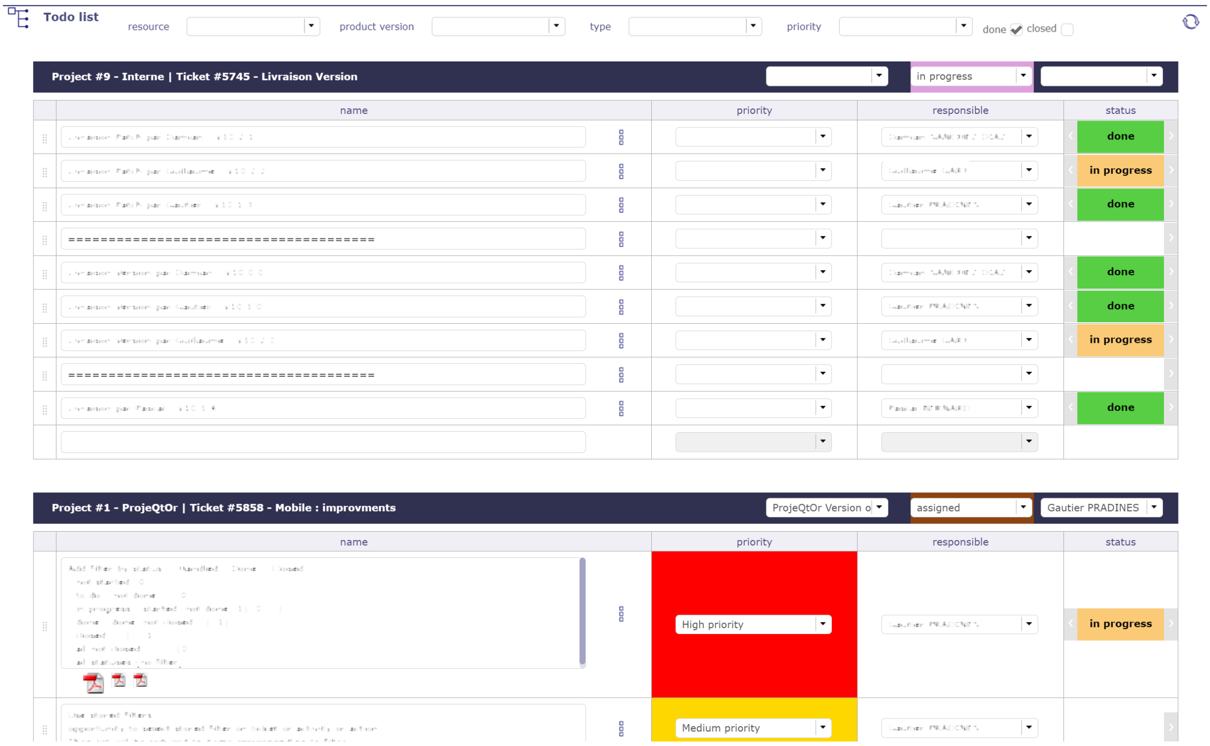


Fig. 98: Todo list screen

- You then have access to all your lists, all elements included.
- Filters are available to restrict the display of these. including the direct display of the version in the form of a listbox, with the possibility of changing the value of the element
- You display the color of the item’s state

5.2.10 Predecessor and Sucessor

This section allows to manage dependency link between planning elements.

A dependency can be created from the predecessor and/or successor planning element.

The dependency link can be created in the Gantt chart.

Click on the name of a predecessor or successor to go directly to the element.

See also:

- *Dependencies*
- *Milestones*

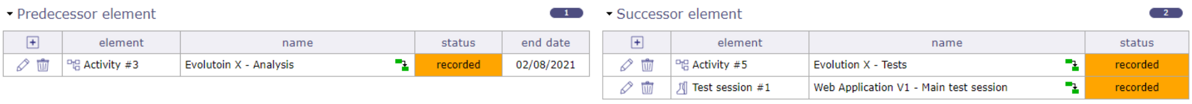


Fig. 99: Predecessor and Successor section

- Click on to add a dependency link.
- Click on to edit the dependency link.
- Click on to delete the dependency link.

In the NAME field, icons are displayed to indicate the type of dependencies

- End End dependency
- End start dependency
- Start start dependency

Modify a dependency

Click on the arrow which turns orange, a pop up is displayed allowing you to modify the type and one to add a possible delay.

The delay can be positive or negative. Negative delay allows overlapping of certain tasks

Fig. 100: Dependencies dialog box

Strict mode for dependencies

The strict dependency mode forces the successor planning element not to start on the same day as the same predecessor but the next day. Even if the task is finished before the end of the day.

To have the successor start on the same day or before the end of the predecessor task, select NO for strict mode or you can also put a negative delay.

The strict dependency mode is a *global parameter*.

By default, the strict dependency mode is set to YES.

Dependencies and delays

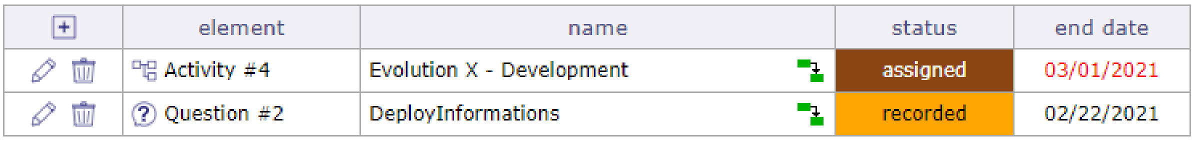


Fig. 101: highlighting the date

Highlighting the date that will most constrain the next activity.

Elements of different projects

It is possible to link items from different projects.

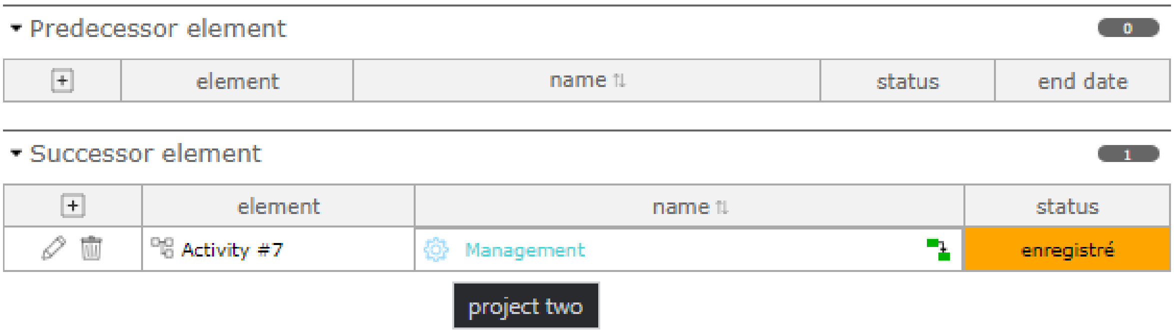


Fig. 102: Dependency between two elements of two different projects

When you pull a dependency between two items from two different projects, the table displays the project icon next to the dependency name

and when you hover over the icon, the tooltip gives you the name of the project whose depends on the element.

Only predecessor/successor of an element

On the Gantt view you can display only the predecessors or all the successors of a particular item.

Fig. 103: Show all successor/predecessor of an element

Note: Recursive loops are controlled on saving.

5.2.11 Linked Elements section

This section allows to manage link between ProjeQtOr elements.

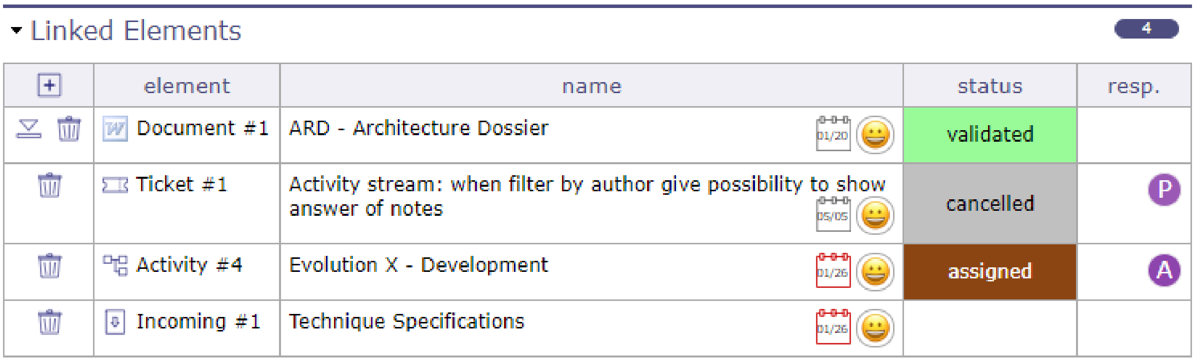


Fig. 104: Linked element section

You associate items on different elements in the same project.

A project can be linked with other.

Click on an item name to directly move to it.

- Click on [+] to create a new link.
- Click on to delete the corresponding link.
- Click on to download the document
- Click on to edit the comment linked to the element

Reciprocally interrelated

If Item A is linked to Item B, Item B is automatically linked to Item A.

A link between items has no impact on them treatment.

Linked element list of values

By default, the list of values shows items of the same project.

But, it is possible to link items from different projects.

Click on to get the list of elements of all projects.

Link with Document

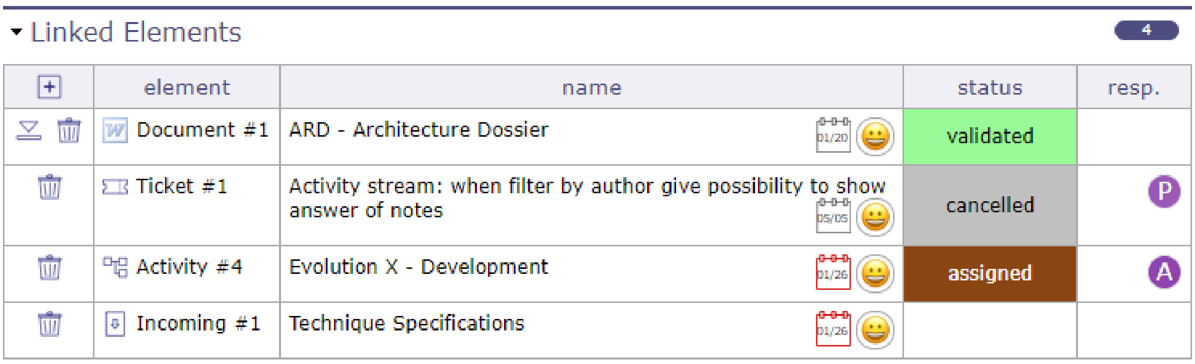
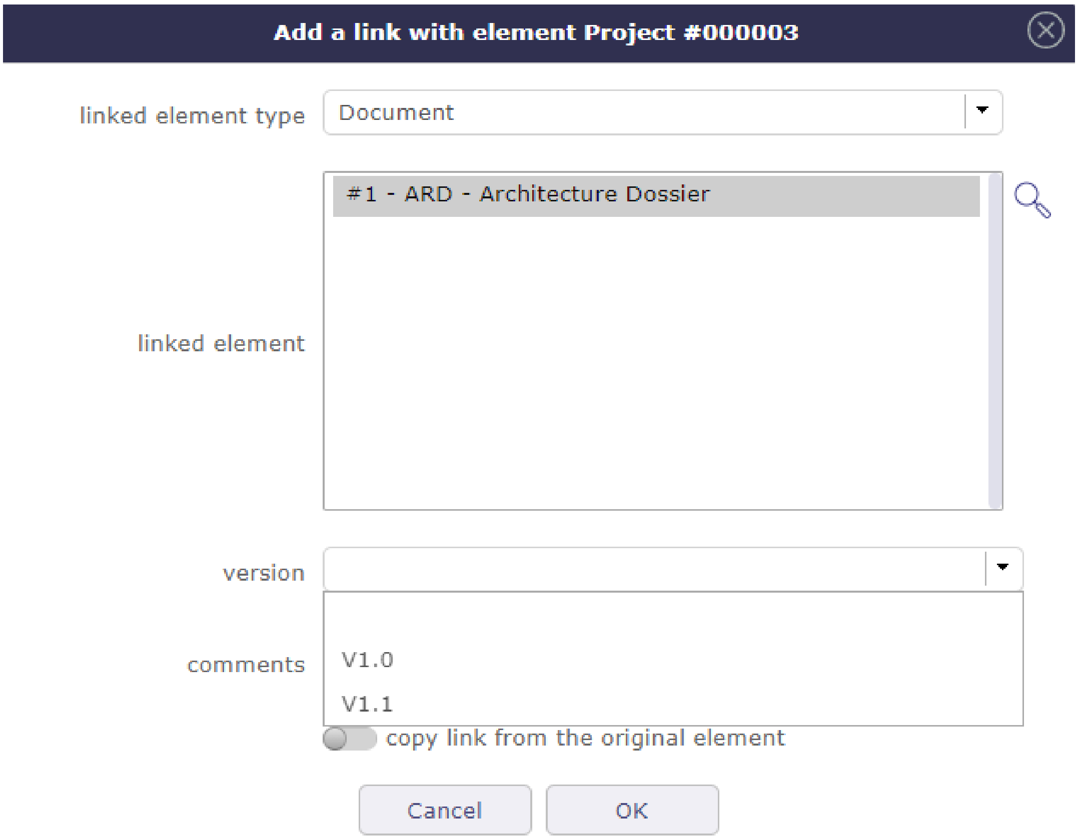


Fig. 105: Add a new link to a document

When a link to a document is selected. The document version can be selected.



Linked documents are available directly in linked elements list.

Specified version

A link with a document element offer the possibility to select a specific version.

A direct link to version of the document is created.

Not specified version

If the version is not specified, the last version will be selected.

The download will transfer always the last version of the document.

5.2.12 Attachments section

This section allows you to attach files or hyperlinks to the selected item.

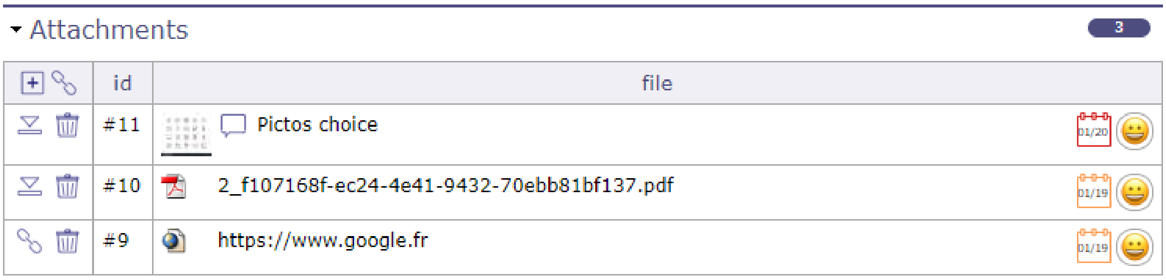


Fig. 106: Attachment section

You can attach all types of files

Add a new file

There are several ways to add a file.

- In the section table of attached files
  - Click on to add an attachment file to an item.
  - Click on to add a hyperlink to an item.
- In the attached files area in the toolbar of the details area
- Directly on the detail area of the element by dragging and dropping

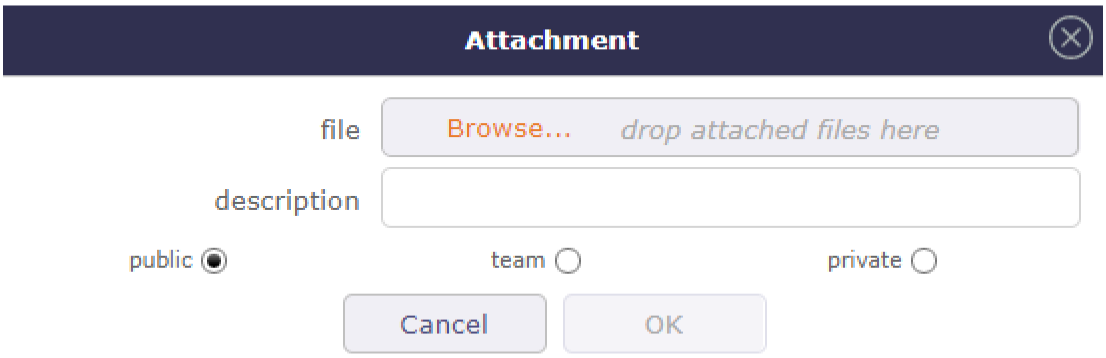


Fig. 107: Add an attachment file window

- Filled in the description to give a name to the document will be attached.
- Hover over the icon to see the exact name of the document. Otherwise, the exact name of the document will be displayed.
  - Click on to remove an attachment.
  - Click on to download the attached file.
  - Click on to access the hyperlink.
  - Click on to edit the comment atached to the element

You can select one or more files of different types with the shortcuts `CTRL` when the files are not consecutive or `SHIFT` for those that follow.

Download a file

Attachments are stored on the server side.

The attachment directory is defined in: ref:*Global Settings<file-directory-section>*.

5.2.13 Notes section

This section allows to add notes on items of elements.

Notes are comments, that can be shared to track some information or progress.

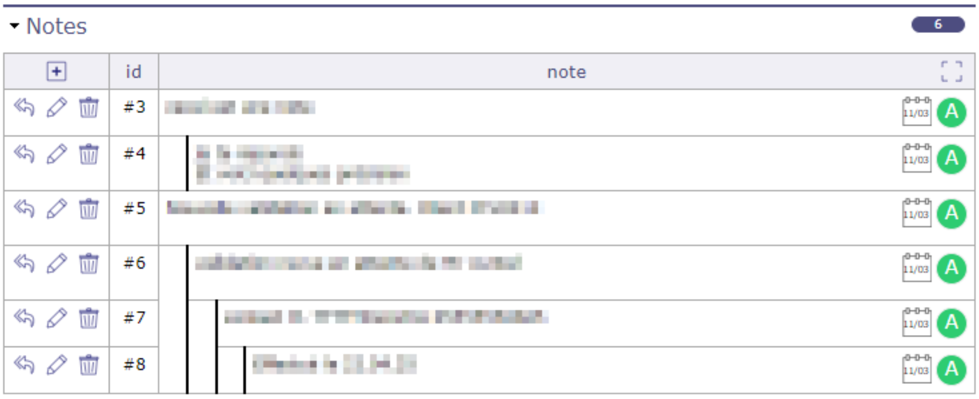


Fig. 108: Notes

- Click on click to switch notes to full screen mode
- Click on to return standard pop up notes
- Click on to add a note to an item.
- Click on to respond to the previous note
- Click on to edit the note.
- Click on to delete the note.

  Predefined note

  The list of values appears whether a predefined note exists for an element or an element type.

  Selecting a predefined note will automatically fill in the note text field.

  Predefined notes are defined in *Predefined notes*.

  Note visibility

  - **Public:** Visible by all members assigned to the project.
  - **Team:** Visible to every member of the creator's team.
  - **Private:** Visible only to the creator.

CHAPTER SIX

PLANNING AND FOLLOW-UP

ProjeQtOr provides all the elements needed to build a planning from workload, constraints between tasks and resources availability.

The main activity of Project Leader is to measure progress, analyse situation and take decisions. In order to ease his work, ProjeQtOr provides several reporting tools, from the well know Gantt chart, to many reports.

6.1 Start Guide

The Started Guide helps you start a brand new session that is still empty.

This allows you to add the main elements needed to start planning your projects.

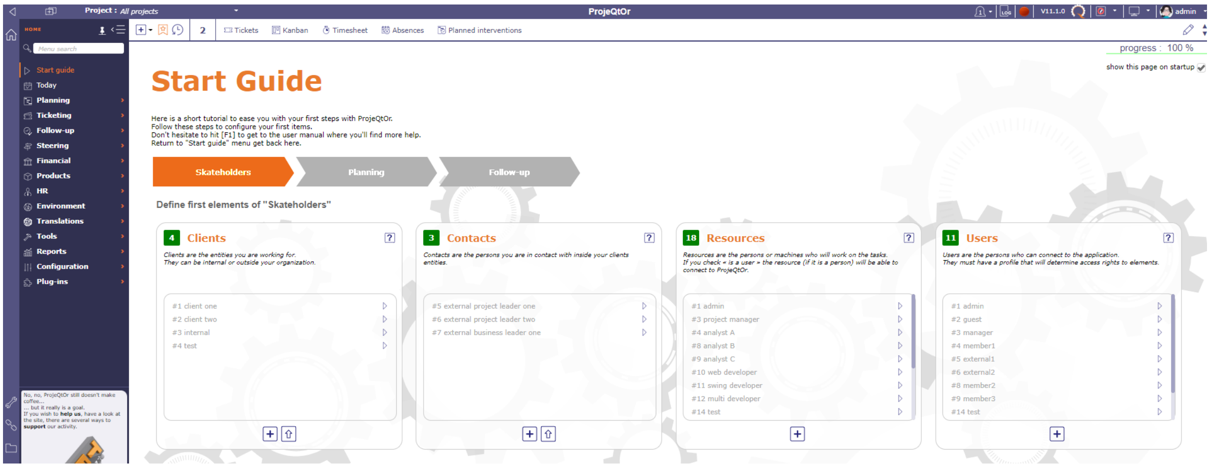


Fig. 1: Start guide screen

When you have not yet added an element, the element blocks are empty and indicate 0 elements

As you start filling in items, the blocks will display the number of items saved and a clickable list of what you have filled in.

- Click on [+] to add a new element.
- Click on [⇧] to import a new element.

each recorded element is clickable and you go directly to the screen dedicated to this element.

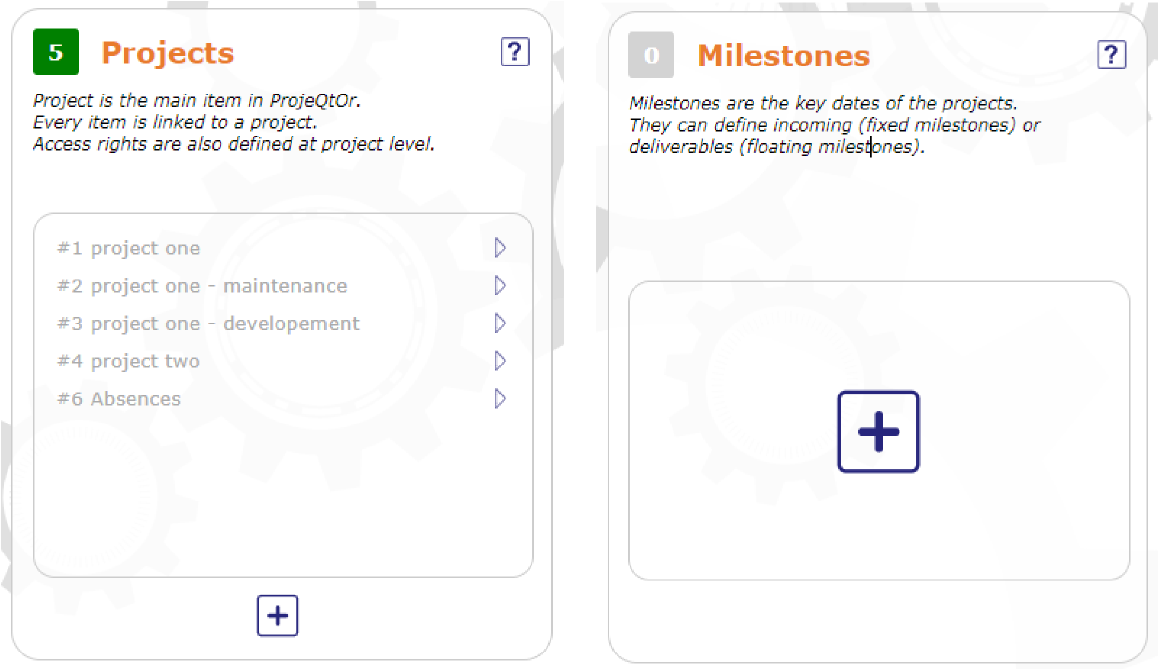


Fig. 2: Filled block and Empty block

6.2 Planning elements

The planning elements *Test sessions* and *Meetings* are described in their topics.

6.2.1 Project

The project is the primary entity of ProjeQtOr.

It is also the top-level of visibility, depending on profiles.

Sub-projects

- You can define sub-projects on any project and this unlimited.
- On the parent project screen, you can view the children in the subproject section.
- Then, the projects may not be real projects, but just organizational breakdown corresponding to an organization.

Project type

There are 4 types of projects which are not managed in the same way.

- **OPE: Operational project**

  Most common project to follow activity.

  All new types are created with **OPE** code.,

- **ADM: Administrative project**

  Type of project to follow non productive work : holidays, sickness, training, . . .

  Every resource will be able to enter real work on these projects, without having to be allocated to the project, nor assigned to project activities.

Assignments to all project task will be automatically created for users to enter real work.

These projects are not visible on Gantt type screens.

Some sections and fields are not visible or do not work on administrative projects like Paused, Fix planning or the minimum threshold.

- **TMP: Template project**

  These projects will not be used to follow some work.

  They are just designed to define templates, to be copied as operational projects.

  Any project leader (profile) can copy such projects, without having to be allocated to them.

- **PRP: Proposal project**

  These projects will not be used to follow some work.

  This type of project makes it possible to define whether a project is strategically interesting to carry out.

See: *project type*

Fix planning

- When the "correct planning" box is checked, the project planning will not be recalculated.
- This avoids modifying the expected values.
- Planning will always be the same no matter what you do on other projects.

Warning: This may lead to dependencies unconsistancies

Non extendable project

When project perimeter is fixed you can't:

- add new elements to this project
- delete elements from this project
- move elements to or from this project

Under construction

- When a project is under construction, no *automatic emails* will be sent, no *notifications* or *alerts* will be generated for the project elements.
- A project can be under construction as long as it isn't stated. Set to *In progress* status.
- The resources don't see it on *timesheet*.

Exclude from global plan

- Do not show the not plannable items for this project on the global planning view.
- This means that only standard planning items will be displayed excluding:
  - *Actions*
  - *Decisions*
  - *Deliveries*

Validated work treatment

Activates treatment of the validated work based on the sum of the work of the project orders otherwise it will be calculated on the sum of the validated work of the activities.

Manual indicators

- Fields: *Health status*, *Quality level*, *Trend* and *Overall progress* are manual indicators.
- They allow define visual way the general health, conformity, trend and progress of the project.
- Some manual indicators are displayed on the *Today screen*.

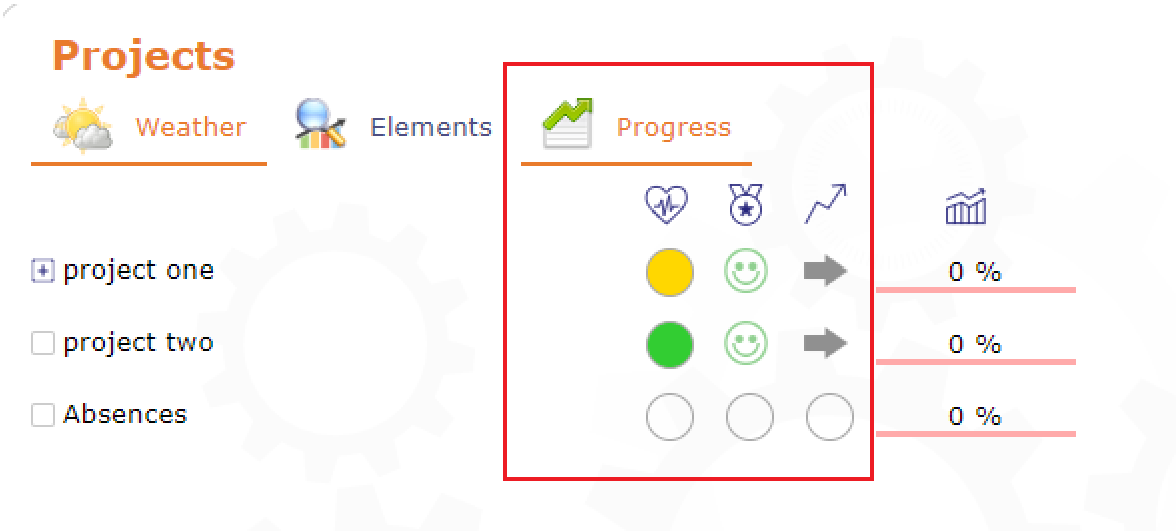


Fig. 3: Manual indicator on the Today screen

Special fields

- The value of the fields the Project name, Sponsor, Project code and Contract code can be used as the substitute value of special fields.
- See: *Special Fields*

Monitoring indicator

- The *indicators* can be defined on the *progress data*.

Do not start project before Validated Start Date

- The schedule should only start from this date, as if there was a fixed milestone preceding the project.
- Resources cannot be charged to the project before the specified date (as with a project under construction).
- This option must be enabled in the *global parameters*.

Project reserve

- Project reserve is an amount reserved based on identifying *Risks* and *Opportunity*.
- Calculated from contingency reserve of risks minus potential gain of opportunities.
- ProjeQtOr uses a technique as "Expected monetary value (EMV)" to convert risks and opportunities into an amount.
- The amount of project reserve will be added to remaining amount.

Section Description

Other sections

- *Progress*
- *Allocations*
- *Versions linked to this project*
- *Types restrictions*
- *Predecessor and Sucessor*
- *Linked element*
- *Attachments*
- *Notes*

Table 1: Required fields

Field	Description
Id	Unique Id for the project.
Name	Short name of the project.
Type	Type of project.
Organization	The organization of the project.
Customer	The customer of the project.
Bill contact	Billing contact.
Project code	Code of the project.
Contract code	Code of the contract of the project.
Customer code	Code of the customer of the project.
Is sub-project of	Name of the top project if this project is a sub-project.
Sponsor	Name of the sponsor of the project.
Manager	Name of the resource who manages the project.
Color	Color of the project, to be displayed in some reports.
Description	Complete description of the project.
Objectives	Objectives of the project.

Field Customer

The value of the field is used in the *Quotations*, *Orders* and *Invoices* concerned with the project.

Field Bill contact

The value of the field is used in *Invoices* concerned with the project.

Section treatment

Table 2: Required fields

Field	Description
Status	Actual *status* of the project.
Health status	Global health status of the project.
Quality level	Estimation of quality level of project (result of audits).
Trend	Trend of global project health.
Overall progress	Overall progress to be selected in a defined list.
Fix planning	Box checked indicates the planning of the project is frozen, and its sub-projects.
Non extendable project	When project perimeter is fixed you can't addor delete elements to this project, move elements to or from this project.
Under construction	Box checked indicates the project is under construction.
Exclude from global plan	Do not show the not plannable items for this project on the global planning view. This means that only standard planning items will be displayed excluding actions, decisions, deliveries.
Validated work treatment	Activates treatment of the validated work based on the sum of the work of the project orders otherwise it will be calculated on the sum of the validated work of the activities.
In progress	Box checked indicates the project is begun.
Done	Box checked indicates the project is finished.
Closed	Box checked indicates the project is archived.
Cancelled	Box checked indicates the project is cancelled.

6.2.2 Activity

Other sections

- *Assignment*
- *Progress*
- *Predecessor and Sucessor*
- *Linked element*
- *Attachments*
- *Notes*

An activity is a kind of task that must be planned, or that regroups other activities.

An activity can be:

- Planned tasks.
- Change requests.
- Phases.
- Deliveries.
- Versions or releases.

Assigned resources

- *Resources* are assigned to activities.
- During an *assignation*, some work is initially planned on this activity for the resource.

Real work allocation

- For a resource, assigned activities are tasks in which he can entry the *Real work*

Parent activities

- Activities can have parents to regroup activities or planned tasks.
- Activities can be sorted inside their parent activity, on the *Gantt* planning view, using drag and drop in the list area.
- Parent activity must belong to the same project.
- When a parent activity contains an assignment with a workload then the planning mode applied does not correspond to any of those proposed in the list of planning modes.
- On a parent activity the planning mode is no longer displayed.

  planning example

  Example with a parent activity with no load and 2 sub-activities with 10 days of load for each of the resources (analyst 1 and analyst 2).

  In this case, the parent activity is the result of the sub-activities that compose it.

  If workload is entered for a resource on a parent activity, and this resource is also scheduled on child activities, then the total of this workload will be displayed on the parent activity for this resource.

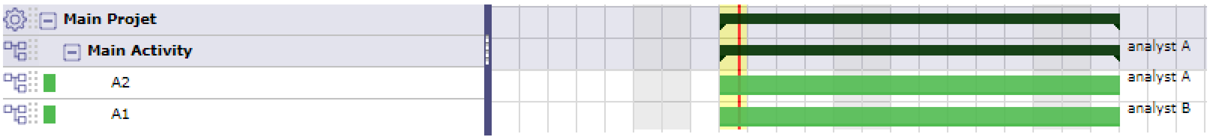


Fig. 4: Mother activity without workload

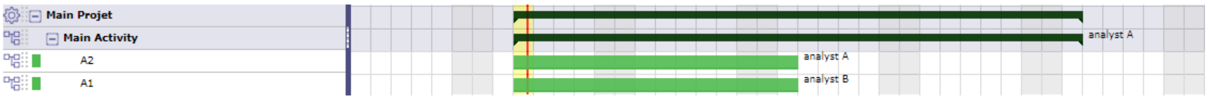


Fig. 5: Mother activity with workload

The dates and durations section display the result

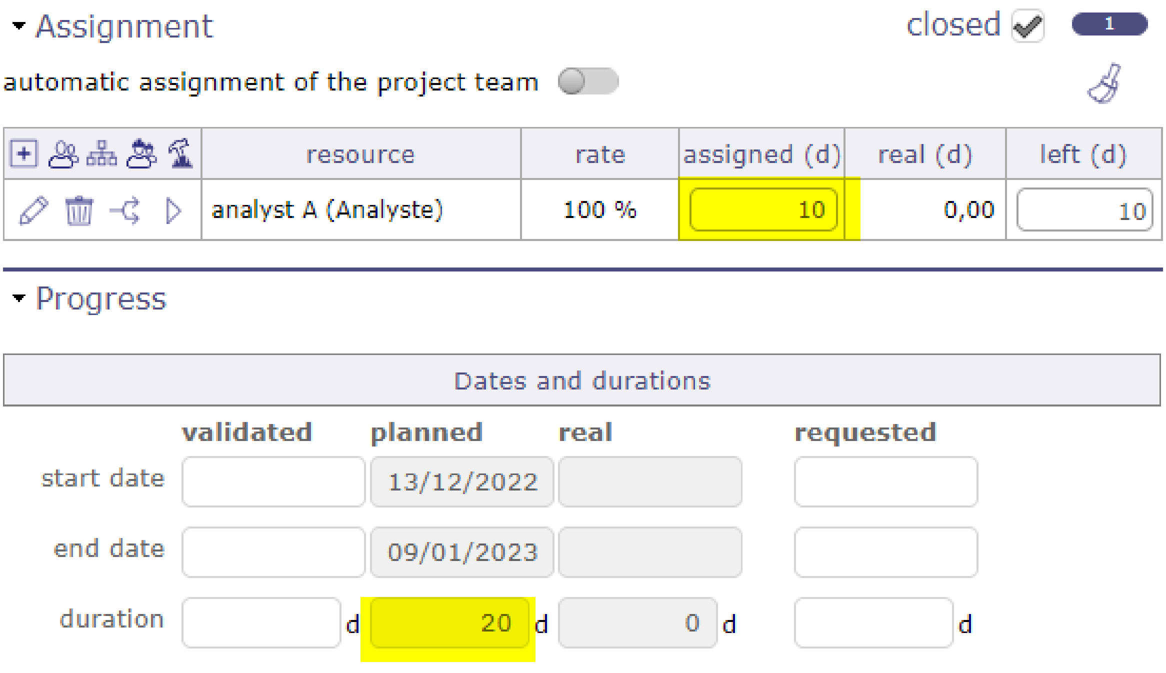


Fig. 6: Dates and durations section on parent activity

The dates and duration section of the activity shows the overall load for a resource.

20 workload days = 10 workload days for Analyst A for parent activity + 10 workload days for Analyst A for activity A.

The mother activity, even if it has priority in relation to its position in the WBS, will distribute the workload assigned for the resource after the workload on the sub-activities.

Activity planning: work on tickets

- *Tickets* can be linked to an activity (task).
- Work on tickets will be included in the activity.

  Assignment of resources to task

  - Resources who will work on the ticket doesn't need to be assigned to linked activity before.
  - The assignment will be automatically created once that resource has entered the working time (real work) in the ticket.

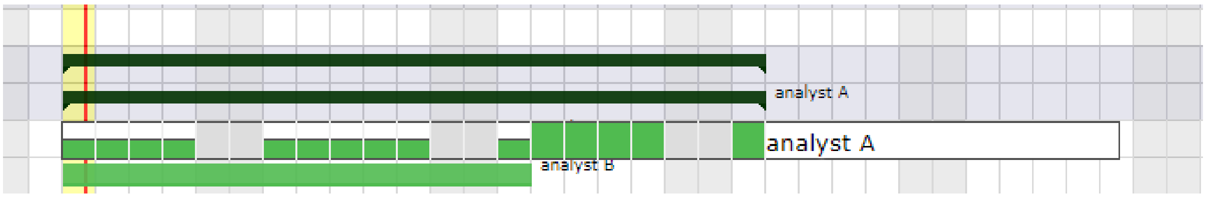


Fig. 7: the load of the mother activity is planned after the sub-activities

- The assigned task and the sum of working time entries by resource in tickets will be available in its timesheet.

Fix planning

- When box "fix planning" is checked, the activity scheduling won't be remade.
- This will avoid change on planned values.
- The planning will always be the same whatever you do on other projects.

Warning: This may lead to dependencies unconsistancies

Filter on list

Ability to filter activities by data or type, for instance by assigned resources

Monitoring indicator

- The indicators can be defined in the *List of Values*.
- See: *Health status* and *Overall progress*

Section Description

Table 3: Required fields

Field	Description
Id	Unique Id for the activity.
Name	Short description of the activity.
Activity type	Type of activity.
Project	The project concerned by the activity.
External reference	External reference of the activity.
Requestor	Contact at the origin of the activity.
Origin	Element which is the origin of the activity.
Description	Complete description of the activity.

Section Treatment

Table 4: Required fields

Field	Description
Parent activity	Parent activity for grouping purpose.
Status	Actual *status* of the activity.
Responsible	Resource who is responsible for the activity.
In progress	Box checked indicates the activity is taken over.
Done	Box checked indicates the activity has been treated.
Closed	Box checked indicates the activity is archived.
Cancelled	Box checked indicates the activity is cancelled.
Target version	The target version of the product allocated in delivery of the activity.
Result	Complete description of the treatment done on the activity.

Field Target version

- Contains the list of *product versions* linked to the project.

6.2.3 Milestone

Other sections

- *Progress*
- *Predecessor and Sucessor*
- *Linked element*
- *Attachments*
- *Notes*

A milestone is a flag in the planning, to point out key dates.

Milestones are commonly used to check delivery dates.

They can also be used to highlight the transition from one phase to the next.

ProjeQtOr offers two types of milestone:

Floating milestone

- This milestone will automatically move to take into account dependencies.

Fixed milestone

- This milestone is fixed in the planning, not taking into account predecessor dependencies.
- This kind of milestone is interesting, for instance to set-up start date for some tasks.
- Fixed date is set by validated date.

Monitoring indicator

- The indicators can be defined in the *List of Values*.
- See: *Health status* and *Overall progress*

Section Description

Table 5: Required fields

Field	Description
Id	Unique Id for the milestone.
Name	Short description of the milestone.
Milestone type**	Type of milestone.
Project	The project concerned by the milestone.
Origin	Element which is the origin of the milestone.
Description	Long description of the milestone.

Section Treatment

Table 6: Required fields

Field	Description
Parent activity	Parent activity for grouping purpose.
Status	Actual *status* of the milestone.
Responsible	Resource who is responsible for the milestone.
In progress	Box checked indicates the milestone is taken over.
Done	Box checked indicates the milestone has been treated.
Closed	Box checked indicates the milestone is archived.
Cancelled	Box checked indicates the milestone is cancelled.
Target version	The target version of the product allocated in delivery of the milestone.
Result	Complete description of the treatment done on the milestone.

Section Details

Items related to the milestone (target milestone) are displayed in the table.

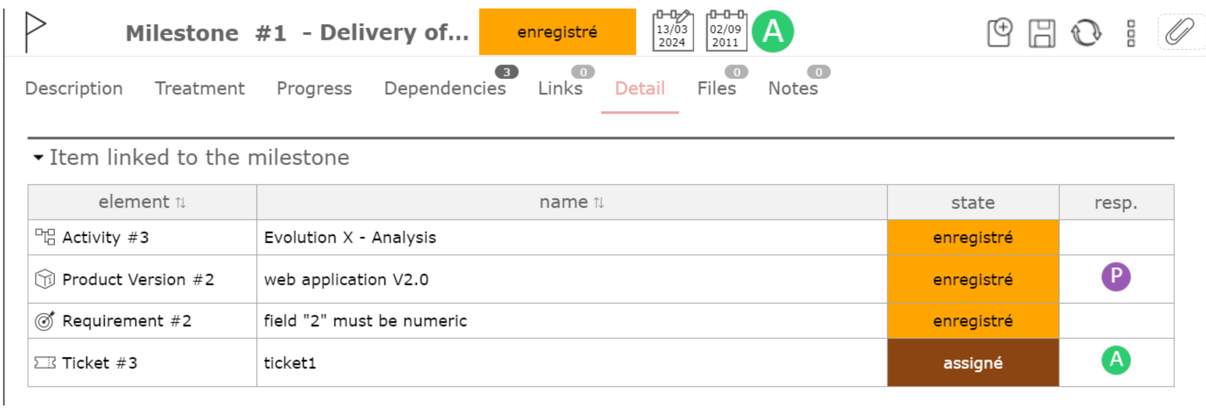


Fig. 8: Details: item linked

- Contains the list of *product versions*.
- Contains the list of *Requirements*.
- Contains the list of *Tickets*.
- Contains the list of *Activities*.

6.3 Planning

The Gantt chart is a tool used in scheduling and project management and allowing to visualize in time the various tasks composing a project.

It is a representation of a connected graph, evaluated and oriented, which makes it possible to graphically represent the progress of the project.

Note: For large projects, with many sub-projects and activities, we limit the number of lines to display so as not to deteriorate performance, even if the project selector has already contextualized the display.

6.3.1 Gantt chart

This screen allows to define projects planning and follow progress.

The Gantt Chart is composed of five areas:

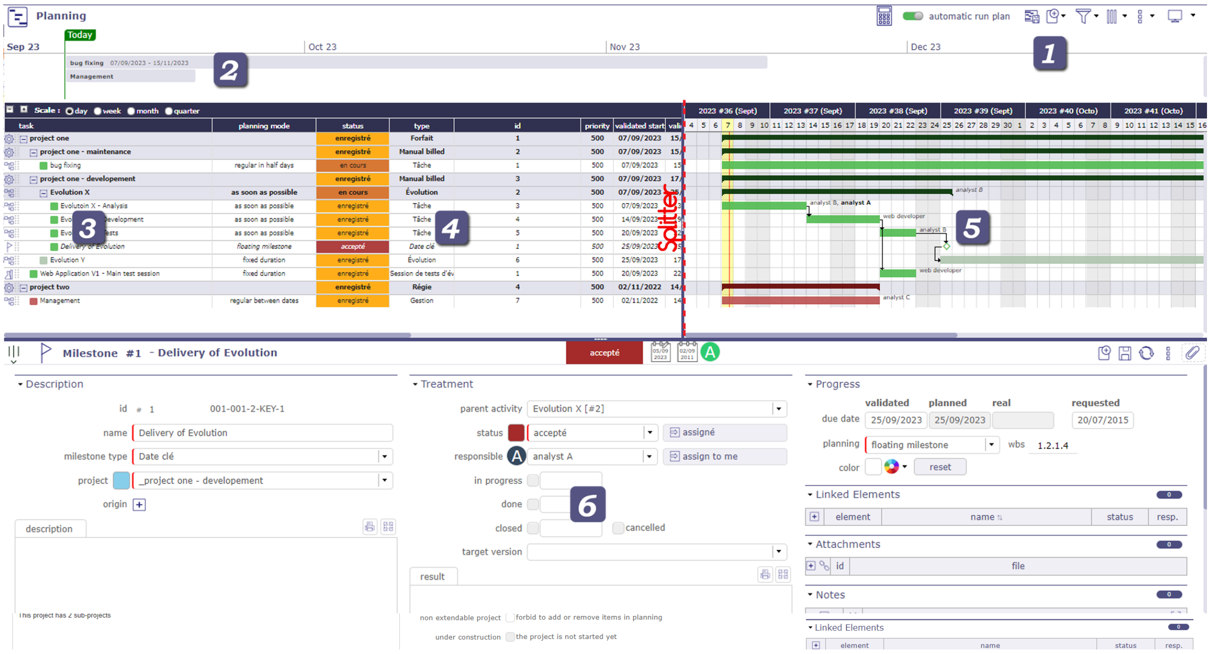


Fig. 9: Gantt (Planning)

Interface areas:

- 1 *Toolbar*
- 2 *Timeline*
- 3 *Task List: the WBS struture*
- 4 *Progress data*
- 5 *Gantt chart view*
- 6 *Details area*

Toolbar

Interface areas

- 1 *Predecessor & Successor*
- 2 *Activity planning calculation*
- 3 *Automatique run plan*
- 4 *Create and display a new baseline*
- 5 *Create a new planning element*
- 6 *Advanced filter*
- 7 *Display the columns*

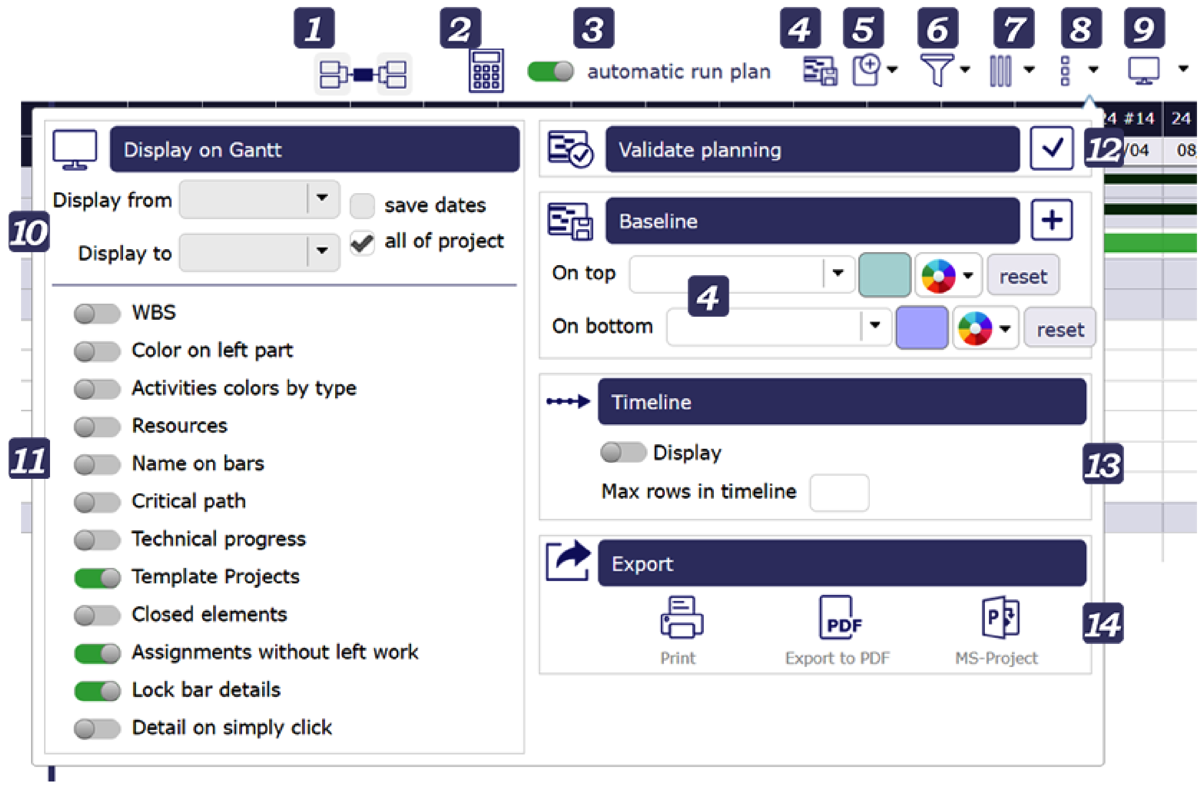


Fig. 10: Gantt chart's toolbar

8 *Planning view options*

9 *Change the layout mode*

10 *Display from… to…*

11 *Display options in Gantt view*

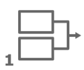
12 *Planning validation*

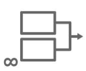
13 *Display the timeline*

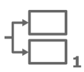
14 *Print and Export*

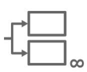
Predecessor and Successor

This functionality allows you to display the predecessors and/or successors of a plannable element (project, activity, milestone, etc.)

Click once on  to display the first level of predecessors of the selected element

Double-click  to display all predecessors of the selected element

Click once on  to display the first level of successors of the selected element

Double-click  to display all successors of the selected element.

Click on to clear the selection of the predecessor or successor

Activity planning calculation

When you make a modification on an element of your project, the project must then be recalculated to take it into account.

You have the option of using the automatic calculation function, which, if you make a modification on the planning screen, and only on this screen, will immediately take this modification into account.

If the modification is made on another screen, even if you have selected automatic calculation then, you will have to restart the calculation on the planning screen.

- Click on to start the activity planning calculation.
- A popup window appears with the list of projects.
- The check boxes allow you to select one or more projects to recalculate.

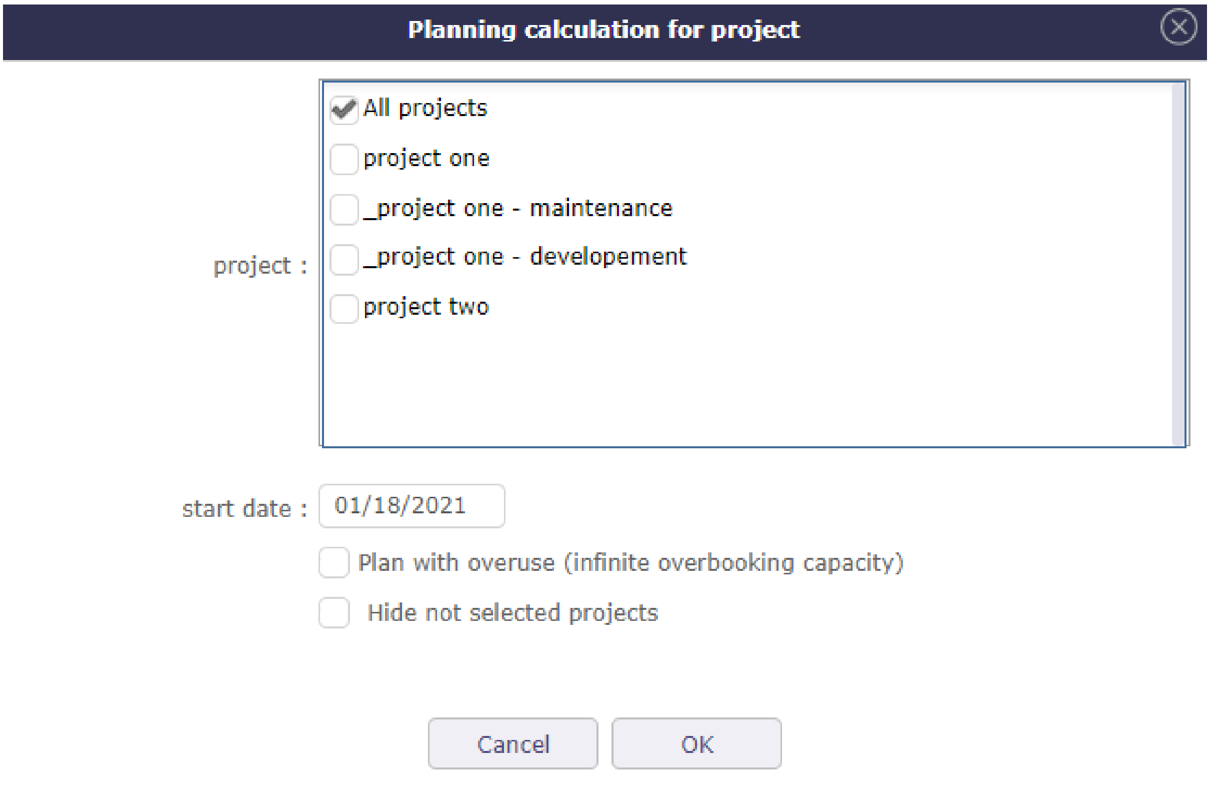


Fig. 11: Project selection popUp for project calculation

If you have selected one or more projects with *Project Selector* then the selected projects will be automatically checked.

Choose the date on which you want to recalculate the project.

By checking the “Hide unselected projects” box, you will only have the projects selected in the project selector and they will be automatically checked.

[back]

Overuse (infinite overbooking capacity)

The overuse option allows you to allocate to all the resources and this, on the projects of your choice, maximum overbooking.

This allows you to see the amount of work that is overused for the resources assigned to the task for each period of time.

> **Warning:** This function is dangerous, it does not reflect reality.
>
> For this reason, by default, it is not activated, even for the administrator.
>
> See: *Specific access* in the Planning section access rights

The overuse option allows you to allocate to all the resources and this, on the projects of your choice, maximum overbooking.

[back]

[3] Automatic run plan

Swith the button to activate automatic calculation on each change.

Only works on the Gantt Planning view.

If the modification of an element is carried out on the dedicated screen of the element, then it is necessary to click again on BUTTON to restart the computation

All modifications about assignement (rate, name or numbers of resources, dates…) done are not displayed on the new planning screen until having, for this purpose, activited the planning calculation, either in an automatic run plan or not.

On the contrary, the screen planning will not change even if modifications have been loaded yet.

> Automatic calculation
>
> **Differential calculation =** calculation of projects that require a recalculation.
>
> **Complete calculation =** calculation of all projects
>
> The calculations are programmed according to a frequency of CRON type (every minute, every hour, at a given hour every day, at a given time on a given week day, …)
>
> See: Global Parameters into the chapter *Automatic planning Calculation*

[back]

[4] Create a baseline

The baseline is a record of the planning state at a time T.

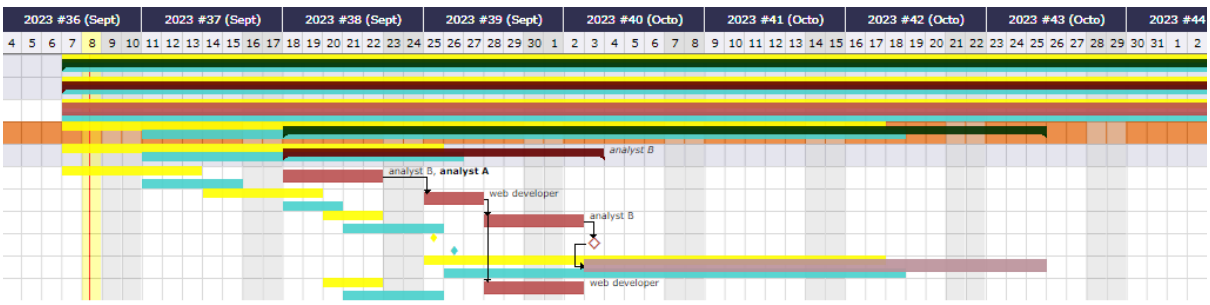


Fig. 12: Baseline display on Gantt chart

You can display two baselines on the Gantt chart. Above and below the bars of the Gantt chart.

You can create as many baselines as you want per day, but you can only save one baseline per day. Each new baseline must replace the previous one.

- Saved a baseline with the button .

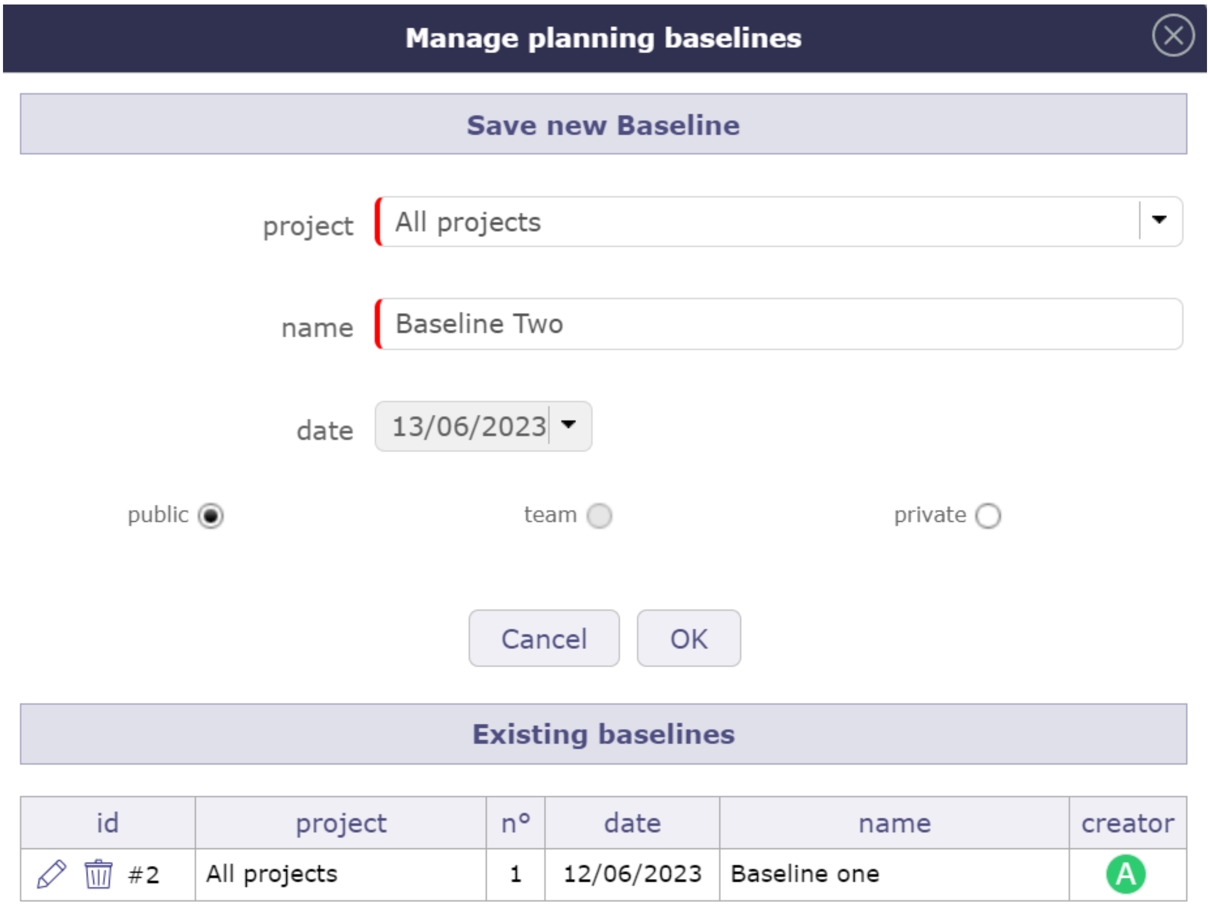


Fig. 13: Baseline management

- Enter the project on which to create the baseline.
- You have possibility to save baselines on all projects.
- The list of existing baselines, already registered, is available via this window.
- You can modify your baseline or delete it to save another one.
- An alert message notifies you when a baseline has already been performed on the current day.

  Show baseline

  You can display two baselines at the same time. The one above the current activity bars of your project. The other below.

  Each of them can be personalized with a different color.

  This option will be very useful for you to compare possible drifts and explain them.

[back]

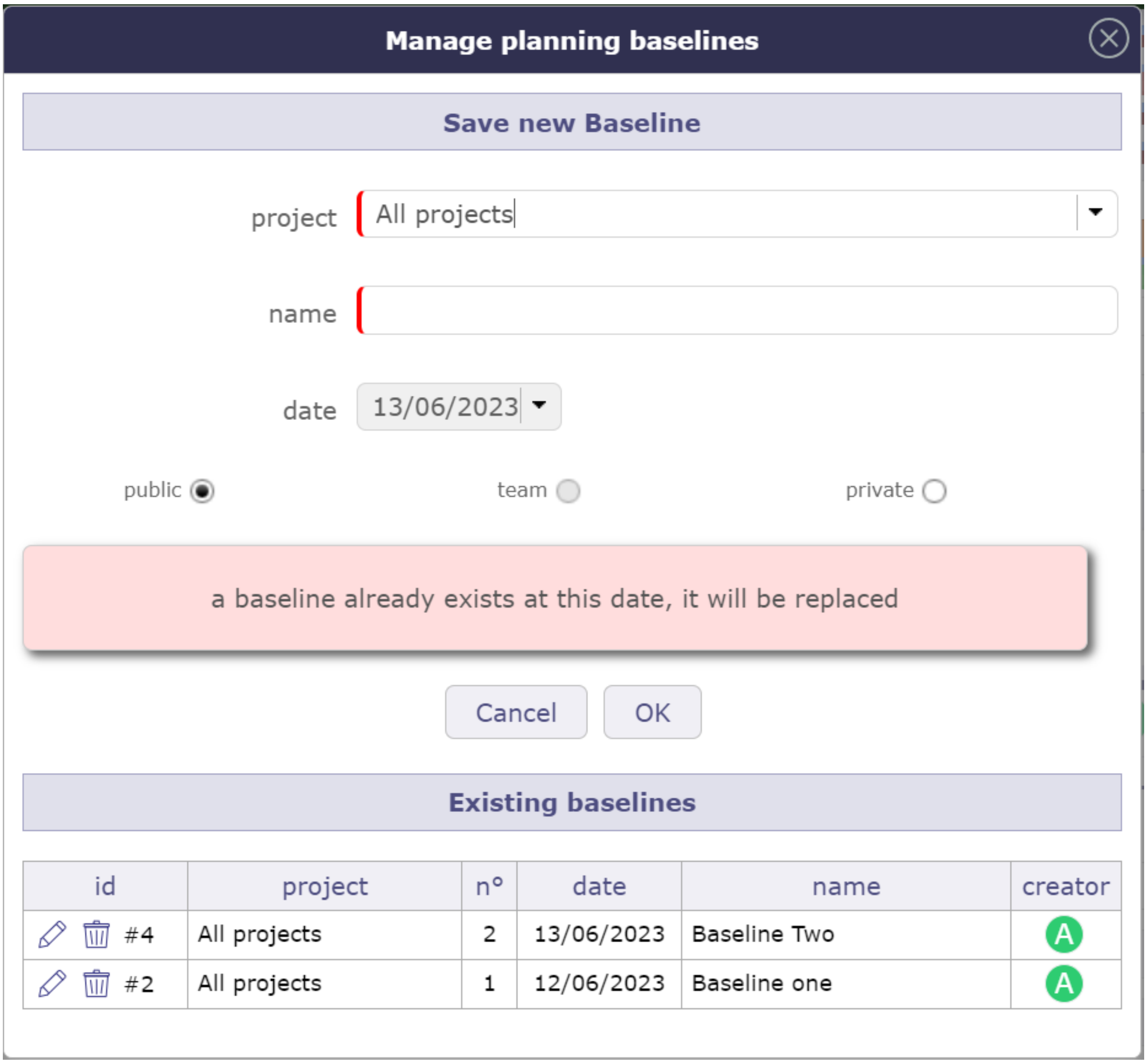


Fig. 14: Error message on baseline management

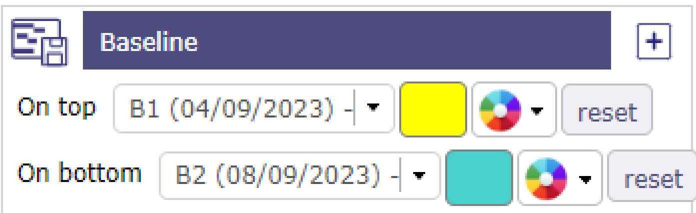


Fig. 15: Display two baselines

5 Add a new planning element

- Allows you to create a new planning element.
- The element is then added under the previously selected element and with the same level of incrementation
- The element is added to the Gantt chart and the detail area adapts to the content created.
- The details area allows you to complete the entry.

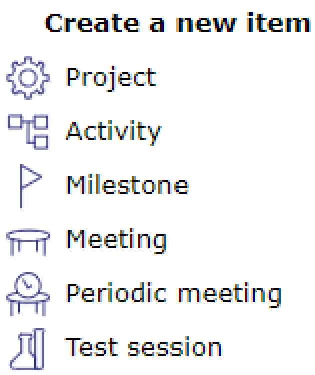


Fig. 16: Popup menu - Create a new item

You can create several elements on the planning view and more on to the *Global planning*.

[back]

6 Advanced Filter

The advanced filter allows to define clause to filter and sort.

More details: *filters*

[back]

7 Displayed columns

This functionality allows to define columns displayed in the progress data view.

More details: *Display and organize the columns*.

[back]

8 Display other options

Clicking the icon will bring up the additional options window.

[back]

9 Change layout of the screen

You can modify the display of the Planning screen independently of the other screens.

If you choose a vertical display mode globally, you can display the planning view horizontally without modifying the general display.

[back]

10 Display from... to...

Change the start and / or end date to limit or extend the display of a Gantt Chart.

If the display is truncated because the project is too long, think to change the display scale.

All the projet

Check **All the project** for the Gantt chart to show all project tasks when possible.

Saving dates

Save your dates of display to retrieve them on every connection.

[back]

11 Other options: checkbox for display

You can display or not, certain information on the Gantt chart.

Show WBS

Click on "Show WBS" to display the *WBS* number before the names.

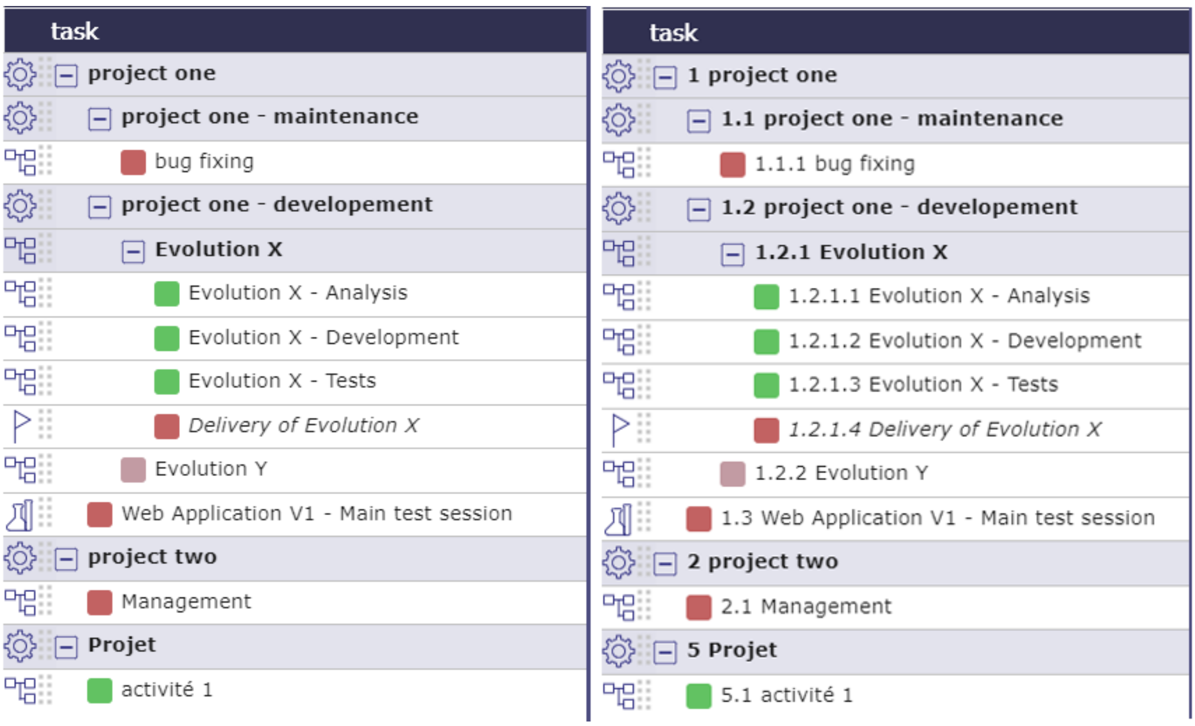


Fig. 17: Task list without and with WBS Display

[back]

Color on activies

You can apply the color of the project or the plannable element on the list (representing the *wbs*) and the Gantt's bars.

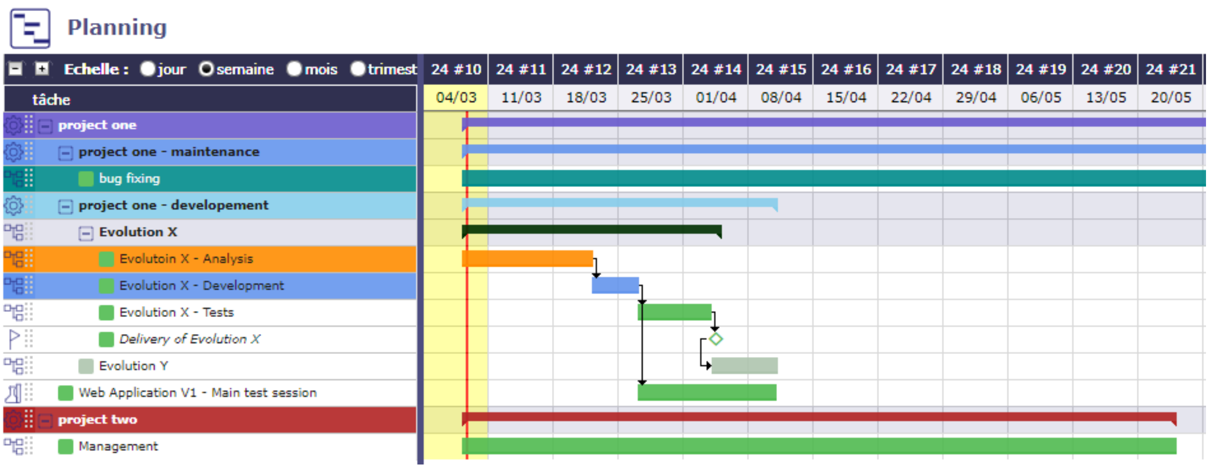


Fig. 18: color applied to the left part of the gantt chart

See: *Custom color*

[back]

Activity colors by type

You can apply the color defined for the *activity types* directly on the Gantt exactly as when you define it in the management section of your activity.

[back]

Resource

The Resource checkbox allows you to directly display the resources assigned to each activity on the Gantt chart.

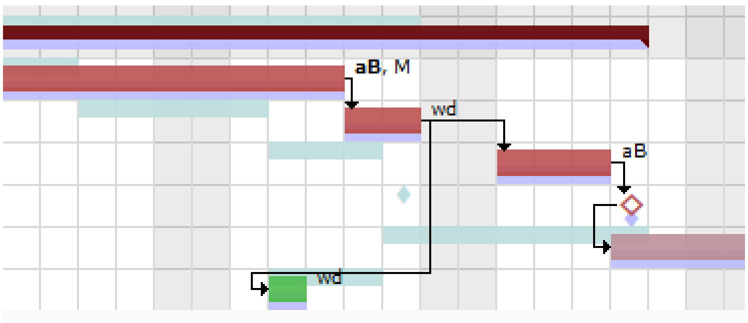


Fig. 19: Display of initials

A user parameter allows you to choose between displaying names or initials.

Choose if you want names, initials or nothing to appear on the Gantt chart.

See: *Tab Display*

[back]

Name on bars

You can display the item name directly on the milestone bars including.

A bar that is too small will truncate the name

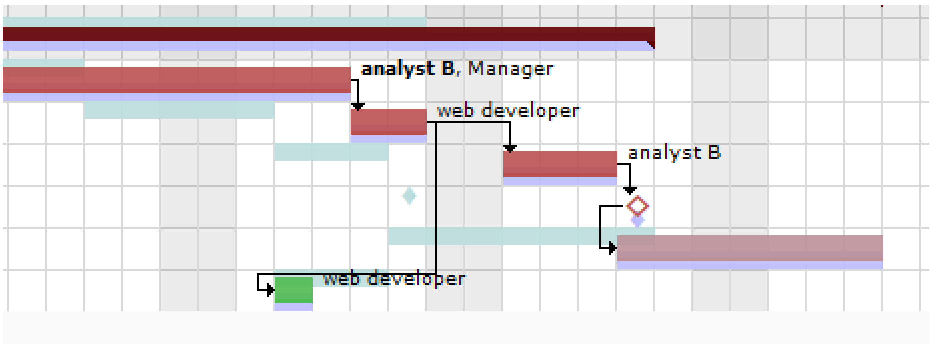


Fig. 20: Display of name

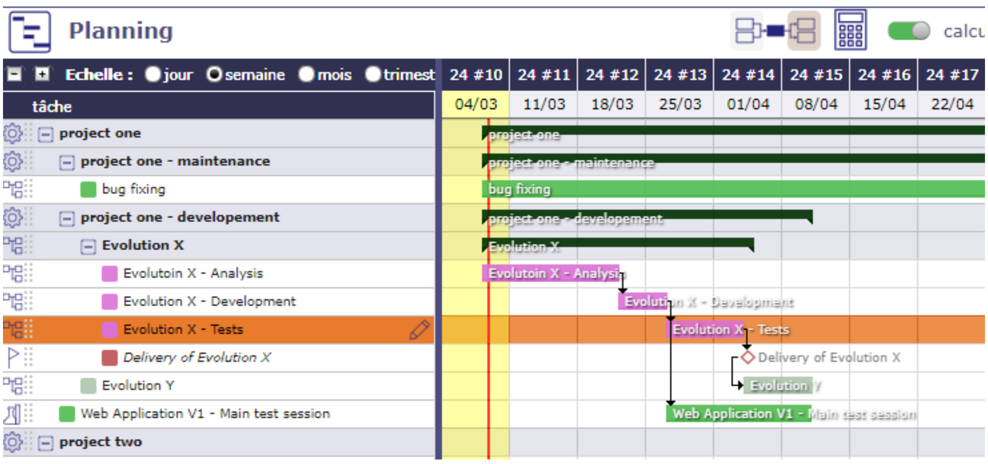


Fig. 21: Bar name

[back]

Critical path

The critical path allows you to determine the total duration of your project. This is the longest sequence of tasks that must be completed for the project to be completed on time.

The Critical Chain, meanwhile, is a technique for planning and monitoring deadlines but has the same principle: take into account the constraints to determine the duration of the project and the critical tasks that may impact this duration. One of these constraints is the taking into account of resource or skill limitations in addition to the dependencies between the tasks and the implementation of buffers, i.e. time reserves, in the critical chain and the secondary chains.

ProjeQtOr offers you a critical chain rather than a critical path, but for better understanding, the term Critical path has been retained.

- click on the **critical path** check box to calculate and display the red path in the Gantt schedule.

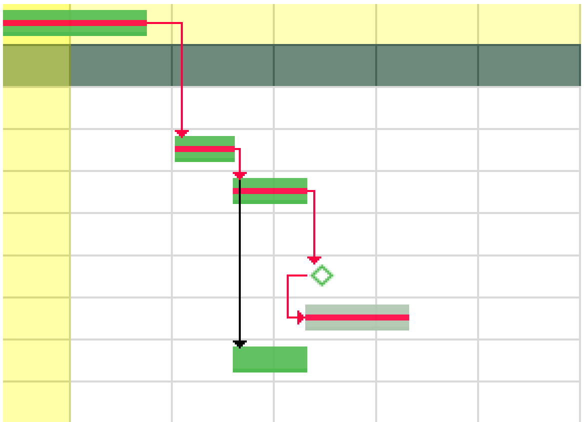


Fig. 22: The red net represents the critical path of the project.

Note: The tasks of the project which are not crossed by the critical path are elements which will not affect the duration of the project and, even modified, will not automatically involve a modification of this duration for the entire project.

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Project model

You can display or hide the template type projects in the area list.

[back]

Closed element

Allows to list closed items on the projects.

[back]

Assignment without left work

Assignments that have no more to do will no longer be visible on the detail.

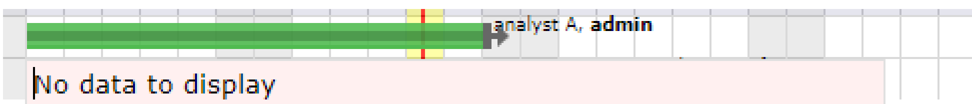

Fig. 23: Hide assignment without left work.

[back]

Lock bar detail

The detail of the bars is visible with a right click directly on the bars.

By default, this detail showing the dispatch of the planned work for the resources, does not remain displayed when you no longer hover over the bar after the right click.

Activate this option so that the detail remains displayed

[back]

Detail on simply click

Single-click detail allows you to click on the lines of the WBS without triggering online editing and display the task detail with a single click.

In this mode, you can double-click on a line to activate inline editing.

When this option is disabled, inline editing is active.

When you click on a line in the WBS structure the icon appears at the end of the line. Click on it to see the details.

Click on || to close the detail

See: Progress data

[back]

Technical progress

When this option is activated, you display the production progress of your work units on the Gantt bar in the same way as the actual work.

You can display both progress bars at the same time on the same activity bar.

[back]

12 Planning validation

Allows you to replace the validated dates with the planned dates.

If you do not have the rights activated in *specific access*> *Planning access right* then you will not see this part in the schedule options

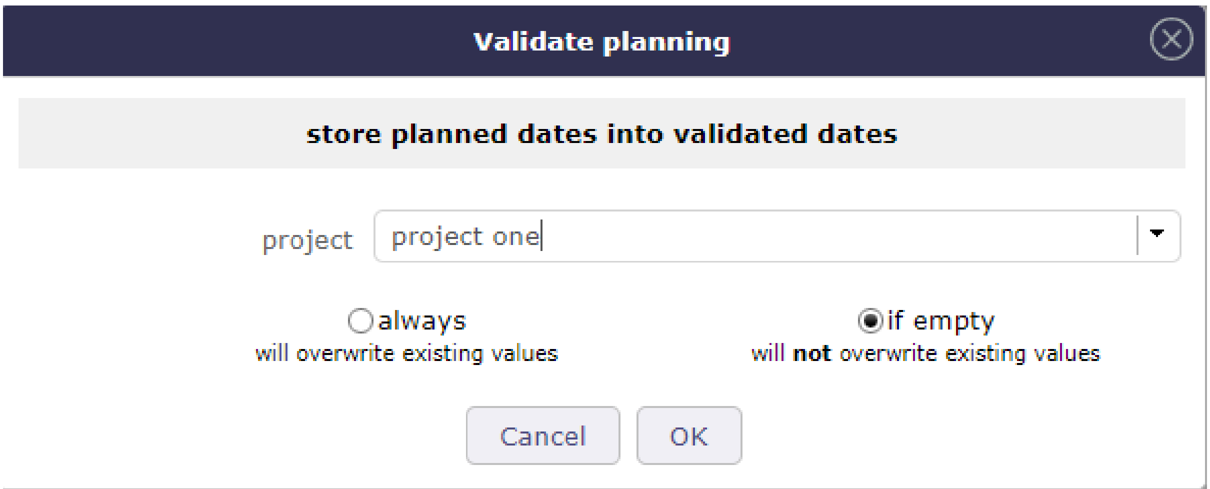

Fig. 24: Store planned dates

With this approach, you validate in a way any possible delay on the activities of your project.

Two actions are available: **Always** or **If empty**.

Always

Will overwrite existing values.

If values are entered in the "validated" fields then, they will all be replaced by the planned dates (calculated by the software)

If empty

Will not overwrite existing values.

If the "validated" fields are not completed, then these dates will be replaced by the planned dates.

If the "validated" fields are completed then they will be kept.

[back]

13 Timeline options

Max row in timeline .

Set the maximum number of lines the timeline should be composed of

Show/Hide Timeline

Show or hide the timeline.

See: *project Timeline*

[back]

14 Print and Export the Gantt chart

You can print directly on your printer or export in PDF format or in MS Project format

Print planning

Click on the button to print the Gantt chart in A4 and / or A3 format.

The print quality, despite printing or exporting on a reduced scale, remains very qualitative and offers very little loss of detail in the diagram.

Export planning to PDF

Allows to export planning to PDF format. Export can be done horizontally (landscape) or vertically (portrait) in A4 and / or A3 format with great detail even with a zoom

Export contains all details and links between tasks and also include a pagination.

And the option **Repeat Headers** allow you to print or export your planning in multiple pages

This feature will execute export on client side, in your browser. Thus the server will not be heavy loaded like standard PDF export does.

It is highly faster than standard PDF export.

> **Warning:** This technically complex feature is highly dependent on the browser and is not compatible with all of them. It is compatible with the latest versions of IE (v11), Firefox, Edge and Chrome. Otherwise, the old export function will be used.

Tip: Forced feature activation/deactivation

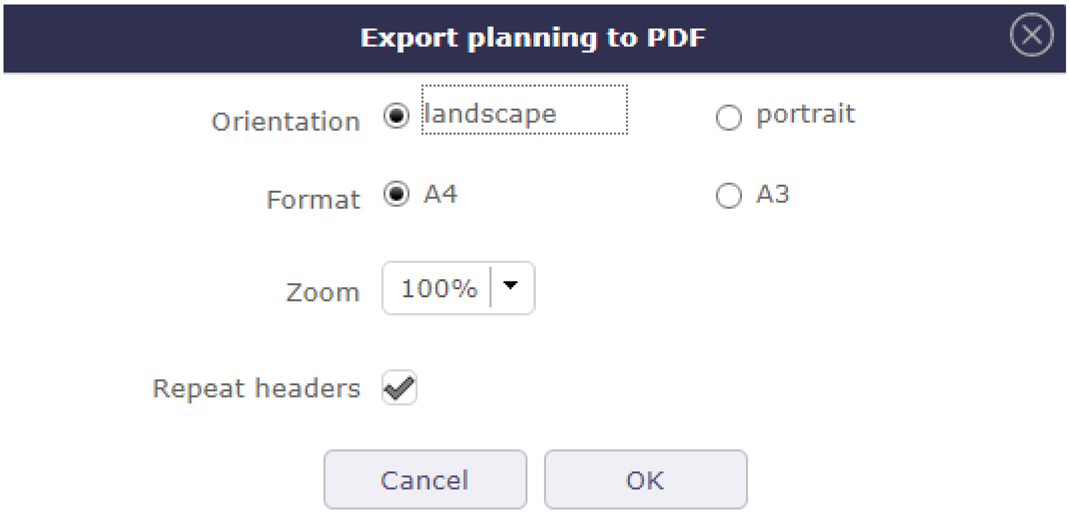

Fig. 25: Export planning to PDF

- To enable this feature for all browsers, add the parameter **$pdfPlanningBeta='true';** in parameters.php file.
- To disable if for all browsers, add the parameter **$pdfPlanningBeta='false';** Default (when **$pdfPlanningBeta** parameter is not set) is *enabled with Chrome, disabled with other browsers*

[back]

Export planning to MS Project

You have the option of exporting XML in MS Project.

Click on the button  to start the export.

A **user parameter** allows you to enter if you want to add the assignments when exporting the project to MS-Project format.

If not, the name of the resources will not be available in the MS-Project application

See:*User Parameters into the chapter<UP-print-export>*

[back]

Task List: the WBS struture

The task list displays the planning elements in hierarchical form by dividing the *WBS*.

Tasks are regrouped by projects and activities.

The projects displayed depend on the selection made with **the project selector**

See: *Project selector*

Interface areas:

1 *Show or Hide activities*

2 *Icon of element*

3 *Reorder Planning elements*

4 *Names of the items*

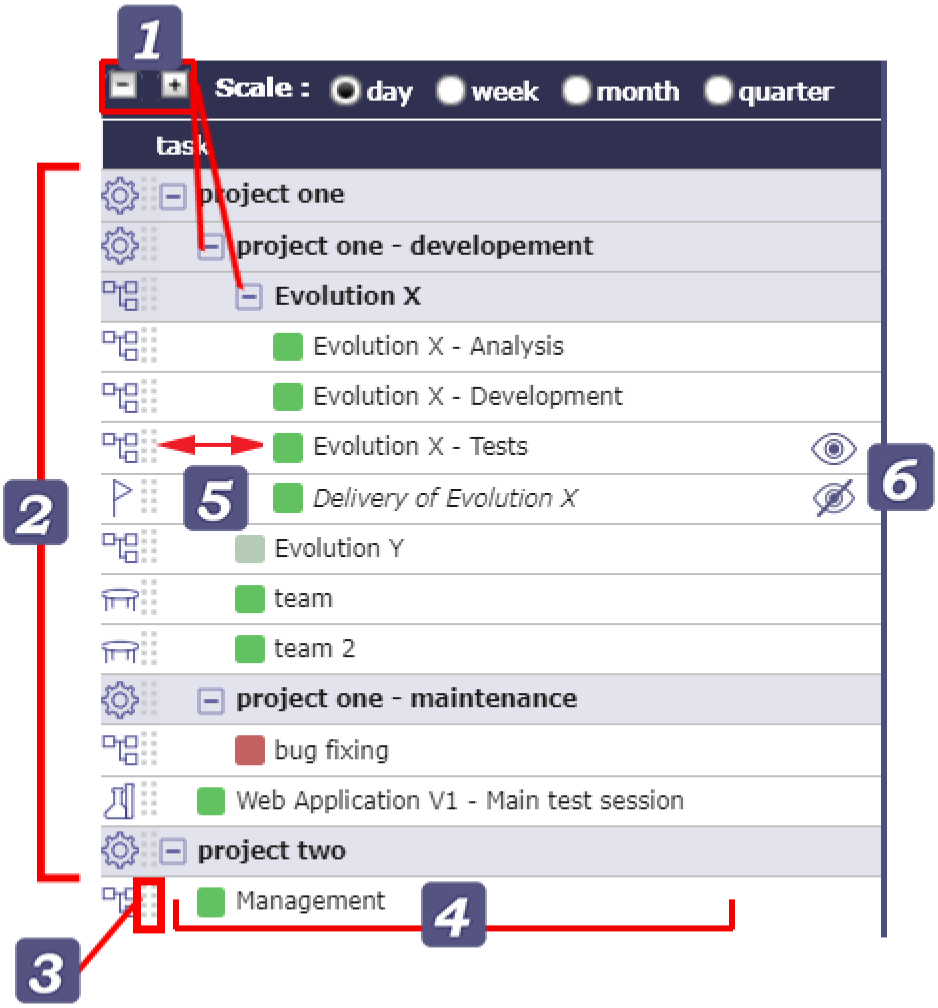

Fig. 26: Task list & progress data view

5 *Increase and decrease indent level*

6 *Edit online*

1 Show/Hide activities

- Click on the plus or minus of the header area to close and open the groups in the list area.
- Click on the icons at the top of the list to expand or collapse all project groups at the same time
- Click on the group row to expand or collapse the group only

See also: *Scale*

2 Icon of element

A specific icon appears to the left of each item type for faster identification.

- Project
- Project to recalculate (the Gant diagramm to display with the latest settings)
- Project under construction
- Projet fixed in the planning
- Activity
- Milestone
- Meeting
- Test session

Other items can be displayed in the *Gantt chart* (action, decision, delivery…)

3 Reorder planning elements

The selector allows to reorder the planning elements.

Note: Ability to move multiple tasks at one time from one location to another using the key control to select the lines and then dragging and dropping them.

Warning: If you move an activity to a new project, the assigned resource must be allocated to the new project to allow this move.

4 Item name

Click on a line to display the detail of the item in the detail area.

5 Increase and decrease indent level

Increase and decrease indent level

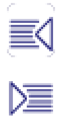

Fig. 27: Indentation buttons

Increase indent

The element will become the child of the previous element.

Decrease indent

The element will be moved at the same level than the previous element.

Progress data

The progress data view allows to show progress on project elements.

To display the progress columns, pull the splitter to the right.

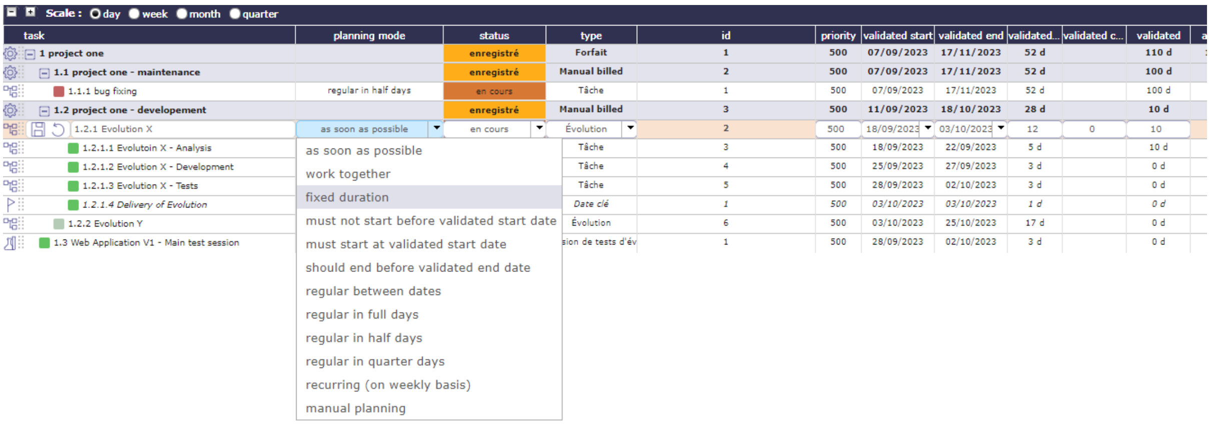

Fig. 28: Progress data view

For each planning element, the progress data are displayed at them right.

you can add or remove the columns you are interested in using column management.

Click on  to manage them.

See: *Display and organize the columns*.

You can change the order of columns and resize them from this view without going through the column management menu.

Drag and drop the column to the right or the left. Click on the splitter between two column to resize the column.

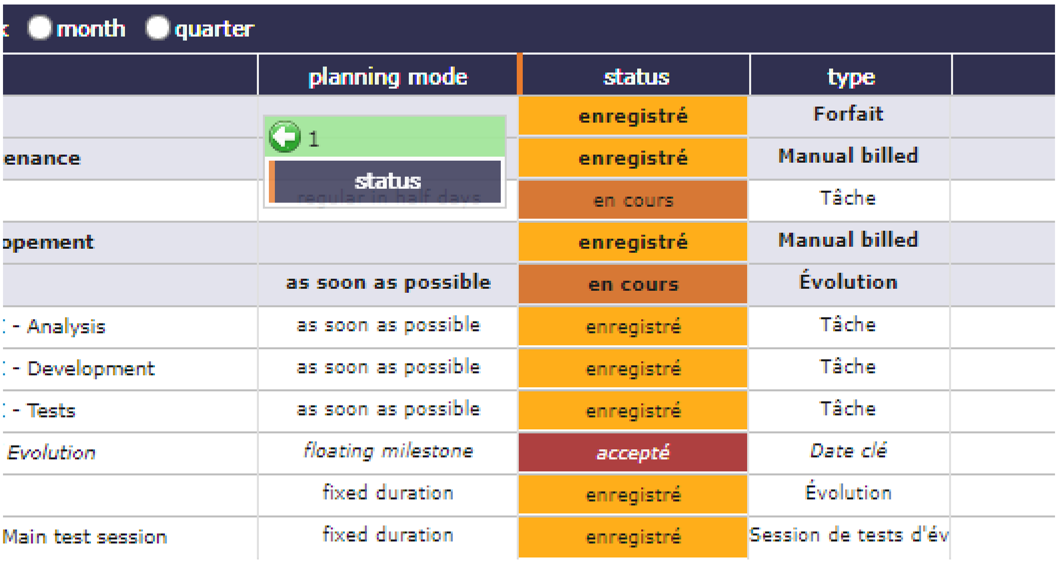

Fig. 29: Move column

Edit online

Each row and each column field can be edited from this view.

Click the field once if the Single Click Details option is disabled, double-click if the option is enabled.

- Click on to display the detail
- Click on to edit the line
- Click on to close the detail.

The controls relating to the choice of certain fields, such as for the planning modes, are well executed even in free edit mode.

Gantt chart view

The Gantt chart view is a graphical representation of the progress data of a project.

For each planning element, a bar is associated with it

Interface areas

1 *Scale*

2 *The Gantt chart's Bars*

3 *Dependencies*

4 *Milestone*

5 *Detail of the work*

6 *Project Timeline*

7 *Edit details on line*

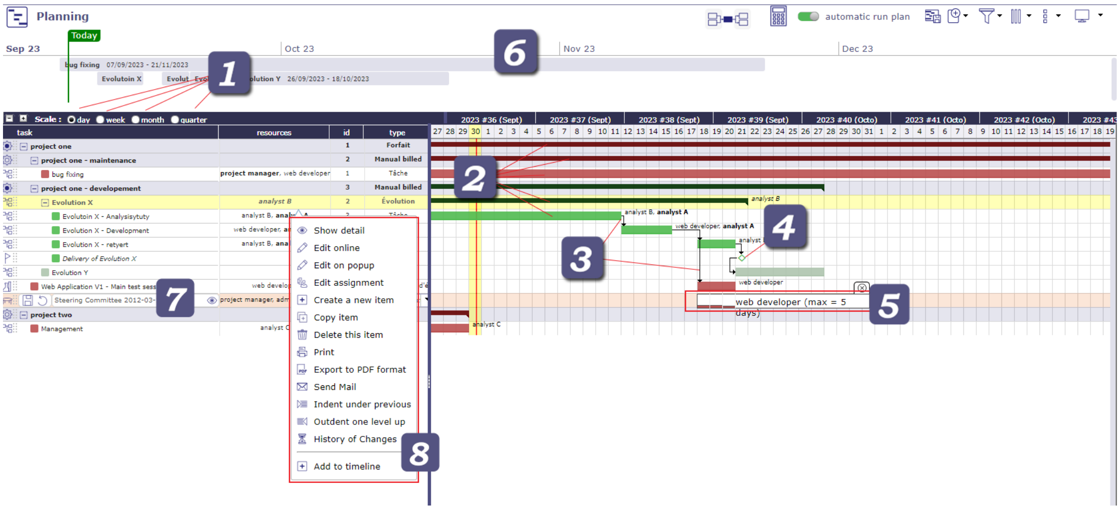

Fig. 30: Gantt chart view

8 *right click menu*

1 Scale

Scale available: daily, weekly, monthly and quarter.

The Gantt chart view will be adjusted according to scale selected.

When you are in the planning view on the wbs and gantt area and details area, you can move from one scale to another using the wheel control on your mouse.

- Mouse wheel up to increase the scale*.
- Mouse wheel down to decrease the scale.
- When you continue to increase after the semester, then we loop and return to the day scale, the smallest.
- Outside of these areas, the mouse wheel will increase the zoom of your browser.

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2 Gantt chart's bars

The bars in the gantt chart graphically represent a line of your *WBS* structure.

We visualize the start and end dates and therefore the duration of the task.

The bars displayed in the gantt chart can appear with different colors. Each color has a meaning.

CURRENT DATE BAR

Yellow column indicates the current day, week, month or quarter, according to scale selected.

The red line in yellow collumn display the current day and time.

PALE GREEN OR RED BAR

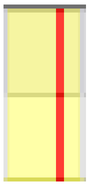


Fig. 31: Current date bar

Condition : Activities without assigned work - pale red or pale green as appropriate

GREEN BAR

Fig. 32: no charge

Condition : Assigned resources are available and meet workload, validated or scheduled dates do not conflict with other items

RED BAR

Fig. 33: all is well

Condition: Planned end date > Validated end date - Real end date if completed task > Valited end date

PURPLE BAR

Fig. 34: Overdue tasks

Condition: If a resource is not or is no longer available on an activity.

The calculator is trying to plan the workload. The resource assigned to the activity is unable to be planned for this task (absence, calendar, assignment or assignment periods, etc.); then the bar turns purple.

PINK BAR

Fig. 35: Impossible to calculate the remaining work

Condition: Planning can take into account validated end dates of activities as a priority using a global parameter.

When this option is activated, the validated end date, if it is not provided, is automatically inherited from the successor or parent.

Fig. 36: Impossible to calculate the remaining work

In the case of an inheritance and the Planned end date > Validated end date, the bar turns pink.

Pale pink without workload and bright pink with workload.

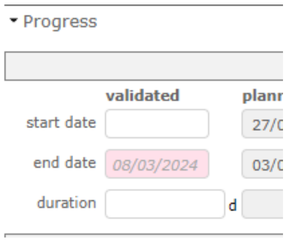


Fig. 37: Inherited date

When the validated dates are inherited then they are displayed in italics and grayed out whether in the list area or the detail area.

FOR COLOR BLIND

The color of the bar adapts to color blind people if you have activated the option.

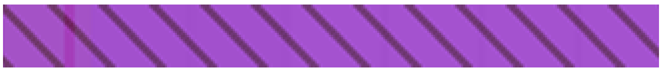
GREEN BAR

Color of the GREEN bar

 Enable this option in *user parameters*

RED BAR

Color of the RED bar.

 Enable this option in *user parameters*

SPECIAL BARS

some features offer different color codes.

SURBOOKING and OVERUSE BAR

Condition: Add extra work time on the standard capabilities of your resources to plan more projects that you will not process.

Fig. 38: Resource capacity overbooking

See: *Managment of surbooking periods*

See: *overuse*

SURCAPACITY BAR

Fig. 40: Overcapacity of resources

Condition: The capacity of the resource has been changed. It can be under capacity or over capacity. That is to say, it does less or more than its FTE.

For more information see: *Variations in resource capacity*

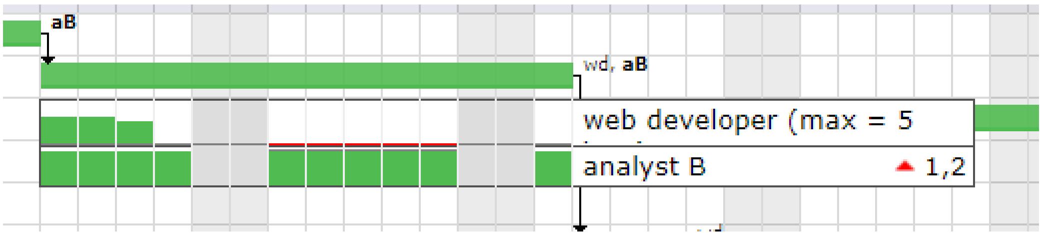


Fig. 41: Surcapacity view on Gantt chart

in progress

Real work

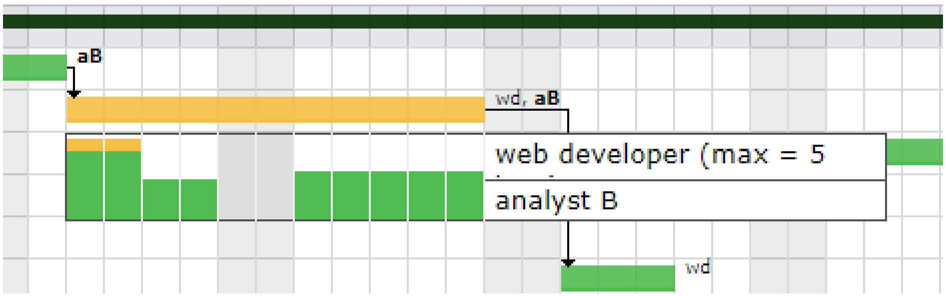


Fig. 39: Surbooking or orveruse view on Gantt chart

Condition: the length represents the percentage of completion based on the actual progress (Assigned - Real work) versus the length of the Gantt bar.

Technical progress

Fig. 42: Work in progress

Condition: the length represents the percentage of completion of the units of work that you enter manually (Delivered - completed) in relation to the length of the Gantt bar.

You can display both progress bars at the same time on the Gantt chart bar.

Fig. 44: Progress bars for actual work and work units

Consolidation bar

Fig. 43: Technical progress

Condition: graphical display of the dates consolidated by the group of planning elements for a project

CUSTOM COLORS

You can apply the color of your choice on the bars of the Gantt chart representing activities, milestones and meetings.

If the Planned end date> Validated end date then the bar should be colored red.

In case you have set a custom color, this state will still be indicated by a thin line at the bottom of the bar.

Fig. 45: Consolidation Bar

And in the task list, where the indicators remain the original color.

A parameter in the tools box allow to apply the color on the left part of the Gantt chart. See: *Apply color on left part*

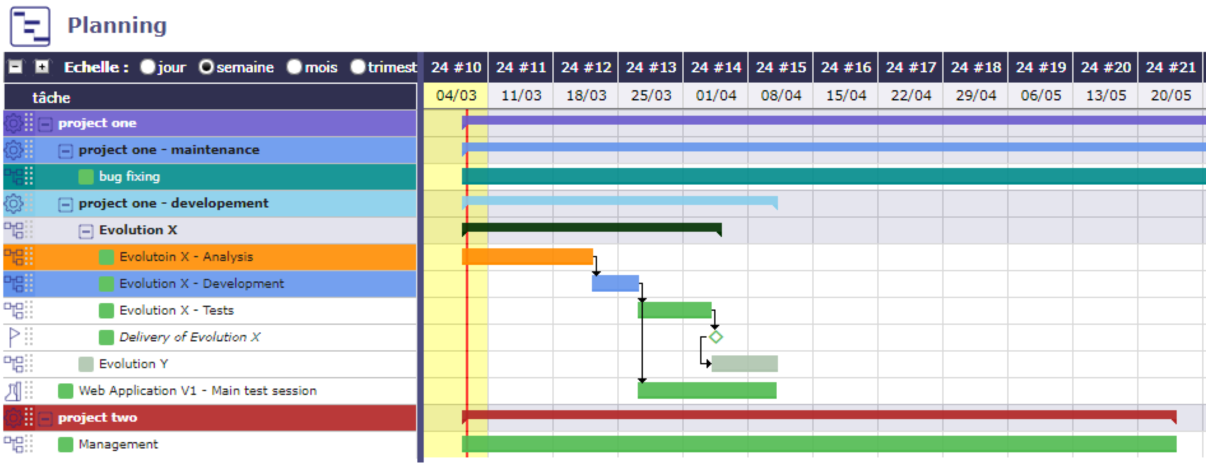


Fig. 47: color applied to the left part of the gantt chart

Click on the reset button to come back to original colors.

You can also set a default color based on the *activity type*.

ITEM NAME DISPLAY

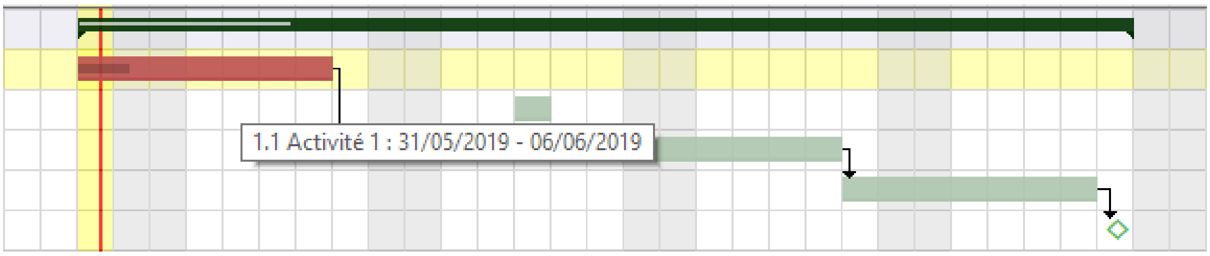


Fig. 48: Item name and planned dates on the selected bar

Move the cursor over the bar to display item name and planned dates.

or activate the "*show bar name*" check box directly on the Gantt view in the planning screen options.

[back]

Dependency links

See also:

- *Predecessor and successor*
- *Milestones*

Dependencies allow to define the execution order of tasks (sequential or concurrent).

All planning elements can be linked to others.

Dependencies can be managed in the Gantt chart and in screen of planning element.

Dependencies between planning elements are displayed with an arrow.

Create a dependency

To create a dependency, left click on a bar of the gantt (the predecessor) and slide towards the successor.

You can also create dependencies with the predecessor and successor tables at the bottom of the details area.

Remember than the first task always drives the second.

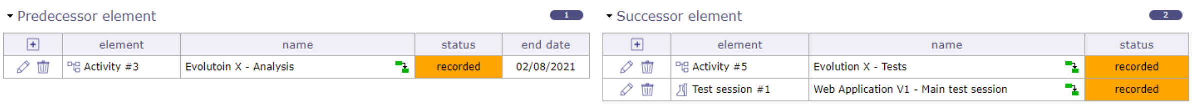


Fig. 49: Predecessor and Successor section - In the NAME field, icons are displayed to indicate the type of dependencies

- Click on on the corresponding section to add a dependency link.
- Click on to edit the dependency link.
- Click on to delete the corresponding dependency link.

Modify a dependency

Click on the arrow which turns orange, a pop up is displayed allowing you to modify the type and one to add a possible delay.

The delay can be positive or negative.

Tip: Multi-line selection is possible using `Control` or `Shift` key while clicking.

Negative delay allows overlapping of certain tasks

See the strict mode of dependencies

Dependency types

End-Start

The second activity can not start before the end of the first activity.

Start-Start

The successor can not begin before the beginning of the predecessor. Anyway, the successor can begin after the beginning of the predecessor.

End-End

The successor should not end after the end of the predecessor, which leads to planning "as late as possible".

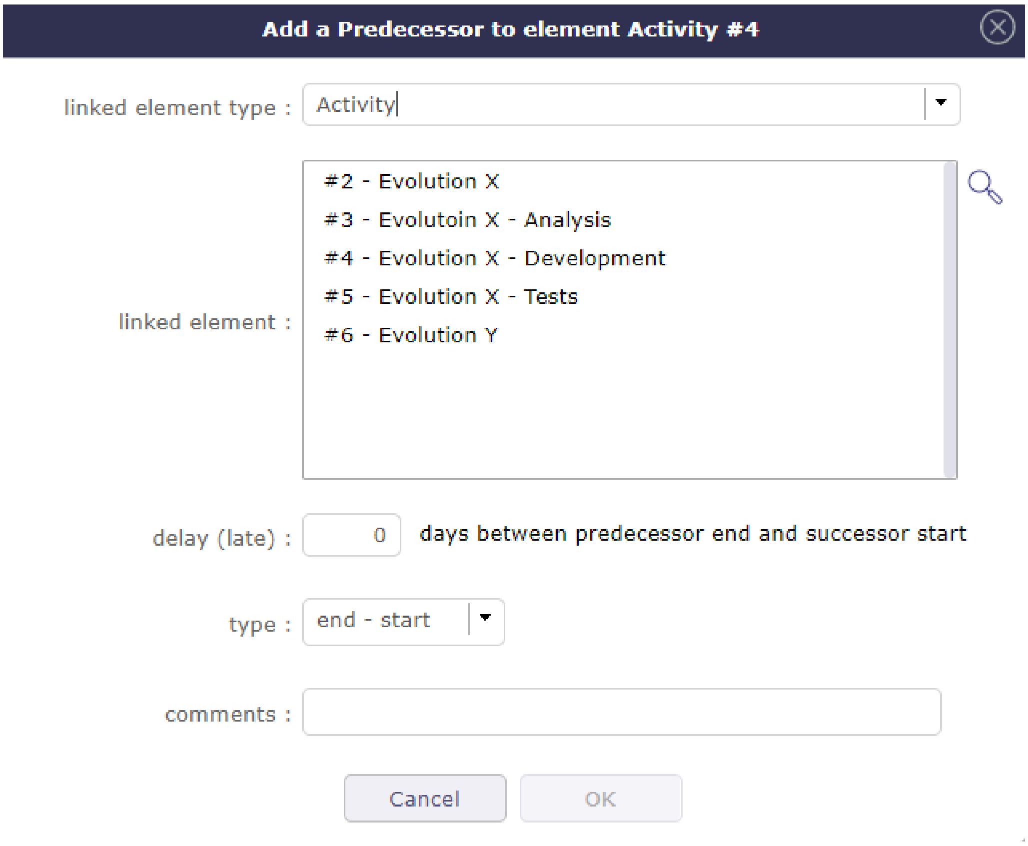


Fig. 50: Dialog box - Predecessor or Successor element

Fig. 51: Dependencies dialog box

Anyway, the successor can end before the predecessor. Note that the successor "should" not end after the end of predecessor, but in some cases this will not be respected:

- if the resource is already 100% used until the end of the successor
- if the successor has another predecessor of type "End-Start" or "Start-Start" and the remaining time is not enough to complete the task
- if the delay from the planning start date does not allow to complete the task

Strict mode for dependencies

The strict dependency mode forces the successor planning element not to start on the same day as the same predecessor but the next day. Even if the task is finished before the end of the day.

To have the successor start on the same day or before the end of the predecessor task, select NO for strict mode or you can also put a negative delay.

The strict dependency mode is a *global parameter*.

By default, the strict dependency mode is set to YES.

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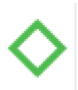
Milestone

Milestones appear as small diamonds. Filled if completed, empty otherwise.

Color of diamond depends on milestone progress.

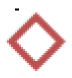
Ongoing milestone and in times



Completed milestone and in times

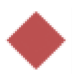
Ongoing milestone and delayed

Planned end date > Validate end date



Completed milestone and delayed

Real end date > Validated end date



[back]

5 Detail of the work

ProjeQtOr also allows you to see the distribution of the workload assigned to the resources.

Right click on a bar to see the detail.

An *option* allows you to display the details of a bar rather than only seeing it on hover.

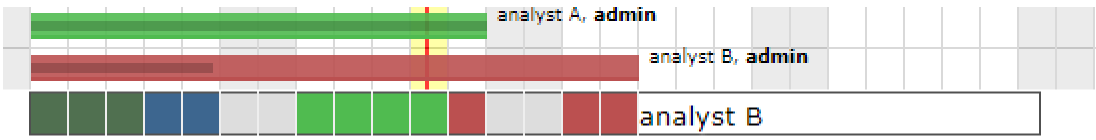


Fig. 52: Display details of the work

The lines are sorted by resource name.

Colors code

Planned workload

Real work - charged to the timesheet

Excess workload over dates

Absence of the resource

> **Warning:** You have to selected day, week or month scale to display detail or a message will ask you to switch to smaller scale.
>
> Quarter is not available for th detail.

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6 Project Timeline

You can view the timeline of your projects in the timeline.

The timeline allows you to have a faster visibility on the progress in time of your projects.

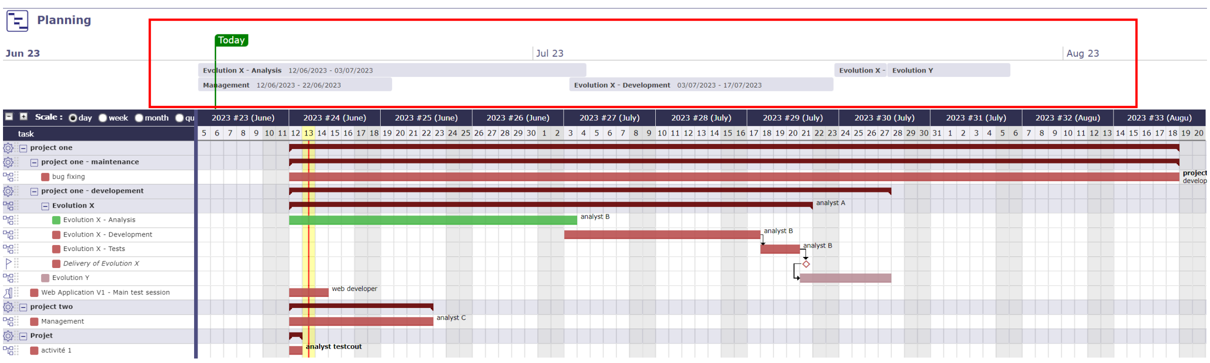

Fig. 53: Timeline

- The timeline offers a linear view of some selected tasks.
- You can add/remove tasks to the Timeline with a single right click.
- Timeline scale automatically adapts to selected tasks.

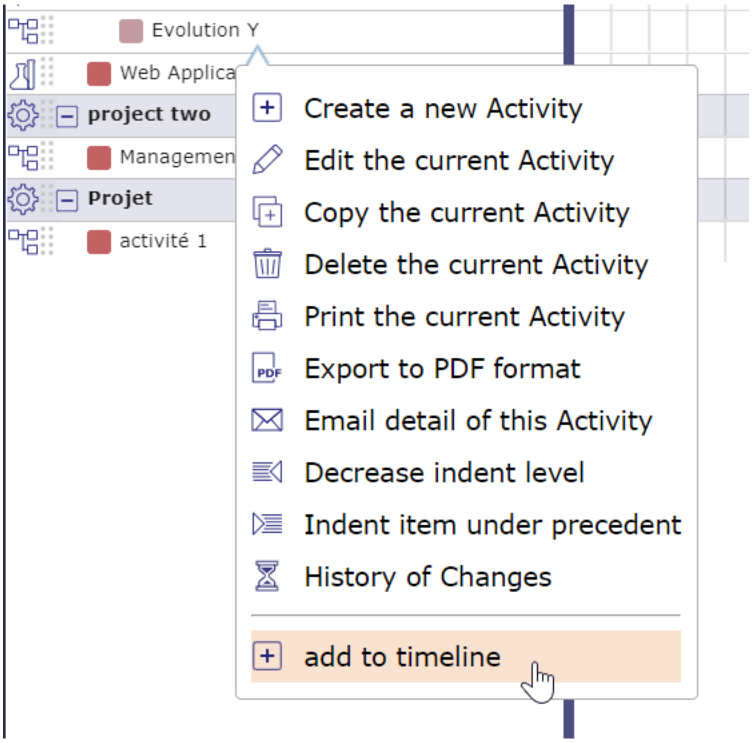

Fig. 54: Add to timeline

- You can hide the Timeline in the Gantt planning view options.

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Edit details on line

The lines represent each task that needs to be accomplished in the project. This is the WBS representation of projects.

You can edit these lines directly on the list.

Each row and each column field can be edited from this view.

Click the field once if the Single Click Details option is disabled, double-click if the option is enabled.

- Click on  to recorded the modification
- Click on  to cancel the modification
- Click on  to display the detail
- Click on  to edit the line
- Click on  to close the detail

The controls relating to the choice of certain fields, such as for the planning modes, are well executed even in free edit mode.

Fig. 55: Edit on line

Either with a single click if the "detail on single click" option is deactivated, or by double clicking if the option is activated.

[back]

right click menu

By right clicking on each of the lines you have access to the Gantt submenu which allows you to access certain actions by going through the main menu of the screen.

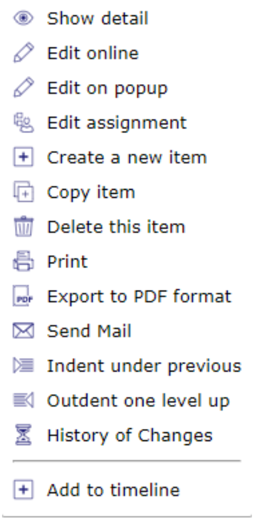

Fig. 56: Right click menu

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Details area

The details area is the same as on all the ProjeQtOr element screens and adapts according to the selected element.

See: *Details area*

6.3.2 Planning order

The planning is calculated as simply as possible. This means that no complex algorithm is applied.

The principle adopted is simply to be able to reproduce what you could do with a spreadsheet type spreadsheet, but this time automatically.

All unrealized work is planned, from the start date to the maximum date depending on the load assigned to the project(s).

The calculations are performed task by task, according to the following organization

- **WBS**

  The WBS (Work Breakdown Structure), that is to say the structure or scheduling of your schedule is planned first if no other constraint comes to disturb this order. It is read from top to bottom and from left to right.

- **The validated end date**

  It is possible to set the default priority of activities from the finish date posted before the order in the WBS structure.

  - This will give higher priority to activities that need to finish sooner, regardless of WBS.
  - The planned end date is by default the validated end date.
  - If the validated end date is not defined, the planned end date can be retrieved from a successor (e.g. end milestone) or from the parent.
  - If two activities have the same scheduled end date, the WBS is always the last priority criterion.
  - This feature can be disabled in Global setting to fetch default WBS criteria only.

- **Priorities of activities**

  All activities with the lowest priority value will potentially be scheduled first.

- **Project priorities**

  The smallest value (index) is calculated first, this means in particular that if the projects have different priorities, all activities of the project with the smallest priority value will potentially be planned first.

- **Planning modes**

  "The must start on the validated date", "regular between two dates" and "recurring" modes are priority modes compared to the other activity planning modes other than manual planning.

- **Dependencies**

  If an activity or project has a predecessor, the predecessor is always scheduled first.

- **Meetings**

  It is fixed on a given date. Even if not all of the participants are available. In this case, an alert informs you and the Gantt chart displays the unavailability.

- **Planning Manual** and planned interventions

  This highest priority planning mode. The workload assigned with this planning mode can be recorded in planned work or in actual work.

6.3.3 Planning Modes

Projeqtor offers several ways to plan the workload for your resource with 11 different planning modes.

The order of the planning modes is not random and the further you go down the list, the more the planning modes have priority and will recover the load on the tasks that can be scheduled in the previous planning modes.

- *As soon as possible*
- *Work together*
- *Fixed duration*
- *Duration driven*
- *Must start before…*
- *Must start at validated date*
- *Should end before…*

- *Regular between dates*
- *Regular between dates in full dat*
- *Regular between dates in half day*
- *Regular between dates in quarter day*
- *Recurring*
- *Manual planning*
- *Minimum threshold & not splitted work*

As soon as possible

- The task is planned to be completed as quickly as possible.
- If no assignment is created the bar will automatically be 1 day.
- If the validated duration is entered, it is this duration that is planned.

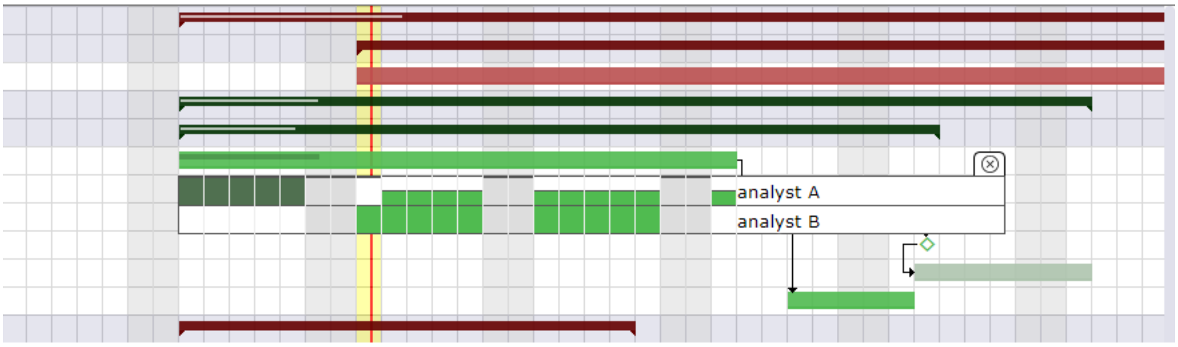


Fig. 57: Planning Mode As soon as possible: the calculation will schedule the resource as soon as it has an available slot

|*MODES*|

Work together

- When two or more resources are assigned to the same task, planning tries to find periods where all resources are available to work together.
- Periods are searched "as soon as possible".
- If only one resource is assigned, this planning mode is exactly the same as "As soon as possible".
- If one resource is assigned more work than the other, the extra work is planned after working together periods.

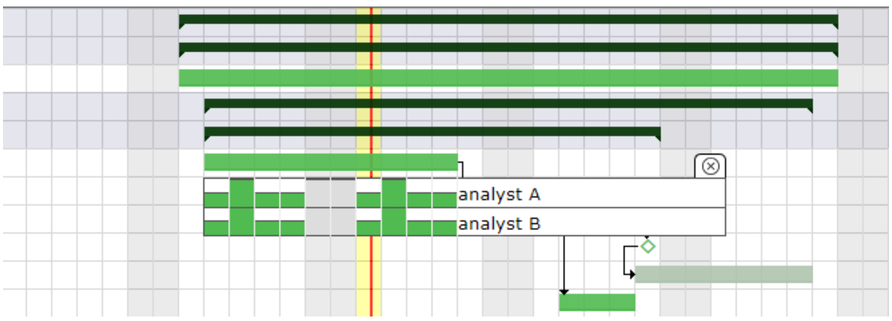


Fig. 58: Planning Mode work together: the calculation will schedule the resources at the same time and as soon as it has an available slot

|*MODES*|

Fixed duration

- The task is planned by duration. The validated duration field must be filled in.
- If work is assigned to the task, the scheduling behavior is the same as "Regular Between Dates".
- Ability to readjust (start and end date) the task with handles directly on the Gantt view bar.
- When the number of assigned work days exceeds the indicated duration, then the days (detail of the Gantt bars) following the validated end date of the activity will be in red.

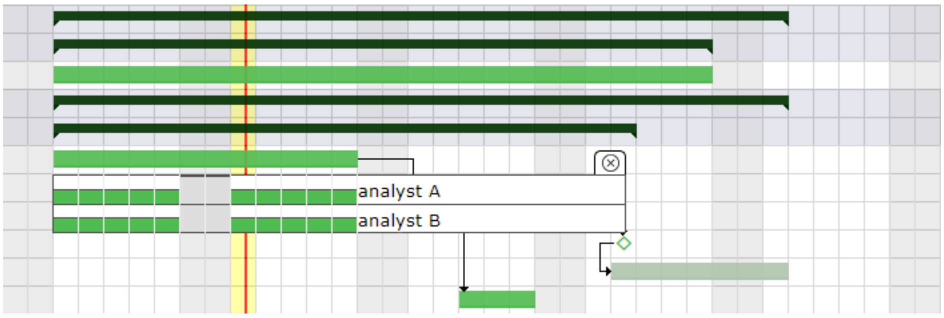


Fig. 59: Planning mode fixed durattion with workload

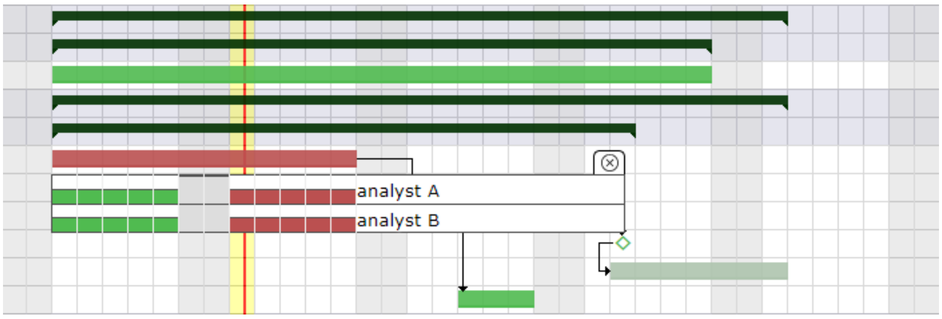


Fig. 60: Planning mode fixed duratiion with workload and validated end date < planned end date

|*MODES*|

Duration driven

- The task is planned by duration which is fixed.
- If the allocation of resources exceeds the set validated duration then the distribution of remaining work becomes overuse.
- When the assigned workload does not exceed the number of days of fixed duration then the planning mode distributes the workload by smoothing it throughout the duration, exactly as with the fixed duration or the regular between two dates.
- In automatic calculation mode, only the activity in this mode will be recalculated.
- Other activities, even those driven by dependencies, will only be recalculated with the full calculation function.
- Ability to readjust and move the task (handles on each side of the bar) directly on the Gantt.
- With the left handle you adjust the full bar without changing the duration.

|*MODES*|

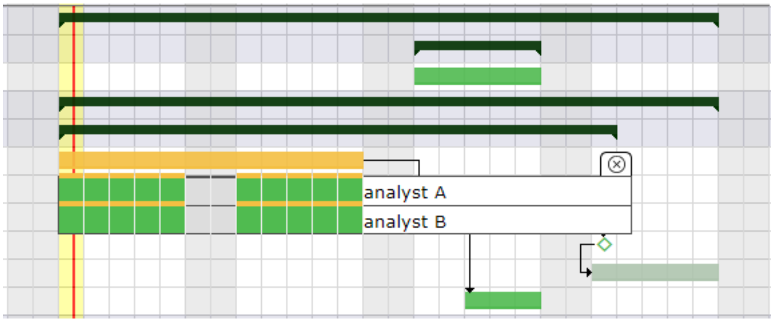


Fig. 61: Planning mode Duration driven: work that exceeds the duration is calculated as overuse

Must not start before validated start date

- The validated start date field must be set.
- The task must not begin before a specific date.
- If a stronger constraint, such as dependencies or real work, is specified, the planning mode will no longer be respected.
- You can block resource imputations in this planning mode by enabling the global parameters "lock timesheet before validated start date" in *global settings*

|*MODES*|

Must start at validated start date

- The validated start date field must be set.
- The task must not begin before this specific date.
- This planning mode reclaims time from previous planning modes.
- It has priority over the "as soon as possible", "fixed duration" and "work together" modes.
- The start date is no longer respected if a stronger constraint, such as dependencies or real work, is specified.

You can block resource imputations in this planning mode by enabling the global parameters "lock timesheet before validated start date" in *global settings*

|*MODES*|

Should end before validated end date

- The validated end date field must be set.
- The task is planned backward from end to start.
- A validated end date must be defined.

|*MODES*|

Regular between dates

- Allows to evenly distribute work between two dates.
- Used for management recurrent activities.
- The validated dates fields must be set.
- Possibility to readjust the task with handles directly on the bar of the Gantt view.

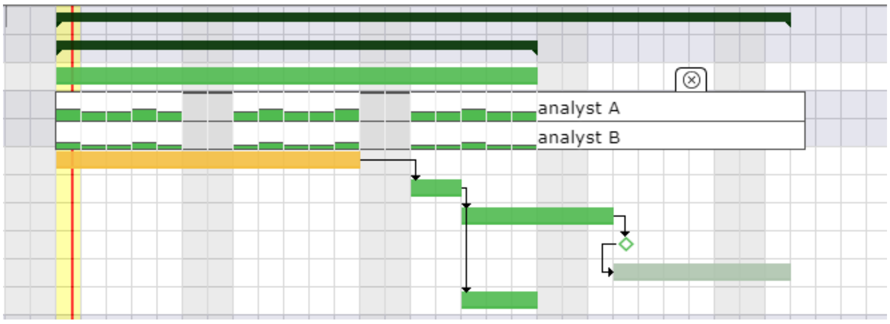


Fig. 62: Regular between dates mode

See also: *Regular modes with excess workload*

|MODES|

Regular in full days

Work will be distributed on full day between on working days.

Possibility to readjust the task with handles directly on the bar of the Gantt view.

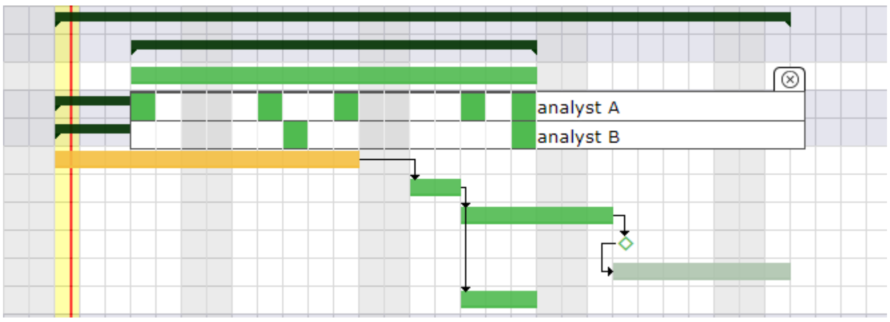


Fig. 63: Planning mode Regular in full days: assigned days are distributed evenly in full days

See also: *Regular modes with excess workload*

|MODES|

Regular in half days

The work will be distributed over half of the day between working days.

Possibility to readjust the task with handles directly on the bar of the Gantt view.

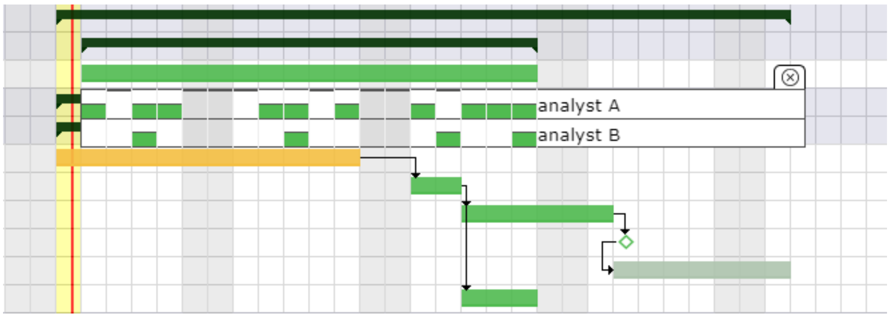


Fig. 64: Planning mode in half day: assigned days are distributed evenly in half days

See also: *Regular modes with excess workload*

|MODES|

Regular in quarter days

Work will be distributed on one quarter of the day between on working days.

Possibility to readjust the task with handles directly on the bar of the Gantt view.

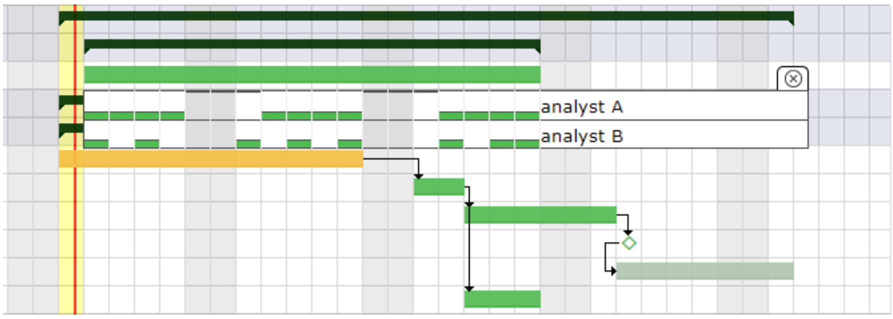


Fig. 65: Planning mode in half day: assigned days are distributed evenly in quarter days

See also: *Regular modes with excess workload*

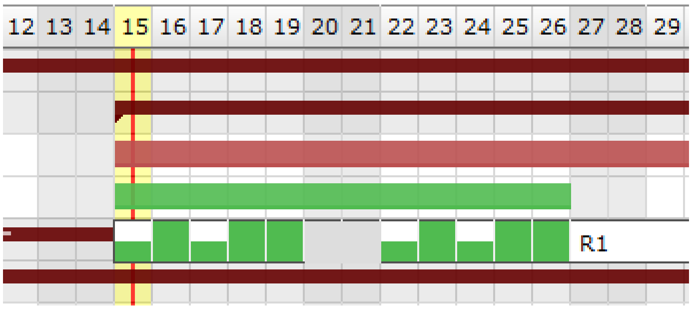
|MODES|

Regular modes with excess workload

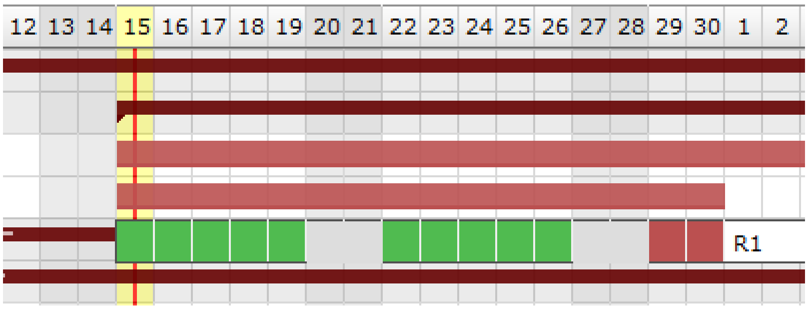
If the dates are too short compared to the assigned load, the excess load will be divided and added in the same way as the chosen mode.

So you can get full days even in regular mode in quarter day or half days.

- Example with 8 days of workload to plan over 10 days with the Regular mode in half days between dates



The load is distributed regularly so as to respect the dates.



If the load is too high to meet the dates, the excess load will be distributed over the whole day after the validated end date and will therefore be late (red color)

|MODES|

Recurring (on a weekly basis)

- This mode allows you to plan the workload on a weekly basis which will be distributed each week, for example 1/2 day every Monday, 1 hour every day, etc.
- It automatically adapts to the elements which determines the total duration of the project. If the project falls behind schedule, this mode will continue to adapt and automatically distribute the load for each added day.

Tip: Please note, the project is only an envelope, it is the elements that compose it which will determine its duration. A recurring activity cannot be calculated correctly if it is the only component of the project, even if it has validated dates. Other elements (Activities, milestones, etc.) will be needed for the distribution of this load to be done correctly.

Click to enter the load for each day of the week.

The work is distributed dynamically according to the load indicated on the assignment table.

If you don't want the recurring activity to fit the project, you can limit it between finish-to-start and finish-to-finish milestones.

See: *Recurrent mode assignment*

|MODES|

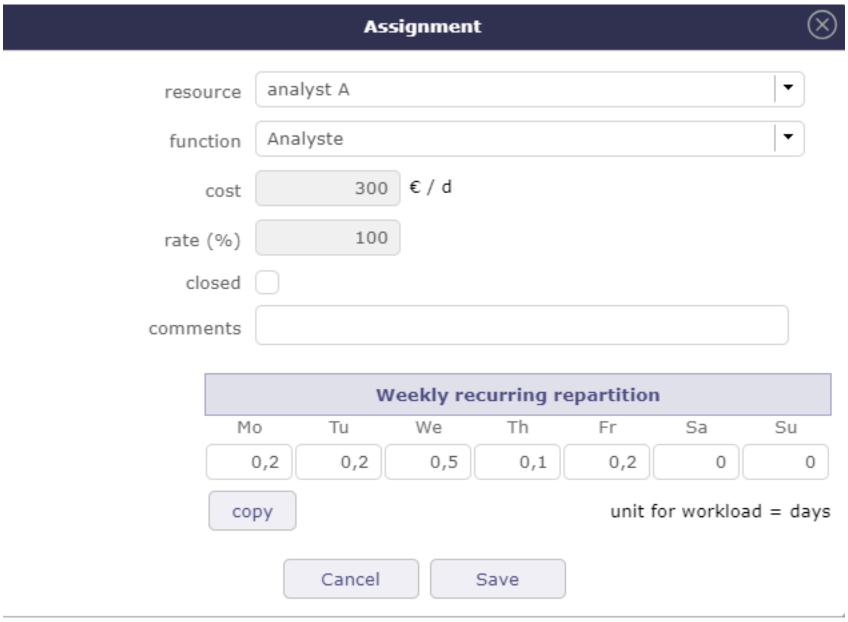


Fig. 66: Planning mode in half day: assigned days are distributed evenly in quarter days

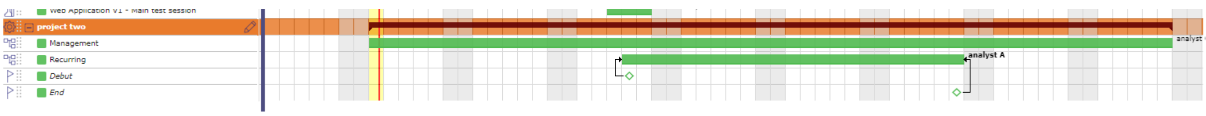


Fig. 67: Planning mode in half day: assigned days are distributed evenly in quarter days

Manual planning

- This is the most priority planning mode and constraint.
- You have the option to save the work as planned or real work.
- Two screens are dedicated to it: *planned interventions* to plan monthly and the *View interventions* for read-only.

Note: The choice of planned or actual work is made in the global parameters in the planning section work tab.

See: *global parameters*.

|*MODES*|

Minimum threshold & not splitted work

When this value is set, the activity will only be scheduled on the day when the daily availability is greater than or equal to this threshold.

You also have the option to add a new property to a “cannot be split” task.

This will require defining the minimum work to be allocated each day and therefore filling in the minimum threshold field.

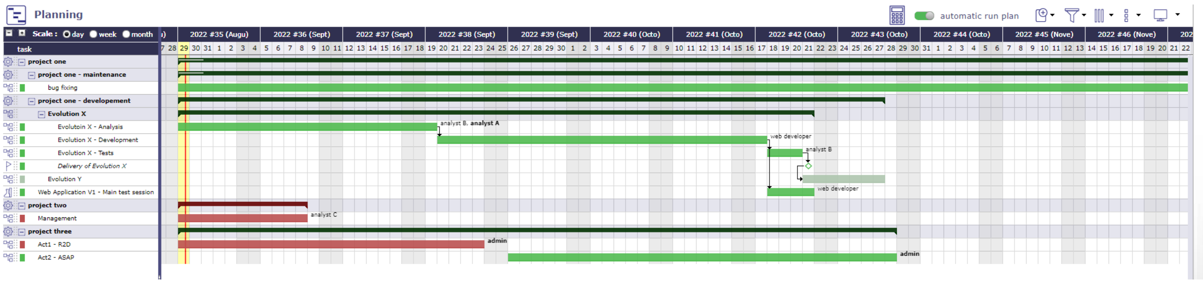
Be careful with this mode, planning will require finding consecutive days with at least the given value possible, which may never happen.

6.3.4 Plan with overuse

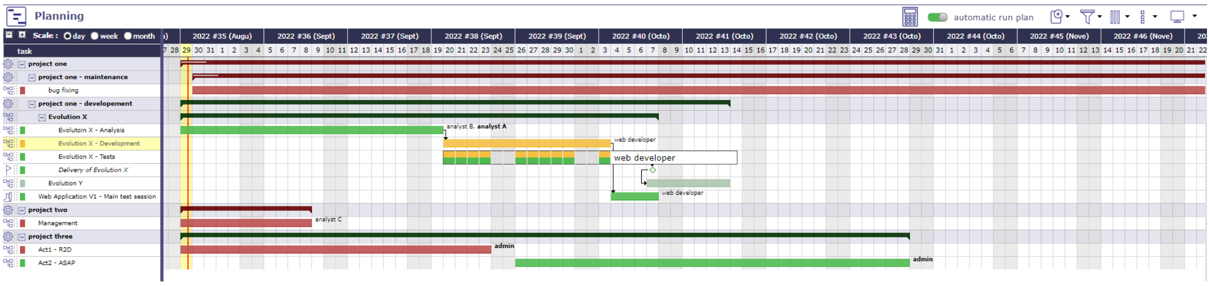
Scheduling with overuse calculates the schedule with “infinite” capacity for each resource.

It is assumed that the resource (ETP=1) can be planned on each project with its maximum ETP.

For example, if the resource is on 5 projects then it will be scheduled up to 5 fte per day.



If we recalculate with infinite capacity this is what the schedule says.



6.3.5 Critical resource

The critical resources screen will allow you to identify the resources that will cause the project to drift and not miss certain key dates due to lack of capacity on the project.

This amounts to calculating the complete schedule and all your resources in infinite overbooking mode.

Critical resource list

The critical resources table tells you for each critical resource displayed

- The name of the resource
- Its charges available
- Its load used
- Overbooking charge
- Its rank (Index used to calculate the margin = difference between available - used)

This table of critical resources is broken down by project.

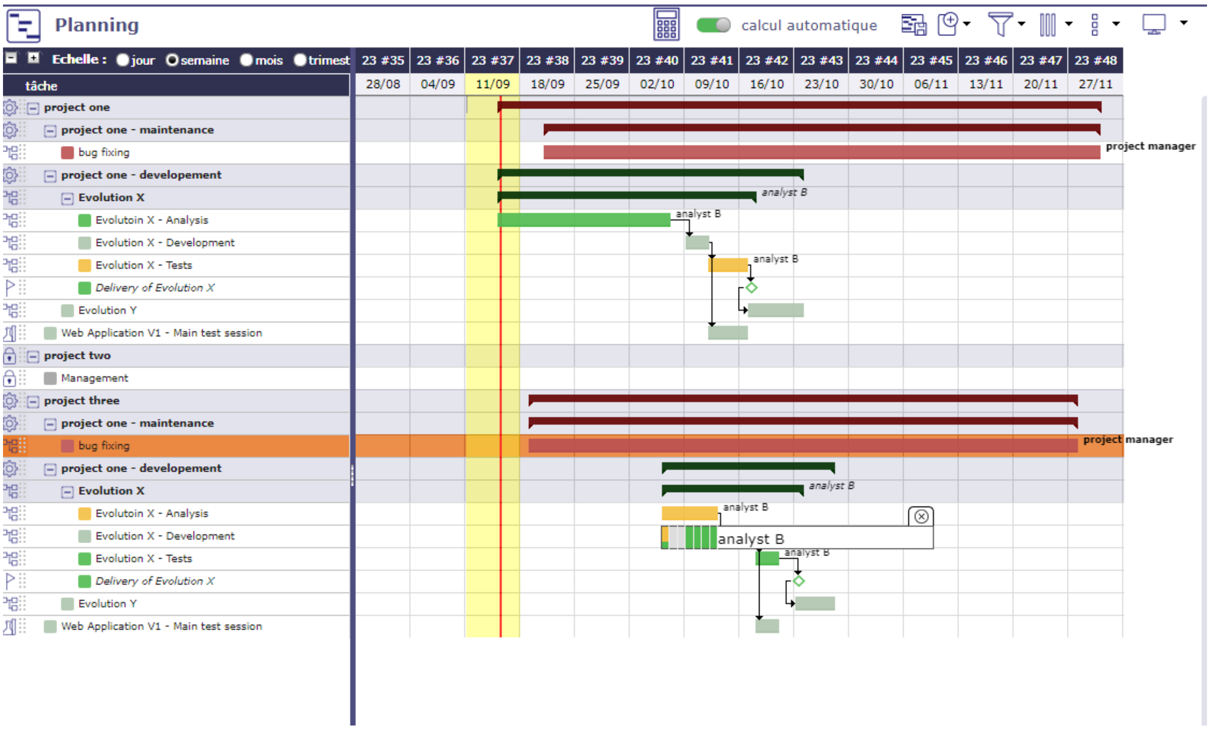


Fig. 68: Planning in infinite overbooking mode

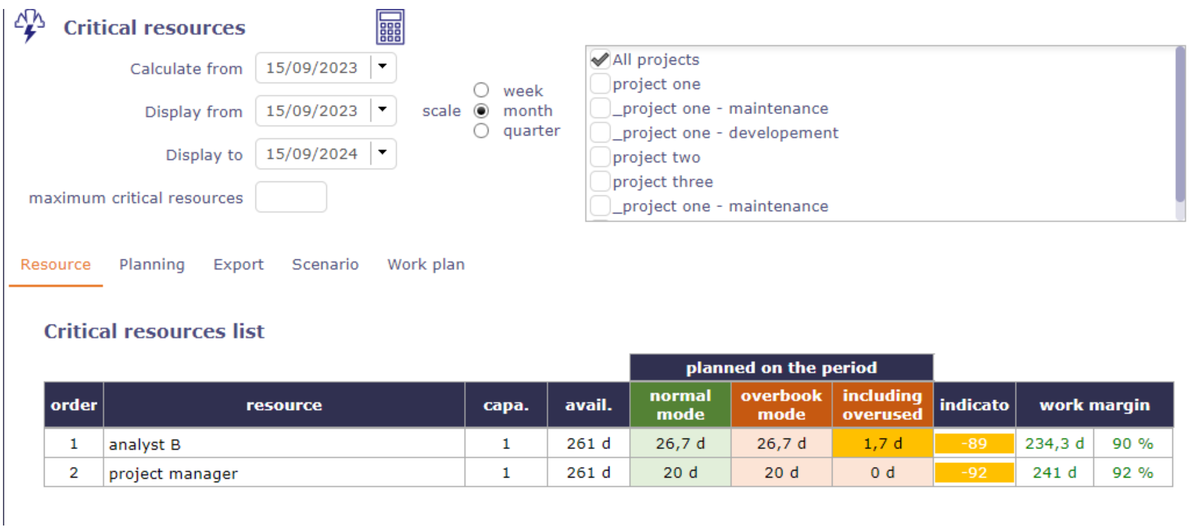


Fig. 69: Critical resources list

Projects using critical resources

The Projects using critical resources table allows you to visualize the number of days late per project and which resources are causing the delay.

The strategic value has no impact on the display of projects and the determination of critical resources. This (numerical) value is free and left to your discretion.

It can be a value between 1 and 100, or a number of Business, regardless, this will allow you to identify whether projects consuming critical resources are strategically sound and therefore worth implementing.

The Critical resources planning

The **Critical resources list by period** table is a representation of the current planning, not the ideal planning.

The display will be done by period defined on the scale (week, month, quarter) or by displaying the "overbooking load" necessary to optimize the planning.

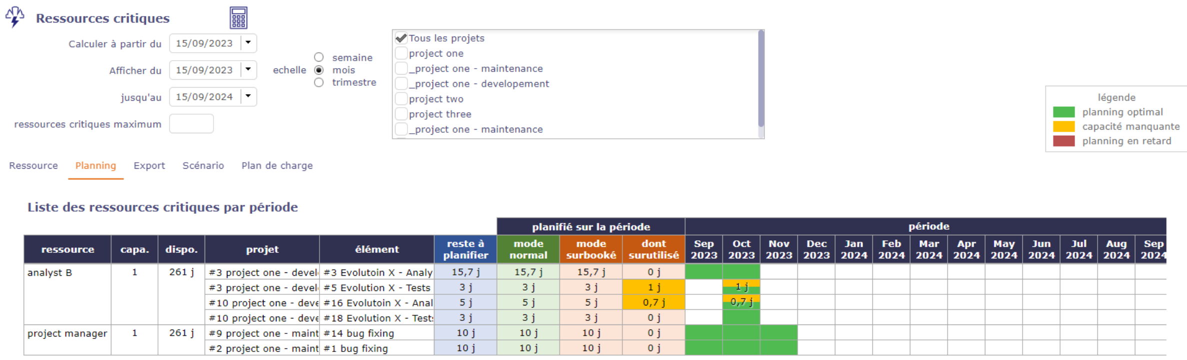


Fig. 70: Critical resource screen

Formatting results and indicators

Indicator is a percentage = (Margin - Subooked) / Available (* 100)

- **Define threshold**
  - Defaut Red = "< 20%"
  - Default Orange = "< 5%"
- **Late planning**
  - In red, the resource does not have sufficient capacity to complete the task on time
  - planned end date > Validated end date - overbooking on the activity
- **Missing capacity**
  - In yellow, the resource does not have sufficient capacity to complete the task on time but is not the cause of the task delay.
  - Planned end date > Validated end date - no overbooking
- **Optimal planning**
  - In green, the resource has sufficient capacity to complete the task on time
  - Planned end date < Validated end date - no overbooking on the activity

The Critical resources export

Exporting projects that use critical resources to Excel format is possible via this tab.

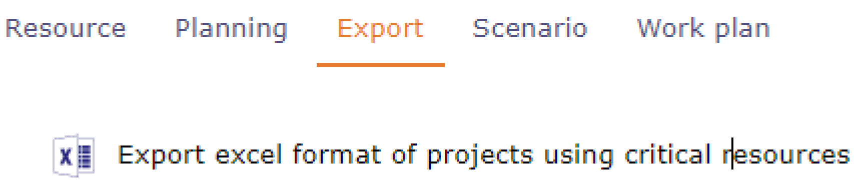


Fig. 71: Export excel format of projects using critical resources

The Critical resources scenario

Without affecting your basic schedule, you can simulate starting one or more project(s) on later dates in months.

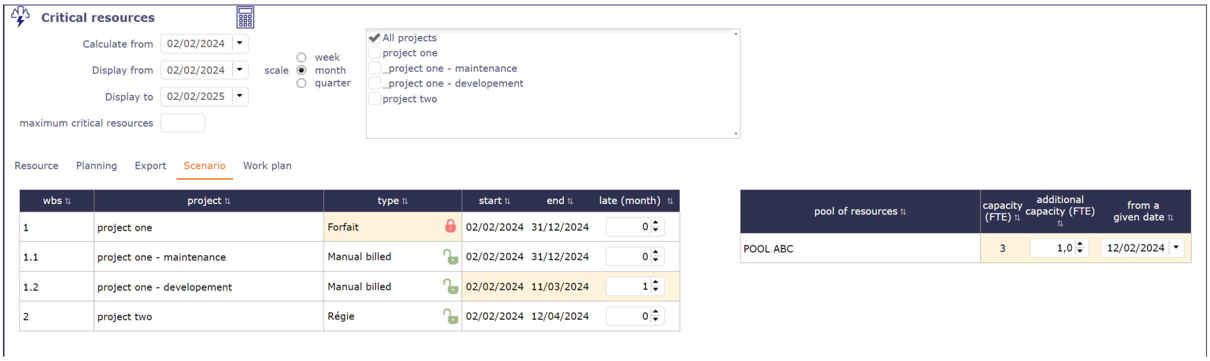


Fig. 72: possible scenarios for a simulation on projects containing critical resources

You can also add additional capacity to your pools to check if the possible addition of resources can improve the planning of your projects.

You can apply a particular date for the new capacity to be added which will decide when the new capacity can be added.

The Critical resources work plan

You can obtain directly on the critical resources screen the report on the load planning on a selected resource for the indicated period.

6.3.6 Planned Interventions

The goal is to make the specifications more flexible to cover broader and more generic needs.

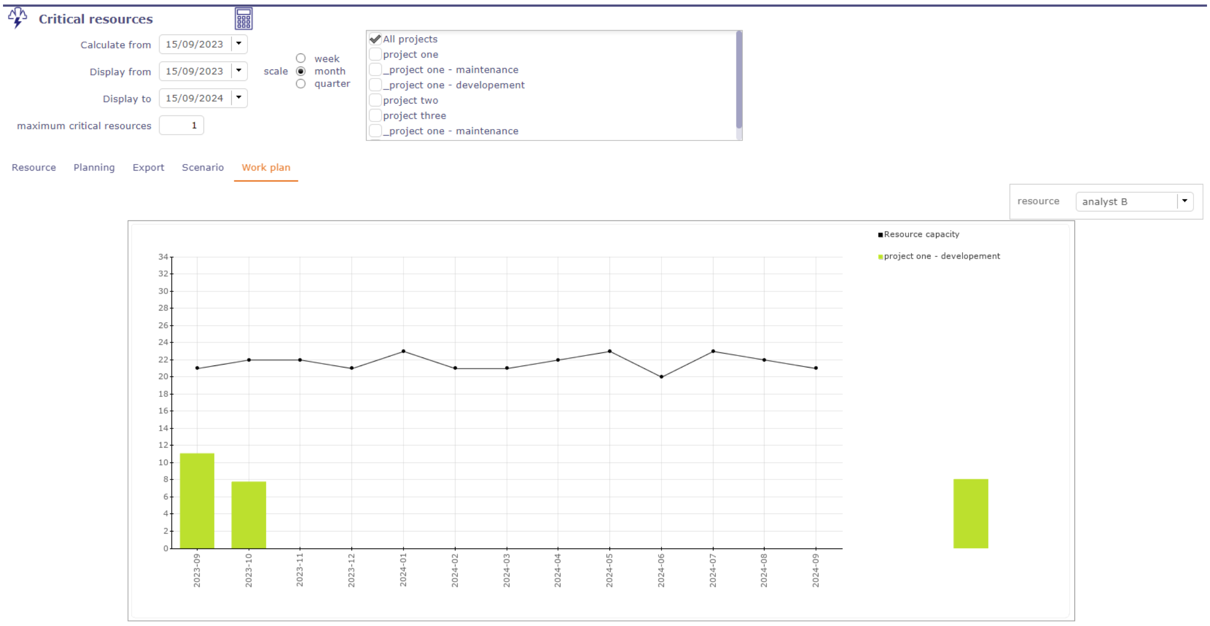


Fig. 73: load planning report for a resource

Assignment

The assigned workload is no longer determined but will be entered on a calendar which can be clicked, per half-day.

See: *Planned interventions assignment*

The workload saved in this window will be displayed to the planned interventions screen.

The planned Interventions

The planned interventions screen allow you to manage the manual planning.

This screen is available if at least one activity has a planning mode set to manual planning.

Interface areas

1 *Display zone*

2 *List of Projects and activity*

3 *FTE*

4 *Interventions mode*

5 *Interventions Calendar*

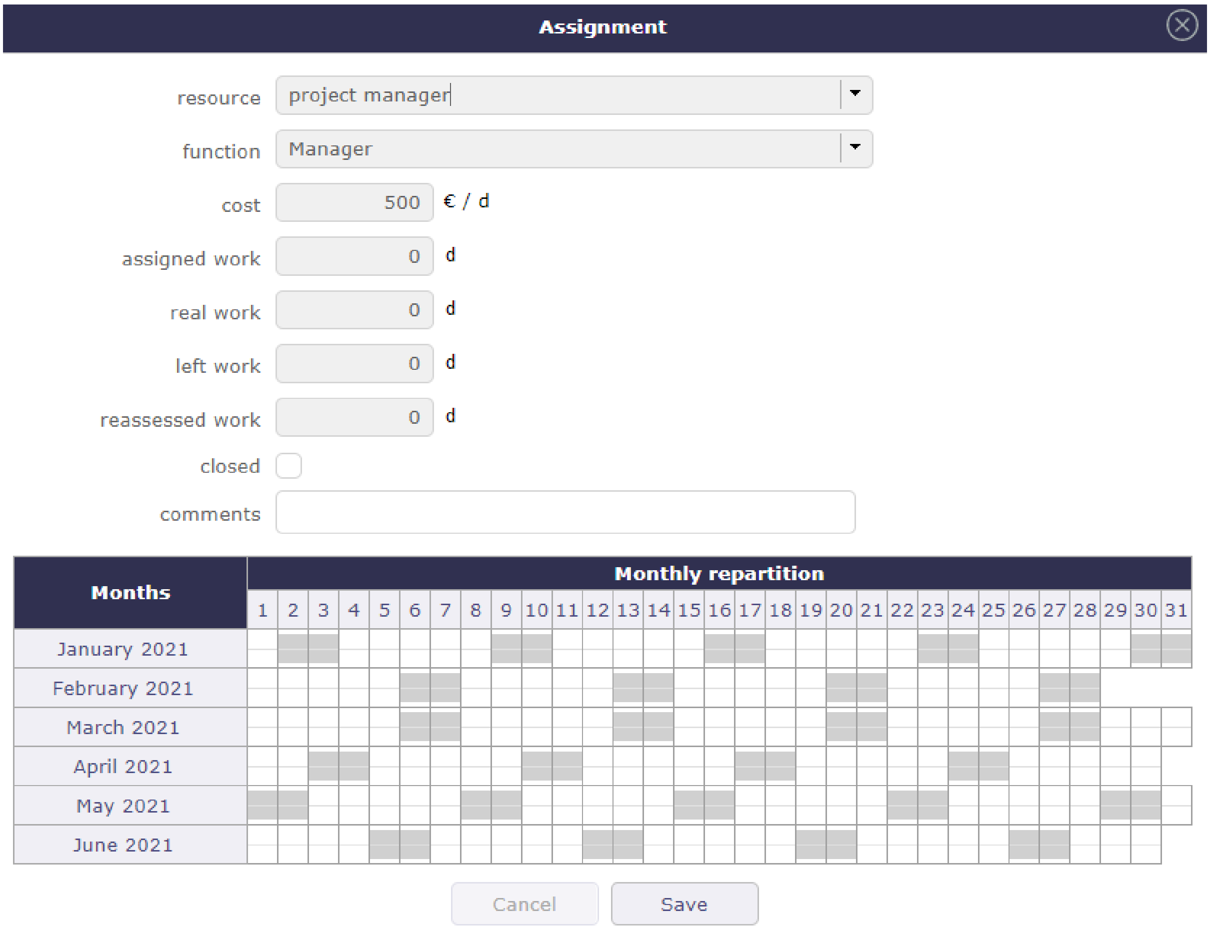


Fig. 74: Assigment with the Manual planning mode

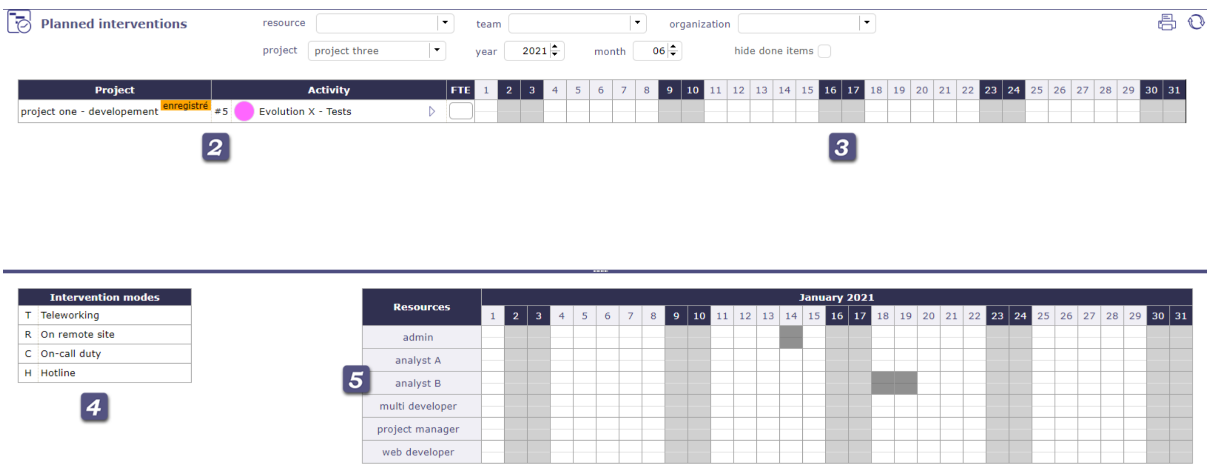


Fig. 75: Planned interventions screen

1 Display zone

The display area allows you to filter the resources you want to display.

The screen is blank until you select the resource, the team or the organization.

The calendar is displayed for the resource or for all members of the selected team or organization.

These parameters are not exclusive, you can select team and organization.

Resource
: Filter by resource on calendar display.

Team
: Filter by team on calendar display.

Organization
: Filter by organization on calendar display.

Project
: Filter by project on calendar display.

Year
: Select the year to display.

Month
: Select the month to display.

Hide done items
: You can hide the activities recorded in the "done" state in the displayed list.

Note: The selected parameters, except the month, always set by default to the current month, are saved as a user parameter.

When the user returns to the screen, he therefore finds the last parameters entered

---

2 List of Projects and activity

The list of activities displayed are in the planning mode "manual planning". If no filter is selected (project, resource, organization ...) then the screen does not display any data.

You cannot create new activities in manual planning mode from the intervention screen. You need to access the activities or schedule screen to create the new activity in manual planning mode. The new activity will then appear in the list.

Click on ▷ to access the activity screen and view its detail

FTE

In this calendar, we display graphically if we respect the quantity of people requested on the activity and on the half day.

Fill in an integer value for each activity to check.

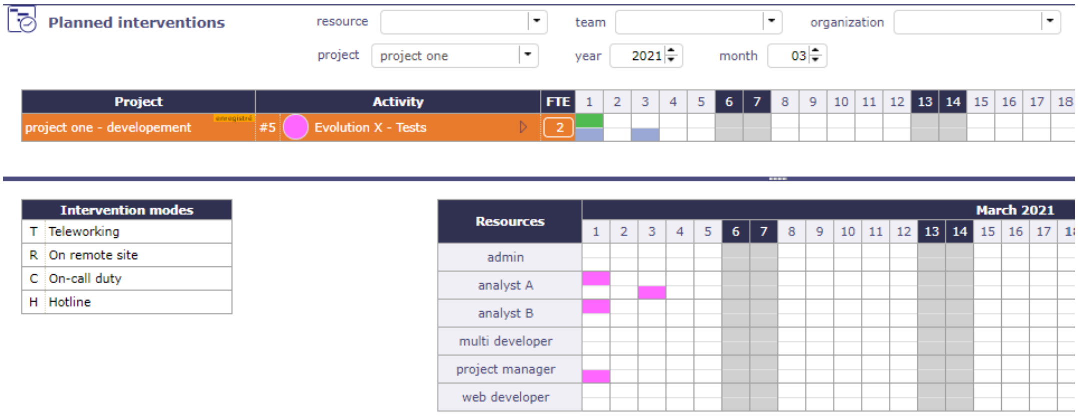
If you enter 1, you expect at least one person to perform half a day on this activity.

A check is then carried out and takes into account all the resources assigned to each activity, and not only those selected and visible on the calendar.

If the field is left empty or at 0 then no control is carried out and the calendar will not display any green or red box.

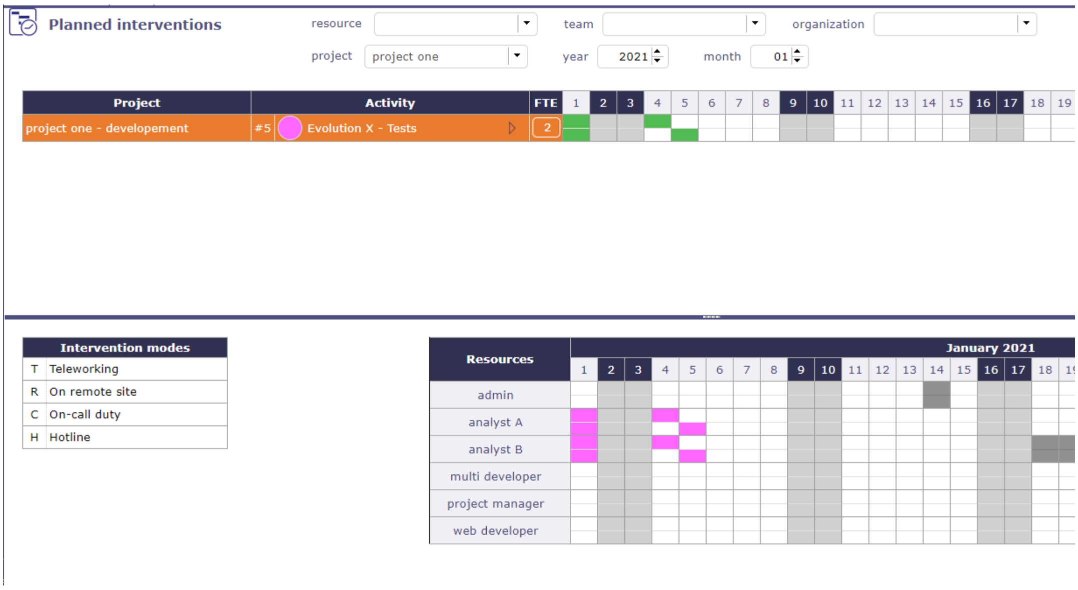
Blue box

When you start to put in the workload but do not yet reach all of the expected FTEs.



Green Box

If the entry respects the workload constraint expected in FTE the box is green.



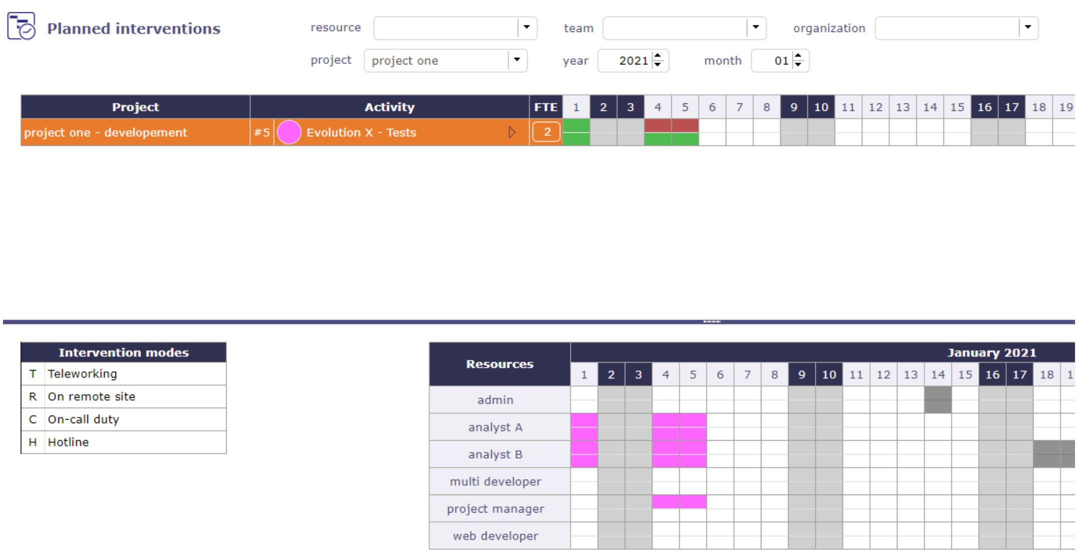
Example with a value of 2 in the FTE field for the selected activity.

This FTE value is defined for each half-day.

You must therefore have 2 effective persons planned for each half day whatever the resource or resources that will be provided.

Red Box

If the total entry is greater than the expected workload in FTE the box is red.



The box then turns red: the workload is higher than expected since we expected a person on this half day and on this activity

Non-colored box

There is no expected workload.

Interventions mode

The list of possible intervention methods is customizable.

This list can be modified via a setting screen in the *list of values*.

The saved modes will remain fixed for all projects and all teams.

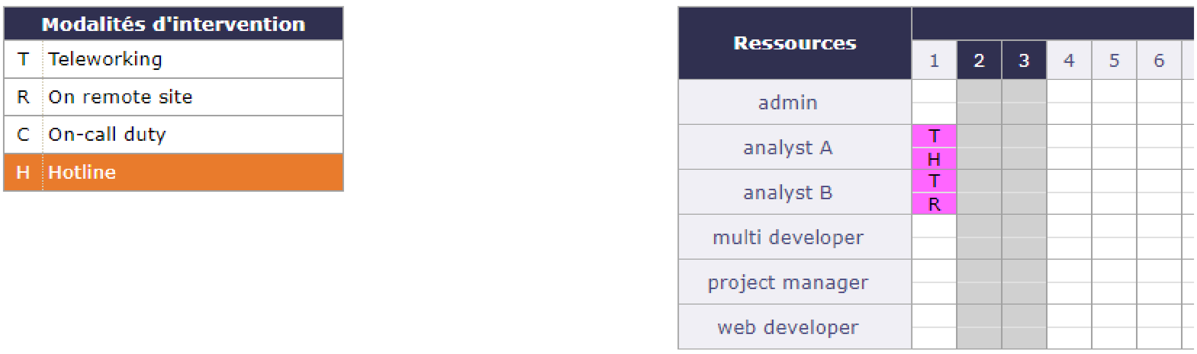


Fig. 76: Intervention mode

You can select an activity or a modality or both.

- If the intervention mode is not selected, the box is colored according to the activity but no letter appears, and vice versa.
- If only the intervention mode is selected, it will be saved without modifying the planned or actual work.

You can however add one or the other after having planned the intervention or the intervention mode.

A second click with the same parameters will delete the assignment.

Ctrl Click allows you to complete the two half days

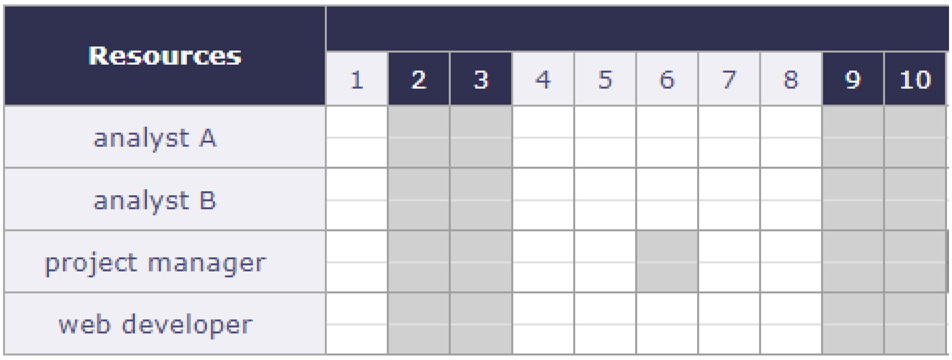
Interventions Calendar

- Click on an activity and / or an intervention modes to plan workload on it
- Click on half a day to plan the workload
- The targeted half day is filled with the color of the selected activity and the letter of the chosen intervention mode.

  Light Gray color

  The light gray box indicates that the day is inactive on the resource calendar.

  It can correspond to a weekend, a public holiday or a non-working day recorded on the resource's calendar.

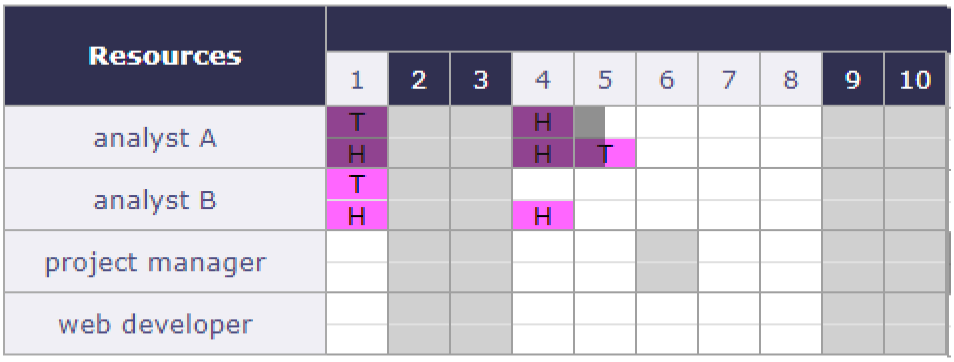


  Dark Gray color

  The dark gray boxes indicate reality. It's work actually performed and informed on the timesheet.

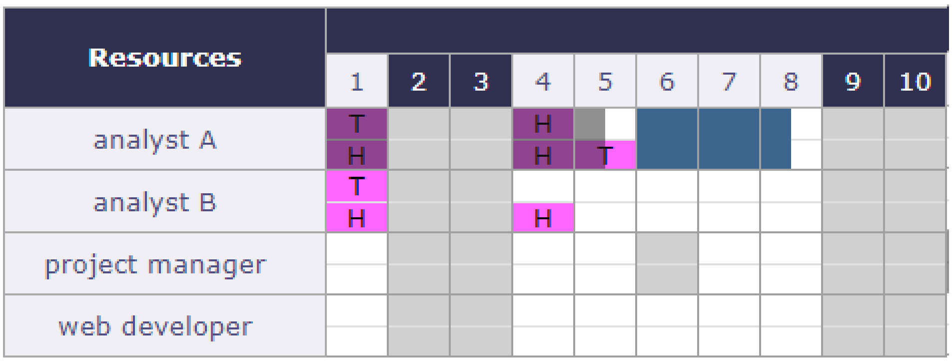
  When real work is completed for half a day, the box is half gray.

  If the full day is completed then the box is completely grayed out.



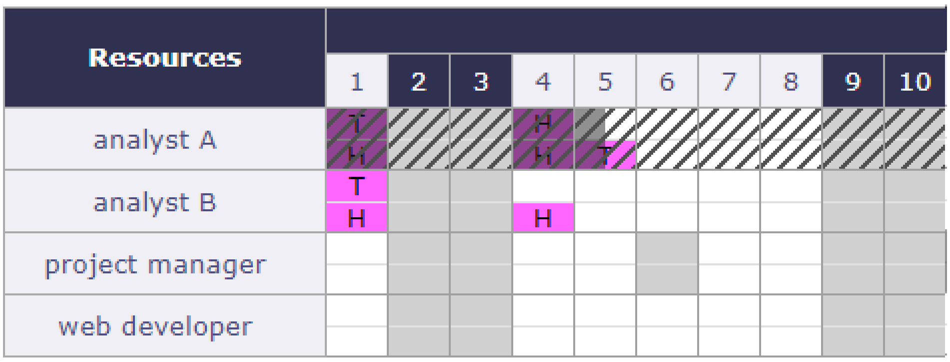
  Blue color

  The blue boxes indicate absences.



Striped box

The striped boxes indicates that the working time recorded by the resource has been validated.



Note: Planned or Real

The workload can be recorded as a planned load or as a real load.

This option can be set in the *global settings*.

View interventions

This screen allows you to see your planned interventions.

You cannot modify these interventions or plan another half day on this screen.

It is a bit the equivalent of planning by resource but in manual planning mode

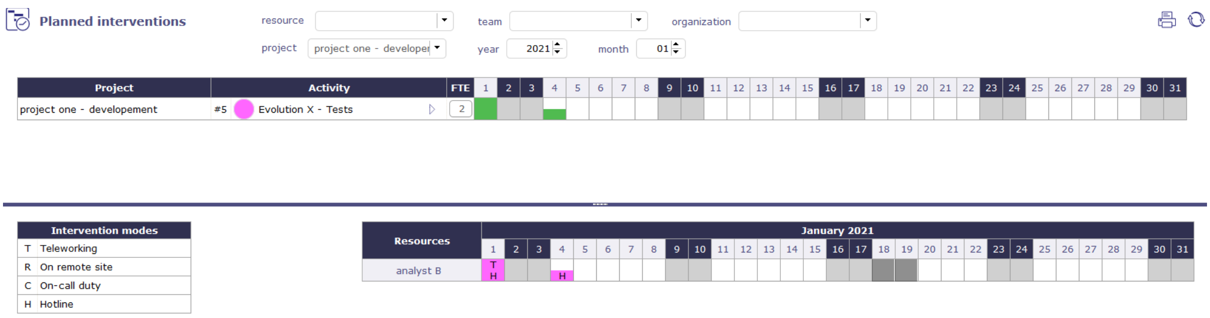


Fig. 77: View interventions screen

6.3.7 Gantt views

Planning global

The global planning allows to create and visualize any type of element (project, activity, milestones, risk, meeting, action . . .)

- Add and Show any new planning element on Gantt chart
- The created item is added in the Gantt and detail window is opened.
- The detail window allows to complete entry
- Project planning and activity planning calculation can be done in the Gantt.
- Requirements can be displayed but you will not be able to create them from the planning view

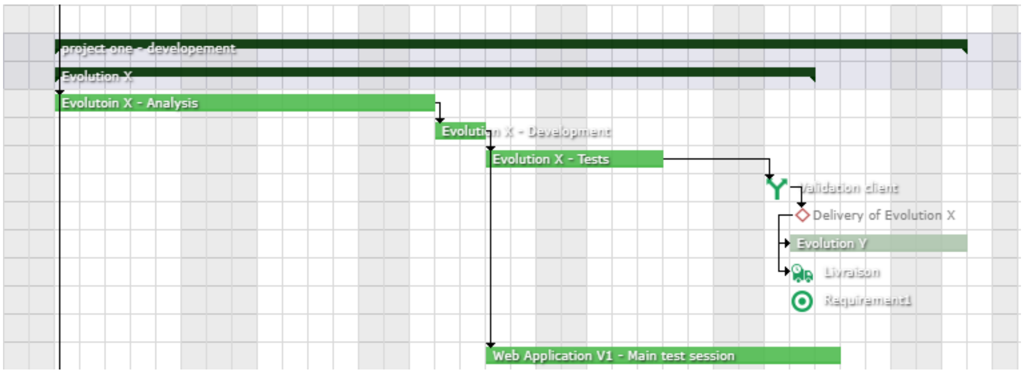


Fig. 78: Global planning

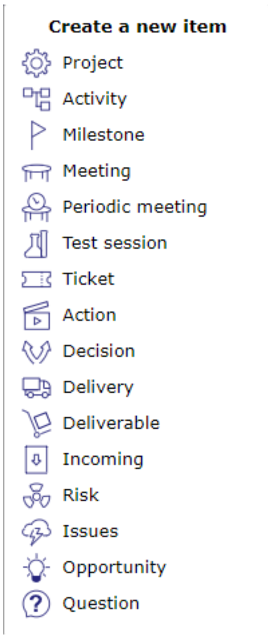


Fig. 79: Create a new item

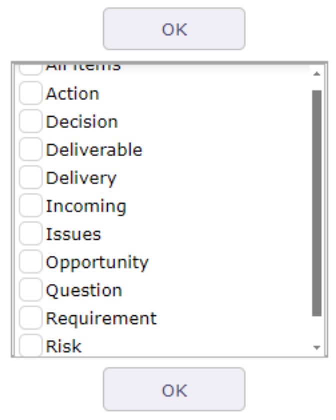


Fig. 80: Display items

Projects portfolio

This screen displays only the projects on the diagram. The activities and other elements that make up the planning are hidden.

It displays milestone and project dependencies only.

Note: This section describes specific behavior for this screen. All others behaviors are similar to *Gantt chart* screen.

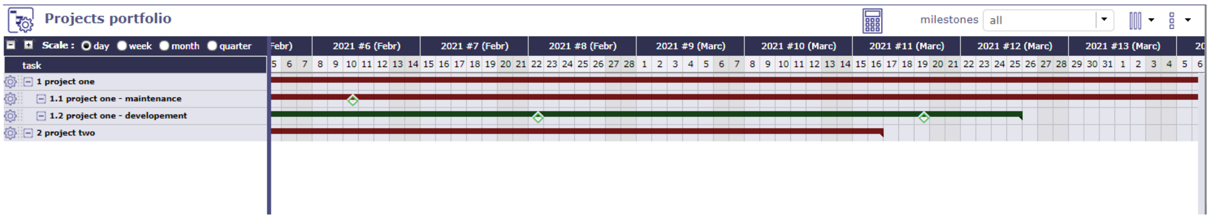


Fig. 81: Gantt (Projects portfolio)

Show milestones

- You have the option to show or hide milestones.
- It is possible to define the type of milestone to display. All milestones are available: deliverable, incoming, key date, etc.
- The milestones are displayed directly on the bar of your project.
- Colored columns are displayed in addition to those in the simple planning view.
- It is about the life and general health of your project. With the health status, quality level, trend and progress columns.

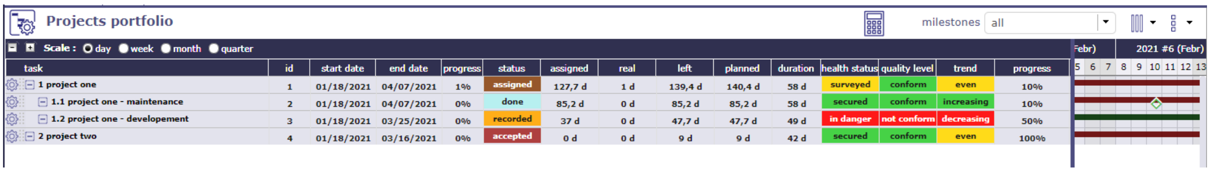


Fig. 82: Projects portfolio columns

As in the planning view, you display a menu dedicated to the portfolio view by right-clicking on the list of projects.

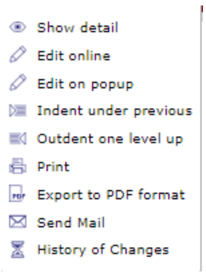


Fig. 83: Right menu

Resource planning

Others section

- *Resource*
- *Diary*

This screen displays the Gantt chart from a resource perspective.

The assigned tasks are grouped under the resource level.

Regarding resource planning, periodic group meetings are under his responsibility.

Ability to view assigned activities without charge.

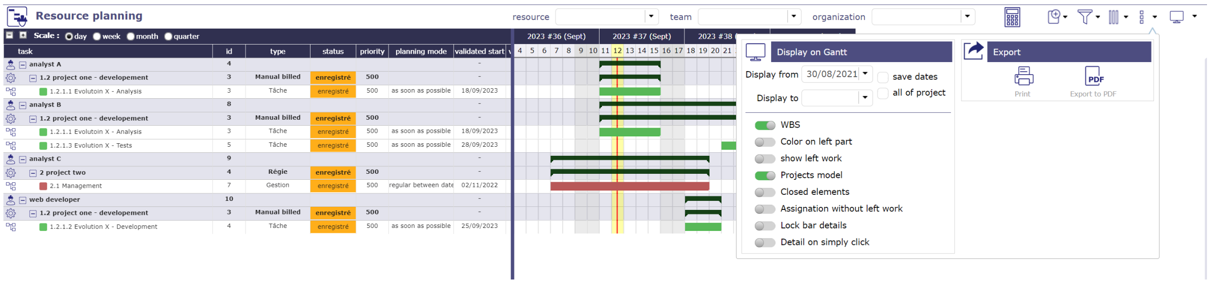


Fig. 84: Gantt (Resource planning)

Interface areas

1 *Show project level*

2 *Gantt charts for resources*

3 *Limit display*

4 *Tools*

5 *Print and exportation*

6 *Display dates*

7 *Checkbox*

1 Show project level

Tasks can be grouped by project in the list area.

Click on Show project level 1 to view the projects on which resource activities depend.

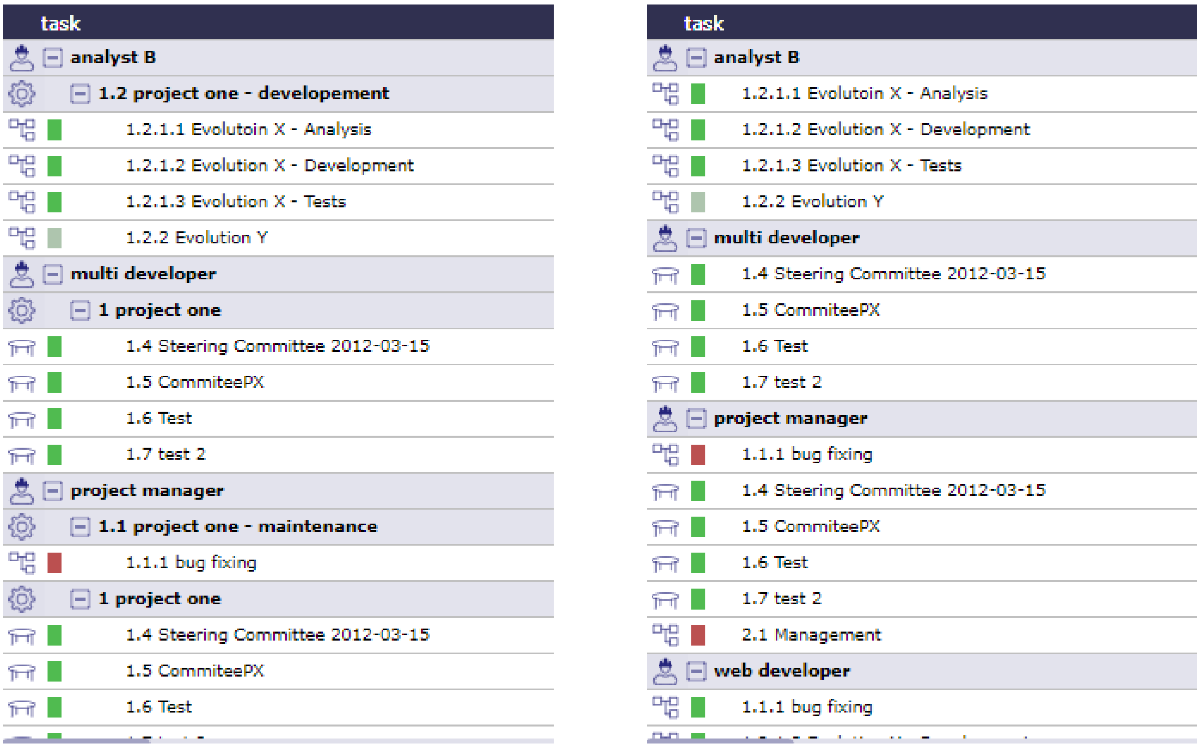


Fig. 85: view with project levels and without project levels

Gantt charts for resources

The bars used in the Gantt chart for resources differ slightly from the standard planning bars.

Most of the bars used in the Gantt chart are the same as for standard planning.

See: *Gantt chart's bars*.

GREY BAR

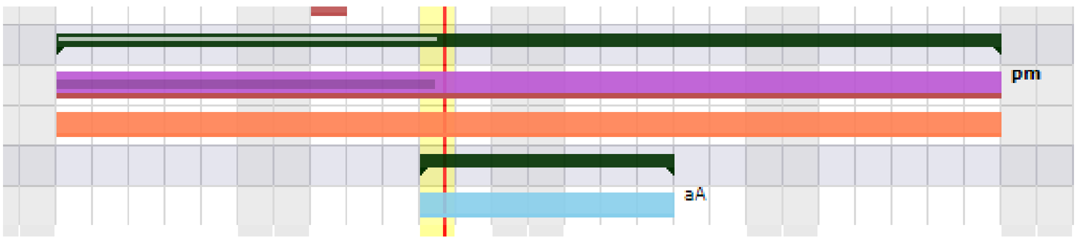


Fig. 46: Custom colors on the gantt chart bars

Condition : Assigned resources are available and meet workload, validated or scheduled dates do not conflict with other items.

The gray bar in the middle graphically represents the actual percentage progress relative to the total duration of the activity.

This makes appear some planning gap between started work and reassessed work.

Dependencies behavior

- Links between activities are displayed only in the resource group.
- Links existing between tasks on different resources are not displayed.

Note: This section describes specific behavior for this screen.

All others behaviors are similar to *Gantt chart* screen.

3 Limit display to selected ressource or team

- Click and select one ressource to display only his data.
- Click and select one team to display only data of resources of this team.
- Click and select one organization to display only data of resources of this organization.

4 Tools

- Click on to start the activity planning calculation. See: *Activity planning calculation*.
- Click on to create a new element.
- Click on to apply many filters. See: *Advanced filters*.
- Click on to organize the columns of the progress data view.
- Click on to display the sub-menu.
- Click on to display this screen in horizontal or vertical mode.

5 print and export

You can print directly on your printer or export in PDF format.

Print planning

Click on the button to print the Gantt chart in A4 and / or A3 format.

The print quality, despite printing or exporting on a reduced scale, remains very qualitative and offers very little loss of detail in the diagram.

Export planning to PDF

Allows to export planning to PDF format.

Export can be done horizontally (landscape) or vertically (portrait) in A4 and / or A3 format with great detail even with a zoom

Export contains all details and links between tasks and also include a pagination.

And the option **Repeat Headers** allow you to print or export your planning in multiple pages

This feature will execute export on client side, in your browser. Thus the server will not be heavy loaded like standard PDF export does.

It is highly faster than standard PDF export.

Warning: This technically complex feature is highly dependent on the browser and is not compatible with all of them. It is compatible with the latest versions of IE (v11), Firefox, Edge and Chrome. Otherwise, the old export function will be used.

Tip: Forced feature activation/deactivation

- To enable this feature for all browsers, add the parameter **$pdfPlanningBeta='true';** in parameters.php file.
- To disable if for all browsers, add the parameter **$pdfPlanningBeta='false';** Default (when **$pdfPlanningBeta** parameter is not set) is *enabled with Chrome, disabled with other browsers*

6 Display dates

This functionality allows to define columns displayed in the progress data view.

More details: *Display and organize the columns*.

7 Checkbox for display

You have the choice to display or not, certain information on the Gantt chart.

Show WBS

Click on "Show WBS" to display the *WBS* number before the names.

Closed item

Flag on "Show closed items" allows to list closed items.

Show left work

The option **Show left work** displays at the end of each bar the left work directly on the gantt chart.

Show activities without work

Basically, activities with no workload do not appear on the Gantt chart by resource.

Check this box to make them appear.

Show project level

Show projects in the list area.

6.4 Today (Dashboard)

This screen allows the user to have an overview of the projects and tasks he is working on.

His projects, the tasks to which the user is assigned, those for which he is responsible as well as the various tasks created by himself or for which he is a requestor are listed in different sections.

Each list can therefore contain different types of tasks. The user can therefore view activities, questions, decisions, tickets, risks, meetings, milestones, … as well as financial elements, such as quotes, invoices or contracts.

It's the User parameter "First page" by default. This parameter defines the screen that will be displayed first on each connection.

The definition of visibility is based on the access rights of each user

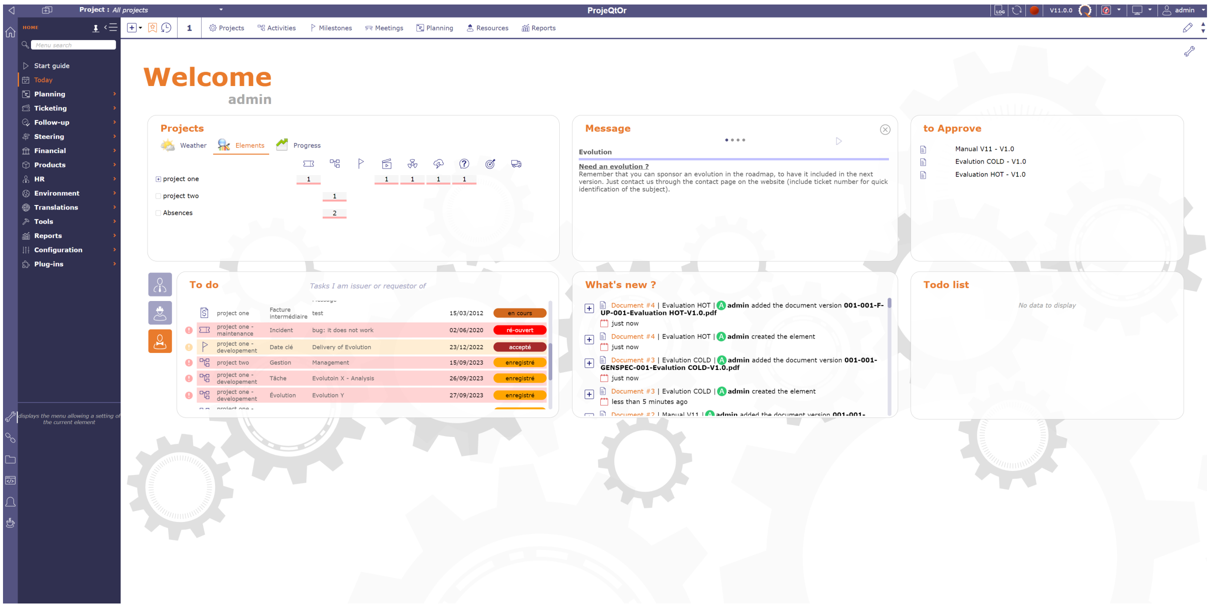


Fig. 87: Today screen's Global view

Parameters

- Click on to access screen parameters.
- Allows to define sections displayed on the screen.
- you can directly click on at the top right of the section to close it
- To change the order of the blocks displayed, click and drag the blocks to the desired location.
- If the movement is authorized the header is green otherwise it is red.

6.4.1 Projects

This section allows you to view current projects on which you have visibility rights.

Several sections are available: the weather forecast of the projects, the elements that compose it and the progress of each.

The projects list is limited to the project visibility scope of the connected user.

The number of displayed projects can be defined in the *global parameters*.

Click on the name of a project will directly move to it.

Weather

Health status

This icon allows to display the health status of the project.

Quality level

A manual indicator can be set on project.

This icon allows to display the quality of the project.

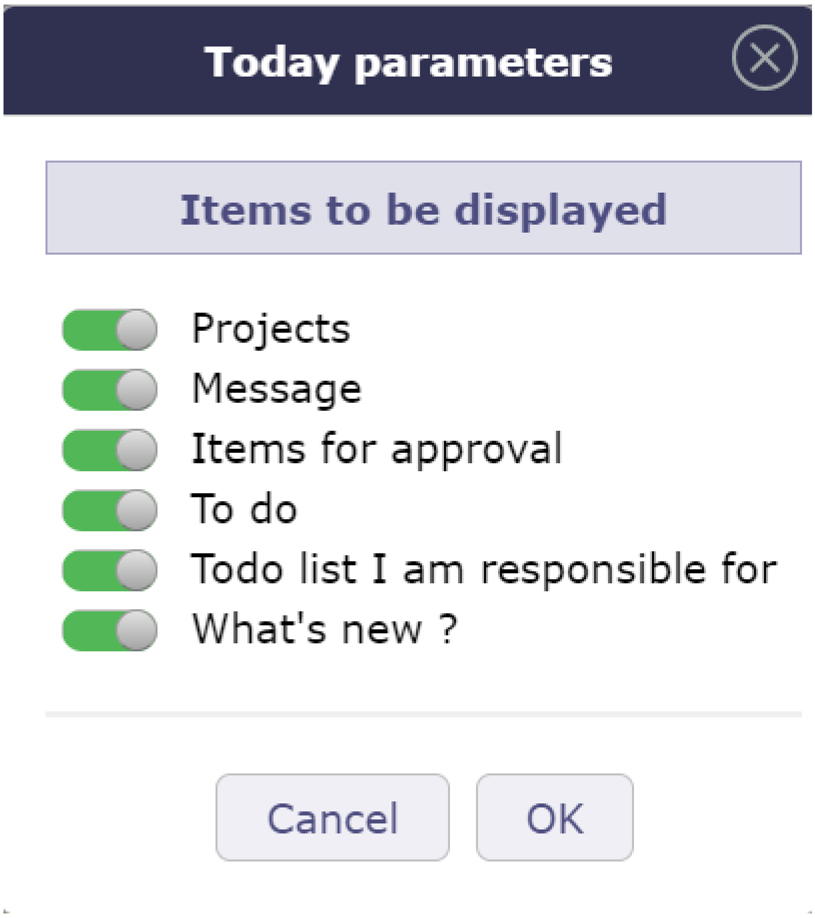


Fig. 88: Dialog box - Today parameters

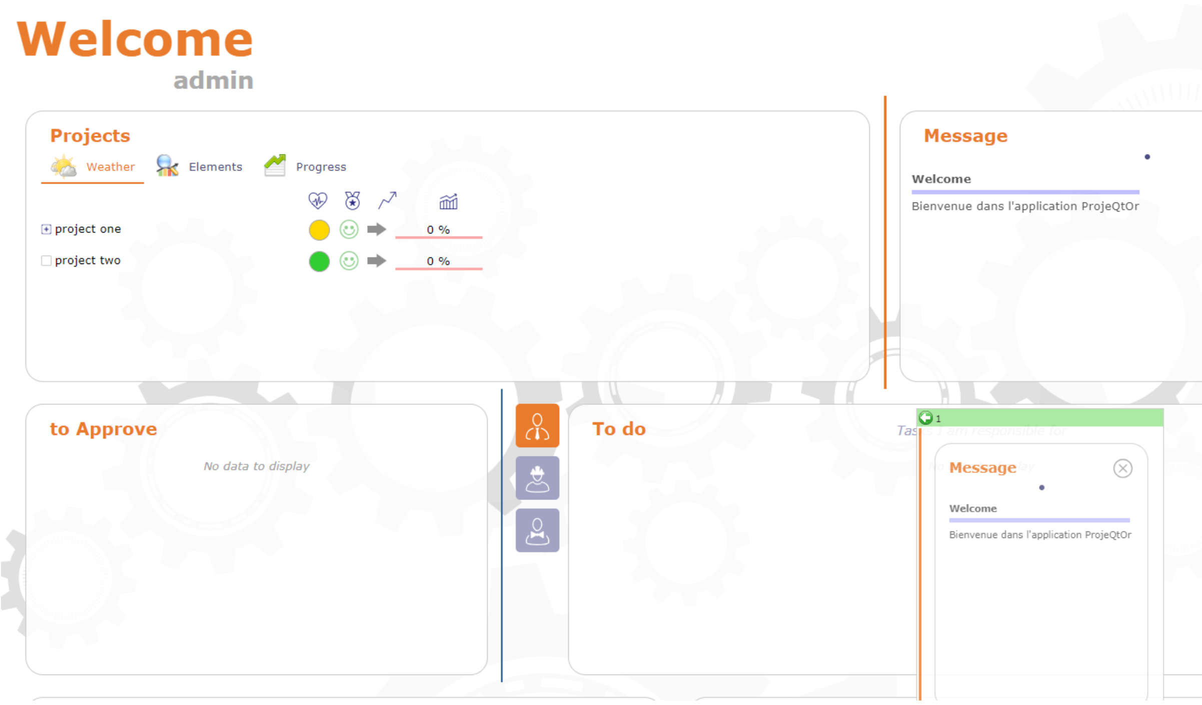


Fig. 89: Move a section

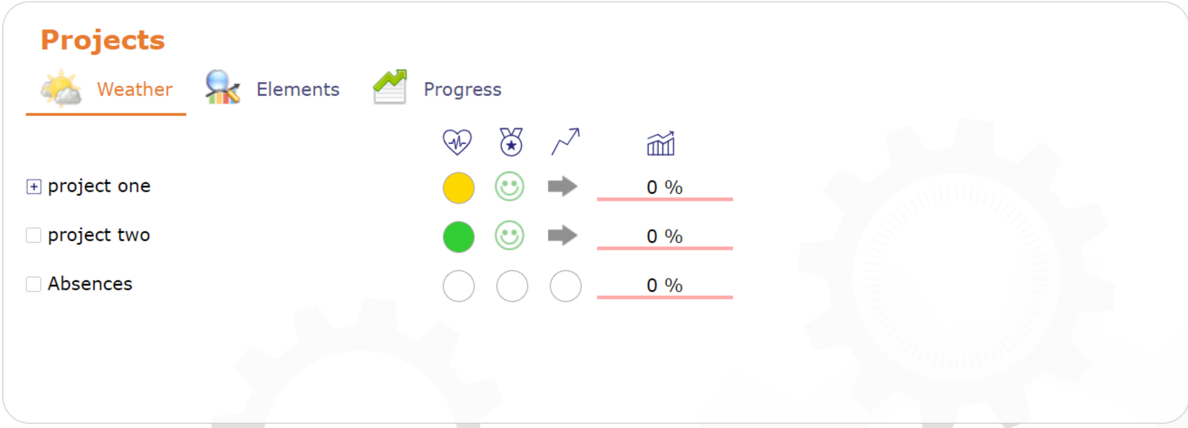


Fig. 90: Projects Weather

Trend

Manual indicator can be set on project.

Trend indicators are displayed.

This icon allows to display the trend of the project.

Overall progress

Actual progress of the work of project and additional progress manually selected for the project

Elements concerned to project

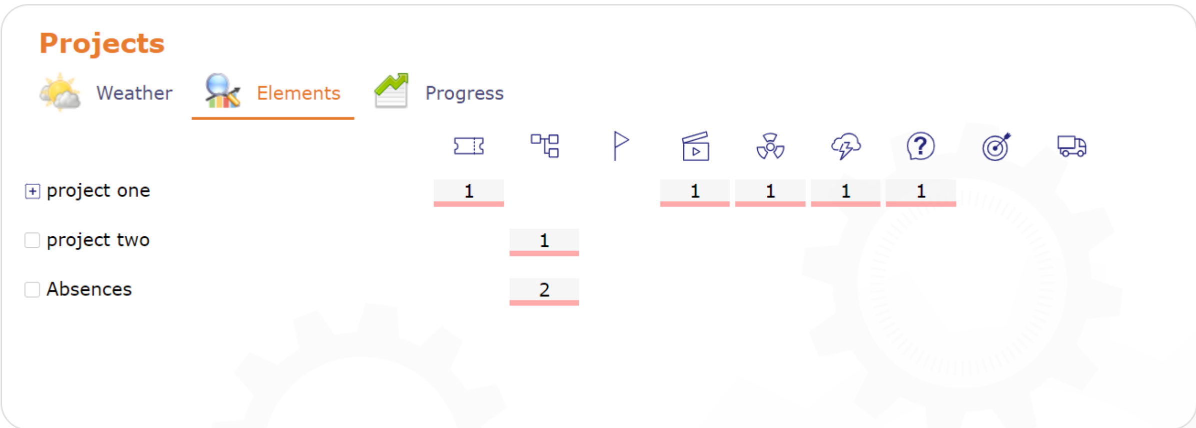


Fig. 91: Projects Elements

Numbers of elements concerned to a project are displayed.

Calculated and overall progress

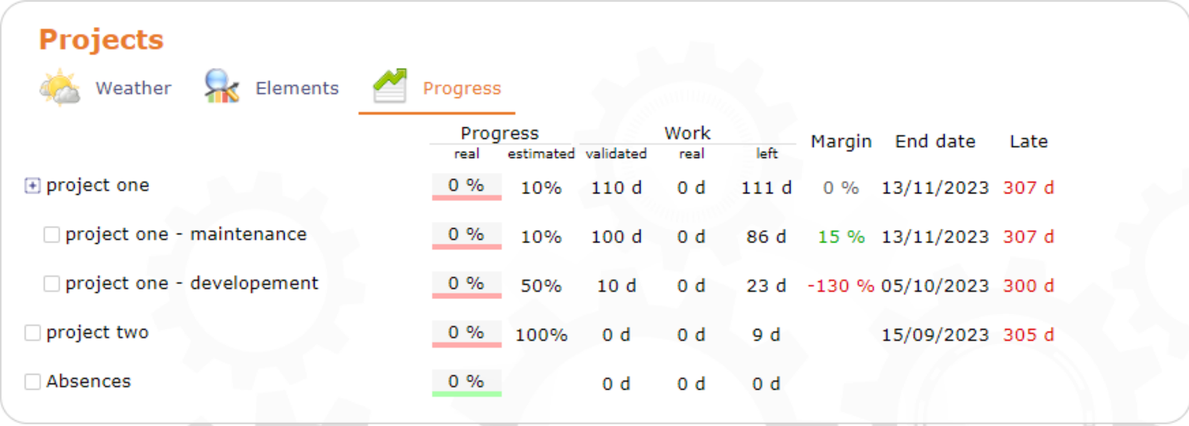


Fig. 92: Projects Progress

Actual progress of the work of project and additional progress manually selected for the project

- On mouse over the bar

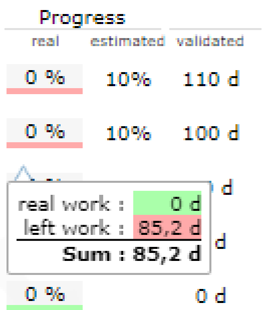


Fig. 93: Calculated progress

On each project shows part of "to do" (red) compared to "done and closed" (green).

- **Progess:**
  - Real: LefProject progress based on actual resource working time.
  - Estimated: Progress of the project based on values set manually for an estimate.
- **Work:**
  - Validate: validate work on the project
  - Real: real work on the project
  - Left: remaining work on the project.
- **Margin:** the margin corresponds to the difference in work between the revised and the validated.
- **End date:** Planified end date of the project.
- **Late:** Number of late days in project.

6.4.2 Message

All scheduled messages will be displayed in this section.

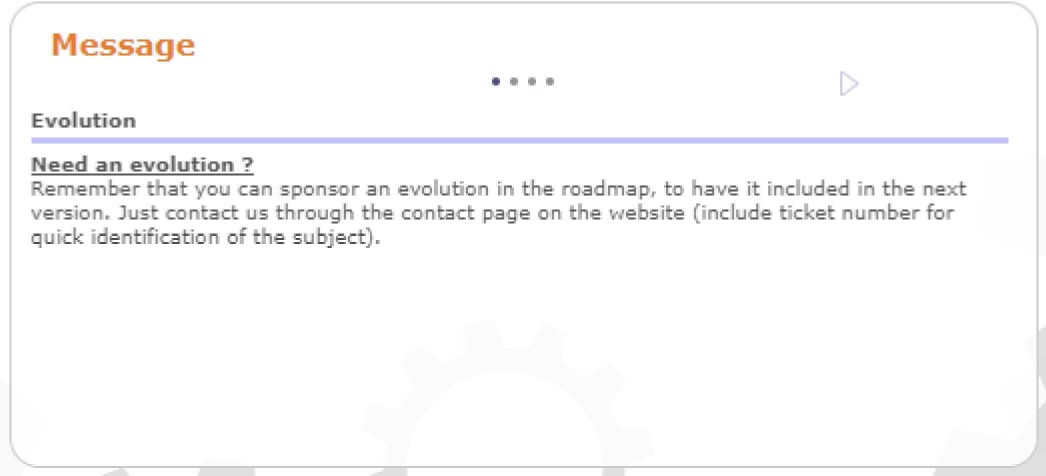


Fig. 94: Message section

Each point corresponds to a different message.

See: *Messages*

6.4.3 To approve

You can define approvers for a document, incoming or outgoing mail.

Fig. 95: Item to approve

Only users assigned to the project linked to the item to be approved can be added.

If you are in the list of approvers, you will see the list of items you need to approve.

The list of items is clickable.

See: *Documents*

See: *Mails*

See: *Approval process*

6.4.4 To do: Tasks list

The list of tasks is divided into 3 parts:

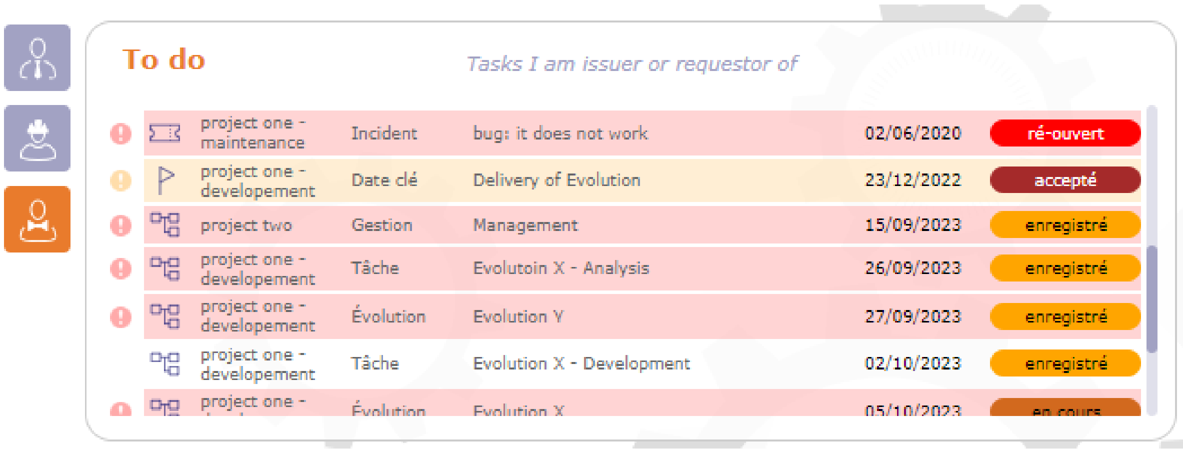


Fig. 96: Tasklist

the tasks for which I am *responsible*,

the tasks assigned to me and finally

the tasks of which I am the *issuer* or the *requestor*

click on the respective buttons to display the list.

Note: Max items to display Parameter

Number of items listed here are limited to a value defined in *Global parameters* and *User parameters*

Enter the number of projects or tasks to appear on the screen.

6.4.5 What's new: the activity Stream

You have access to the activity stream of the elements that you see displayed in accordance with the rights of your profile.

See: *Activity Stream*

6.4.6 Todo List

In this section you see the current todo lists on which you have rights

See: *Todo list*

6.4.7 Reports

You can select any report to be displayed on the Today screen.

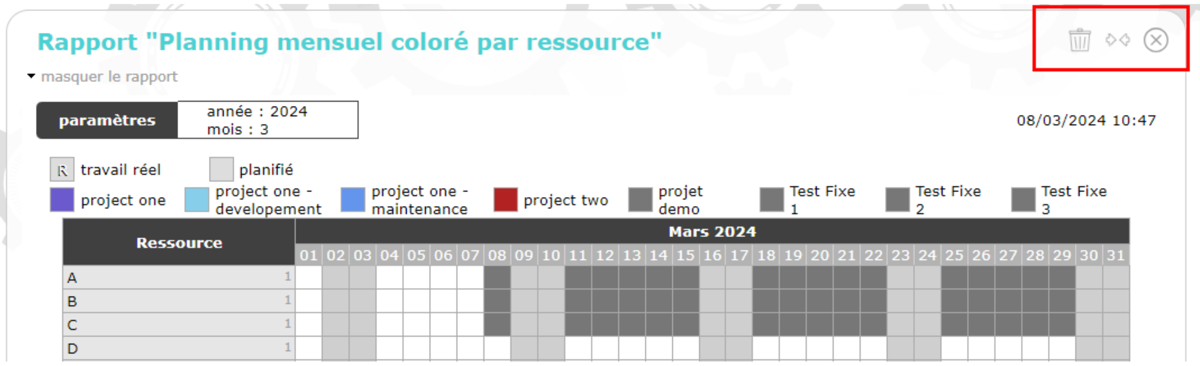


Fig. 97: Reports on today

- Click on from the today screen window or in the *screen parameters*.
- Click on to reduce the report display area to half the screen width.
- Click on to extend the report display area to the entire width of the screen.

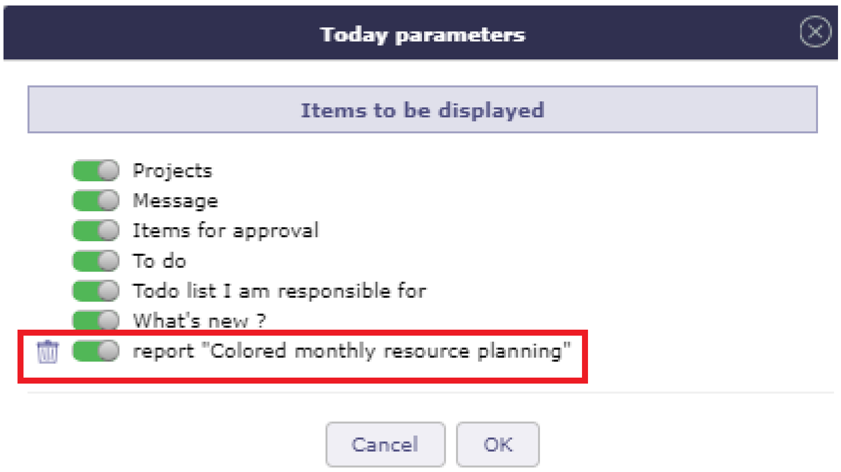


Fig. 98: Display parameters on today

Add selected report

- To do this, just go to the selected report, select parameters and display result (to check it is what you wish on today screen).
- Click on to insert this report with parameter on the Today screen.
- Any unchanged parameter will be set as default value.
- These reports will be displayed on Today screen like other pre-defined parts.

See: *Favorite Report*

See: *Today Screen Report*

6.5 Diary

Allows to display planned task to a resource on a calendar view.

This view can be monthly, weekly or daily.

Just click on any task to access directly.

You can show activity without workload on diary screen.

Note: On mouse over the task, you can see a short information about the task.

Meetings are sorted in chronological order within the day.

6.5.1 Calendar selector

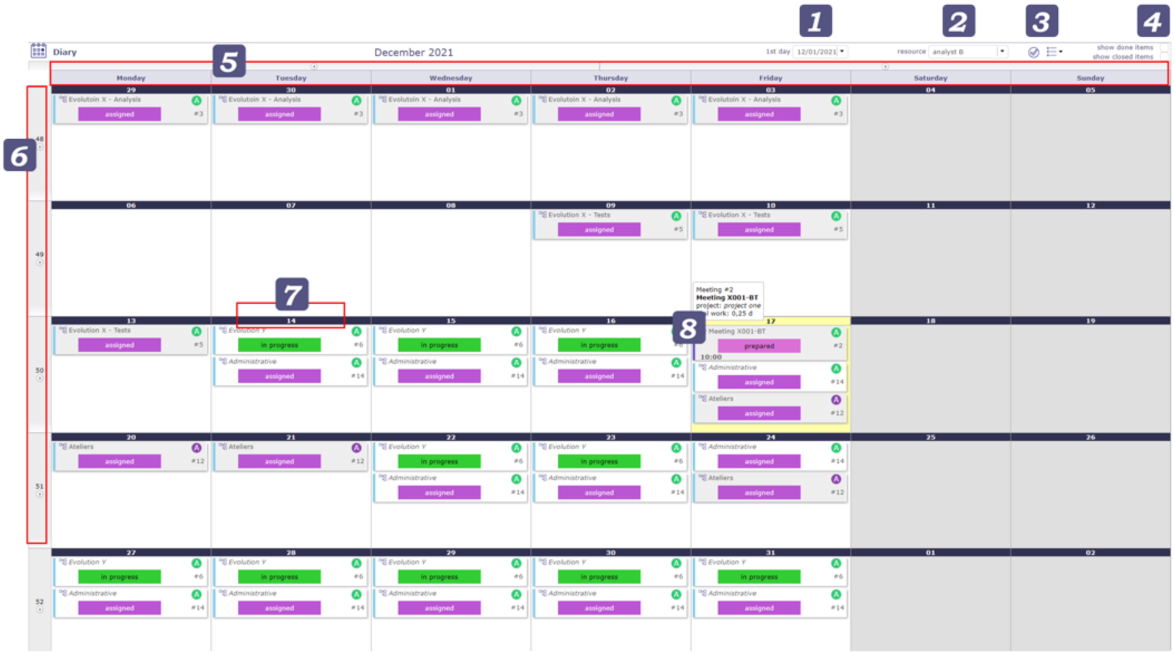


Fig. 99: Diary calendar selector

> **Day colors**
>
> - **Yellow day** : Current day
> - **Grey days** : Days off

1 1st day

Displays a specific date or date.

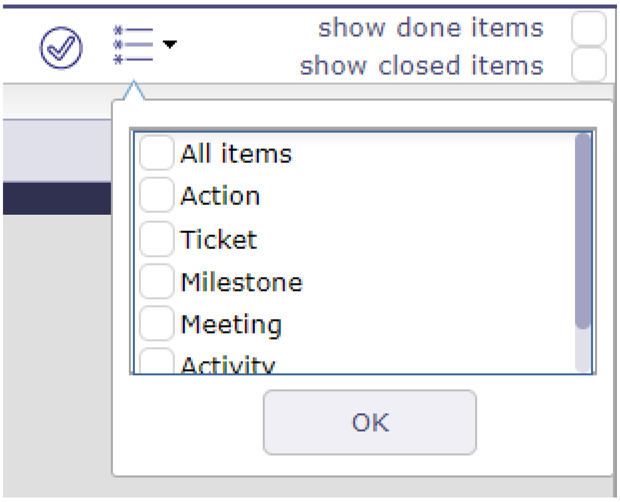
The first day of the week or month is displayed according to the selected view.

2 Resource

Allows to select the resource calendar.

3 Select item to display on the liste

Allows you to display only certain items on the calendar like activities, meetings, actions, tickets…



4 Show done items & Show closed items

Allows to display or not the done and closed items.

5 and 6 Top buttons and Left side buttons

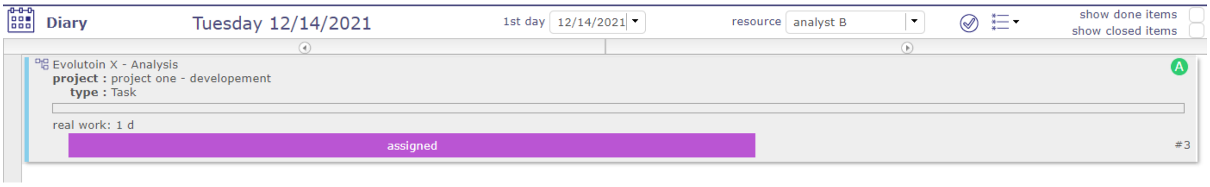
Allows to change current month, week, or day.

Click on to go to week display mode.

Click on to return to the last display mode.

7 Day number button

Click on the day number button to go day display mode.

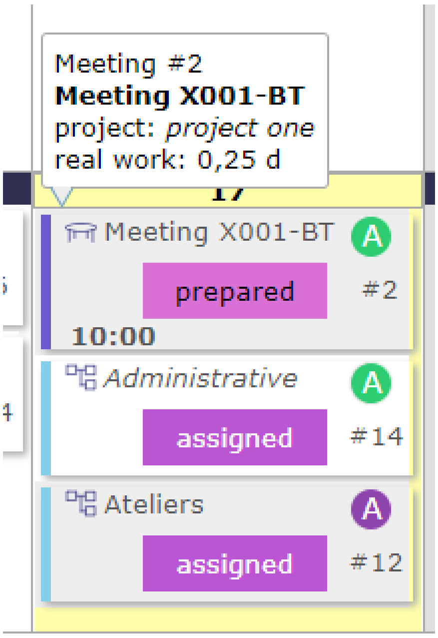


8 Task / Activity / Tickets/ Leaves

Each item the resource is assigned to is displayed in its log.

All types of holidays and deliveries are also displayed.

The color that appears on the objects are those of the project to which they are attached.

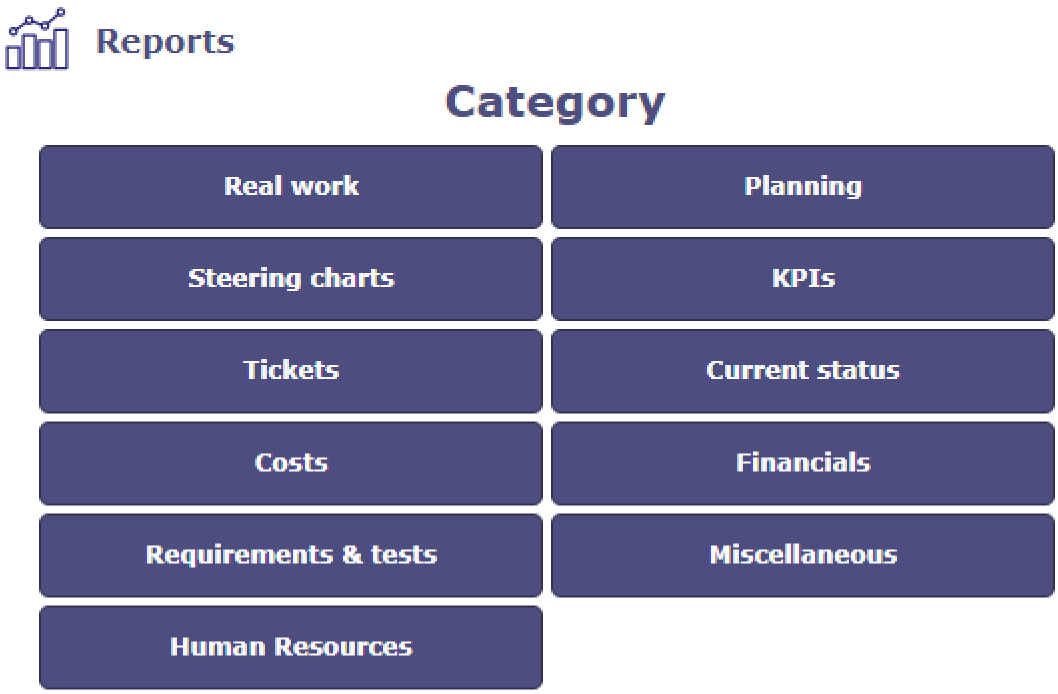

Meeting #2
Meeting X001-BT
project: project one
real work: 0,25 d
17
Meeting X001-BT
A
prepared
#2
10:00
Administrative
A
assigned
#14
Ateliers
A
assigned
#12

6.6 Reports

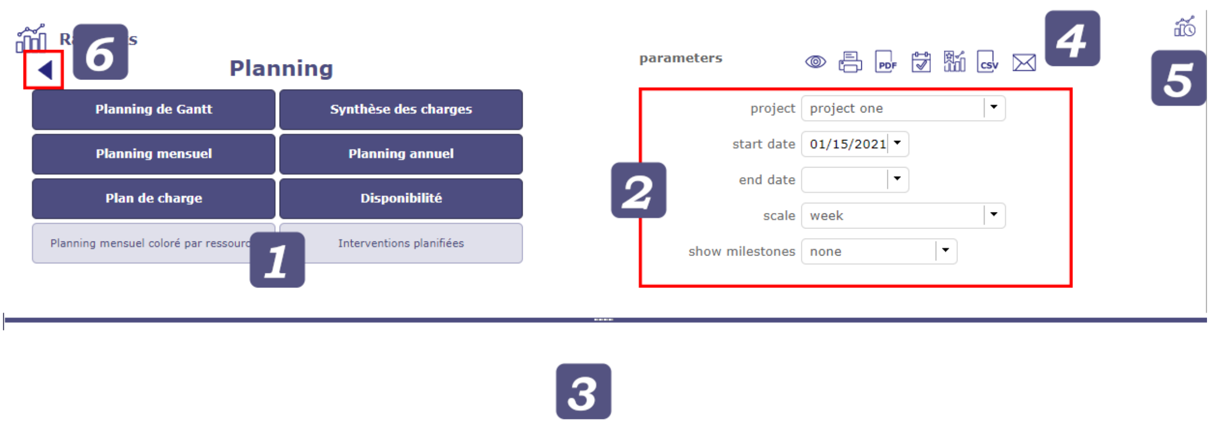
A list of reports is available in different categories. They themselves contain several sub-categories.

You will find the reports home page in the menu but also all the categories.

These, directly accessible, allow you to find the report of your choice from the main menu.



6.6.1 Reports View



1. Select a category to view subcategories and select a report.
2. Parameters specific to this report are displayed. Update the settings to get the information you need.
3. Click on to generate the report. The selected report will appear under the splitter.
4. Several tools are available to export and send your reports. See *buttons*.

5. You can access the scheduled reports screen from the reports screen.
6. Click on the arrow to return to the list of categories.

Note: Horizontal slider position is saved when changed manually.

Buttons

- Click on to View the report.
- Click on to get a printable version of the report.
- Click on to export the report as PDF format.
- Click on to View this report on the Today screen.
- Click on to define this report as favorite.
- Click on to schedule sending the selected report
- Click on to go to scheduled report screen

6.6.2 Today Screen Report

You can add reports to your home screen today.

- Select the report you want to see quickly on this screen.
- Click on the button
- On the Today screen, the report is Viewed at the bottom of the page
- Click on the setting icon on the screen today to change the location of the report

Note: Update

The Viewed report is updated automatically. Any modification made to the content of the latter is reflected on the screen today.

Click the parameter button to define the location of the report (s) on the Today screen.

Click on the handles to move the item in the list.

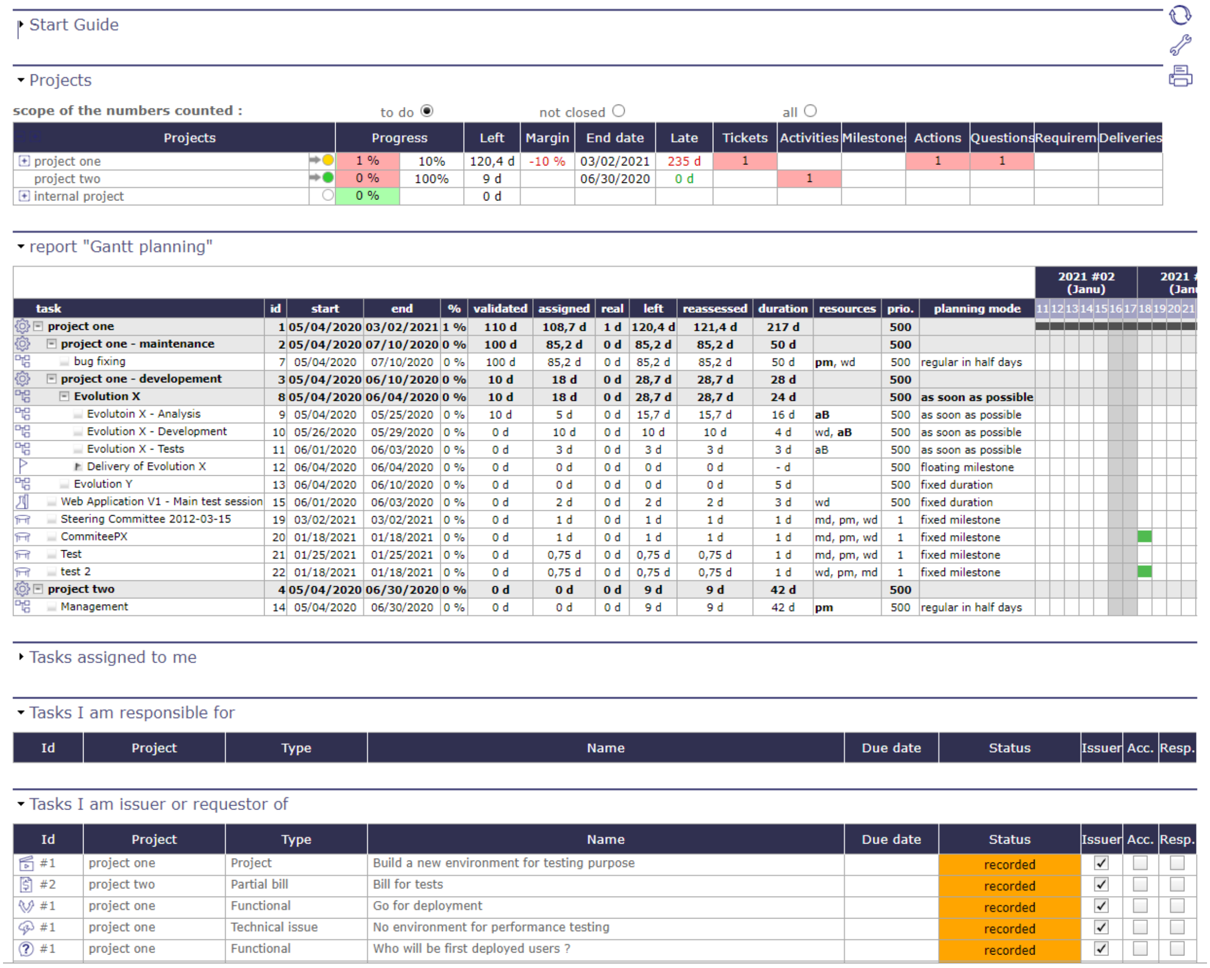
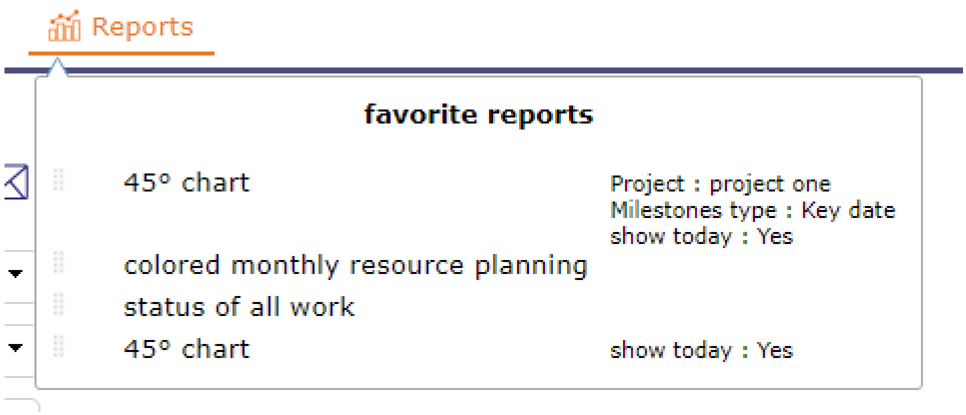


Fig. 100: View a report on the today screen

6.6.3 Favorite reports

Move your cursor over the reports menu icon (in the top bar) to show the popup menu that contains your favorite reports.



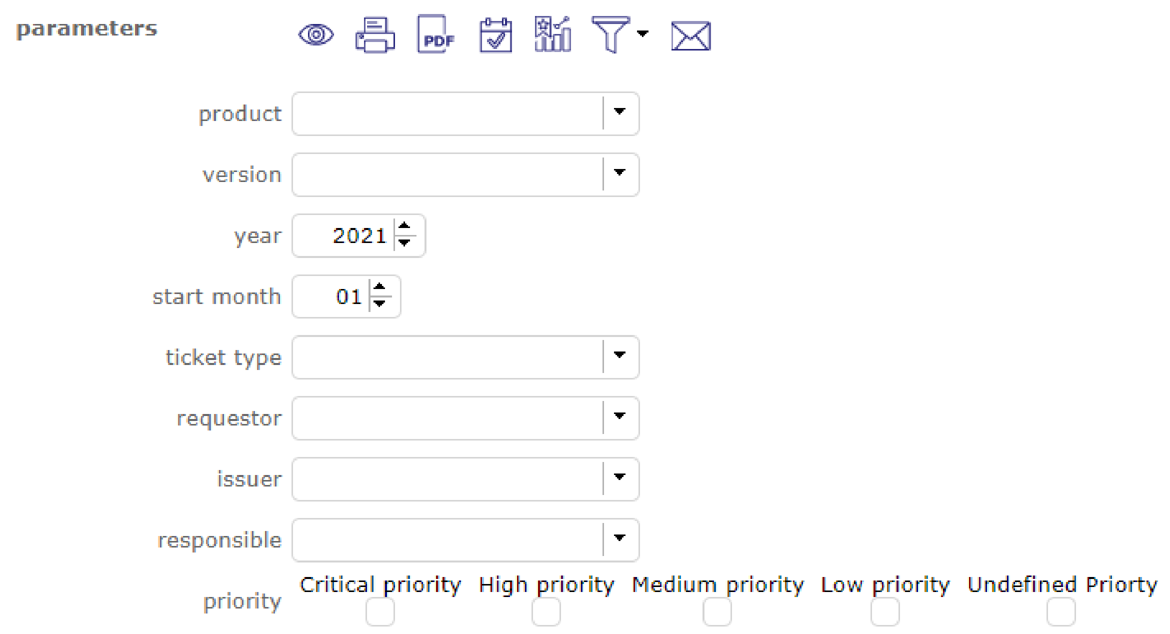
You can add a "blank" report type to the favorites or to a specific project and resources. In this case, next to the report name, linked items will be Viewed.

Popup menu management

- Allows to reorder reports Viewed with drag & drop feature. Using the selector area button icon drag .
- Click on to remove the report from the list.

6.6.4 Filter Reports

For tickets and only tickets, you can apply an existing or create filter



As with the advanced list box filters, you can choose from many criteria to create your filter;

See: *advanced filters*

6.6.5 Report Sending programmation

Other sections

- *Scheduled report*

Ability to schedule the sending of reports as emails

For example, you can send a report every day, every Monday or every first day of the month

To view all scheduled reports for sending, go to Scheduled Report in the Tools menu

6.6.6 Reports from lists

When you are on a list of items, such as activities, tickets, actions or any other items… you can create reports from your list layout

On the list

The “save object list as report” function is available in the list box tools.

You can edit the columns and place them in the order you want, you can apply simple or advanced filters.

When you click on a pop-up is open.

Name your list layout and save it by clicking .

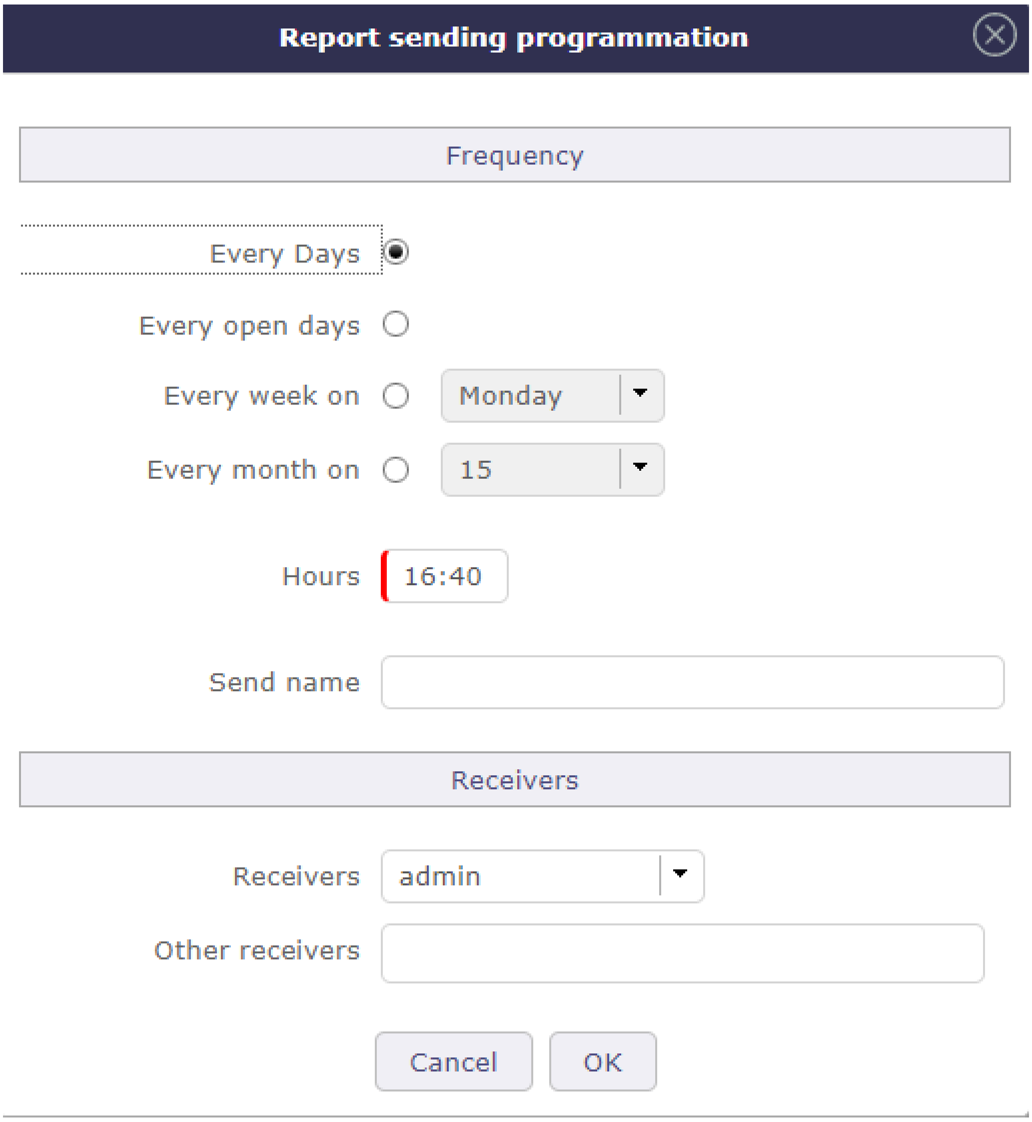


Fig. 101: Sending a report to email

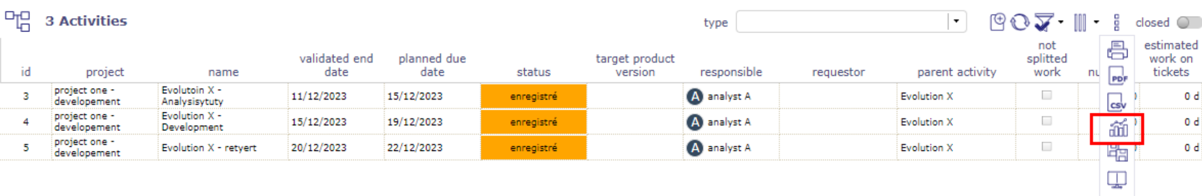


Fig. 102: List as report

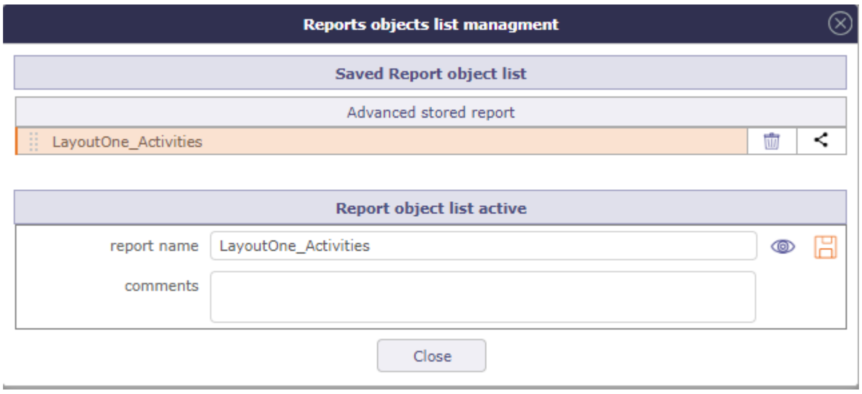


Fig. 103: Windows to save the list as report

The list will be stored as you prepared it and you will find it in the reports.

On the reports

In the reports, you will find a new category where the different list reports that you have copied so far will be copied.

They are sorted by items, knowing that you can create several different reports for the same item.

Fig. 104: Windows to save the list as report

You will then obtain the report as you programmed it from the element list.

Each of these reports can be added to the today screen, can be sent at a given frequency.

They can be printed and exported to PDF, CSV and Excel.

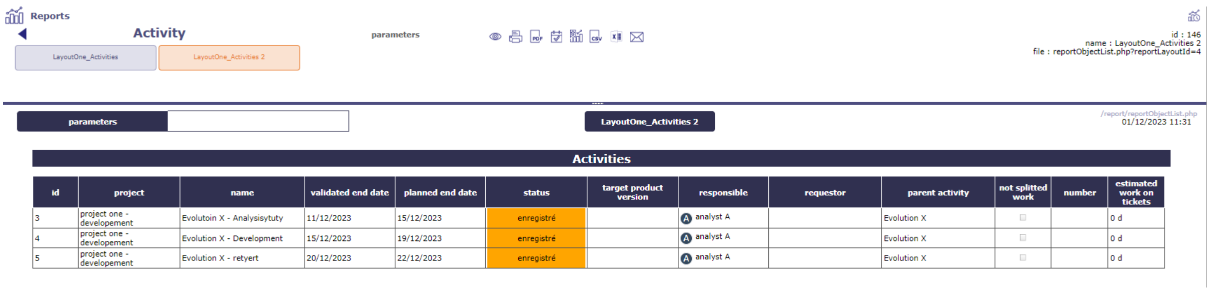


Fig. 105: Windows to save the list as report

6.6.7 Complete list of reports

Legend:

Almost all reports can be exported in PDF or printable format.

- Export to CSV
- Export to Excel
- No export
- Print only

Real Work

Allows you to view the actual expenses consumed by your resources on one or all projects over a given period.

Most reports allow you to refine the display by organization, by team and by resource or even by type of activity.

reports that can be exported in excel format are indicated by the icon

WORK

1. Work - Weekly
2. Work - Monthkly
3. Work - Yearly
4. Work - Between two dates
5. Work for a resource - Weekly
6. Work for a resource - Monthkly
7. Work for a resource - Yearly
8. Work for a resource - Between two dates
9. Monthly wor for resource
10. Work monthly detailed by resource
11. Work yearly per month

WORK DETAILED PER ACTIVITY

12. Detailed work per activity - Weekly
13. Detailed work per activity - Monthkly
14. Detailed work per activity - Yearly
15. Detailed work per activity - Between two dates

WORK DETAILED PER RESOURCE

16. Detailed work per resource - Weekly
17. Detailed work per resource - Monthkly
18. Detailed work per resource - Yearly

19. Detailed work per resource - Between two dates

WORK SYNTHESIS PER ACTIVITY

20. Work synthesis per activity
21. Work synthesis per activity between two dates

INDIVIDUAL CHARGES BY TYPE OF ACTIVITY

22. Work for a resource per type of activity - monthly
23. Work for a resource per type of activity - Yearly
24. Work for a resource per type of activity - Between two dates

OTHERS

25. Left work

Planning

The reports in the planning category allow you to track the use of your resources through your project schedules. Diagram, synthesis, colored report, loads plan between planned and real work…

GANTT PLANNING

26. Portfolio Gantt planning

WORK SYNTHESIS

27. Work synthesis per activity
28. Work synthesis per activity - between two dates
29. Work synthesis per ticket
30. Synthesis of technical progress
31. Work synthesis per resource

MONTHLY PLANNING

32. Monthly planning resource/project
33. Monthly planning project/resource
34. Monthly planning project/activity/resource
35. Monthly planning resource/project/activity
36. Monthly planning for a resource
37. Monthly planning for a resource (per project)

YEARLY PLANNING

38. Yearly planning resource/project
39. Yearly planning project/resource
40. Global planning project/resource per month
41. Yearly planning project/activity/resource

WORK PLAN

42. Work plan per week
43. Work plan per month
44. Work plan per resource and per week
45. Work plan per resource and per month
46. Workload plan on given period

◁ **AVAILABILITY** ▷

47. Monthly availability of resources
48. Availability synthesis

◁ **OTHERS** ▷

49. Colored monthly resource planning
50. Planned interventions

Steering charts

The management diagrams are very precise reports to follow, compare and inform on the costs, deadlines and progress of your projects.

51. Burndown chart
52. S curve chart
53. 45° chart
54. Performance indicator
55. Proposales
56. RIDA (Statement of Information Decisions Actions)

KPIs

Track your KPI indicators with precision.

◁ **KPI DURATION** ▷

57. KPI Duration for project
58. KPI Duration consolidated

◁ **KPI WORKLOAD** ▷

59. KPI Workload for project
60. KPI Workload consolidated

◁ **KPI INCOMING/DELIVERABLE** ▷

61. KPI Deliverable for project
62. KPI Deliverable consolidated
63. KPI Incoming for project
64. KPI Incoming consolidated

◁ **OTHERS** ▷

65. Client invoicing terms

66. Work Units synthesis
67. Workload history

Tickets

Find here all the reports concerning the follow-up of your tickets on one or more projects and this, over a given period.

You can restrict and filter your display by resource, by customer, by requestor, issuer or manager. But also by priority or qualification.

TICKET COUNT

68. Yearly report for tickets
69. Yearly report for tickets by type
70. Report for tickets cumulated - number of days
71. Yearly report for tickets by product

REPORT FOR TICKETS BY QUALIFYING

72. Report for tickets by qualifying - weekly
73. Report for tickets by qualifying - monthly
74. Report for tickets by qualifying - yearly
75. Report for tickets by qualifying - global

REPORT REPARTITION

76. Report for opened tickets - weekly
77. Report for opened tickets - monthly
78. Report for opened tickets - yearly
79. Report for opened tickets - global

TICKET SYNTHESIS BY STATUS

80. Handled ticket synthesis - monthly
81. Done ticket synthesis - monthly

OTHERS

82. Curve of tickets BurnDown
83. Clients impacted by tickets CSV

Current status

The current status category allows you to follow the status of elements relating to the project: Activities, activity tasks, risks, Document approval …

RISK AND ACTIONS

84. Risk management plan
85. Actions table

OTHERS

86. Status of ongoing work
87. Status of all work
88. Opportunity plan
89. Version detail
90. Jobs summary for activities
91. Approval of documents

Costs

You will be able to follow all your costs related to the project, the activity or your resources.

EXPENSES

92. Project expense per month
93. Individual expense per month
94. Total expense per month

OTHERS

95. Cost synthesis per activity
96. Resources costs per month
97. Detailed resource costs per activity per month
98. Total expense and cost per month

Financials

In the same way, you will be able to follow the receipts related to the project and their consolidation.

CLIENT INVOICING TERM

99. Monthly terms
100. Weekly terms

OTHERS

101. Invoices
102. Financial expenses board
103. Financial expenses synthesis
104. Monthly consolidation
105. Summary of orders / client invoicing

Requirements & Tests

You will be able to trace the status of cases played out for requirements and / or products, monitor requirements coverage, review annotations, comments and obtain various summaries.

◁ **TEST COVERAGE** ▷

106. requirements test coverage
107. products test coverage
108. test cases detail
109. test session summary

◁ **REQUIREMENT FLOW** ▷

110. Requirements flow annual
111. Requirements cumulated on number of days
112. Requirement yearly by type

◁ **REQUIREMENT OPENED**

113. Requirement weekly opened
114. Requirement monthly opened
115. Requirement yearly opened
116. Requirement global opened

◁ **OTHERS** ▷

117. Curve of requirement Burn-Down
118. Requirements with open questions

Miscellaneous

A set of additional but very comprehensive reports on your projects and some of its elements.

◁ **HISTORY** ▷

119. Detail of history for one item
120. Deleted items

◁ **OTHERS** ▷

121. Connections audit
122. Project dashboard
123. Followed items
124. List of attachments per user

Human Resources

A set of additional but very comprehensive reports on your projects and some of its elements.

125. Resources inputs - outputs
126. Resources workforce
127. Resources seniority

6.7 Real work allocation

6.7.1 Timesheet

This screen is dedicated to entering actual work.

The resource completes their work every day, for each assigned task.

Data entry for a resource is done on a weekly basis.

The corresponding cost to the real work is automatically updated to the assignment, activity and project.

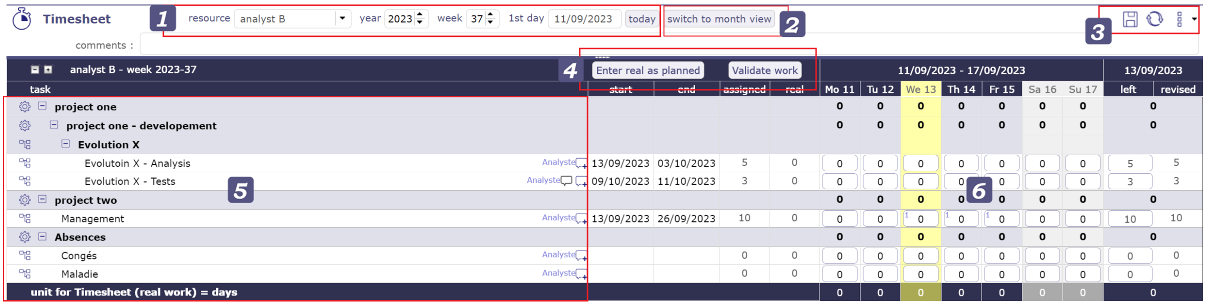


Fig. 106: Timesheet zone screen

Interface areas

1 *Selection and filters*

2 *Switch display*

3 *Tools*

4 *Data entry validation*

5 *Task Zone*

6 *Entry field*

1 Selection and filters

This filters allows to select a timesheet for a resource and for a period.

Resource selection

- By default, users can only select themselves as a resource.
- Access to other resources timesheet depending on *Specific access*.

Selection period

By default, the period is determined according to the current day.

Targeted periods are displayed in different places on the screen.

- You can select the number of the week and its year directly with the corresponding filters.
- The "first day" filter allows you to choose a specific date, day, month and year. The full week containing this date will be displayed.
- The button today targets the current week
- The D-day is highlighted.

Switch display

By default, the timesheet display is presented by week.

By clicking on the “switch the month view” button, the timesheet display switches to monthly view.

The start and end dates of an item are no longer displayed in this mode.

Tools

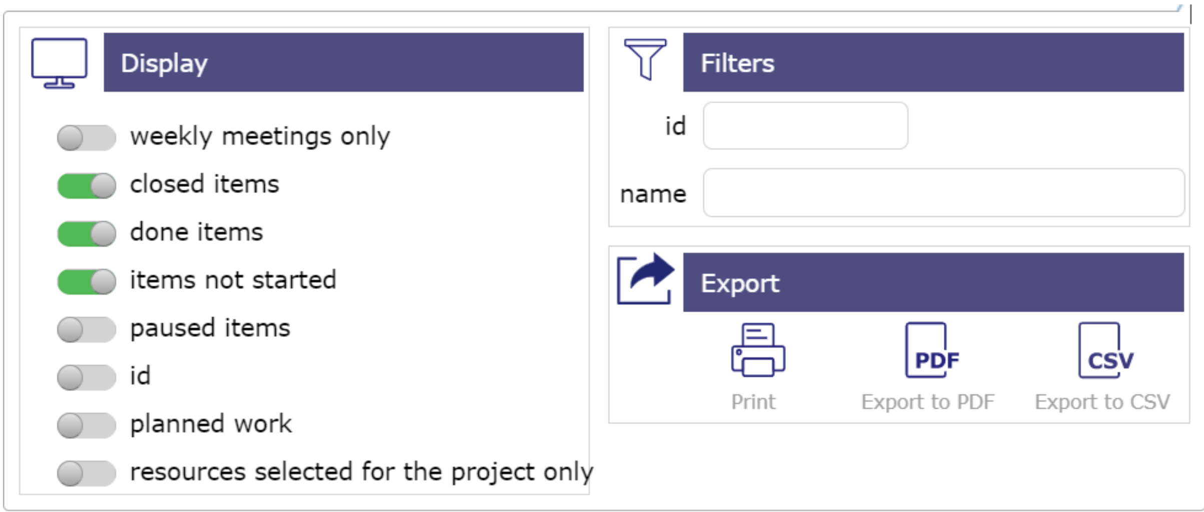


Fig. 107: Timesheet options

- Click on to save timesheet datas.
- Click on to refresh datas.
- Click on to display options.

  Display

  The toggle buttons help you filter the information visible on your timesheet.

  Switch the button to the right (green button) to activate the display.

  Weekly meetings only

  - Recurring meetings display all meetings with one meeting per line. Depending on the period and frequency of your recurring meetings, many lines may be displayed.
  - With this option, you only display meetings for the week displayed on the screen.

  Closed items

  - Switch the button to show closed tasks. Archived tasks.

  Done items

  - Switch the button to show completed tasks. With left work to 0.

  Items not started

  - Switch the button to show unstarted tasks. The macro state **in progress** must be activated and saved for the tasks for this option.

  Paused items

  - Switch the button to show show tasks that have been paused. the **pause** macro state must be activated and saved for the tasks for this option.

ID

- Show ID to identify all single task.

Planned work

- Planned work is indicated on each input cell, in the upper left corner, in light blue.
- Allows you to display the planned working time per day for the resource assigned to the task.

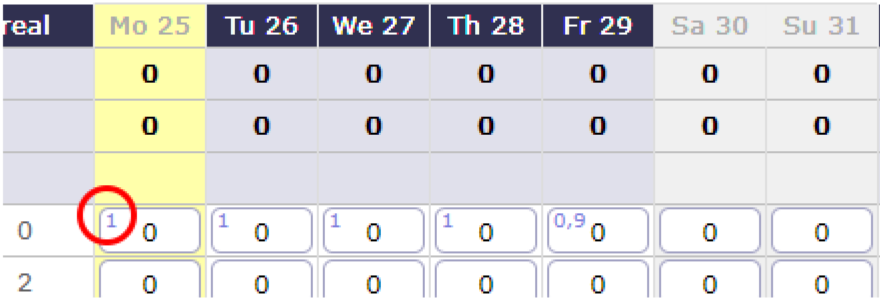


Fig. 108: Planned work

Resource selected for the project only

- You can limit the display of the *resource selection* drop-down list.
- If you have selected a project in your *project selector* then you will only see the resources assigned to that project.

Filter

Quick filters are used to define the list of tasks displayed by name and ID.

Export

- Click on to print timesheet.
- Click on PDF to export timesheet in PDF format.
- Click on CSV to export timesheet in CSV format.

Data entry validation

Enter real as planned

Planned work on an activity for a resource is carried forward for each day.

If there is no figure displayed then it means that the resource is not supposed to be informed of the actual work on this activity during this period.

Even if planned work is scheduled for a resource, there is nothing forcing it to complete its work as expected.

The option *Show planned work* must be activated.

Submit work

ProjeQtOr offers a system of validation of charges which makes it possible to follow the information of the real work of resources by a hierarchical manager.

After sending the actual work, you can no longer change the actual working time for the week.

You must cancel the validation request to make a change.

Validate work

Project managers can validate the work or any other personalized profile authorized to do so.

Only people with the necessary permissions can see this button

When the work is validated, then the resource can no longer modify its work on this week. Likewise, the cancellation of validation will no longer be available.

The validation system is optional and can therefore be hidden.

Task Zone

The list displays the tasks assigned to the resource selected in the list.

Click on the activity name to access the activity details screen.

Tasks assigned with actual work are always displayed, even when closed.

The function of the resource on this task is displayed at the end of the line.

Note:

- A resource can have multiple *functions*.
- It is possible to *assign* the same resource several times but with different functions to monitor project costs.

- The icon allows you to add a comment.
- The icon indicates that there is a comment on the assigned task.
- Simply move the mouse over the icon to see the latest comment.
- Click to view all comments
- A global comment can be added on the weekly follow-up.

The Start and End columns display the planned dates for each activity.

Entry field

In order to see and know the assignments on a task, several columns indicate the periods assigned to a resource

Assigned

It is the work assigned to the resource that is calculated by the software.

Real work

This is the work actually performed and reported by the resource.

Left work

This is the work that the resource still has to provide for this task

Left work is automatically decreased on input of real work.

Resources can adjust this value to estimate the work needed to complete the task.

Reassessed

This is the work required to complete the task. It's the actual work + the rest to do. See: "progress-section-date-duration"

- You cannot edit Assigned Work, Actual Work, and Reassessed directly in columns.
- This information is calculated directly by the software based on what you have entered

Real work entry

- Area to enter real work. It possible put real work in off days.

- Columns of days off is displayed in grey.
- Days off is determine in resource *calendar definition*.

Total of days

On the last row is the sum for all days of the week.

It is a synthesis displayed for each project and globally for the whole week.

The resource capacity is defined by the number of hours per day and the resource capacity (fte).

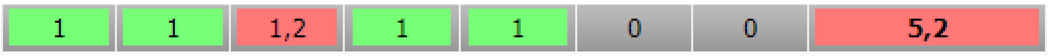


Fig. 109: Total of the day Zone

- Total for the day is **green** if entries are completely within the resource's ETP capacity
- The total for the day is **light red** if entries are greater than the resource's FTE capacity.
- Total for the day is **dark red** if entries are greater than the maximum daily work allowed on the resource.
- A message A message warns you that you exceed the authorized fixed quota.
- You will not be able to save the timesheet with a higher quota
- Total for the day is **uncolored** if entries are less than the resource's FTE capacity

See also:

- *Unit for work*

  Allows to set the unit time for real work and workload and the number of days worked per week. The number of hours per day is defined here.

- *Timesheet*

  You can set many levers, alerts or display options

- *Generation of alerts if real work is not entered*

  You can trigger alerts on the entry of actual work for different collaborators. These messages can be sent at a frequency defined by email or displayed as an alert directly in the application.

- *Automatic feeding of the real*

  You can automatically fill in the actual work from the work scheduled up to a given date and then trigger the automatic calculation of the projects from the day after that date.

The status of tasks

The task status can be changed automatically according to data entries on real work and left work.

- Set to first **in progress** status: if the parameter value is set to "Yes", when real work is entered on a task, its status will be changed automatically to the first status "In progress".
- Set to first **done** status: if the parameter value is set to "Yes", when left work is set to zero on a task, its status will be changed automatically to the first status "done".

  Change status validation

  An icon will be displayed on the task if a status change is applicable.

  - Due to real work is entered, the task status will be changed to the first 'In progress' status.
  - The real work is entered, but the task status will not change because at issue is occurring.
  - Due to no more left work, the task status will be changed to the first 'done' status.

- No more left work, but the task status will not change because at issue is occurring.

> **Warning:** Common issue
>
> - If a *responsible* or a *result* are set as mandatory in element type definition for the task. It's impossible to set those values by real work allocation screen.
> - The change status must be done in treatment section on the task definition screen.

Pool of ressource management

When the option **display pools on Timesheet** is activated, when a resource is assigned to an activity at the same time as a resource pool of which it is a part, then it will see the row for itself and the row for the resource pool.

When the option is disabled then the resource only sees its line.

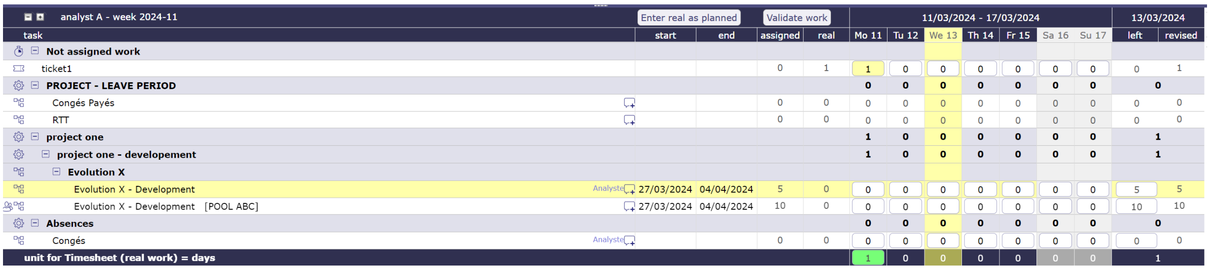


Fig. 110: Timesheet with resource and resource pool lines

When the option is set to **no** then you can choose to display at least the left work to be done on this one.

The following option **show pool to update their left work** allows you to display a row for the pool below the resource row to modify the left work.

an icon then appears at the end of the resource line for the pool.

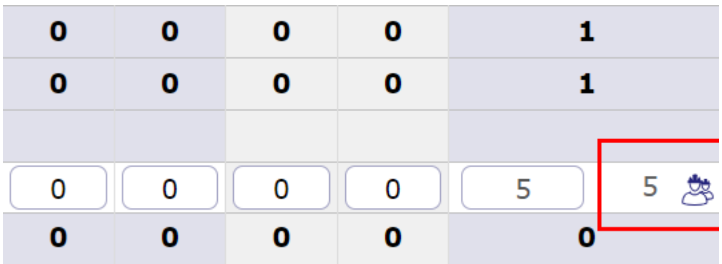


Fig. 111: icon pool of resources for the left work

Click on it and a line is available to modify the left work for the pool of resources.

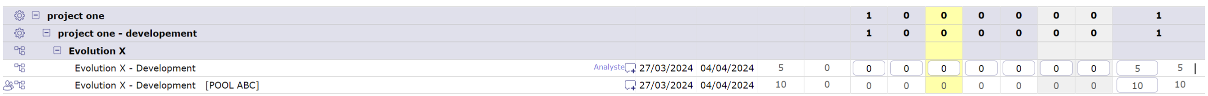


Fig. 112: pool of resource line

6.7.2 Timesheet Validation

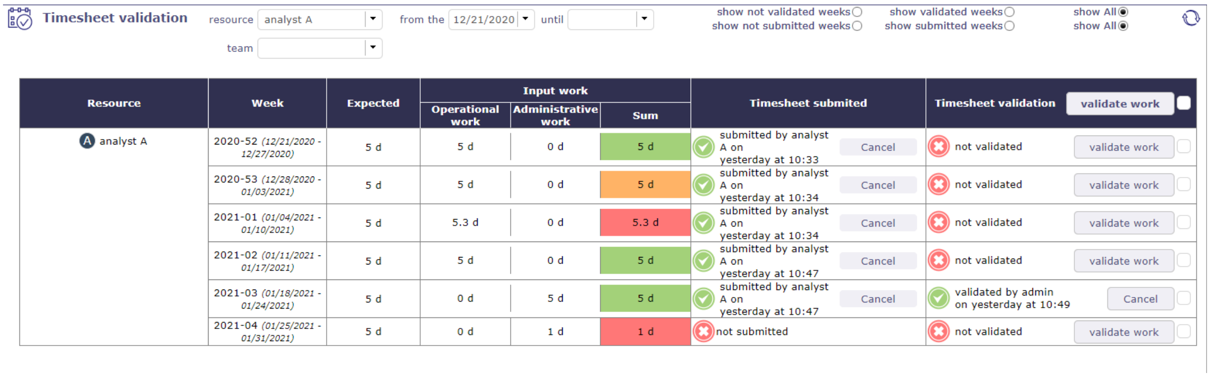


Fig. 113: Timesheet validation

The timesheet validation screen allows the project manager to receive, verify and validate the time allocated weekly by the resources to an activity for all the projects.

Selection and filters

You can filter the display of this screen by resource, by team and by period.

The visibility of resources in the list is defined according to your rights defined by your profile.

You can increase the display restriction with the possibility to show only some of the validation request.

Color code

According to the work completed by the resource, and according to the expected workload for this resource.

The project leader receives the timesheet with a precise color code.

- **Green:** The completed job is the same as the expected one.
- **Red:** The filled workload is shorter or longer. It does not match the expected work.
- **Orange:** the job is not the same as the expected job but the load is the same.

Fig. 114: Example of completed charges which generate the orange color code

Validation

In the “Timesheet submitted” column you see the date and time when the resource to send the submission.

In the “Timesheet validation” column you have the possibility to validate the work or to cancel the submission so that the resource can correct his work.

6.7.3 Monthly consolidation

Monthly consolidation allows you to view, control and validate resource allocations to a particular project for an entire month. This screen will list all the projects on which the user has visibility.

Fig. 115: Monthly consolidation screen

Filters will limit the list:

- Project to restrict the listed projects to this project and its sub-projects
- Project Type to restrict the listed projects to projects of this type
- Organization to restrict the listed projects to the projects of this organization
- Month and year to restrict to this date

Note: By default, this will be the last month for which projects are still blocked, or failing this it will be the current month.

This screen will display for each project not validated:

- The currently known CA
- The currently known validated load
- The total actual load currently known to the project
- The actual load consumed on the project for the selected month
- The remainder to be done currently known
- The currently known reassessed load
- The currently known margin (load) = load validated - load reassessed

For validated projects, the data displayed is that stored during validation.

Block a project over a month

The and buttons allow you to block or unblock charges beyond the month-end date. When the project is blocked for a given month, you cannot enter a charge for the following month, even if it has started. The block will be propagated recursively to sub-projects.

Validate a project over a month

The and buttons allow you to block or unblock charges beyond the month-end date. When the project is blocked for a given month, you cannot enter a charge for the following month, even if it has started. The block will be propagated recursively to sub-projects.

> **Warning:** Access to the blocking / unlocking and the validation button will be configured by a *specific right*.

6.7.4 Absences

Absences must be reported as soon as possible so that the calculation of your project schedule takes into account the unavailability of resources.

projeqtor offers two types of non-productive work records:

- A simple system, that of absences, linked to an administrative project which will make it possible to record real work in the future.
- a complex system, that of *human resources*, linked to a system of contracts and rights acquired over time.

Absences are related to an administrative type project.

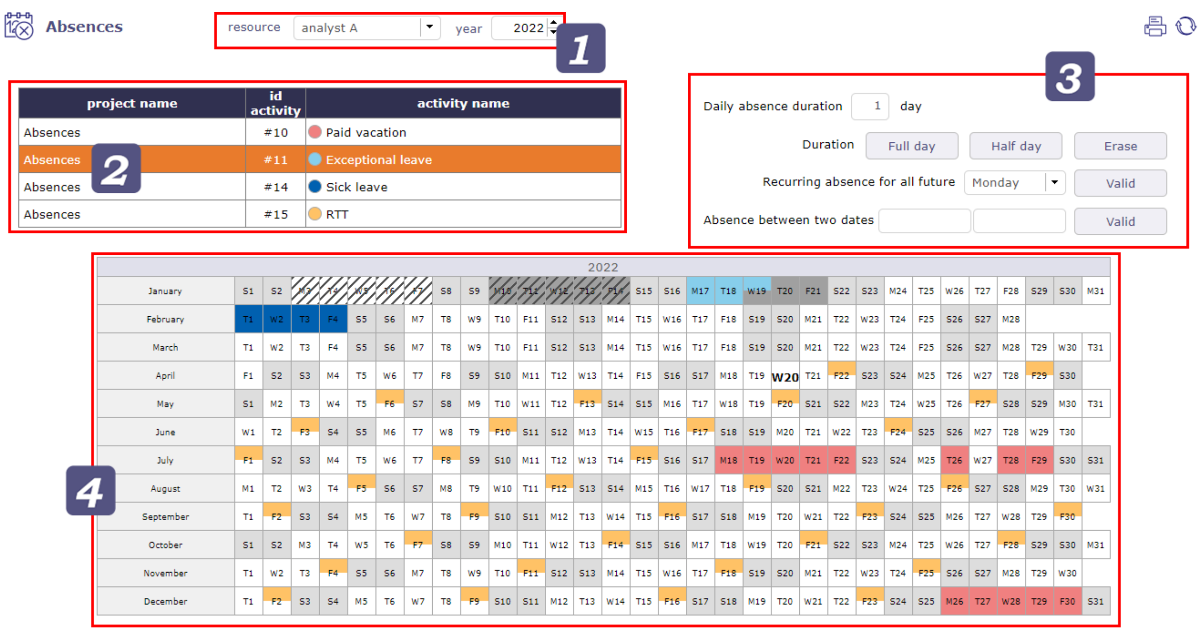


Fig. 116: absences screen

Only one project is necessary for all the resources, without them being allocated to this project.

- Resource Selector

Depending on your rights and profile, you can have access to the resources that you manage or only to yourself.

Select the resource whose non-productive days you want to add as well as the year on which these days will be retained.

2 Types of absences

Each type of absence is an activity related to the administrative project.

You can create as many activities as types of absences.

you must select an activity first to be able to click on calendar days.

3 Accelerator

After selecting the type of leave, click on the accelerators to enter the selected value directly in the date boxes in the calendar.

- 1: full day
- 0.5: half day on the type of leave selected
- 0: delete the days already entered

You can combine an absence recurrence for a given day.

- Select the day value (0.5, 1) and then select a day from the drop-down list.
- The corresponding days will be marked absent for the previously selected value from the current date until the end of the current year.

You can also select a period between two dates to apply the selected value.

4 calendar

Select the type of leave from the existing list.

Click on the boxes of the dates concerned by non-productive work or use accelerators.

The boxes are filled with the color of the leave type.

If you use the human resources absence system, then you will see the dedicated project appear.

project name	id activity	activity name
Absences	#10	Congés
Absences	#11	Maladie
PROJECT - LEAVE PERIOD	#8	Congés Payés
PROJECT - LEAVE PERIOD	#9	RTT

Fig. 117: list of projects and related activities on the absences screen

Absences recorded via the human resources system will still be displayed on the absences screen.

Others color

S22 indicate non-working days.

T20 indicate real work (timesheet).

M1 indicates the week has been submited/validated.

M10 indicate that real work recorded has been submitted/validated.

6.8 Collaboration

6.8.1 Voting management

ProjeQtOr gives users the possibility to vote on tickets, activities, change requests or requirements.

The voting functionality is a module and will need to be enabled through module management in order to be used.

To make an item votable you must create some use rules.

The principle is to assign points to users so that they can vote on a particular item.

Voting attribution rule

Points are assigned to a client and his contacts or to a user.

It is possible to assign fixed points or to assign points at a given frequency.

The user can use his own points or the points of the customer he belongs to as a contact.

The allocation is recalculated when the user logs in, for himself and for the client to which he belongs.

The calculation is based on the last date of assignment of voting points.

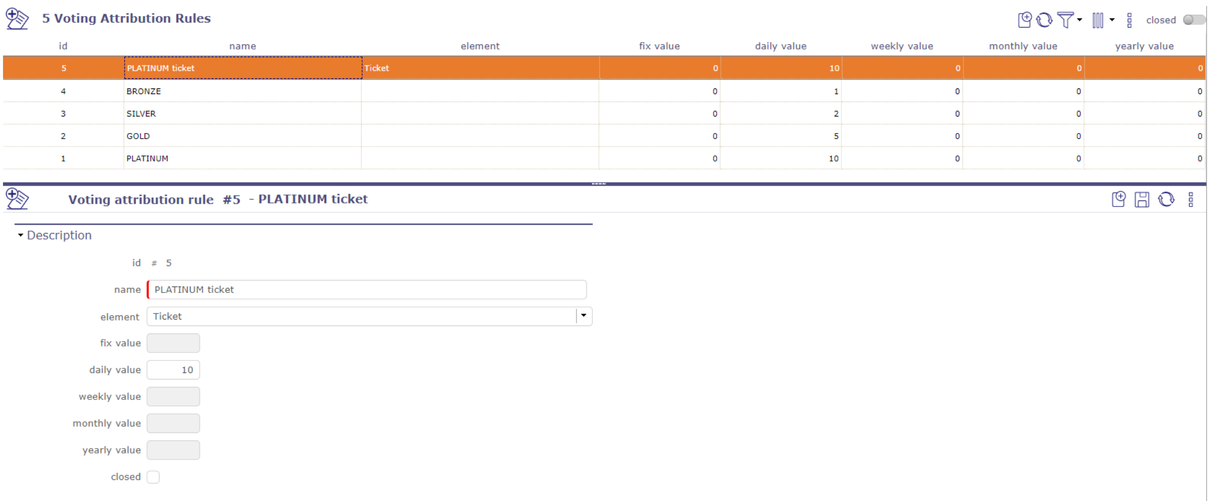


Fig. 118: Voting attribution rules screen

On the voting rules screen click on  to create a new rule.

Fill in one of the voting elements. If the field is left empty, then the attribution will concern all the voting elements at the same time.

Fill in a value (number of points) to give to the user.

Fix value

You give a well-defined number of points that will not change.

To reassign points, you must recreate a new attribution rule.

Periodicity of values

You give a number of points which will increment at regular intervals.

Every day, every week, every month or every year, the user will receive the number of points entered.

Attribution

On the client or user screen, in the Voting attribution section you add the rules created beforehand.

Click to add a rule.

The pop-up opens and you can choose the rule(s) that suits your needs.

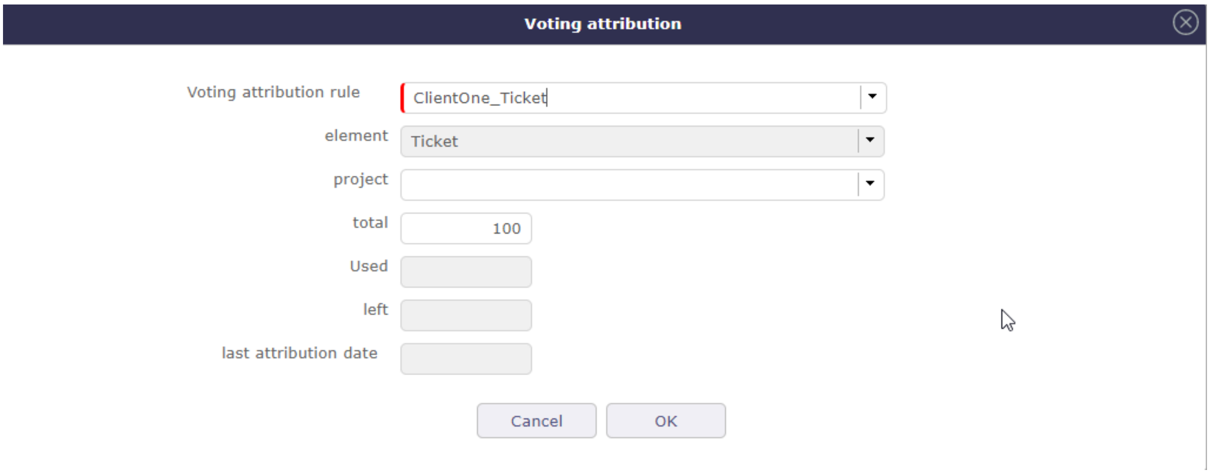


Fig. 119: Voting attribution pop-up

The information is retrieved automatically from the allocation rule and the history of points spent.

You will be able to follow the evolution of your points directly on the customer or user screen.

Voting use rule

To be able to vote, it is necessary to create rules for the use of votes.

How the user will and can use their points, on what element and how to convert and equate points to workload days.

Click on to create a new rule

The project is not mandatory. If it is filled in then the points will only be usable on the elements of this project.

The voter can vote without having the rights to update the item, just with "read" rights on the element and a certain number of points.

The voter can withdraw his points from one element to put them on another.

Blocking status

At a stage (status to be defined), the element can be blocked: the points can no longer be edited or deleted.

conversion of points

Conversion ratio of estimated work into number of points.

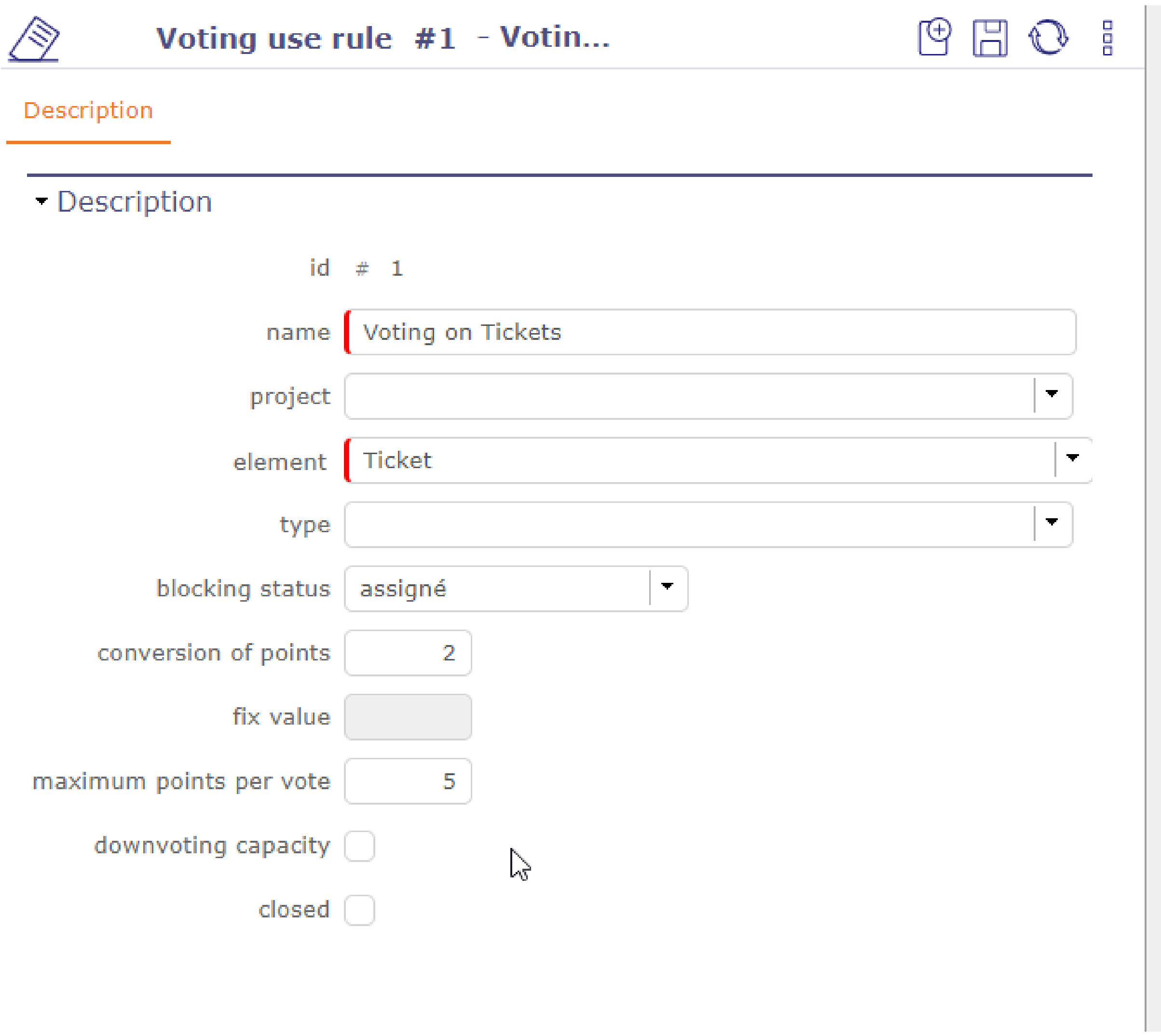
For example with a ratio of 2, a ticket with 1.5 estimated work will have target points of 3.0

Fix value

The fixed value is only filled in if the assignment rule linked to the usage rule is filled in as a fixed value.

Maximum points per vote.

Vous pouvez fixer un maximum de point à utiliser sur un élément votable.


Voting use rule #1 - Votin...
Description
Description
id # 1
name Voting on Tickets
project
element Ticket
type
blocking status assigné
conversion of points 2
fix value
maximum points per vote 5
downvoting capacity
closed

Si vous fixer cette valeur, vous ne pourrez jamais dépenser plus que cette valeur sur l'élément.

Downvoting capacity

The voter can vote negative. This is a good way to show your disinterest or a way of mentioning that you don't like the general idea of the element.

Vote

When a voteable item is defined, the voting attribution table is available on the respective screens of the items.

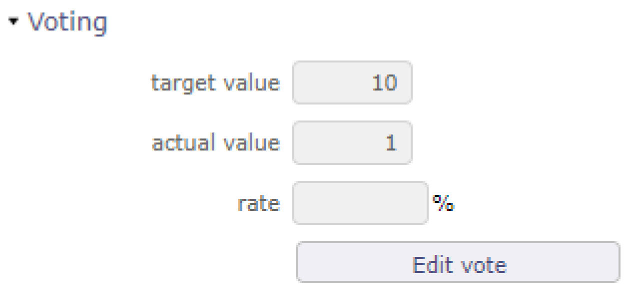


Fig. 120: Voting section

The target value is populated only if you have estimated work on the item.

Estimated work on tickets and requirements and validated workload on activities.

See: *Dates and duration*

Tip: Convertion

TargetValue = ceil (plannedWork * workPointConvertionRate)

If work = 0,5j | rate = 3 –> points = 2

There is no decimal value. Round up to the next whole.

If work = 5j | rate = 2 –> points = 10

Click on the vote button to access the voting pop-up.

Fig. 121: Voting pop-up

Fill in the number of points you want to use for this vote.

You can see:

Limit per vote

indicates the maximum number of points you can use for voting this item.

Own vote

The user uses his points in his own name.

Client vote

The user uses the points attached to the customer as a contact.

Left points

Indicates your remaining number of points for the user and for the customer.

Comment

The comments are added as *note* on the item page.

When a user/customer has voted, a tracking table allows you to see who has voted and how many points have been scored.

The rate indicates the percentage of progress for the vote of the element according to the target value and the number of votes.

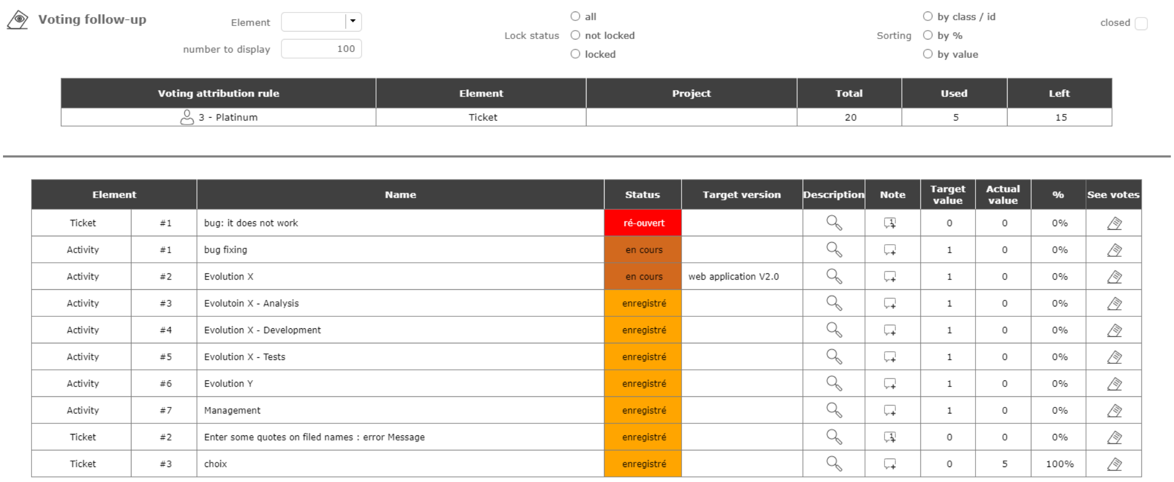
On the *Kanban* this percentage is reflected by the color filling of the vote icon.

To modify or delete your vote, click on the edit vote button. Leave the field empty or fill in 0 to cancel your vote.

Voting follow-up

The area at the top of the screen allows you to view the allocation rules that are linked to you.

The area at the bottom of the screen allows you to see the voted items, sorted by descending % of votes.



Voting attribution rule	Element	Project	Total	Used	Left
3 - Platinum	Ticket		20	5	15

Element		Name	Status	Target version	Description	Note	Target value	Actual value	%	See votes
Ticket	#1	bug: it does not work	ré-ouvert				0	0	0%	
Activity	#1	bug fixing	en cours				1	0	0%	
Activity	#2	Evolution X	en cours	web application V2.0			1	0	0%	
Activity	#3	Evolutoin X - Analysis	enregistré				1	0	0%	
Activity	#4	Evolution X - Development	enregistré				1	0	0%	
Activity	#5	Evolution X - Tests	enregistré				1	0	0%	
Activity	#6	Evolution Y	enregistré				1	0	0%	
Activity	#7	Management	enregistré				1	0	0%	
Ticket	#2	Enter some quotes on filed names : error Message	enregistré				0	0	0%	
Ticket	#3	choix	enregistré				0	5	100%	

Fig. 122: Voting follow up screen

Filters make it possible to restrict the view of the elements and to sort them.

Click to display the item detail in a pop-up.

Click to view or add a note.

Click to display the voting table.

Click on the voteable item's ID to go to the item's screen.

On this screen, a project manager (rights to be defined) can modify the target version and the status of one or more elements.

Voting Attribution follow-up

The vote attribution follow-up screen allows you to view the elements voted by a user.

- Username
- Name of the client if he is the latter's contact.
- The attribution rule linked to it.
- The element affected by the assignment rule.
- The status
- The target version
- The project if it has been informed about the rule of use linked to the element.
- The points acquired, spent and remaining

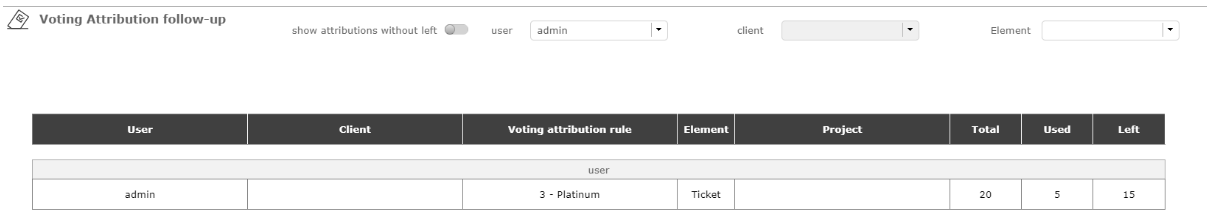


Fig. 123: Voting attribution fllow-up screen

Several filters allow you to restrict the display by user, client and/or element.

6.9 Asset Management

This module is dedicated to the management of your IT infrastructure.

You can manage:

- All types of equipment
- Equipment categories
- Brands
- Models
- Equipement localisations

6.9.1 Equipment

This screen allows you to manage lists of licenses, versions, products or even components linked to equipment.

- Define the list of devices contained in another device.
- Display the global tree of the equipment constituting an equipment, by being able to close or expand a given level.
- When copying a device you can select the complete composition of this device.
- Each piece of equipment contained is duplicated, recursively, by initializing the unique data (serial number, references, etc.).

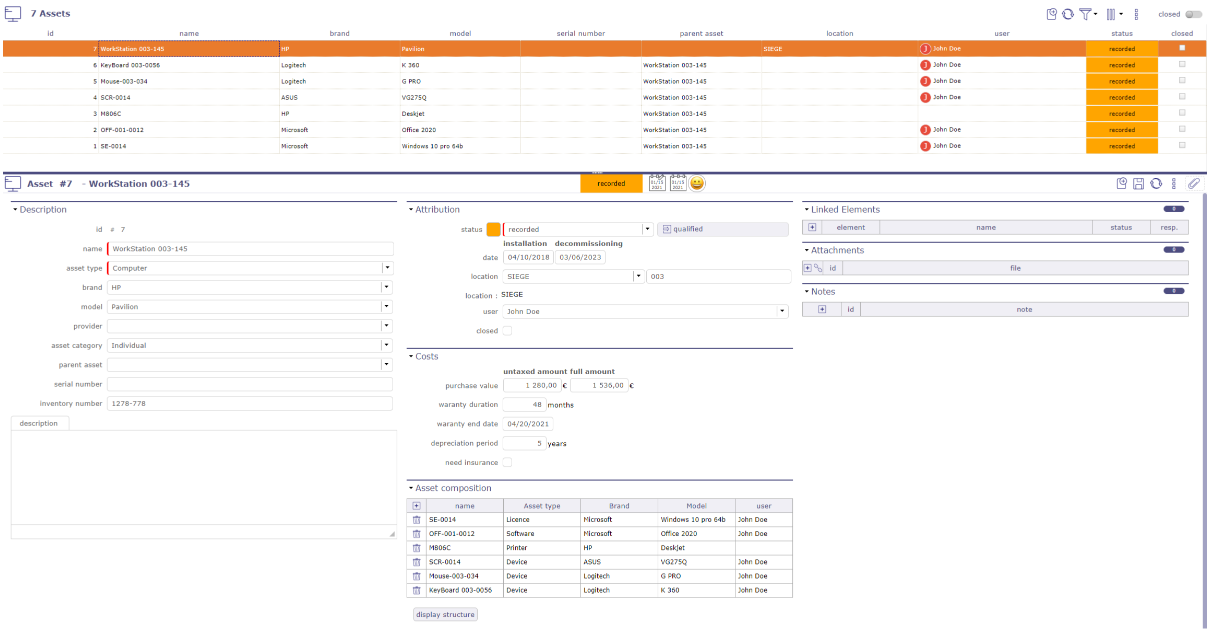


Fig. 124: Asset management screen

Access rights

You can limit the visibility of equipment.

some fields will be updated automatically to allow the user to see the items they have just created.

If a profile has creation rights and read rights only on "the items for which it is responsible", the creation must automatically position the manager on the current user.

If a profile has creation rights and read rights only on "its own elements", the creation must automatically position the user on the current user.

This rights management is automatically extended to all elements not dependent on the project.

Feeding the responsible field when creating an element if the user has visibility rights such as "the elements for which he is responsible".

Warning: Hide buttons "Lock" and "send mail" when access right is readonly

Note: Each asset related to a resource or an user, is displayed on their respective screen.

See: *Resource* and *User*

Description

This section allows you to enter the details of the composition of an item of equipment.

Table 7: Fields of add an origin element dialog box

Field	Description
name	Name of the asset.
Asset type	Type of the asset defined in the asset type screen.
Brand	Brand of the asset defined in the brand screen
Model	Model of the brand of the asset.
Provider	Equipment provider
Asset category	Category of the asset. Individual or collective by defaut.
Parent asset	Link to parent equipment. This contains the other equipment. A computer has multiple devices.
Serial number	Serial number of the material or the serial numer of a licence.
Inventory number	Add your own identification number to your equipment inventory.
Description	Description of the asset

Attribution section

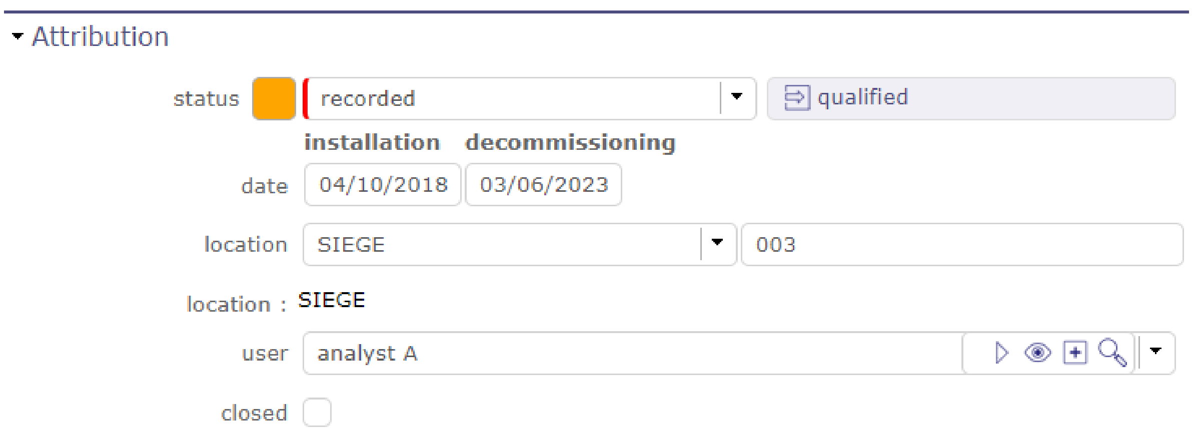


Fig. 125: Attribution section

This section allow to define:

- A status for each device according to the selected workflow.
- An installation date and a possible decommissioning date.
- The location of the equipment, with the possibility of defining a list (see: *Asset types*) and / or a manual entry field for more precision.
- The user who will benefit from this equipment.
- The closed check box. Which allows to put the equipment in archive mode.

Costs section

This section allow to define costs for the selected asset.

You can set a cost for:

- Purchase value
- The warranty period
- End of warranty date
- The amortization period
- The need for insurance

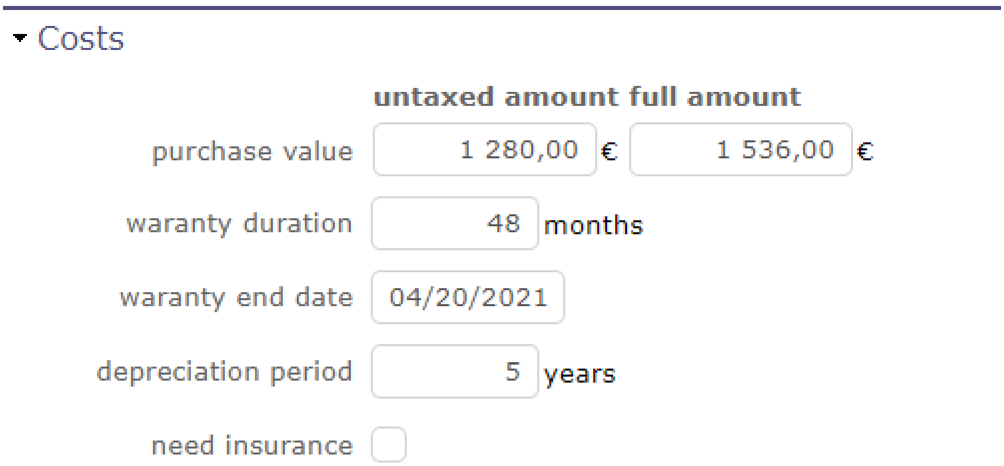
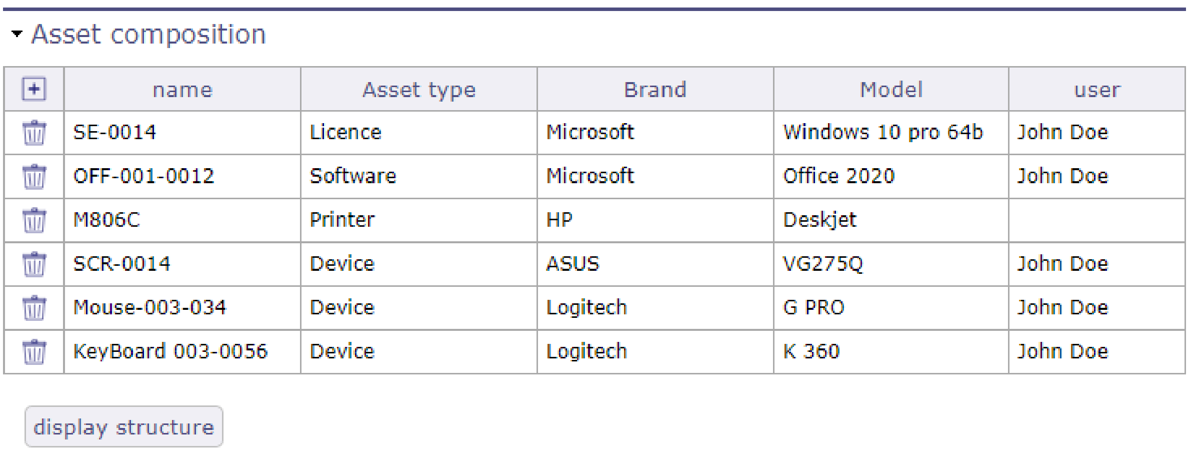


Fig. 126: Costs section

Asset composition section

When you define an element parent, the components of the element appear in this section giving you the complete structure of an element.



name	Asset type	Brand	Model	user
SE-0014	Licence	Microsoft	Windows 10 pro 64b	John Doe
OFF-001-0012	Software	Microsoft	Office 2020	John Doe
M806C	Printer	HP	Deskjet	
SCR-0014	Device	ASUS	VG275Q	John Doe
Mouse-003-034	Device	Logitech	G PRO	John Doe
KeyBoard 003-0056	Device	Logitech	K 360	John Doe

Fig. 127: Asset composition

The button `display the structure` opens a pop up which summarizes the complete composition of your equipment in table form.

You can print this box.

Print preview

Send document to printer

name	Asset type	Brand Model	user	serial number inventory number	status
#7 WorkStation 003-145	Computer	HP Pavilion	John Doe	1278-778	recorded
#1 SE-0014	Licence	Microsoft Windows 10 pro 64b	John Doe		recorded
#2 OFF-001-0012	Software	Microsoft Office 2020	John Doe		recorded
#3 M806C	Printer	HP Deskjet			recorded
#4 SCR-0014	Device	ASUS VG275Q	John Doe		recorded
#5 Mouse-003-034	Device	Logitech G PRO	John Doe		recorded
#6 KeyBoard 003-0056	Device	Logitech K 360	John Doe		recorded

Fig. 128: Asset composition section

6.9.2 Asset types

The types of asset in equipment make it possible to list the different materials of an equipment.

For example, a workstation contains a computer, peripherals such as a screen, a mouse, a keyboard, or even a webcam, software, licenses, a printer . . .

But you can also create even more detailed lists with types of information storage, processing, or network equipment.

Other sections

- *Behavior*

Table 8: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: *Workflow*).
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the type.

You can define an icon for each type of asset.

ProjeQtOr puts some icons at your disposal but you can create and import yours in the application.

Save your icons in the **www\projeqtor\view\icons** folder and relaunch the application.

6.9.3 Asset category

The screen of the equipment categories will allow you to make a more detailed inventory of certain equipment.

You can determine for example whether a piece of equipment can be personal, for a service or collective.

But you can also determine if a device is part of a hardware, network or workstation architecture

Table 9: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.

6.9.4 Brands

The brand screen allows to create a list of brands making up your IT infrastructure.

Table 10: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the type.
Closed	Box checked indicates the type is archived.

6.9.5 Models

The model screen allows you to create a list of models linked to a brand and type of equipment.

Table 11: Required fields

Field	Description
Id	Unique Id for the type.
brand	Name of the brand.
Name	Name of the model
Asset type	Name of the asset type
Description	Description of the model.

6.9.6 Location

Location screen allow to create a list of places so that you can locate your equipment.

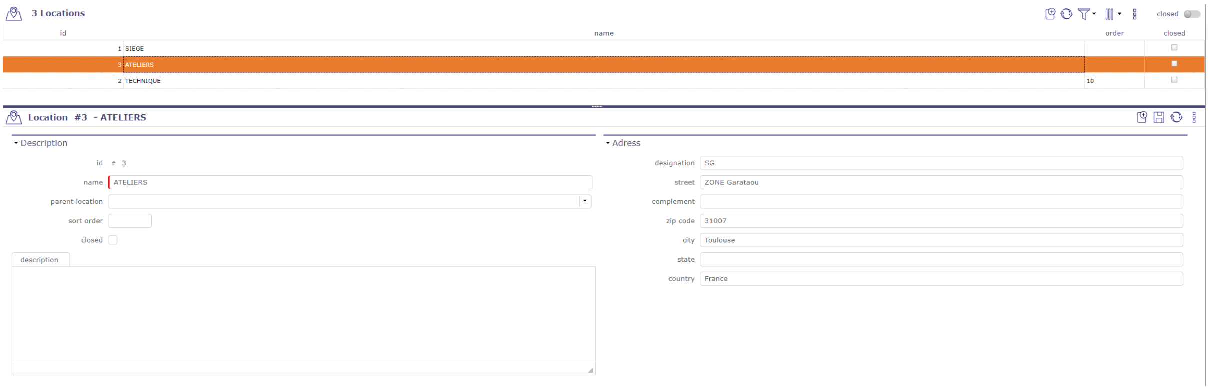


Fig. 129: Location screen

Description section

Table 12: Required fields

Field	Description
Id	Unique Id for the type.
Name	Name of the location.
Sort order	Number to define order of display in lists.
Closed	Box checked indicates the type is archived.
Description	Description of the location

The “location” fields in the assets screen offers the possibility of selecting from the recorded list of locations and a manual entry field allowing you to add details with alphanumeric characters.

Adress section

You can complete the axacte address by filling in numerous fields :

- Street
- Complement
- Zip code
- City
- State
- Country

Fig. 86: all is well

CHAPTER

SEVEN

DOCUMENT MANAGEMENT TRANSLATION

7.1 Documents

ProjeQtOr integrates some EDM functionalities, and allows you to manage documents and follow the evolution of document versions. Each document or document version can then be linked to an element of ProjeQtOr (Project, Activity or other).

Concepts

- *Product*

A document is a reference element that gives a description of a project or product.

The document element describes the general information.

The file will be stored in the tool as versions.

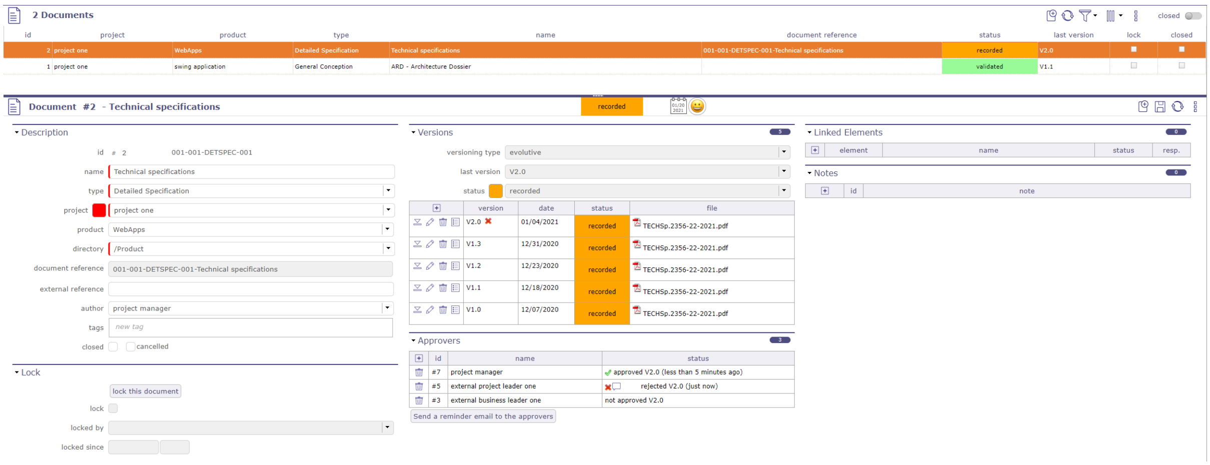


Fig. 1: Documents screen

Warning: ProjeQtOr does not integrate the following features:

Full text indexing of documents, to search for a document using a keyword it contains as well as online editing of documents.

Description section

Other sections

- *Linked element*
- *Notes*

Table 1: Required fields

Field	Description
Id	Unique Id for the context.
Type	Type of the document
Project	Name of the project to which the document is attached
Product	Name of the product to wich the document is attached
Directory	Choose the *directory* in which the document should be saved
Document reference	Automatic reference created from the parameters saved in the *global parameters*
External reference	Manual reference corresponding to your activity
Author	The author, the creator of the document.
Closed	Box checked indicates the document is archived.
Cancelled	Box checked indicates the document is cancelled.

Project and Product

Must be concerned either with a project, a product or both.

If the project is specified, the list of values for field "Product" contains only products linked the selected project.

Field Author

Positioned by default as the connected user.

Can be changed (for instance if the author is not the current user).

Section Lock

This section allows to manage document locking.

When a document is locked the following fields are displayed.

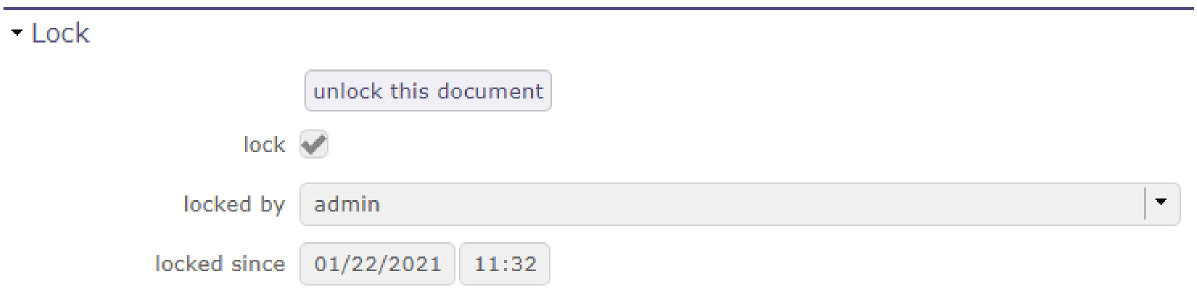


Fig. 2: Lock document section

- Locked: box checked indicates the document is locked.

- Locked by: user who locked the document.
- Locked since: date and time when document was locked.

  lock/unlock this document

  - Button to lock or unlock the document to preserve it from being editing, or new version added.
  - When document is locked it cannot be modified
  - When the document is locked, it can not be downloaded except for the user who locked it or a user with privilege
  - Only the user who locked the document, or a user with privilege can unlock it
  - You can forbid *Global Parameters*

7.1.1 Document versioning

This section allows to manage version list of document.

Document versioning allows to keep different version at each evolution of the document.

Document can evolve and a new file is generated at each evolution.

Type of versioning must be defined for a document.

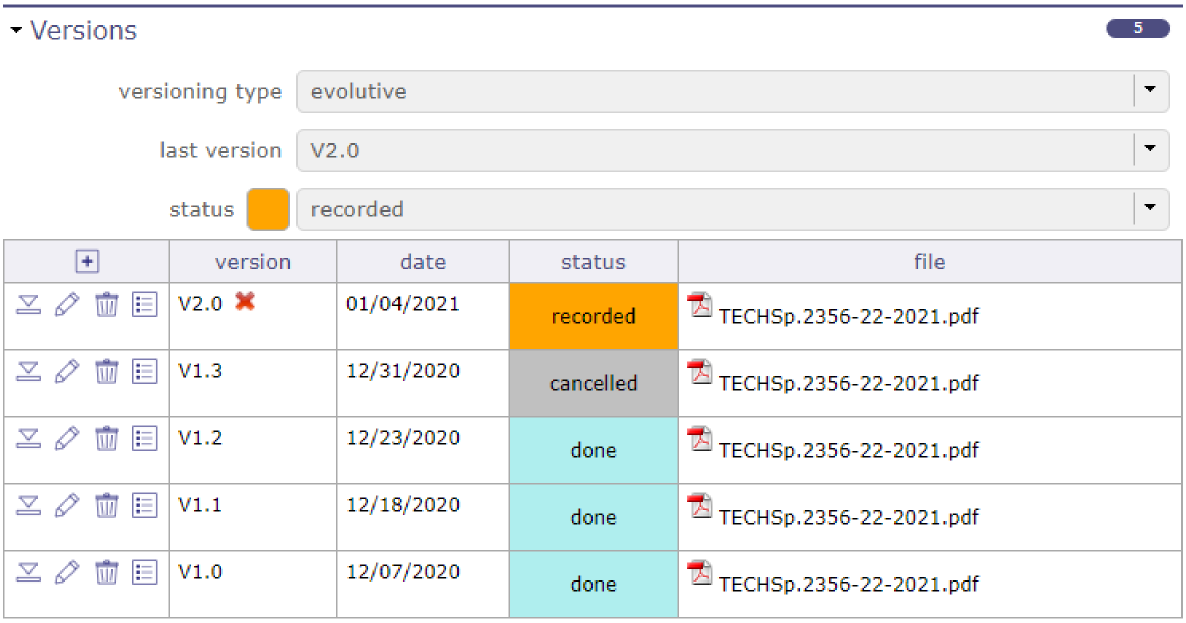


Fig. 3: Versioning section

- Click on to add a new version.
- Click on to download file at this version.
- Click on to modifiy a version.
- Click on to delete a version.
- Click on to display the history for approvals for version

Note: Drag and drop

You can drag your file directly onto the screen.

The "document version" pop-up opens automatically to allow you to drop your file into the pop-up window.

Type of versioning

A document can evolve following four ways defined as versioning type :

Evolutive

- Version is a standard Vx.y format.
- It is the most commonly used versioning type.
- Major updates increase x and reset y to zero.
- Minor updates increase y.

Chronological

- Version is a date.
- This versioning type is commonly used for periodical documents.
- For instance : weekly boards.

Sequential

- Version is a sequential number.
- This versioning type is commonly used for recurring documents.
- For instance : Meeting reviews.

Custom

- Version is manually set.
- This versioning type is commonly used for external documents, when version is not managed by the tool, or when the format cannot fit any other versioning type.

Document viewer

- Document viewer available for image, text and PDF files.
- Click on  to display the pop up.

Note: Drag and drop

You can drag your file directly onto the screen.

The "document version" pop-up opens automatically to allow you to drop your file into the pop-up window.

Note: Name of download file

The name of download file will be the document reference name displayed in **description** section.

If you want to preserve the uploaded file name, set the parameter in the *Global parameters*

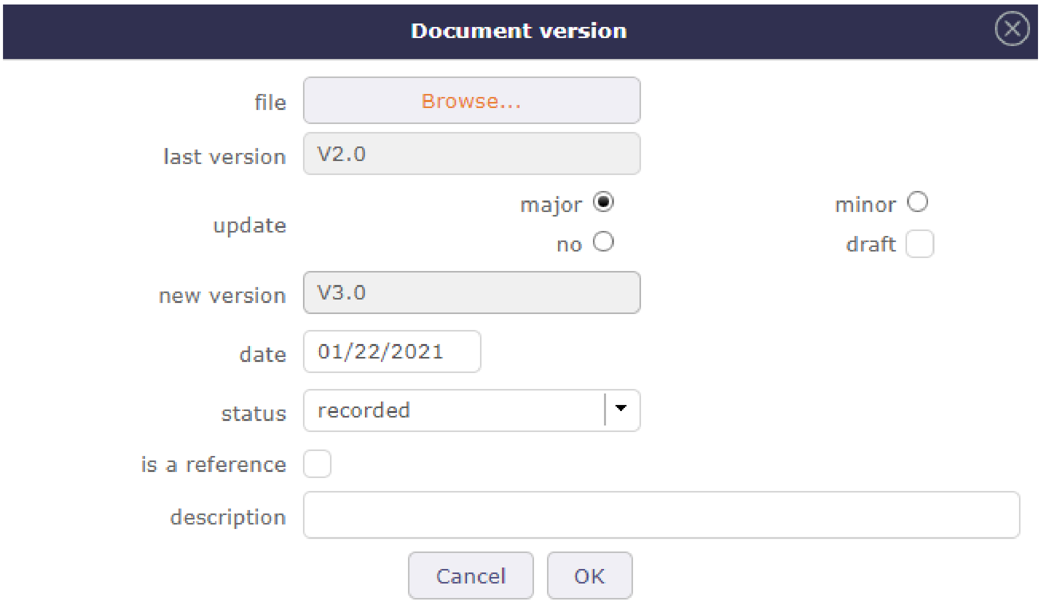


Fig. 4: Document version dialog box

Field "Update"

A version can have a draft status, that may be removed afterwards.

Field "Is a reference"

Should be checked when version is validated.

Only one version can be the reference for a document.

Reference version is displayed in bold format in the versions list.

Field "Description"

May be used to describe updates brought by the version.

This icon appears when the description field is filled.

Moving the mouse over the icon will display description text.

7.1.2 Approval process

You can define approvers for a document.

Only users assigned to the project linked to the document can be added.

- Click on to add an approver
- Click on to delete an approver

The approvers

When an approver is created in the list, the approver is also automatically added to the latest version of the document.

When adding a version to the document, approvers are automatically added to the version.

Each approver can see the list of documents to approve on their Today screen.

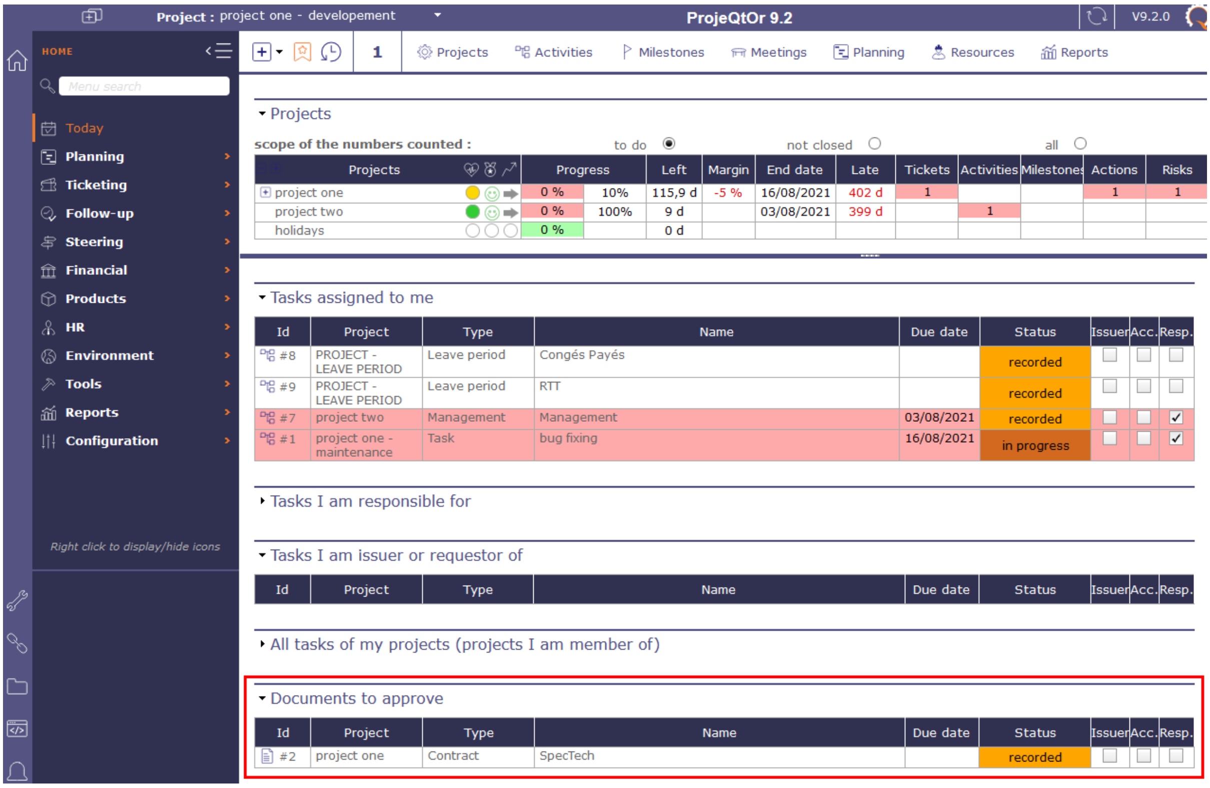


Fig. 5: Documents to be approved on the today screen

On the Documents screen, the approver can approve or reject the document.

All approvers of the document can view the response of other approvers.

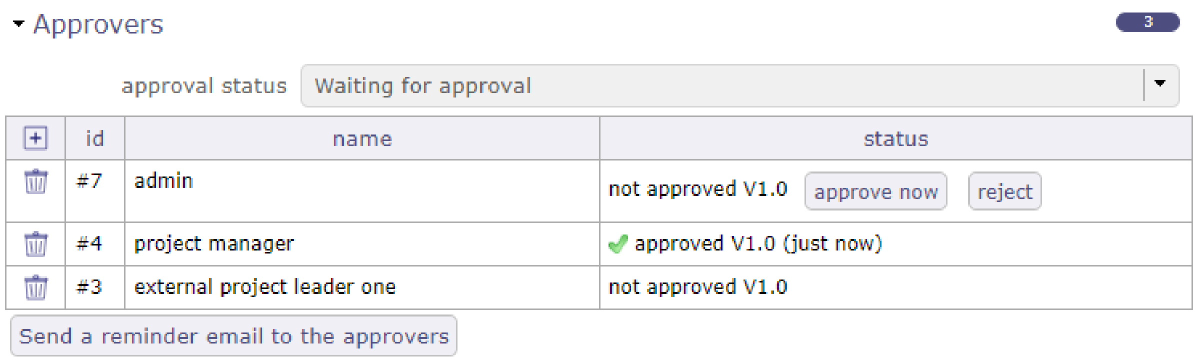


Fig. 6: Documents to be approved on the today screen

Once the document is **approved**, the line is then checked and the date and time of the approval recorded.

If the document is **rejected**, the line is then marked with a cross with date and rejection cause.

Approval status

This status allows you to globally track the status of the approval.

It can be used in a filter, like all the other fields of the document object.

calculated according to the approval status of the latest version of the document and may take the following values:

- **Without approval:** if no approver has been added to the list of approvers
- **Rejected:** if at least one approver rejected the version of the document
- **Pending approval:** if there is at least one approver who has not approved the document and no one has yet rejected the version of the document
- **Approved:** if all approvers approved the document.

Note: The quick search only display documents that are in directories to which the user has rights.

Send a reminder email to approvers

Send an email to approvers who have not yet validated the document.

Those who have already validated it will not receive this email.

The sending will be effective if an email address has been registered for the user.

7.1.3 Document directories

Document directories management allows to define a structure for document storage.

Location

- The files of document will be stored in the folder defined by the parameters **Document root** and **Location**.
- **Document root** is defined in *Global parameters* screen.
- **Location** is automatically defined as «Parent directory» / «Name».
- **Product** will be the default to new stored documents in this directory.
  - If the project is specified, the list of values contains the products linked the selected project.
  - If the project is not specified, the list of values contains all products defined.
- The **Default type** will be the default to new stored documents in this directory.

Directory access rights

- The list of documents only displays Documents that are in directories for which the user has read rights.
- You can define the access rights to documents according to the profile at each level of the document directory tree.
- There is no notion of inheriting rights to subdirectories.
- You define for each profile the CRUD right (create / read / update / delete) on each directory.
- The rights defined in the "Project dependent data access" rights screen will only be used as a definition of default values when creating a directory.

See: *Documents rights per directory*

Note:

- Note that if a directory is dedicated to a project, the profile used for assigning rights is the user's profile on this project, otherwise it is his default profile.
- The assignment of modification or deletion rights without assigning read rights is inconsistent and will not be taken into account.

7.1.4 Global export for document

The export of documents allows the extraction of documents in .zip file format.

The generated .zip file will be named with the formatting nameElement_UserN°ID.zip

You will be able to extract:

- All documents in a directory
- All the documents for a given element (project, activity, ticket, etc.)
- All the documents of a project and its elements
- All the documents of a project and its elements including the sub-projects and the elements of these sub-projects.

This includes attached files in addition to documents.

Extract files for project

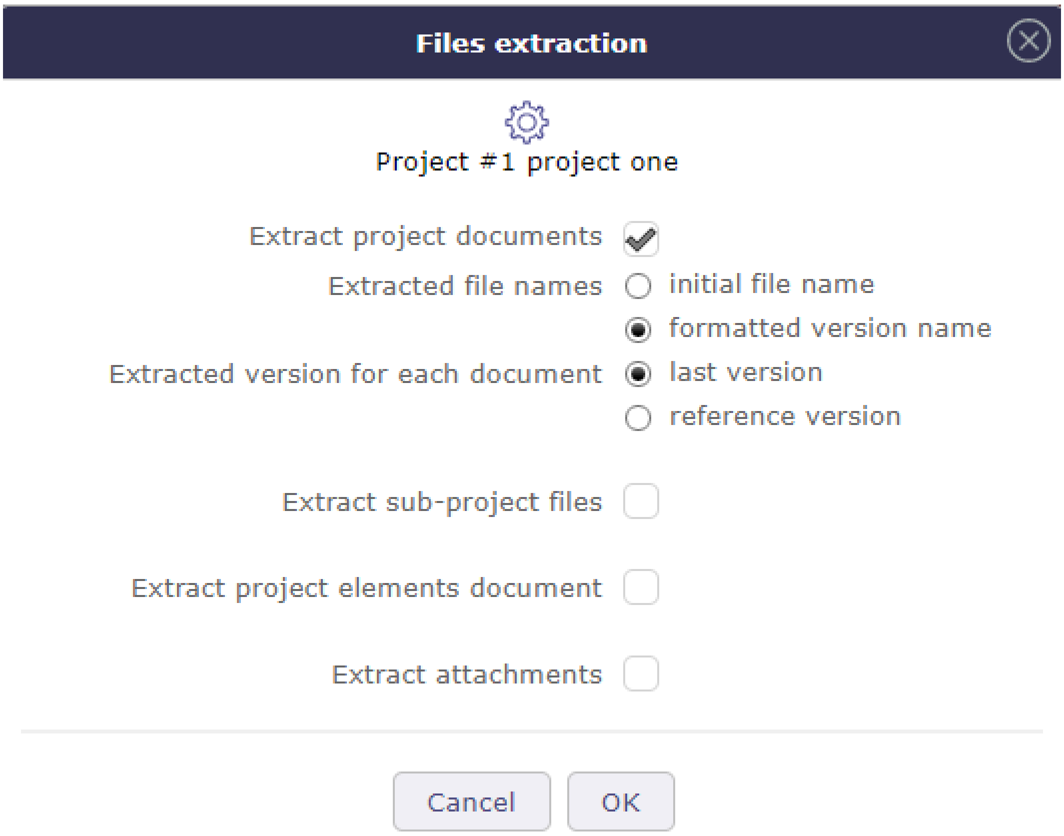


Fig. 7: Document's files extraction for project

- Click on  in the tools menu in the details area to open the pop up

  Extract project document

  All documents related to the selected project will be exported.

  Extracted file names

  Name preservation is only active on documents.

  The initial name keeps the exact name of your document.

The formatted name retrieves the document reference and the extracted version.

Extracted version for each document

Two possibilities :

- Last version
- Reference version

> **Warning:** The reference version is not necessarily the last version

Extract sub-project files

Without this option the sub-projects will not be included in the extraction.

Extract project elements document

Each element of the project containing documents will be exported.

Each item will have its own folder in the zip file.

Extract attachments

All the attached files on the project and its elements will be exported.

Extract files for directories

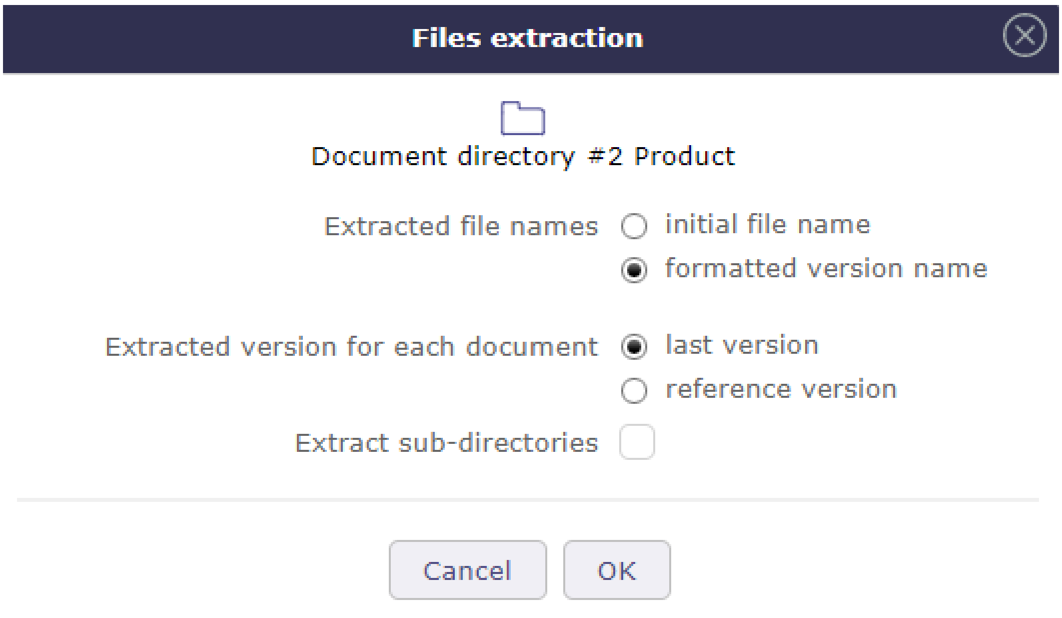


Fig. 8: Document's file Extraction for directories

The document directories can be extracted in their entirety.

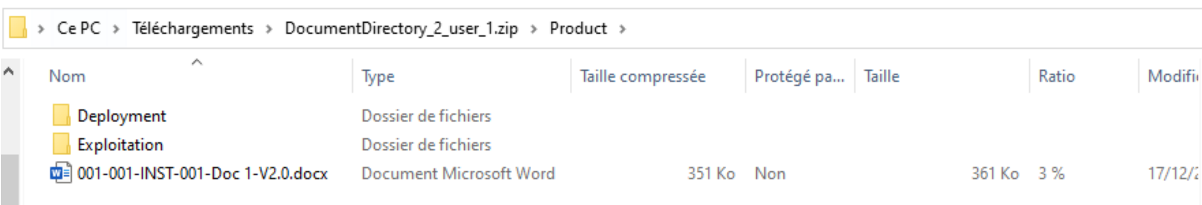


Fig. 9: Exemple Extract files for directory

When extracting directories including sub-directories, we find in the generated zip file only the sub-directories containing documents.

Extract file names

Name preservation is only active on documents.

The initial name keeps the exact name of your document.

The formatted name retrieves the document reference and the extracted version.

Extract document version

Two possibilities:

- Last version
- Reference version

> **Warning:** The reference version is not necessarily the last version

Extract sub-directories

Without this option the sub-directories will not be included in the extraction.

Extract for item

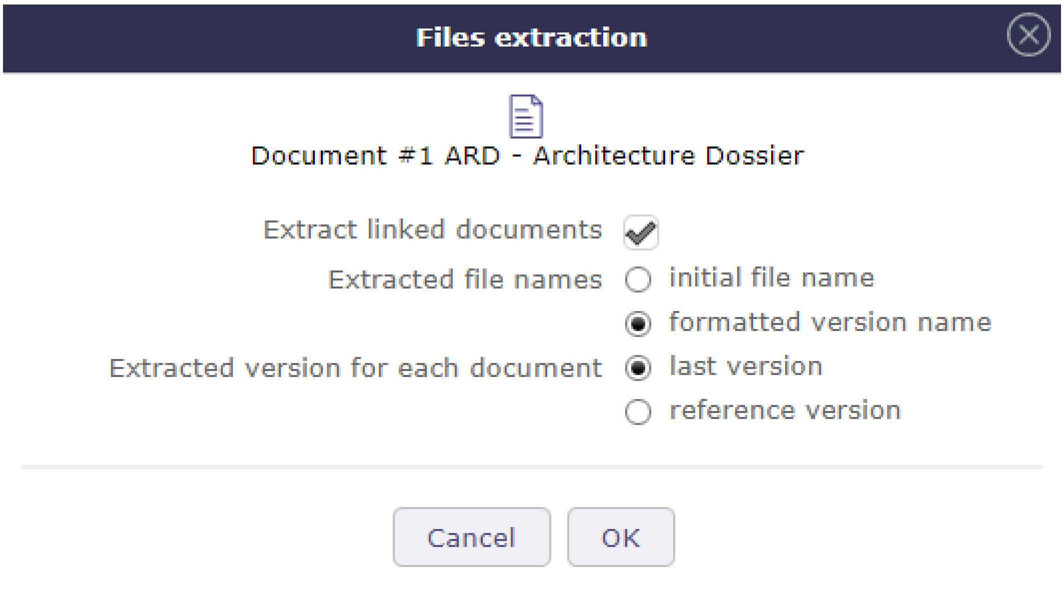


Fig. 10: Document's file Extraction

The documents, attached files can be extracted of an item.

Extracted file names

Name preservation is only active on documents.

The initial name keeps the exact name of your document.

The formatted name retrieves the document reference and the extracted version.

Extracted version for each document

Two possibilities:

- Last version

- Reference version

> **Warning:** The reference version is not necessarily the last version

Extract attachments

Include attached files in the extract

7.1.5 Nomenclature

product designation in the document nomenclature

Possibility to take into account the designation of the product in the nomenclature of documents with the new codes

- {PROD} product designation
- {PROJ/PROD} the project code if specified, otherwise the product designation
- {PROD/PROJ} designation of the product if specified, otherwise the project code

7.2 Translation

Translations are a separate module. By activating it you have access to a series of screens allowing you to manage your translation requests.

See: *Module management*

7.2.1 Translation request

You must enable configuration management to manage products, product versions, and release components.

When you request a translation, the fields "version component" and "product version" are mandatory.

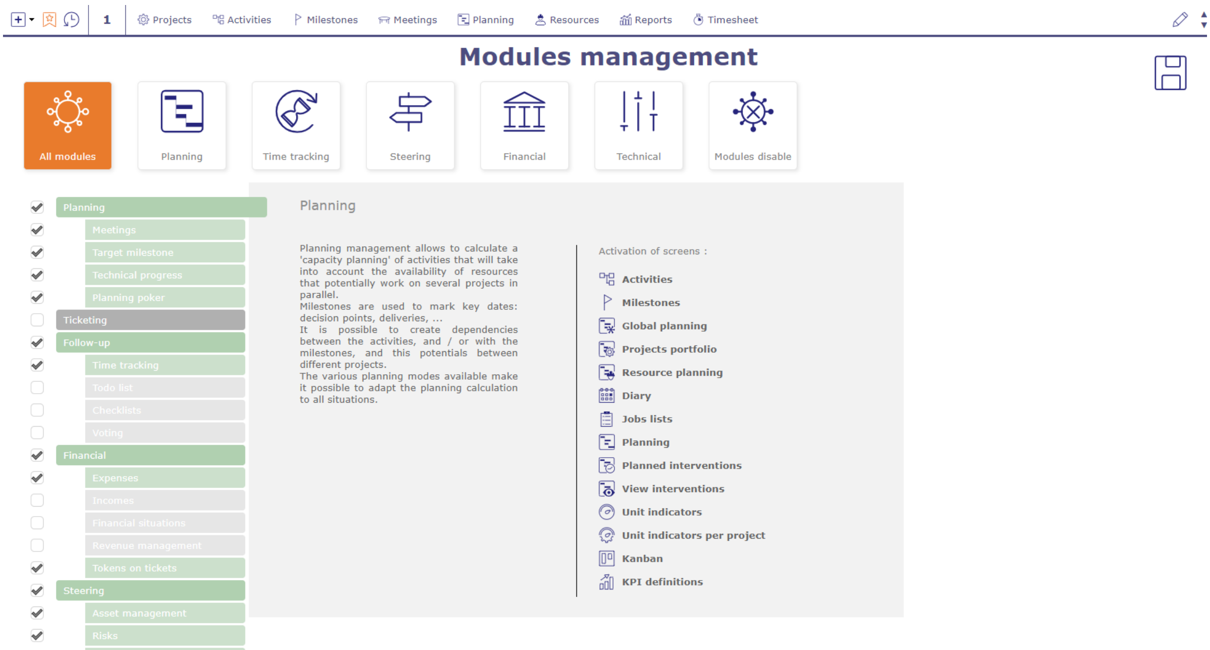
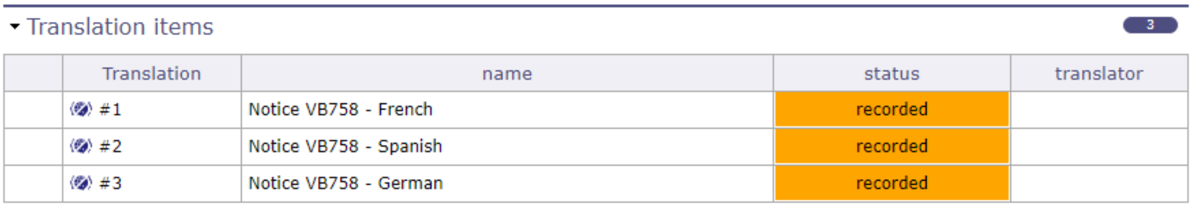


Fig. 11: Module management screen

7.2.2 Translation

When you perform a translation request, a translation line is created for each language associated with the product or component version.



Translation items 3

	Translation	name	status	translator
	#1	Notice VB758 - French	recorded	
	#2	Notice VB758 - Spanish	recorded	
	#3	Notice VB758 - German	recorded	

Fig. 12: Translation items

Each of these lines are displayed on the translation screen.

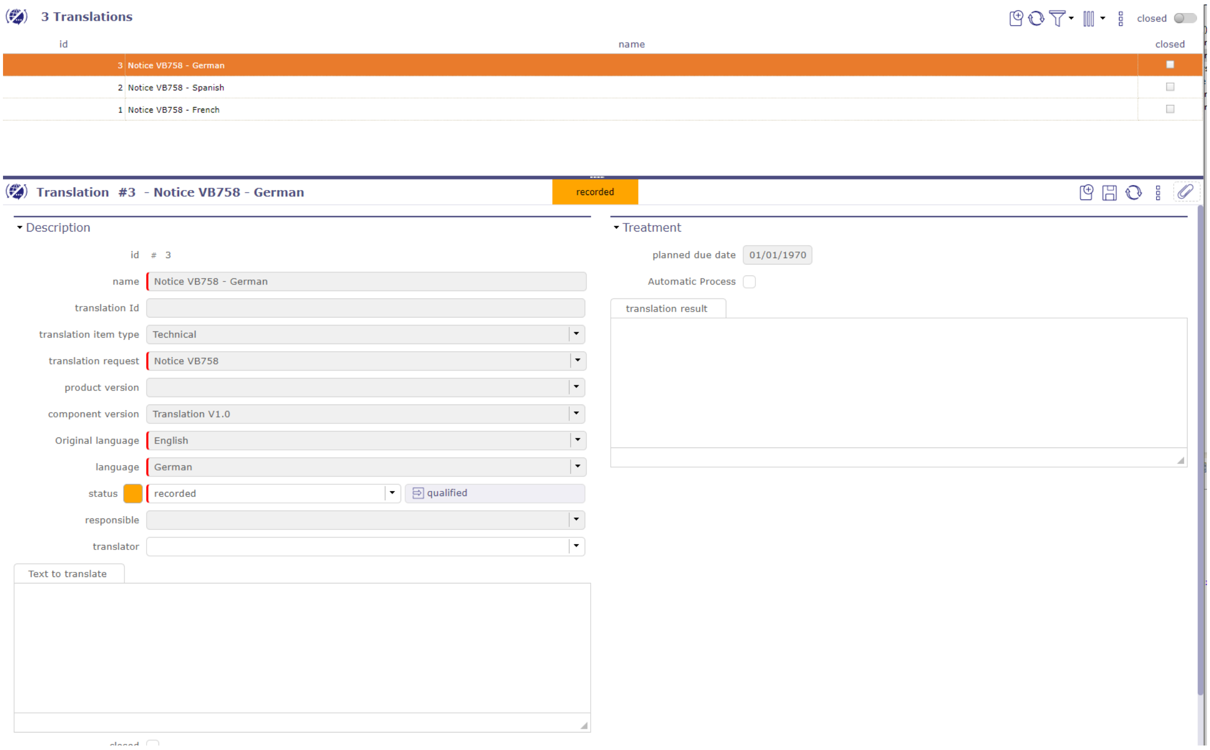


Fig. 13: Translation items

You will find the information entered in the translation requests screen. These fields are grayed out and can only be modified on the request screen.

The only field available is that of translators.

The list of translators is proposed according to the skills indicated on the traudctors and the languages requested during the request.

If the text to be translated is of German origin and the destination languages are English and Spanish, then the translator must know these three languages to appear in the lists.

If no translator appears in the lists, it means that you do not have the competent translators for this translation.

7.2.3 Translators

You register your translators from your resources.

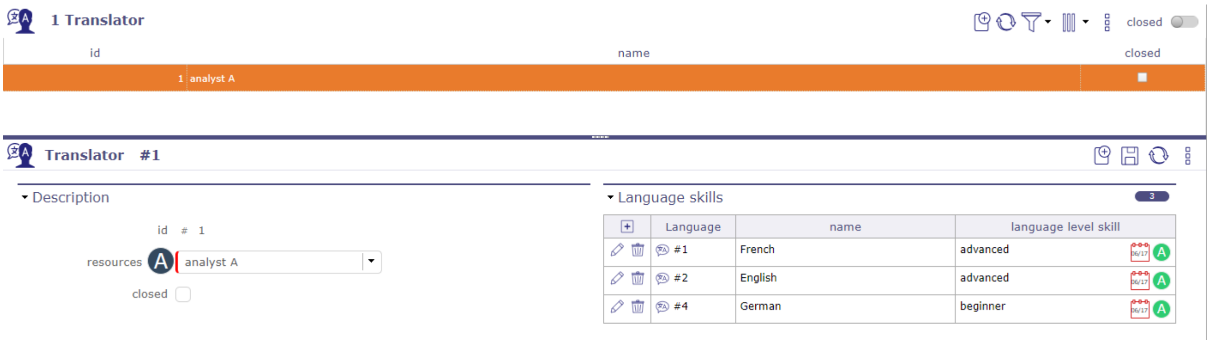


Fig. 14: Translators screen

- Each translator can have one or more associated languages.
- Each language has a skill level.

7.2.4 Language skill level

You set the skill levels on this screen.

The levels are customizable and you can create as many as you want.

By default, ProjeQtOr offers you the 3 most basic levels: beginner, intermediate and advanced.

These skill levels are required of you when creating your *Translators*.

7.2.5 Translation requests and items types

You define the types of translation that you will use in your business.

This allows you to apply a different workflow and behavior for each type.

For each type you can apply automatisms.

Translation lines also have the possibility of being typed.

You can more easily compartmentalize your requests.

See: *List of types*

CHAPTER

EIGHT

FINANCIAL

8.1 Expenses

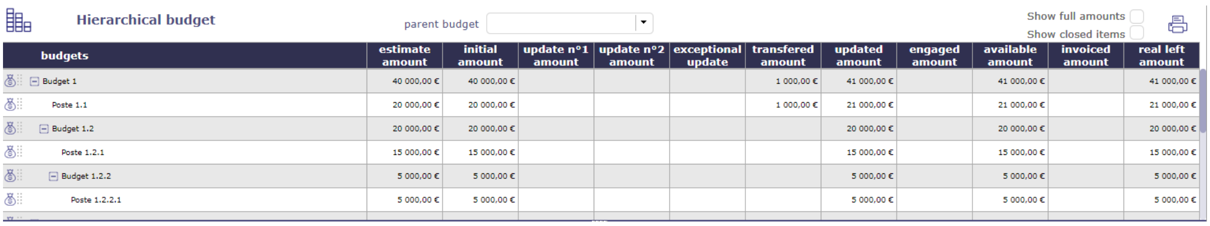
8.1.1 Hierarchical budget

The hierarchical view of budgets allows you to display an overview of budgets in a graphic way with an indent system for better reading.

You can filter the list of budgets using the parent budget filter.

You can display a particular budget family.

You can move budgets by “drag and drop”.



budgets	estimate amount	initial amount	update n°1 amount	update n°2 amount	exceptional update	transfered amount	updated amount	engaged amount	available amount	invoiced amount	real left amount
Budget 1	40 000,00 €	40 000,00 €				1 000,00 €	41 000,00 €		41 000,00 €		41 000,00 €
Poste 1.1	20 000,00 €	20 000,00 €				1 000,00 €	21 000,00 €		21 000,00 €		21 000,00 €
Budget 1.2	20 000,00 €	20 000,00 €					20 000,00 €		20 000,00 €		20 000,00 €
Poste 1.2.1	15 000,00 €	15 000,00 €					15 000,00 €		15 000,00 €		15 000,00 €
Budget 1.2.2	5 000,00 €	5 000,00 €					5 000,00 €		5 000,00 €		5 000,00 €
Poste 1.2.2.1	5 000,00 €	5 000,00 €					5 000,00 €		5 000,00 €		5 000,00 €

Fig. 1: Hierarchical budget screen

8.1.2 Budget

A budget is a list of all products and different expenses to plan. It is a plan that allows to define in advance the expenses, the incomes and the possible savings to be realized during a definite period.

It allows to anticipate the resources that the company will have at a specific moment.

- You can create as much budget and sub budget as you want.
- An expense is related to a base budget, ie a budget item
- A budget item is linked to a parent budget
- Only the current budget items will be displayed in the lists.
- Current, under construction and closed budgets will not appear in the lists. To view the closed items, check the “closed” box.

  Budget parent filter

  With the filter, you can display in the list area, only a budget and its family (sub-budget).

  An indentation of these to the right shows that they are sub-budgets.

  To see the closed items in this list, check the “closed” box.

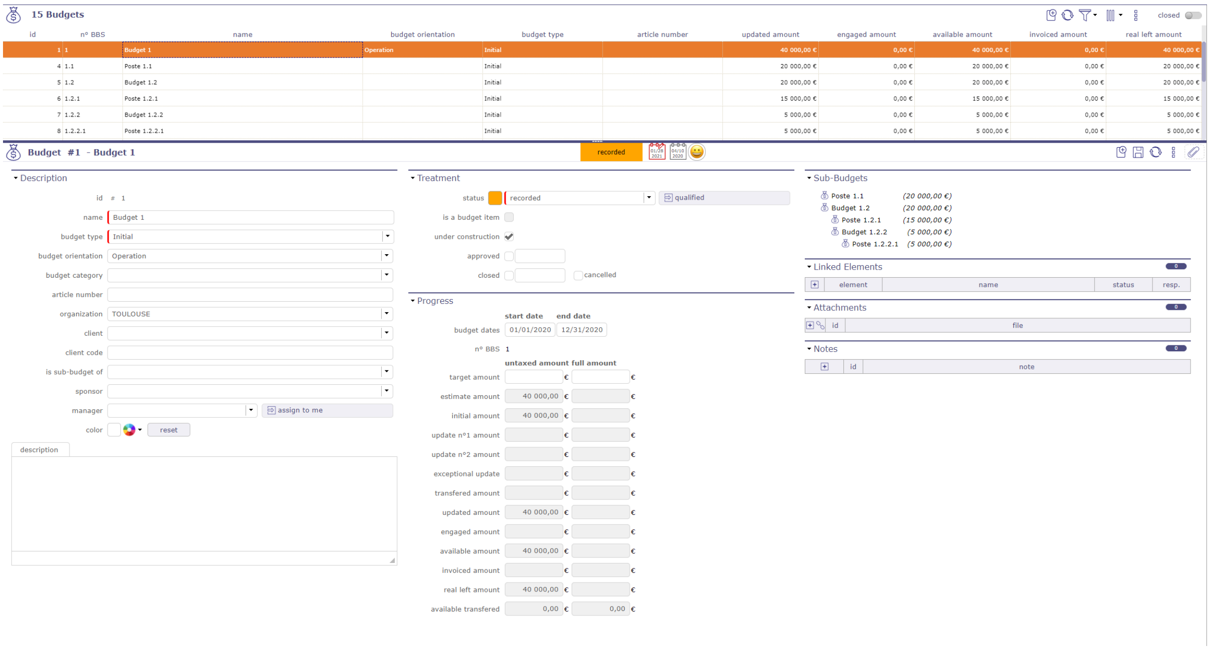


Fig. 2: Budget Screen

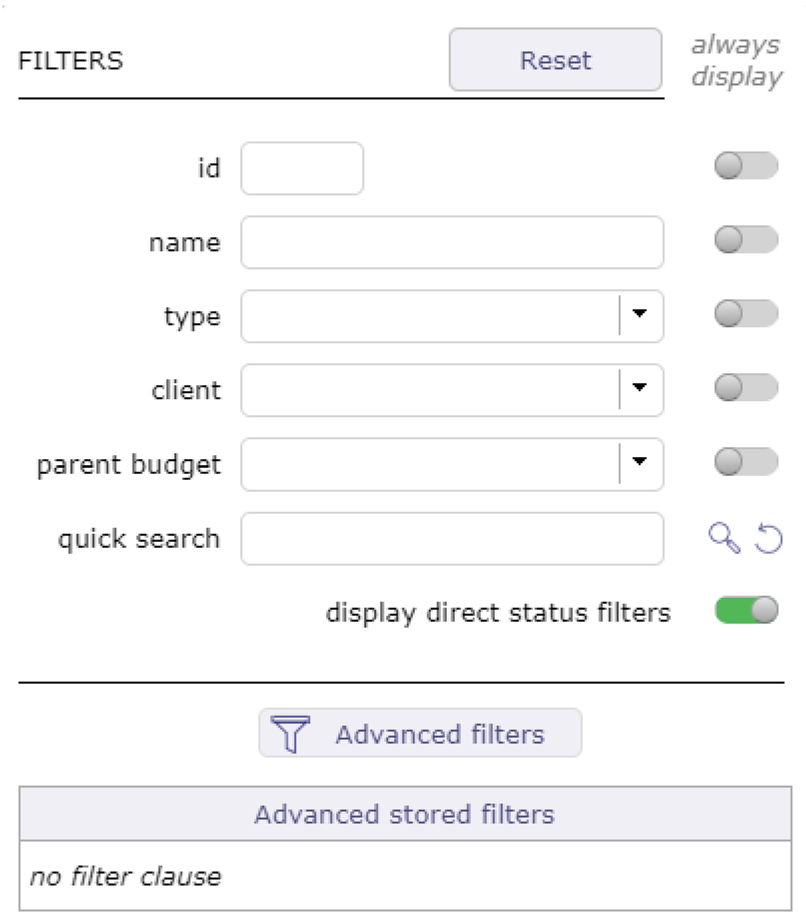


Fig. 3: Filerts on budget

If you change the name of a budget, remember to refresh the page so that the lists take into account the changes.

- The parent budget exists only to consolidate the data of the underlying budget items.
- You cannot modify the expenses in the Progress field of a parent budget.
- Only the target amount can be changed if the budget treatment is still under construction.

The budget item

- The budget item is the finer element of the budget analysis.
- These posts or budget destinations will allow you to detail your budget, categorizing it at your convenience.
- When you create a *project expenses* or an *individual expenses*, you can link them to a specific budget item.

Description

This section allows to identify items of the element.

Table 1: Required field

Field	Description
Id	Unique Id for the budget
Name	Short description of the budget
Budget type	Type of budget: initial or additional
Budget orientation	The orientation of the budget: operation or transformation
Budget category	subdivision of budget orientation into category
Article number	The number of the article
Organisation	Name of the organisation
Customer Code	the code you attribute to your client
is sub-budget of	if your budget is part of another budget
Sponsor	from the budget. If your budget comes from grant for example

Treatment

This area allow you to change the macro state of the budget.

- A budget may be under construction
- A budget under construction does not allow to see the fields “target amount” and prevents the modification of the estimated amount
- The “approved” macro-state changes and automatically cancels the “under construction” macro state. The date is then displayed in the fields of the macro-state concerned.
- Each sub-budget is then impacted and the “approved” state will then be propagated on all of his family.
- Each macro state “under construction”, “approved”, “closed” and “canceled” modified from the parent budget screen propagates in cascade over the entire budget hierarchy.

Table 2: Required field

Field	Description
Status	Change of states according to the *Workflow* selected for the type of your budget
Is a budget item	Self-checked box when the budget becomes a sub-budget
Under construction	When the budget is validated. The box is unchecked
Approved	When the box is checked, the target amount is blocked
Closed	Flag to indicate that profile is archived.
Cancelled	Flag to indicate that profile is cancelled.

Progress

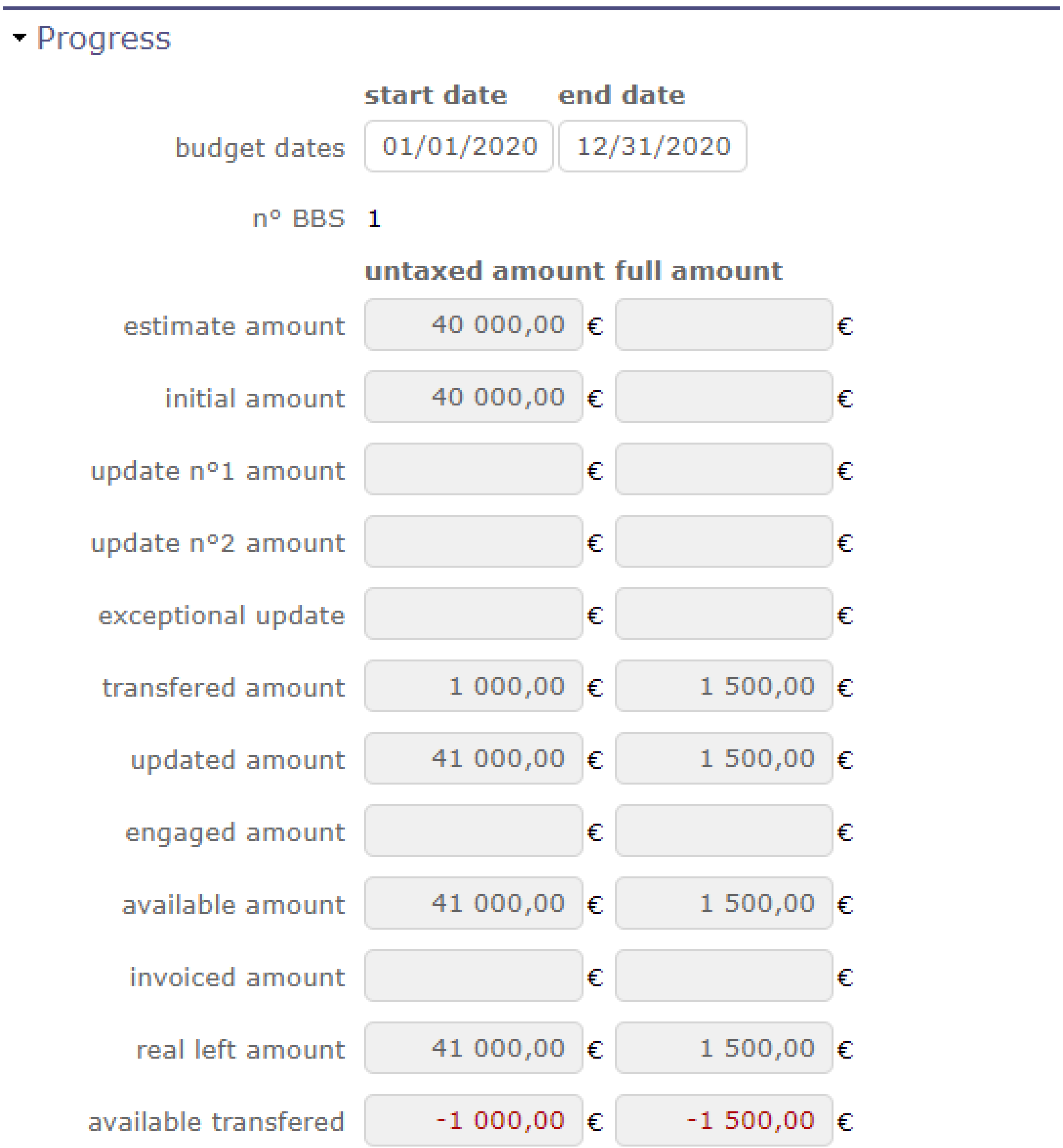


Fig. 4: Progress Section

This section allows to follow the consolidation of all the expenses.

The target amount is the only amount that you can change on a parent budget if it is still under construction.

The other amounts are recovered from the sub-budgets and consolidated on the parent budget.

Transferred Amount allows to release a sum of an amount planned for a budget item in order to redistribute it to another item.

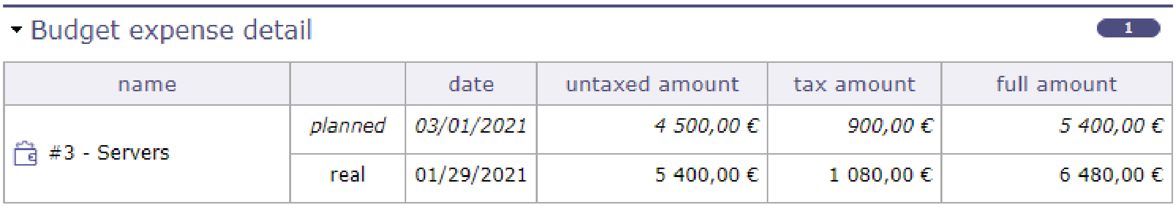
This amount is visible on all budget items.

Transfered Amount

- Enter a negative amount on a budget line to transfer an amount
- Enter a positive amount on a budget line to recover this amount
- Only the parent budget and its sub budget will see this amount.
- Another parent budget can not recover this amount.

Budget expense detail

This section displays lines in detail This section, available at the first level of the parent budget, displays in detail the *expense lines of the project* that have been linked to the defined budget items.

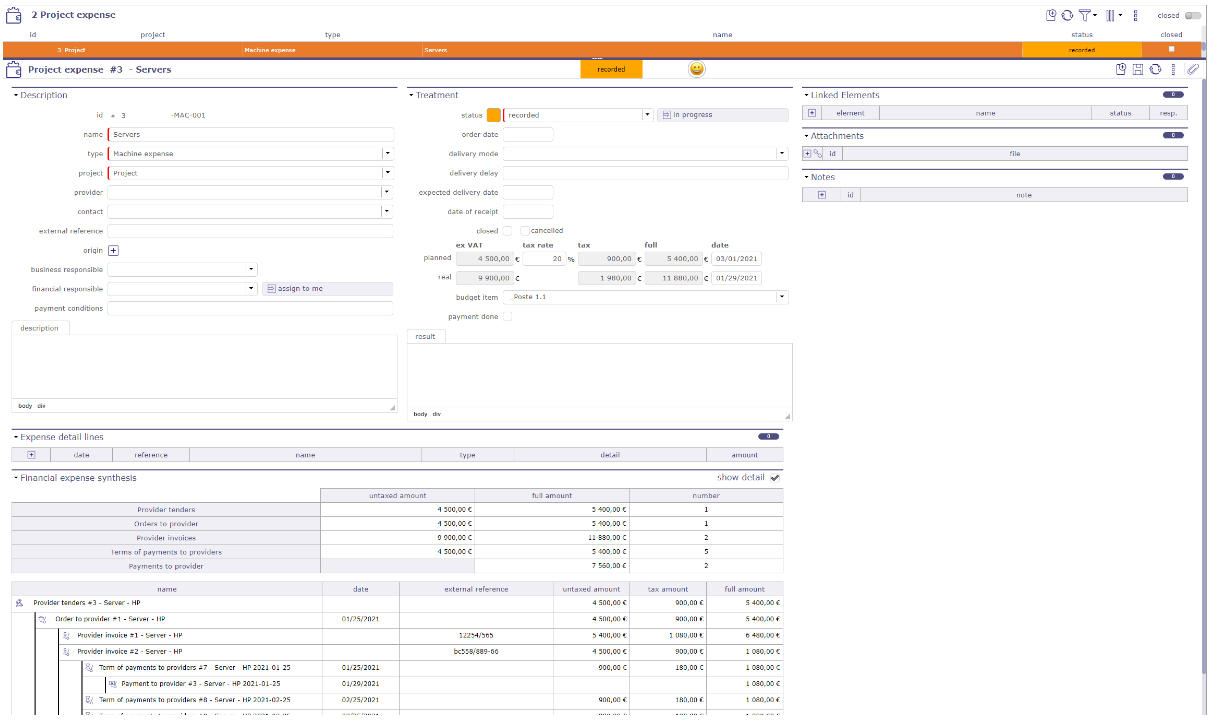


▾ Budget expense detail 1

name		date	untaxed amount	tax amount	full amount
#3 - Servers	*planned*	*03/01/2021*	*4 500,00 €*	*900,00 €*	*5 400,00 €*
	real	01/29/2021	5 400,00 €	1 080,00 €	6 480,00 €

Fig. 5: Details lines

8.1.3 Project expense



Other sections

- *Expenses detail lines*
- *Linked element*
- *Attachments*
- *Notes*

A project expense stores information about project costs that are not resource costs.

This can be used for all kinds of project cost :

- Machines (rent or buy).
- Softwares.
- Office.
- Any logistic item.

Section Description

Table 3: Required field

Field	Description
Id	Unique Id for the expense.
Name	Short description of the expense
Type	Type of expense: machine or office expense
Project	The project concerned by the expense
Provider	Provider name
External reference	External reference of the expense
Origin	Element which is the origin of the quotation
Business responsible	The person who makes the purchase requisition
Financial responsible	The person who pays the purchase
Payment conditions	Conditions of payment
Description	Complete description of the expense

Section Treatment

Table 4: Required field

Field	Description
Status	Actual *status* of the expense.
Order date	Date of the order.
Delivery mode	Delivery mode for the order.
Delivery delay	Delivery delay for the order.
Expected delivery date	Expected delivery date for the order.
Date of receipt	Date of receipt of the order.
Closed	Box checked indicates that the expense is archived.
Cancelled	Box checked indicates that the expense is cancelled.
Planned	Planned amount of the expense (Date is mandatory).
Real	Real amount of the expense (Date is mandatory).
Payment done	Box checked indicates the payment is done.
Result	Complete description of the treatment of the expense.

Fields Planned & Real

- **Ex VAT**: Amount without taxes.
  - Real amount is automatically updated with the sum of the amounts of detail lines.
- **Tax**: Applicable tax.
- **Full**: Amount with taxes.
- **Payment date**:
  - For field "Planned" is the planned date.
  - For field "Real" can be the payment date or else.

8.1.4 Activity expenses

An activity expense is directly linked to an activity and therefore consolidated up to the project.

One stores cost information directly on the activity and adds to the stored project and resource information.

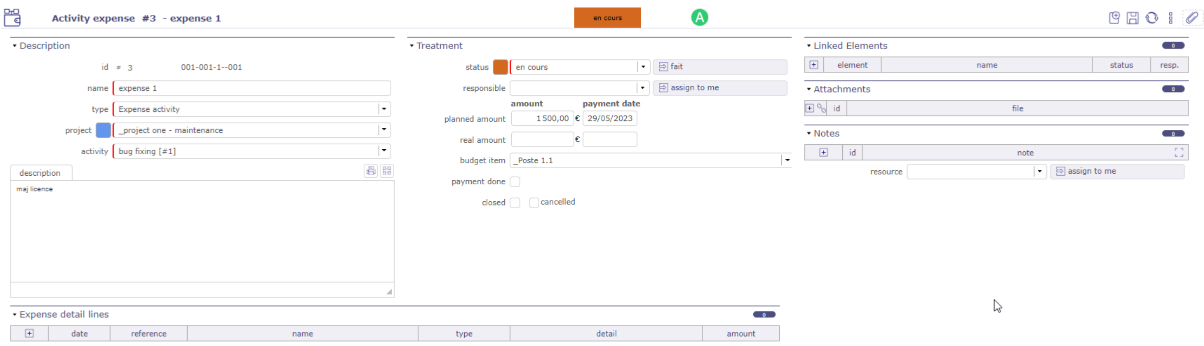


Fig. 6: Expense activity

Treatment

Table 5: Required field

Field	Description
Status	Actual *status* of the expense.
Responsible	Person responsible for the processing of this expense
Planned amount	Planned amount of the expense (Date is mandatory)
Real amount	Real amount of the expense (Date is mandatory)
Budget item	Budget item related to expense
Payment done	Box checked indicates the payment is done.
Closed	The box is checked automatically when the invoice linked to this expense is paid
Cancelled	Box checked indicates that the expense is cancelled

8.1.5 Individual expenses

An individual expense stores information about individual costs, such, for example, as travel costs.

This can for instance be used to detail all the expense on one month so that each user opens only one individual expense per month (per project), or detail all the elements of a travel expense.

Treatment

Table 6: Required field

Field	Description
Status	Actual *status* of the expense.
Responsible	Person responsible for the processing of this expense
Planned amount	Planned amount of the expense (Date is mandatory)
Real amount	Real amount of the expense (Date is mandatory)
Budget item	Budget item related to expense
Payment done	Box checked indicates the payment is done.
Closed	The box is checked automatically when the invoice linked to this expense is paid
Cancelled	Box checked indicates that the expense is cancelled

8.1.6 Expenses detail lines

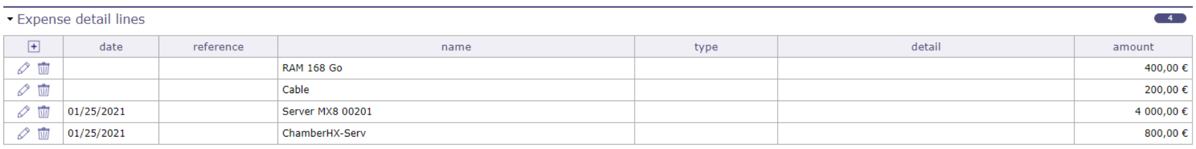


Fig. 7: Project details lines

Section Expenses detail lines

This section is common to individual, activity and project expenses.

It allows to enter detail on expense line.

Fields: Real amount and date

- When a line is entered, expense real amount is automatically updated to sum of lines amount.
- Real date is set with the date in the firts detail line.

- Click on to add a detail line.
- Click on to modify an existing detail line.
- Click on to delete the detail line.

  Field Date

  This allows to input several items, during several days, for the same expense, to have for instance one expense per travel or per month.

  Field Type

Depending on type, new fields will appear to help calculate of amount.

Available types depending on whether individual or project expense.

See: *Expenses details types*.

Field Amount

Automatically calculated from fields depending on type.

May also be input for type "justified expense".

Financial expenses synthesis

When your financial elements have been linked and attached to a project expense (detailed or not), you will find the summary of these elements.

Financial expense synthesis — show detail

	untaxed amount	full amount	number
Provider tenders	4 500,00 €	5 400,00 €	1
Orders to provider	4 500,00 €	5 400,00 €	1
Provider invoices	9 900,00 €	11 880,00 €	2
Terms of payments to providers	4 500,00 €	5 400,00 €	5
Payments to provider		7 560,00 €	2

name	date	external reference	untaxed amount	tax amount	full amount
Provider tenders #3 - Server - HP			4 500,00 €	900,00 €	5 400,00 €
Order to provider #1 - Server - HP	01/25/2021		4 500,00 €	900,00 €	5 400,00 €
Provider invoice #1 - Server - HP		12254/565	5 400,00 €	1 080,00 €	6 480,00 €
Provider invoice #2 - Server - HP		bc558/889-66	4 500,00 €	900,00 €	1 080,00 €
Term of payments to providers #7 - Server - HP 2021-01-25	01/25/2021		900,00 €	180,00 €	1 080,00 €
Payment to provider #3 - Server - HP 2021-01-25	01/29/2021				1 080,00 €
Term of payments to providers #8 - Server - HP 2021-02-25	02/25/2021		900,00 €	180,00 €	1 080,00 €
Term of payments to providers #9 - Server - HP 2021-03-25	03/25/2021		900,00 €	180,00 €	1 080,00 €
Term of payments to providers #10 - Server - HP 2021-04-25	04/25/2021		900,00 €	180,00 €	1 080,00 €
Term of payments to providers #11 - Server - HP 2021-05-25	05/25/2021		900,00 €	180,00 €	1 080,00 €

Fig. 8: Financial expenses synthesis with details lines

8.1.7 Call for tenders

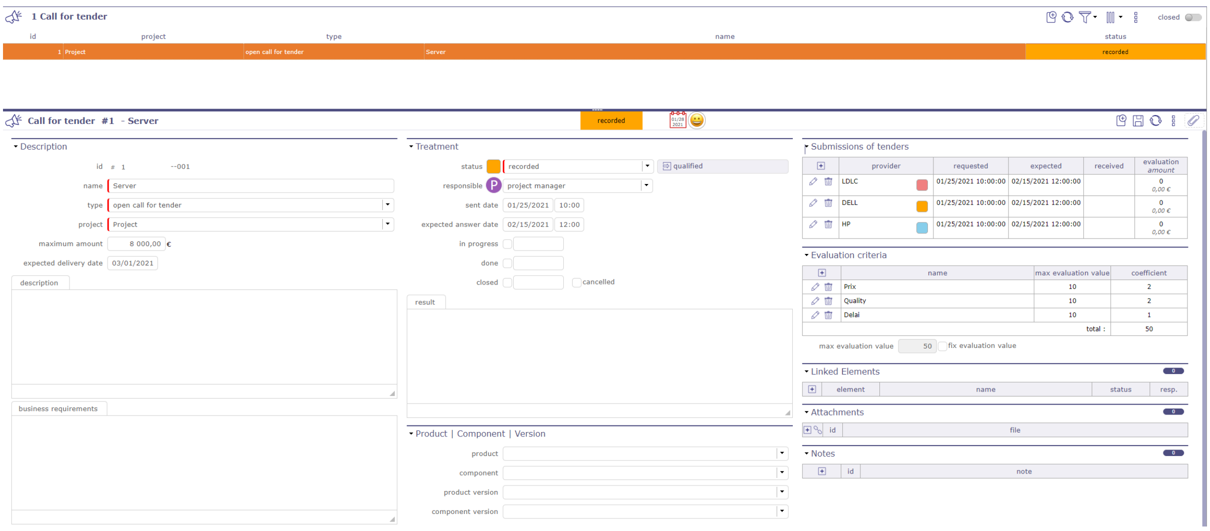


Fig. 9: Call for tender screen

This screen allows you to record information on your needs for any request for tenders from your providers.

This can be used to detail all requests and find the best proposal.

To help you do this, you have the option of creating different evaluation criteria. You can then assign a value to them in the offer.

The call for tenders, once saved, automatically creates a provider offer for each of the selected providers.

Description

Table 7: Required field

Field	Description
Id	Unique Id for the call for tender
Name	Short name of the call for tender
Type	Type of tender. See: *List of type*
Project	Project link to call for tender
Maximum amount	Maximum amount of the call for tender
Expected delivery date	Date expected
Description	Description of the tender
Business requirements	Description of the requirements
Technical requirements	Description of the technical requirements
Other requirements	Description of the others requirements (organization, financial…)

Treatment

Table 8: Required field

Field	Description
Status	Actual *status* of the item according to the workflow you have selected.
Responsible	Person responsible for the processing of this call for tender.
Sent date	Sent date of the call for tender.
Expected answer date	Expected answer date, meaning expected tender date.
In progress	Box checked indicates that the tender is In progress with date when checked.
Done	Box checked indicates that the tender is done with date when checked.
Closed	Box checked indicates that the tender is archived with date when checked.
Cancelled	Box checked indicates that the tender is cancelled.
Result	Description or analysis of the desired result.

Submissions of tenders

This section contains the list of providers to whom the invitation to tender is sent.

- Click on to add a provider to the list.
- Click on to edit informations.
- Click on to delete a provider to the list.

A pop up is displayed. Fill in the different fields necessary for your needs.

- You can choose a specific supplier contact.
- The contacts available in the list are linked to the selected supplier.
- These contacts must be registered in advance on the provider's screen.
- Change supplier, the contact list will adapt
- The dates of the request and the expected response.
- The status of the submission to tender. Several statuses are available.

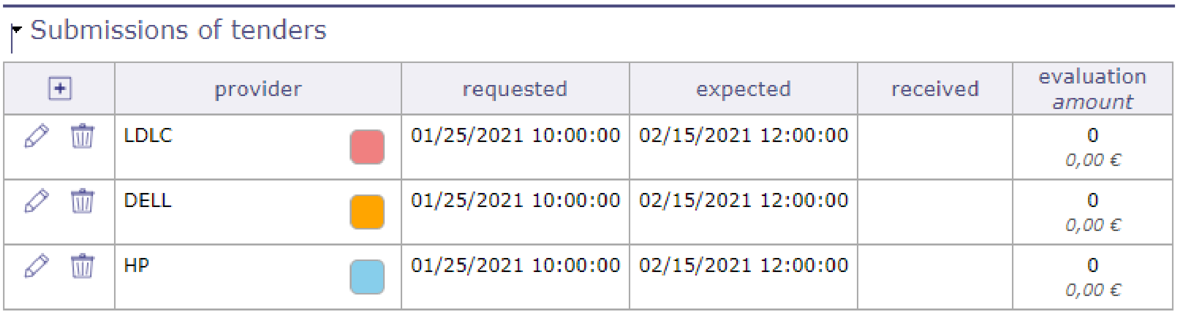


Fig. 10: Submission to call for tender pop-up

- They are fully configurable and customizable. Each status has a color code.
- See: *List of values*

Field	Description
Provider	Name of the provider to which the offer was sent as well as the color code corresponding to the provider's st
Requested	Request date when tender sent with the hour.
Expected	Answer date expected with the hour.
Received	Date of receipt of the provider's offer
Evaluation amount	Evaluation note given to the provider upon receipt of the offer according to the selected criteria and the total

You can access to each offer by clicking on the name of the provider or by visiting the provider offers screen.

Evaluation Criteria

This section allows you to add evaluation criteria to rate your providers based on your requests.

- Click on to add a criteria
- Click on to modify a criteria
- Click on to delete a criteria

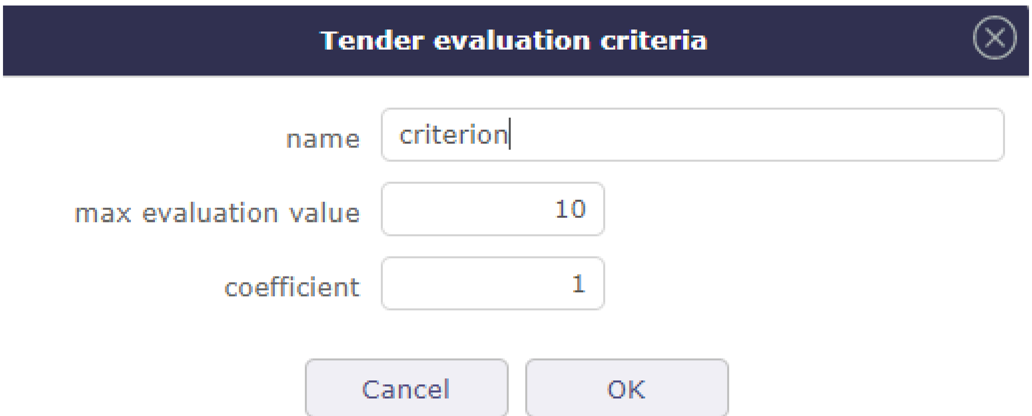


Fig. 11: Add an evaluation criteria

- Name your evaluation criteria.
- Assign a maximum rating value.
- Assign a coefficient according to the importance of the criteria.

- The score is calculated based on the values assigned and reported in the “submission of tenders” table.

Tip: Click on to logically switch from one financial item to another:

Call for tenders -> Provider tenders -> Order to provider -> Terms/Bills -> Payments to providers

Each time you copy a financial item, the most logical financial item for the rest of the order process will be displayed automatically.

The amount of expense of these elements will be recovered, passed on and linked to each of the others and will allow you more precise monitoring.

You can prevent the carry forward of amounts or the generation of expenses in the *global parameters*

8.1.8 Provider Tenders

Provider tenders store information about responses to tenders you have submitted.

This can be used to detail all the offers, compare them, evaluate them to choose the most suitable for your needs.

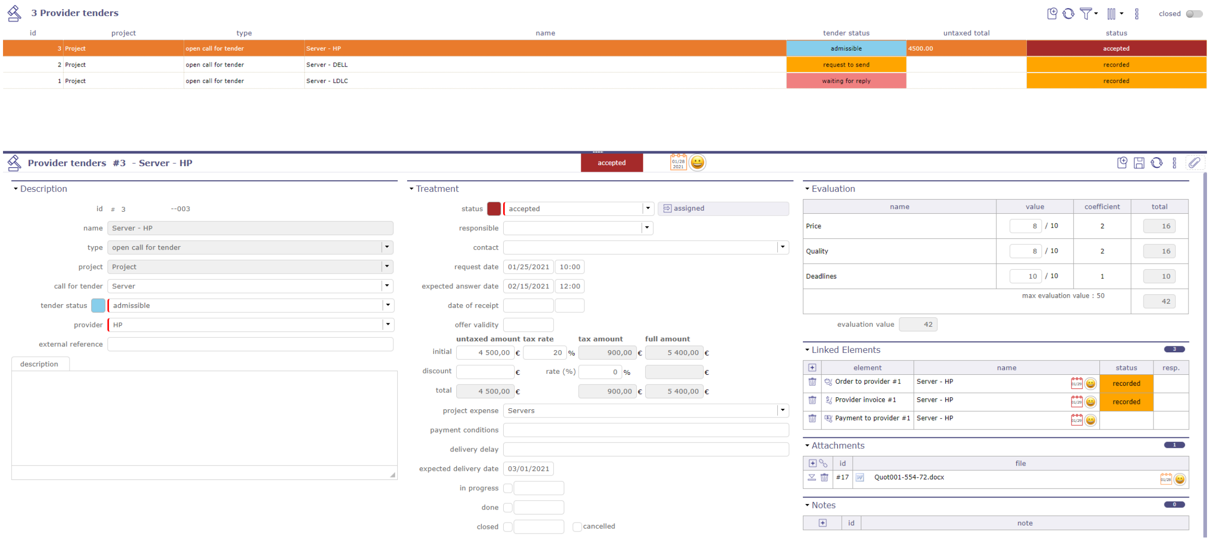


Fig. 12: Provider tender screen

An offer can be created manually or generated automatically following a call for tenders.

Each provider added to the invitation to tender will generate an offer.

Description

Table 9: Required field

Field	Description
Id	Unique Id for the tender.
Name	Short name of the tender.
Type	Type of tender. See: *List of type*
Project	Project link to tender.
Call for tender	Link to call for tender.
Tender statuts	Statut of the tender.
Provider	Provider of the tender.
External reference	External reference of the tender.

Treatment

Table 10: Required field

Field	Description
Status	Actual status of the tender.
Responsible	Person responsible for the processing of this tender.
Contact	Contact of the tender.
Request date	Resquest date for tender.
Expected answer date	Expected answer date of the tender.
Date of receipt	Date of receipt of the tender with the hour.
Offer validity	Offer validity date.
Initial	Initial amount not taxed - Amount of tax applicable by the provider and the type of product - Total amou
Discount	Negotiated price - Enter a numerical value and the percentage is calculated automatically. And converse
Total	Total amount with discount taken into account.
Project expense	Connect your provider's offer to an existing project expense.
Generate expense	Automatically create expenses from the current item. The name of the project expenditure generated wil
Payment conditions	Type of payment conditions.
Delivery delay	Delivery delay of the tender.
Expected delivery date	Expected delivery date of the tender.
In progress	Box checked indicates that the tender is In progress with date when checked.
Done	Box checked indicates that the tender is done with date when checked.
Closed	Box checked indicates that the tender is archived with date when checked.
Cancelled	Box checked indicates that the tender is cancelled.
Result	Description or analysis of the expected result from this provider.

project expenses and generate expense

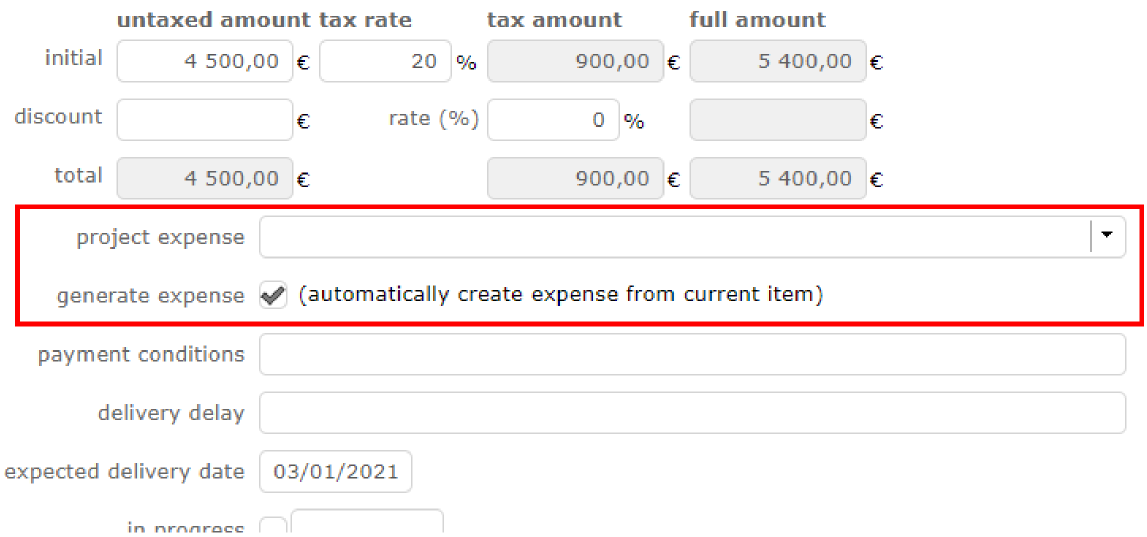


Fig. 13: Generate expense

You can attach a specific expense to your order.

Select a manually created expense from the project expense list.

If you have not created an expense upstream, check the generate expense box, a line will then be created in the project expenses.

Evaluation

The Evaluation section is only available when the offer is linked to a call for tenders.

If the offer is created manually, the evaluation section does not offer criteria.

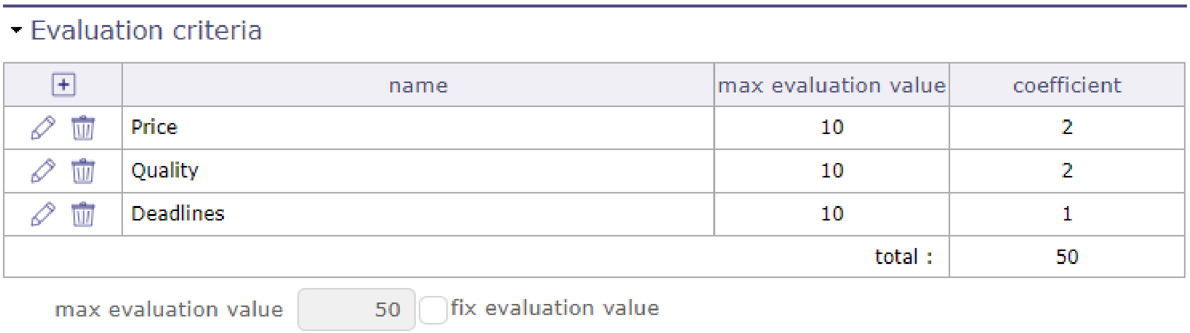


Fig. 14: Evaluation section

When the link is made then:

- You can assign evaluation criteria
- You can assign a rating with a coefficient system.
- The evaluation will display a summary of your criteria with their scores.
- The overall score will then be displayed on the invitation to tender for all the offers concerned.
- See: *the criteria evaluations* in the Call for tenders chapter

8.1.9 Orders to provider

This screen allow to manage the orders to provider.

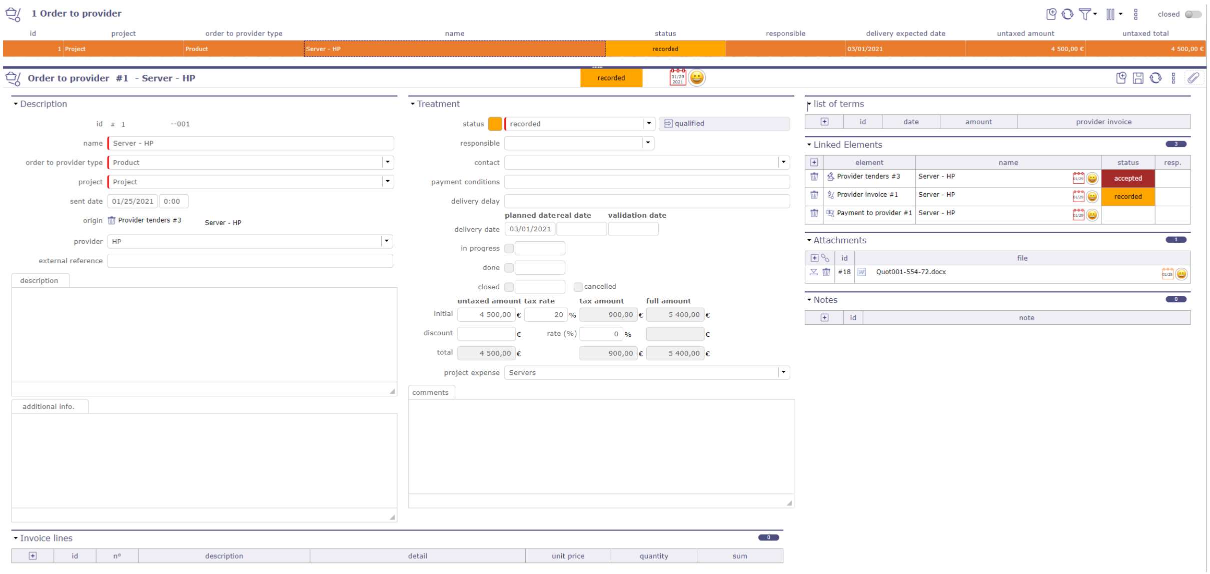


Fig. 15: Order to provider screen

Description

Table 11: Required field

Field	Description
Id	Unique Id for the expense
Name	Short description of the expense
Order to provider type.	Type of order product and/or Service. See: *Order to Provider types*
Project	The project concerned by the order
Sent date	Date of sending to the provider
Origin	Element which is the origin of the quotation
Provider	Name of the provider
External Reference	Provider reference

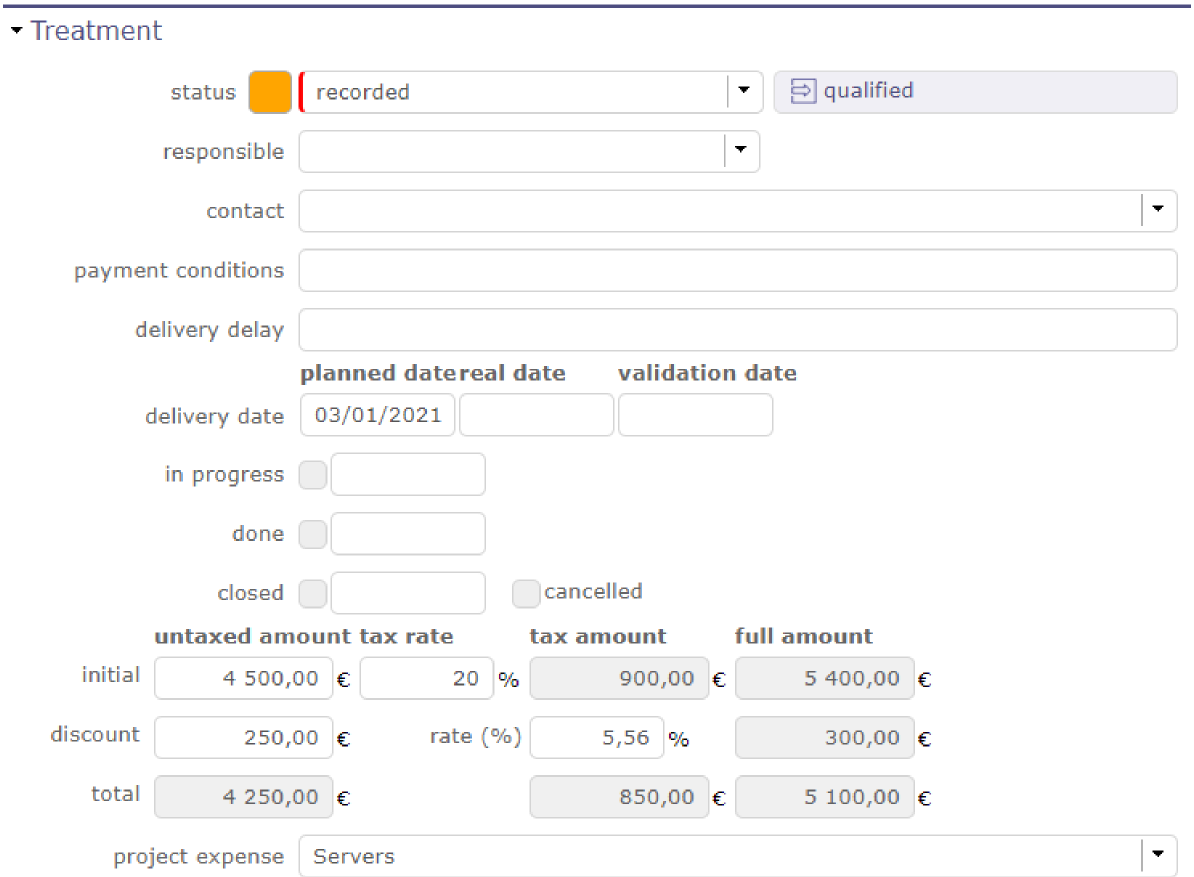


Fig. 16: Order to provider - Treatment section

Treatment

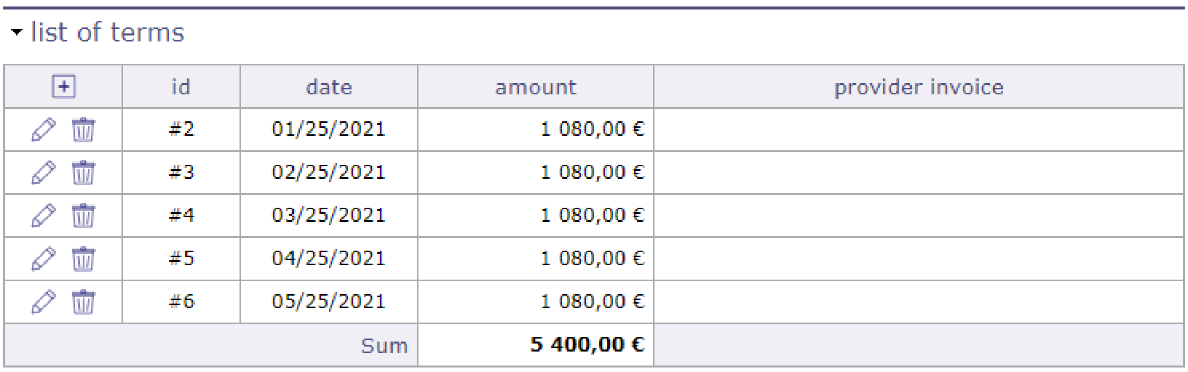
Table 12: Required field

Field	Description
Status	Defines the progress of the processing of the element according to the *workflow* used
Responsible	Name of the person in charge of the order
Contact	Name of the contact related to the order at the provider
payment conditions	Description of payment terms
Delivery delay	From the validation of the order, processing time and preparation of the order
Delivery date: **Planned date**	Delivery date planned by the provider
Delivery date: **Real date**	Date of receipt of delivery
Delivery date: **Validated date**	Date of validation of delivery to the service provider
In progress status	Defines whether 'In progress' flag is automatically set for this status
Done status	Defines whether 'done' flag is automatically set for this status
Closed status	Defines whether 'closed' flag is automatically set for this status
Cancelled status	Defines whether 'cancelled' flag is automatically set for this status
Untaxed amount	Amount of the order without taxes
Tax rate	Applicable tax rates in your country/region
Tax Amount	Total amount of taxes calculated based on Taxe rate
Full amount	Total amount of the order including taxes
Project expense	Connect your provider's offer to an existing project expense
Generate expense	Automatically create expenses from the current item. The name of the project expenditure gener
Comment	Leave your comments here

List of terms orders

This section allows you to create one or more terms for your invoices.

- Click on to add a term. A pop-up opens.
- Click on to add an existing term.


list of terms

	id	date	amount	provider invoice
	#2	01/25/2021	1 080,00 €	
	#3	02/25/2021	1 080,00 €	
	#4	03/25/2021	1 080,00 €	
	#5	04/25/2021	1 080,00 €	
	#6	05/25/2021	1 080,00 €	
		Sum	**5 400,00 €**	

Fig. 17: List of term section

- The name and the date are mandatory.
- Enter the number of installments you want to pay your invoice.
- If 1 then it is a cash payment.
- When you enter several terms, the calculation on the total amount is done automatically.
- When you copy your order as an invoice, the terms are automatically added to it.

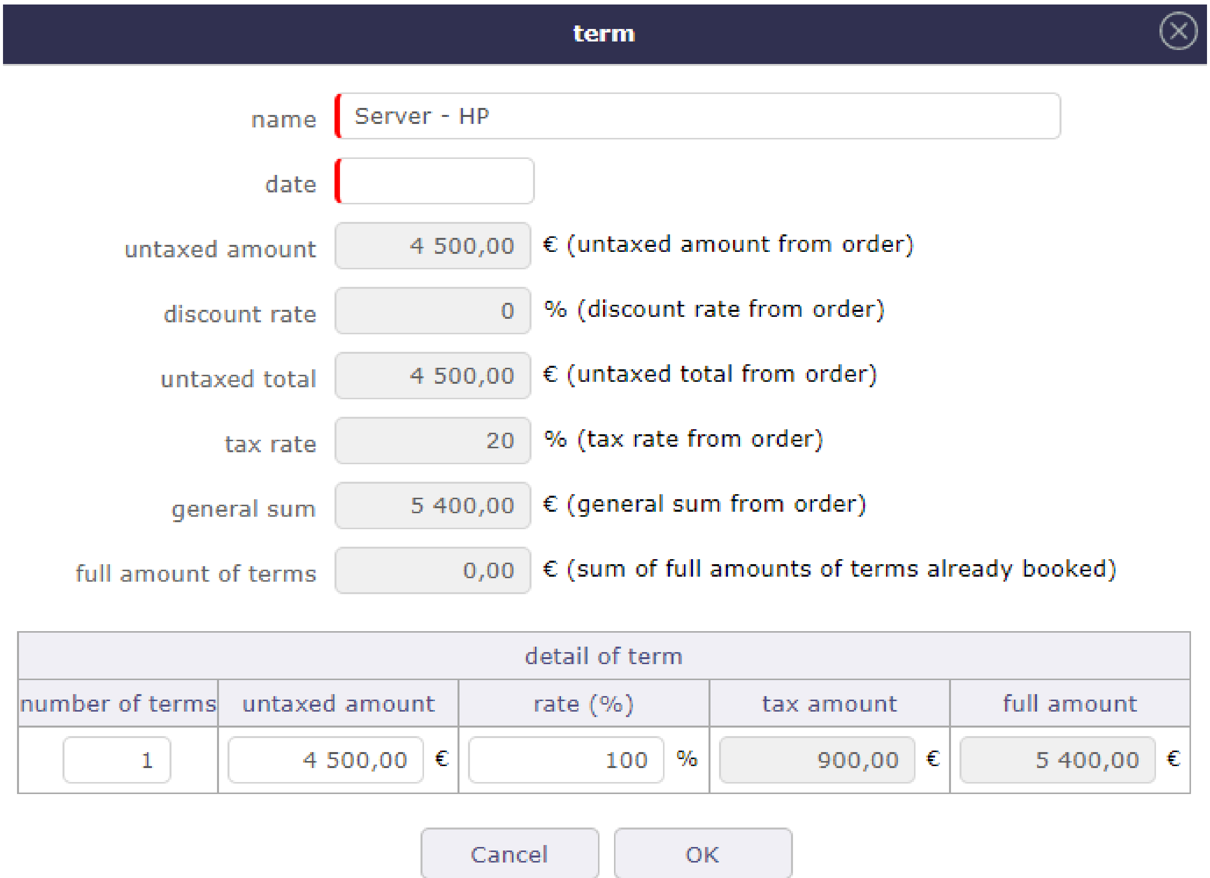
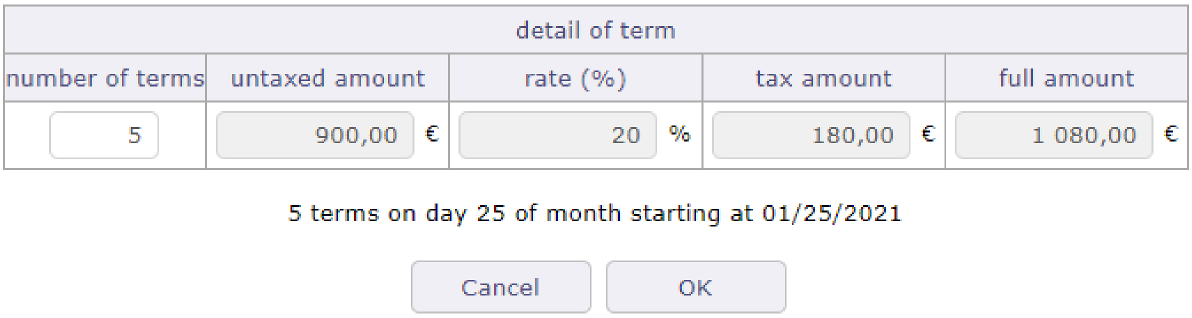


Fig. 18: Terms creation pop-up

- You can add due dates from the provider invoices screen if you have not done so on this screen.



detail of term				
number of terms	untaxed amount	rate (%)	tax amount	full amount
5	900,00 €	20 %	180,00 €	1 080,00 €

Fig. 19: Calculation after number of deadlines entered

When you transform your order into an invoice, the terms recorded in the offer are automatically transferred to the invoices.

See: *List of terms*

In the order, these will be filled in as invoiceed with a link to the latter.

	id	date	amount	provider invoice		
invoiced	#10	04/25/2021	1 080,00 €	#2	bc558/889-66	qualified
invoiced	#11	05/25/2021	1 080,00 €	#2	bc558/889-66	qualified
paid	#7	01/25/2021	1 080,00 €	#2	bc558/889-66	qualified
invoiced	#8	02/25/2021	1 080,00 €	#2	bc558/889-66	qualified
invoiced	#9	03/25/2021	1 080,00 €	#2	bc558/889-66	qualified
		Sum	**5 400,00 €**			

Fig. 20: List of terms invoiceed

8.1.10 Terms of payments to providers

In France, inter-company payment periods are regulated and set at maximum 60 calendar days or 45 days end of month from the date of issue of the invoice.

Failing to mention the payment period in the contract or the invoice, it is legally fixed to 30 days after receipt of the goods or performance of the service.

- Depending on the sector, deadlines are modifiable
- you can save, organize, track and edit your payment dates to your provider
- You can record one or more payment delays on each invoice to the service provider.
- A invoice can therefore be paid either in cash or in several installments.
- Each recorded due date, whether on the supplier orders screen or on the supplier invoices screen, generates a line on the terms screen.

Description

Table 13: Required field

Field	Description
Id	Unique Id for the term of payment
Name	Short description of the term
Project	project attached to the term of payment
Order to provider	Name of the order atatched to the term of payment
Provider Bill	the provider's invoice
Responsible	Name of the person in charge of the payment

Fixed price for term

Table 14: Required field

Field	Description
Initial ex VAT	Amount before taxes
Tax	Applicable tax
Full	Amount with taxes
Date	date of expiry
Billed status	If payment has been invoiceed
Paid status	If payment has been paid
Closed status	Defines whether 'closed' flag is automatically set for this status.

Note:

- **Ex VAT:** The column value is automatically updated with the sum of invoice line amounts.
- **Tax:** If the tax is not defined, nothing is applied in this field and the amount will remain without tax
- **Full:** If the total amount exclusive of tax and the tax rate have been entered, the total amount will be calculated automatically
- On the project, the sum of the expenses must be carried out in including taxes if the entry of expenses is in including taxes

8.1.11 Provider invoices

This screen is used to manage invoices generated manually or linked to provider offers.

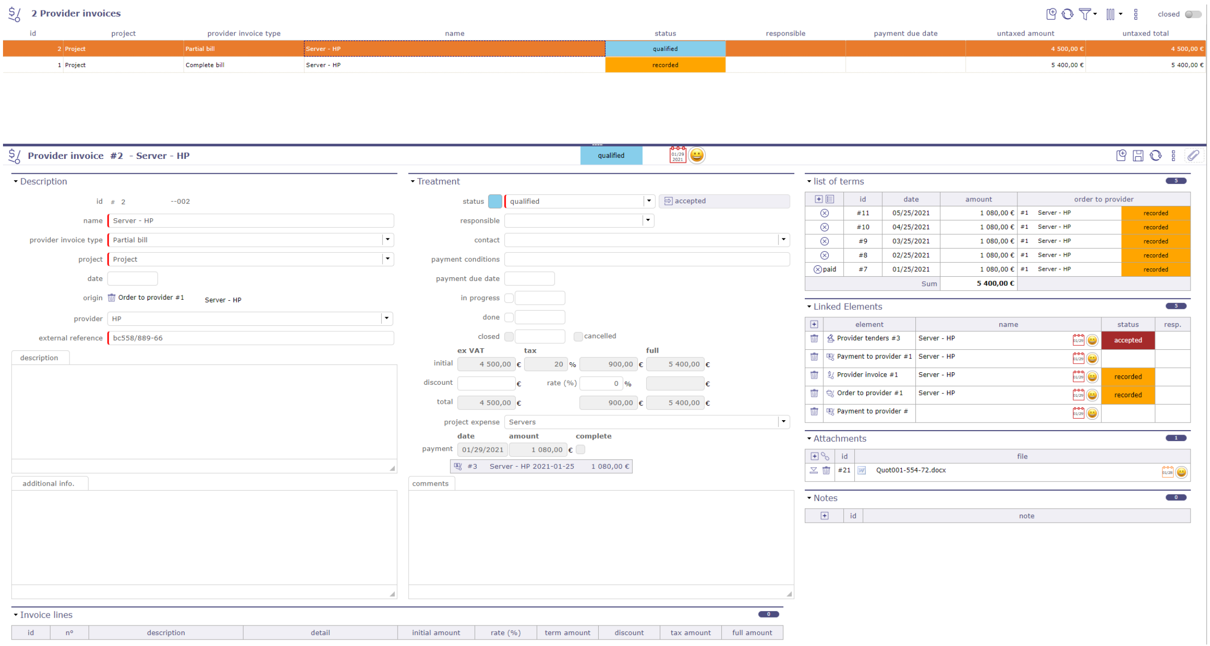


Fig. 21: Provider invoice screen

Description

Table 15: Required field

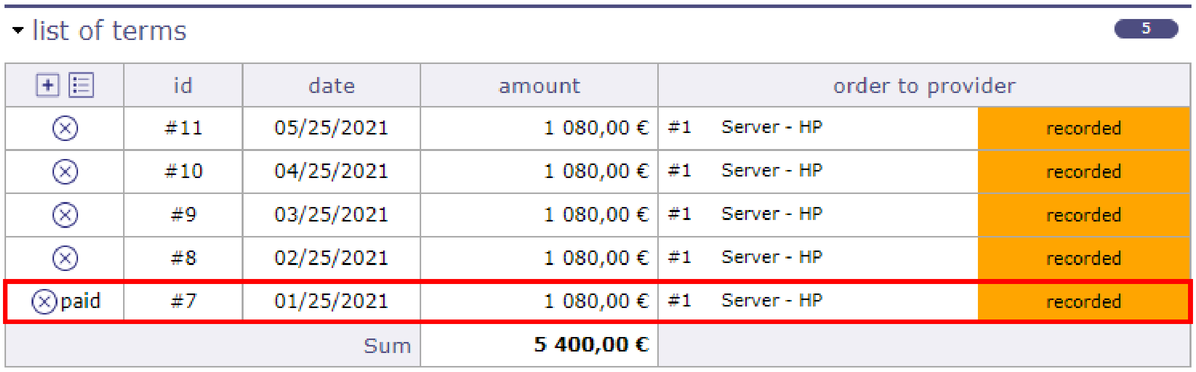
Field	Description
Id	Unique Id for the term of payment
Name	Short description of the term
Provider	The way to define common behavior on group of invoices
Project	project attached to the invoice
Date	Date of the invoice
Origin	Element which is the origin of the quotation
Provider	Provider name.
External reference	*External reference* of the provider's invoice
Description	Complete description of the expense.

Treatment

Table 16: Required field

Field	Description
status	Actual status of the expense.
Responsible	person placing the order
Contact	name of the person at the provider related to this invoice
Payment conditions	the payment terms of the provider
Payment due date	expected payment date
In progress	Box checked indicates that the tender is In progress with date when checked.
Done	Box checked indicates that the tender is done with date when checked.
Closed	Box checked indicates that the tender is archived with date when checked.
Cancelled	Box checked indicates that the tender is cancelled.

List of terms



list of terms 5

	id	date	amount	order to provider	
	#11	05/25/2021	1 080,00 €	#1 Server - HP	recorded
	#10	04/25/2021	1 080,00 €	#1 Server - HP	recorded
	#9	03/25/2021	1 080,00 €	#1 Server - HP	recorded
	#8	02/25/2021	1 080,00 €	#1 Server - HP	recorded
paid	#7	01/25/2021	1 080,00 €	#1 Server - HP	recorded
		Sum	**5 400,00 €**		

Fig. 22: List of terms invoiceed

This section allows you to create one or more terms for your invoices.

If your invoice was created from an order, then the terms recorded on the offer will be automatically recovered on the invoice.

- Click on to add a term. A pop-up opens.
- Click on to add an existing term.
- Click on to remove a term.
- The name and the date are mandatory.
- Enter the number of installments you want to pay your invoice.
- If 1 then it is a cash payment.

When you transform your order into an invoice, the deadlines recorded in the order are automatically transferred to the invoices.

In the orders, in the deadlines section, these will be indicated as invoiced

Each line provides a link to the item screen.

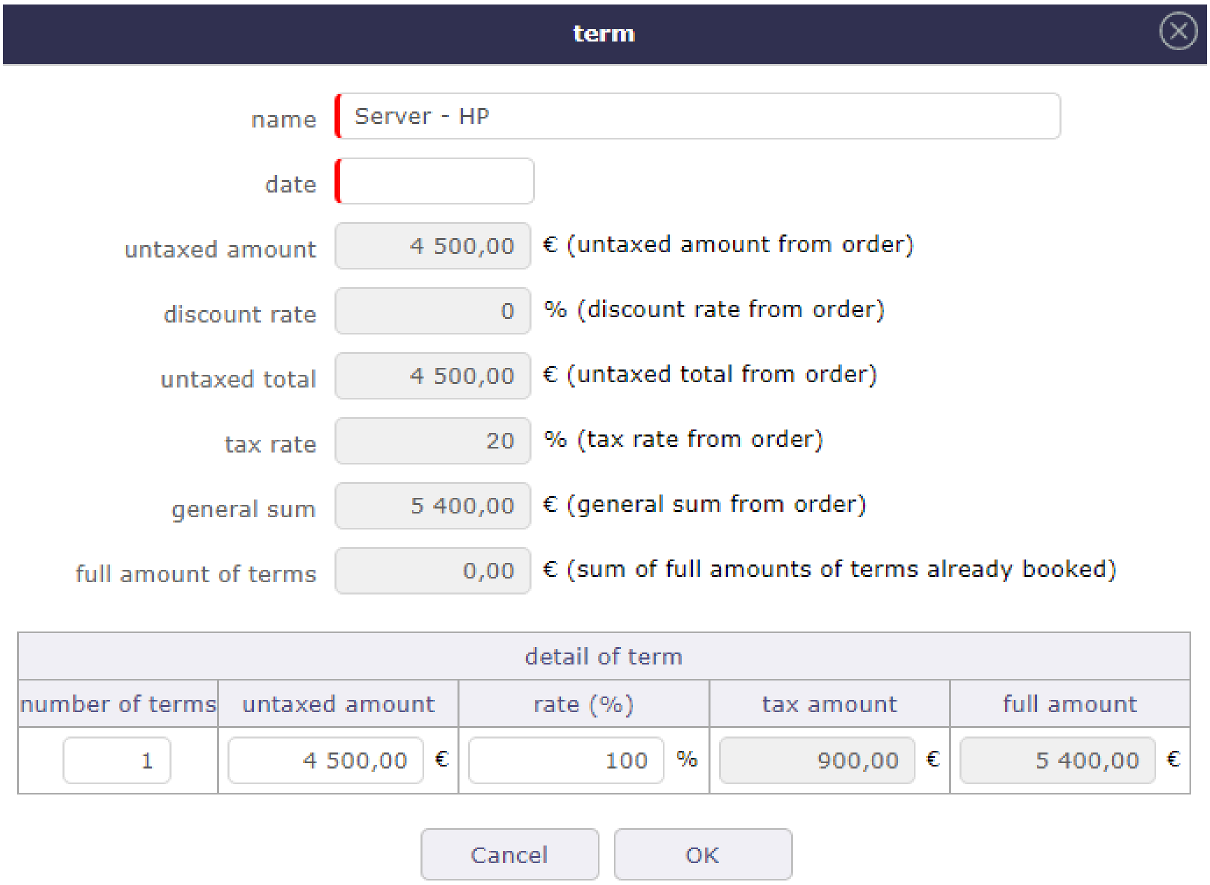


Fig. 23: Terms creation pop-up

Fig. 24: List of terms invoiceed

8.1.12 Payments to provider

Follow the payment of your provider invoices to better organize your general cash flow or your working capital.

Description

Table 17: Required field

Field	Description
Id	Unique Id for the term of payment
Name	Short description of the payment
Payment to *Providers types*	The way to define common behavior on payments to provider

Treament

Table 18: Required field

Field	Description
Payment mode	Groups different payment methods.
Payment date	The date on which the payment method chosen above will be made.
payment amount	Amount of the invoice.
Payment fee	Fee generated by payment or otherwise.
payment credit	Amount of credit if there is.
Provider payment term	Selection of the payment term to the provider. if the exchanges were created on the offers or on the i
Provider invoice	Selection of the provider invoice. The invoice is automatically choose if the provider payment term i
Provider invoice reference	The reference is automatically fill in when selecting the provider invoice.
Provider	The name of the provider is automatically fill when selecting the provider invoice.
Provider invoice amount	The amount of the invoice is automatically fill when selecting the provider invoice.
Closed	Box checked indicates that the tender is archived with date when checked.

When the payment to the supplier has been completed and recorded, on the screen of provider invoice in the treatment section, you will find a record of these payments.

In the list of terms section, you can see in the table, the terms for which the settlement has been made.

When all the due dates have been paid:

- on the invoice screen the "full" box is automatically checked
- The date of the last installment is recorded
- A summary is displayed with the name of each payment made
- Each line is clickable.

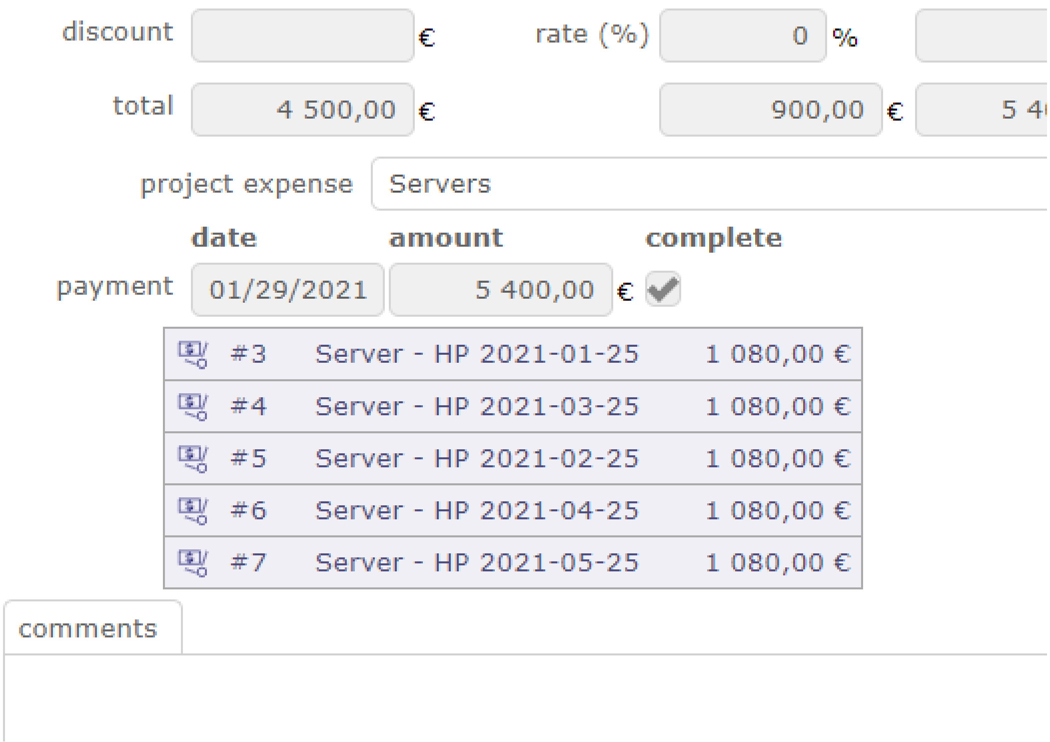


Fig. 25: List of paid installments

8.1.13 Provider Contract

ProjeQtOr gives you the possibility to manage and precisely follow your supplier contracts

The supplier contract is necessarily linked to a project and a supplier.

Section Description

Complete the description of the contract.

Other sections

- *Contract Gantt provider*

Table 19: Required field

Field	Description
Name	Name of the contract
Number	Reference number of the contract
Client contract type	List of types of the contracts
Project	Project to which this contract will be attached
Supplier	Supplier concerned by the contract
Contact	List of provider contact only. Contacts must be registered in advance on the supplier's screen. Change supplier, the contacts list is suitable.
Supplier reference	Reference of the provider
Phone number	The field is of alphanumeric type. You can enter a telephone number with precision. Example with a number phone and his ext.
Origin	Used to enter the origin of the agreement Example the name of the seller or the advertisement which brought the customer
Description	Descriptive text of the contract

Section Treatment

Follow the state, the progress of your contract in this section.

Responsible

- Choose a responsible
- Its initials are displayed on the Gantt chart of contracts

Workflow

- The workflow is based on the default workflow.
- You can change or modify the current workflow.
- See: *Workflow*

Renewal

Defines the behavior of the renewal of a contract at the end of the initially planned duration

- **Never:** the contract will never be renewed
- **Tacit:** the contract will be renewed if there is no termination
- **Express:** the contract is renewed and is the subject of a written or verbal act

States

- **In progress:** Date on which the contract is taken over. Effective. This date can be entered manually or by going to the Assigned state of the workflow
- **Done:** Date the contract ends.
- **Closed:** Date on which the contract was closed.
- **Cancelled:** Cancellation Date

Section contact

This section allows you to fill in the information relating to your contact with the provider

Table 20: Required field

Field	Description
Contact	Name of the provider contact
Phone Number	Phone number of the provider contact.The field is not numeric and lets you add textual information such as the extension number.
Levels of service agreements	Determines if you have levels of service agreements (*SLA*) for this contract. This check box is an indication.
Intervention time	Periods during which services, contacts and interventions with the provider will be possible. You can choose a time slot for weeks, Saturdays, as well as Sundays and holidays.

Section Progress

In the Progress section, determine the different dates and deadlines for the contract, notice, deadlines, payments …

Table 21: Required field

Field	Description
Contract dates	Start and end date of the contract
Initial contract term	Contract duration displayed according to the chosen unit: day, month, year
Notice period	Duration displayed according to the chosen unit: day, month, year
Notice date	Free reminder of a scheduled deadline
Due date	End of contract validity
Periodicity of the contract (Month)	Duration of the renewal of the contract is possible. Example 24-month subscription renewal
Billing frequency (Month)	Billing frequency during the term of the contract

8.2 Incomes

Follow with the "Incomes" menu, incoming financial movements and your customers and all the elements revolving around them, such as contracts, quotations, bills, catalogs …

8.2.1 Client contract

ProjeQtOr gives you the possibility to precisely manage and monitor your customer contracts.

The customer contract is necessarily linked to a customer.

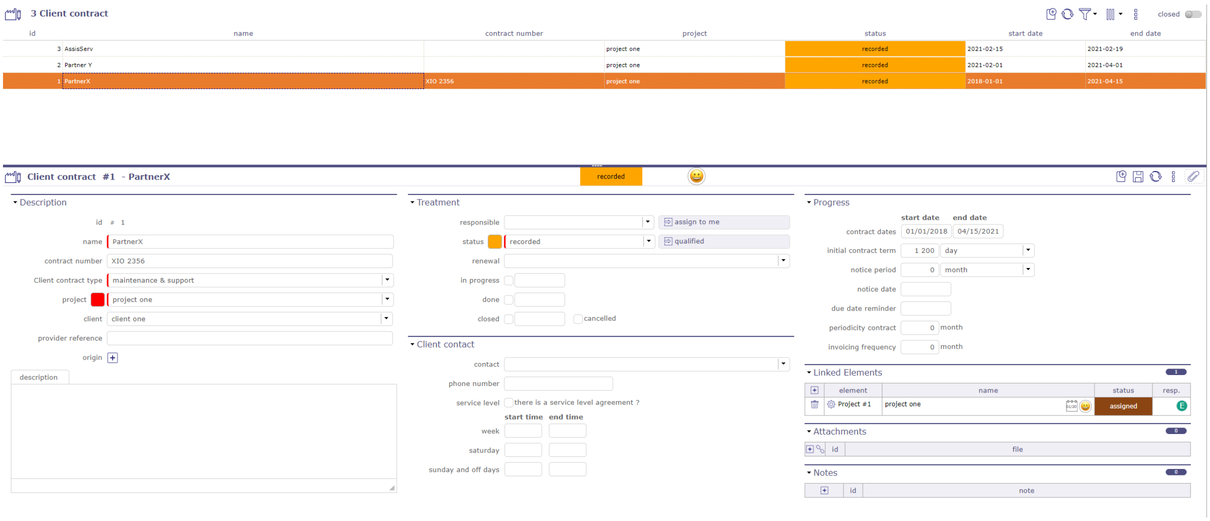


Fig. 26: Client contract screen

Section Description

Complete the description of the contract.

Other sections

- *Contract Gantt client*

Table 22: Required field

Field	Description
Name	Name of the contract
Number	Reference number of the contract
Client contract type	List of types of the contracts
Project	Project to which this contract will be attached
Customer	Customer concerned by the quotation
Contact	Customer contacts only. Contacts must be registered in advance on the customer's screen. Change customer, the contacts list is suitable.
Client reference	Reference of the client
Phone number	The field is of alphanumeric type. You can enter a telephone number with precision. Example:XXXXXXXXXX ext XX
Origin	Allows to link the document defining the SLA
Description	Descriptive text of the contract

Section Treatment

Follow the state, the progress of your contract in this section.

Responsible

- Choose a responsible
- Its initials are displayed on the Gantt chart of contracts

Workflow

- The workflow is based on the default workflow.
- You can change or modify the current workflow.
- See: *Workflow*

Renewal

Defines the behavior of the renewal of a contract at the end of the initially planned duration

- **Never:** the contract will never be renewed
- **Tacit:** the contract will be renewed if there is no termination
- **Express:** the contract is renewed and is the subject of a written or verbal act

States

- **In progress:** Date on which the contract is taken over. Effective. This date can be entered manually or by going to the Assigned state of the workflow
- **Done:** Date the contract ends.
- **Closed:** Date on which the contract was closed.
- **Cancelled:** Cancellation Date

Section contact

This section allows you to fill in the information relating to your contact with the client.

Table 23: Required field

Field	Description
Contact	Name of the client contact
Phone Number	Phone number of the client contact.The field is not numeric and lets you add textual information such as the extension number.
Levels of service agreements	Determines if you have levels of service agreements (*SLA*) with the client for this contract. This check box is an indication.
Intervention time	Periods during which services, contacts and interventions with the client will be possible. You can choose a time slot for weeks, Saturdays, as well as Sundays and holidays.

Section Progress

In the Progress section, determine the different dates and deadlines for the contract, notice, deadlines, payments …

Table 24: Required field

Field	Description
Contract dates	Start and end date of the contract
Initial contract term	Contract duration displayed according to the chosen unit: day, month, year
Notice period	Duration displayed according to the chosen unit: day, month, year
Notice date	Exact date of notice
Due date	End of contract validity
Periodicity of the contract (Month)	Duration of the renewal of the contract is possible. Example 24-month subscription renewa
Billing frequency (Month)	Billing frequency during the term of the contract

Management of ordered ticket

You can manage token orders on your customer's contract.

For more information on defining tokens see: ref:Management of tokens on ticket. You will be able :

- Define tokens (duration, cost, markup, …)
- Record token orders on a customer contract
- When entering work on ticket, select the token used
- Summarize tokens ordered, used and left on customer contract

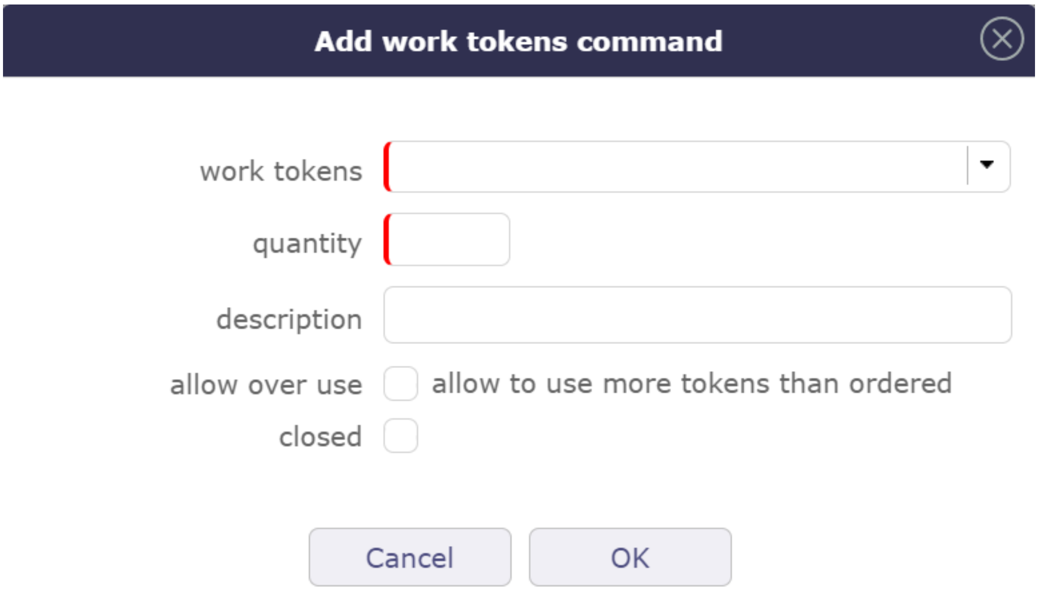


Fig. 27: Add work token command

- Click on [+] to add tokens to the order
- Select the token type from those defined on the project or its parent projects.
- Entering the ordered quantity of tokens
- Added a descriptive comment

When you have entered the order, the table will indicate:

- Calculation of the total duration ordered (in hours or days depending on the unit of time entry)
- Calculation of the total amount ordered
- Display of the total number of tokens used (without taking into account markups)
- Display of the increase in the total number of tokens used (taking increases into account)
- Display of the total duration of tokens used (taking into account markups)
- Display of the total cost of tokens used (taking into account markups)
- Display of the remaining duration of the tokens (duration ordered minus duration used)
- Display of the remaining amount of tokens (amount ordered minus amount used)
- Total line, summing the numbers, amounts and durations (ordered, completed, remaining) for all types of tokens in the contract

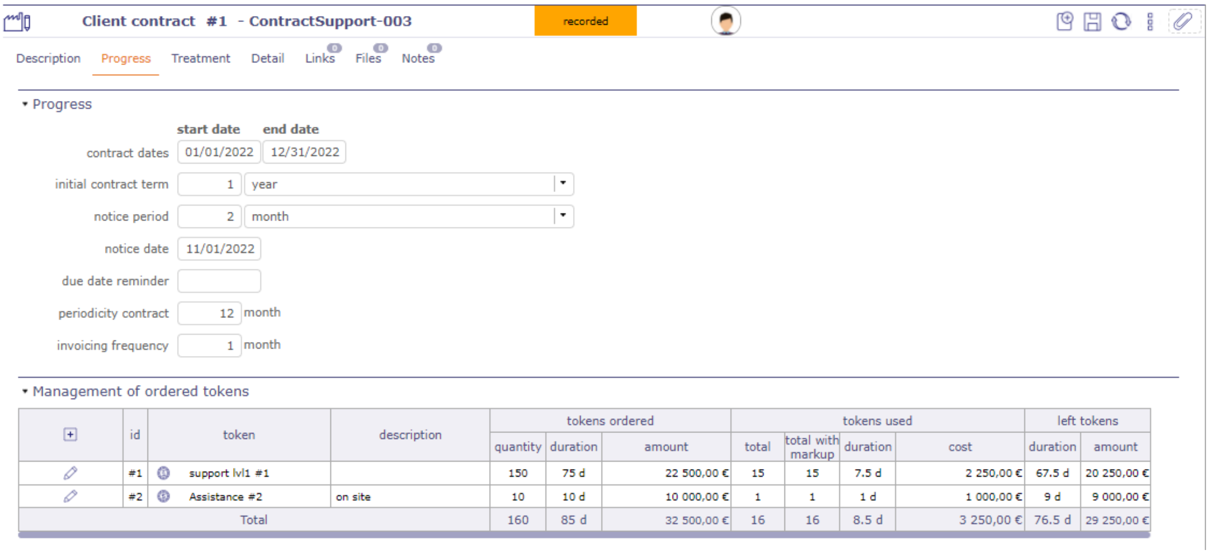


Fig. 28: Management of ordered tokens

8.2.2 Client Quotation

A quotation is a proposal estimate sent to customer to get approval of what's to be done, and how must the customer will pay for it.

On the quotation form, you can record all the information about the sent proposal, including attaching some file completely describing the proposal with details terms and conditions.

Transform quotation to order

A quotation can be copied into an order when corresponding document is received as customer agreement.

Bill lines section

This section allows to detail the quotation modality.

Section Description

Other sections

- *Bill lines*
- *Linked element*
- *Attachments*
- *Notes*

Table 25: required field

Field	Description
Id	Unique Id for the bill.
Name	Short description of the bill.
Client quotation type	Type of the quotation to define the way the concerned activity should be billed
Project	The project concerned by the quotation
Origin	Element which is the origin of the quotation
Recipient	Name of entity receiving the quotation
Customer	Customer concerned by the quotation.
Contact	Contact in customer organization to whom you sent the quotation.
Request	Request description.
Additional info.	Any additional information about the quotation.

Note: Field “Customer”

Automatically updated from project field.

Section Treatment

Table 26: required field

Field	Description
Status	Actual *status* of the quotation.
Responsible	Resource who is responsible for the quotation.
Sent date	Date when quotation is sent to customer contact.
Send mode	Delivery mode.
Offer validity	Limit date of the validity of the proposal.
Likelihood	The probability that the proposal will be accepted.
In progress	Box checked indicates that the quotation is taken in charge.
Done	Box checked indicates that the quotation is processed.
Closed	Box checked indicates that the quotation is archived.
Cancelled	Box checked indicates that the quotation is cancelled.
Planned end date	Target end date of the activity object of the quotation.
Activity type	Type of the activity object of the quotation.
Payment deadline	The payment deadline is stated on the quotation.
Amount	Total amount of the quotation.
Estimated work	Work days corresponding to the quotation.
Comments	Comment about the treatment of the quotation.

8.2.3 Client Orders

An order (also called command) is the trigger to start work.

On the order form, you can record all the information of the received order.

Scheduled work and budgeted cost of project

- The scheduled work (field: "validated work") of the project will be initialized with the sum of total work from all orders.
- The budgeted cost (field: "validated cost") of the project will be initialized with the sum of the total amount before taxes for all orders.
- See: *Progress section*

Bill lines section

This section allows to detail the order modality.

Section Description

Other sections

- *Bill lines*
- *Linked element*
- *Attachments*
- *Notes*

Table 27: required field

Field	Description
Id	Unique Id for the order.
Name	Short description of the order.
Order type	Type of order.
Project	The project concerned by the order.
Customer	Customer concerned by the order.
Contact	Contact in customer organization to whom you sent the order.
External reference	*External reference* of the order (as received).
Date of receipt	Receipt date.
Receive mode	Delivery mode.
Origin	Element which is the origin of the order.
Description	Complete description of the order.
Additional info.	Any additional information about the order.

Note: Field Customer

Automatically updated from project field.

Section Treatment

Table 28: required field

Field	Description
Status	Actual *status* of the order.
Responsible	Resource who is responsible for the order.
In progress	Box checked indicates that the order is taken in charge.
Done	Box checked indicates that the order is processed.
Closed	Box checked indicates that the order is archived.
Cancelled	Box checked indicates that the order is cancelled.
Activity type	Type of the activity object of the order.
Linked activity	Activity representing the execution of the order.
Initial	Initial values.
Amendment	Additional values.
Total	Sum of the initial values and amendment.
Start date	Initial start date of the execution of the order.
End date	Initial and validated end date of the execution of the order.
Comments	Comment about the treatment of the order.

Note: Fields behavior

- **Fields Initial, Amendment and Total**
  - **Ex VAT**: Amount before taxes.
    - The column value is automatically updated with the sum of bill line amounts.
  - **Tax**: Applicable tax.
    - If the applicable tax isn't set, the tax defined for the selected customer is used.
  - **Full**: Amount with taxes.
  - **Work**: Work days corresponding to the order.
    - The column value is automatically updated with the sum of bill lines quantities.
    - When the measure unit is "day".
- **Field Amendment**
- The columns values "Ex VAT" and "Work" are automatically updated with the sum of billing lines with selected amendment checkboxes.
- **Fields Start and end date**
- **Initial** : Initial dates
- **Validated** : Validated dates

Warning: Activity type

- The activity should be created only after approval.

8.2.4 Client invoicing terms

A term is a planned trigger for billing.

You can define as many terms as you wish, to define the billing calendar.

Note: Terms are mandatory to bill "Fixed price" project.

A term can be used just one time. The bill name will be displayed.

A term has triggers

- You can link the activities that should be billed at this term.
- A summary of activities is displayed for validated and planned amount and end date.
- Validated and planned values play the role of reminder.
- You can use these values to set real amount and date.

Description

Other sections

- *Notes*

Field	Description
Id	Unique Id for the term.
Name	Short description of the term.
Project	The project concerned with the term.
Bill	Bill name that uses this term.
Closed	Flag to indicate that term is archived

Fixed price for term

Field	Description
Real amount	Defined amount for the term.
Real date	Defined date for the term.
Validated amount	Sum of validated amounts of activities defined as triggers (**Read only**).
Validated date	Max of validated end dates of activities defined as triggers (**Read only**).
Planned amount	Sum of planned amounts of activities defined as triggers (**Read only**).
Planned date	Max of validated end dates of activities defined as triggers (**Read only**).

Fields Amount and Date (Planned & Validated)

- When a trigger is entered, the values of planned and validated are automatically updated with the sum and the max of triggered amounts.

Trigger elements for the term

This section allows to manage element trigger.

Trigger element management

- Click on to add an element trigger.
- Click on to delete an element trigger.

Field	Description
Linked element type	Type of element to be selected (Activity, Meeting, Milestone, Project, Test session).
Linked element	Item to be selected.

8.2.5 Client invoices

A bill is a request for payment for delivered work.

Billing will depend on billing type defined for the project through project type.

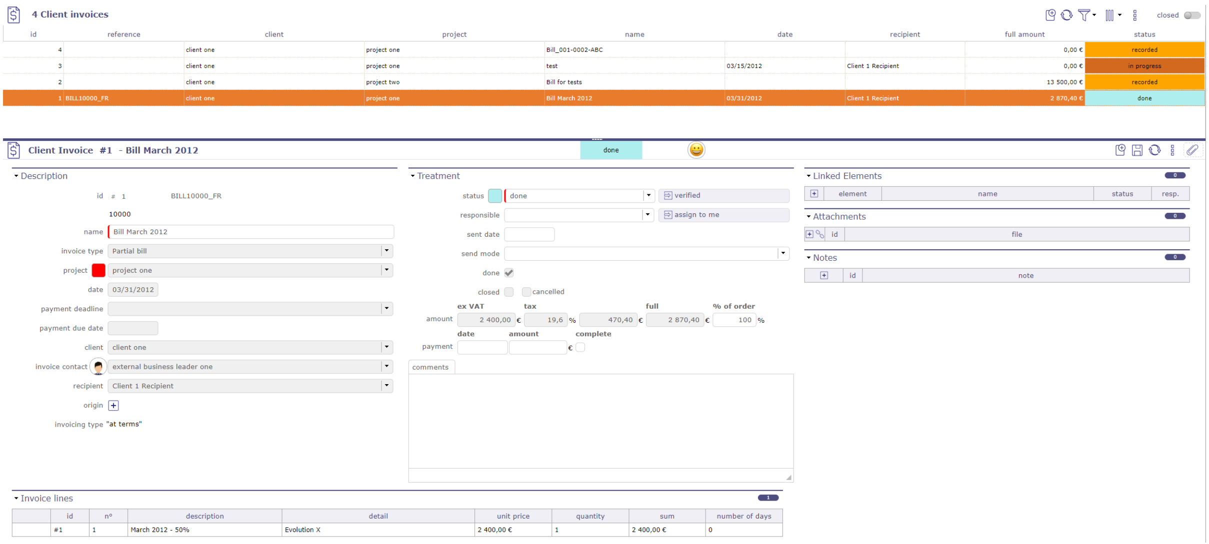


Fig. 29: Clients Bills

Invoice Type

Fig. 30: Schema bill

- Each bill is linked to project, a project has a project type, and a project type is linked to a billing type.
- So the billing type is automatically defined for the selected project.
- Billing type will influence bill line format.

At terms

- A *term* must be defined to generate the bill, generally following a billing calendar.
- Used for instance for: **Fixed price projects**.

On produced work

- No term is needed.
- The billing will be calculated based on produced work by resources on selected *activities* and on a selected period.
- Used for instance for **Time & Materials projects**.

On capped produced work

- No term is needed.
- The billing will be calculated based on produced work by resources on selected *activities* and on a selected period.
- Taking into account that total billing cannot be more than project validated work.
- Used for instance for **Capped Time & Materials projects**.

Manual

- Billing is defined manually, with no link to the project activity.
- Used, for instance for **Any kind of project where no link to activity is needed**.

Not billed

- No billing is possible for these kinds of projects.
- Used, for instance for **Internal projects & Administrative projects**.

> **Warning: Billing report**
>
> Only bill with at least status "done" will be available for reporting.
>
> Before this status, they are considered as a draft.

Description section

> **Other sections**
>
> - *Linked element*
> - *Attachments*
> - *Notes*

Table 29: required field

Field	Description
Id	Unique Id for the bill.
Name	Short description of the bill.
Bill type	Type of bill.
Project	The project concerned by the bill.
Date	Date of the bill.
Payment deadline	Payment deadline.
Payment due date	Due date for payment (read only). The value is calculated with date of bill + payment deadline
Customer	Customer who will pay for the bill.
Bill contact	Contact who will receive the bill. Automatically updated from project fields
Recipient	Recipient who will receive the payment for the bill.
Origin	Element which is the origin of the bill.
Billing type	Project billing type.

Treatment Zone

Table 30: required field

Field	Description
Status	Actual *status* of the bill.
Responsible	Resource who is responsible for the bill.
Sent date	Date when bill is sent to customer contact.
Send mode	Delivery mode.
Done	Flag to indicate that the bill has been treated.
Closed	Flag to indicate that the bill is archived.
Cancelled	Flag to indicate that the bill is cancelled.
Amount	Total amount of the bill.
% of order	Percentage of the bill balance over order amount.
Payment	Payment of bill.
Comments	Comments for the bill.

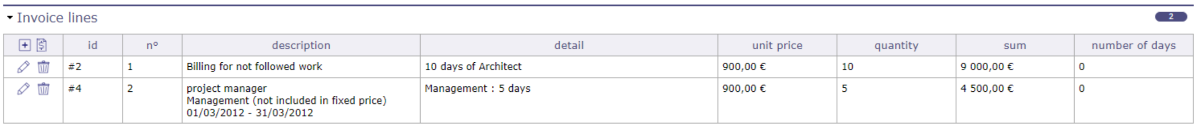
Fields Amount

- **Ex VAT:** Amount without taxes.
  - The value is automatically updated with the sum of bill line amounts.
- **Tax:** Applicable tax.
  - Automatically updated from customer field.
- **Full:** Amount with taxes.

Fields Payment

- **Date**: Date of payment.
- **Amount**: Payment amount.
- **Complete**: Flag to indicate that complete payment.

Invoice lines



▾ Invoice lines

	id	n°	description	detail	unit price	quantity	sum	number of days
	#2	1	Billing for not followed work	10 days of Architect	900,00 €	10	9 000,00 €	0
	#4	2	project manager Management (not included in fixed price) 01/03/2012 - 31/03/2012	Management : 5 days	900,00 €	5	4 500,00 €	0

Fig. 31: bill lines treatment

Input for each bill line depends on billing type.

Field	Description
Id	Unique Id for the bill line.
N°	Number of the line for the bill.
Description	Description of the line.
Detail	Detail of the line.
Unit price	Unitary price of billed element.
Quantity	Quantity of billed element.
Sum	Total price for the line (Price x Quantity).

Bill lines management

- Click on to add a bill line. A different "Bill line" dialog box will be displayed depends on billing type.
- Click on to add a formated line depending on billing mode
- Click on to modify an existing bill line.
- Click on to delete the bill line.

Bill line "At terms"

Table 31: required field

Field	Description
N°	Number of the line for the bill.
Term	Project terms to be selected.
Description	Description of line.
Detail	Detail of the line Can be set on update.
Price	Real amount of term.

Field Description

- Automatically set with the term name.
- Can be modified on update.

Bill line On produced work & On capped produced work

Table 32: required field

Field	Description
N°	Number of the line for the bill.
Resource	Project resources to be selected.
Activity price	Project activities price to be selected.
Start date	Start date of the period to take into account.
End date	End date of the period to take into account.
Description	Description of line.
Detail	Detail of the line Can be set on update.
Price	Price of the activity.
Quantity	Quantity of element.
Amount	Amount for the line (Price x Quantity).

Field "Description"

- Automatically set with selected resource, activity price name and dates.
- Can be modified on update.

Bill line "Manual billing"

Field	Description
N°	Number of the line.
Amendment	Flag to indicate this is an amendment line.
Description	Description of the line.
Detail	Detail of the line.
Price	Unitary price of element / measure unit.
Quantity	Quantity of element.
Amount	Amount for the line (Price x Quantity).

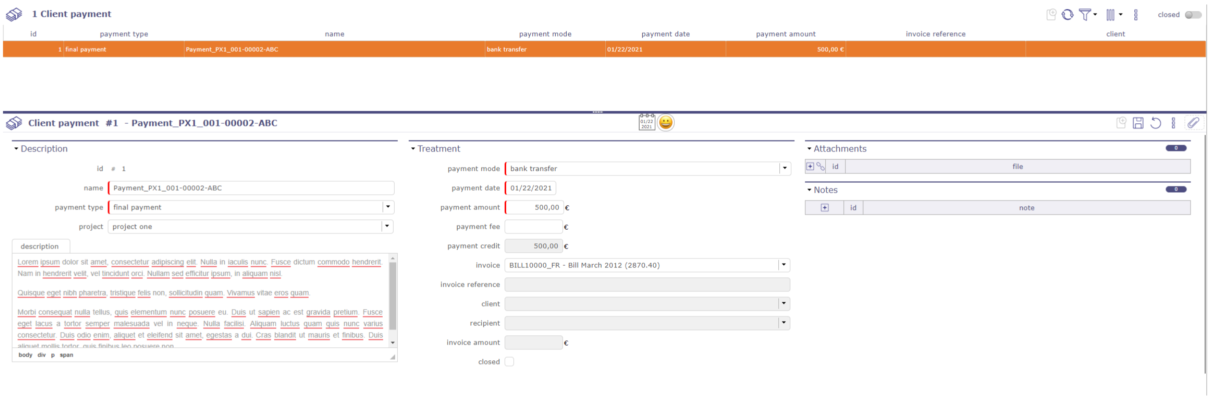
Field "Amendment"

- This field is used for amendment values in order detail.

8.2.6 Client Payments

Allow to define payment of bills.

The bill keeps track of payment.



Description

Table 33: required field

Field	Description
Id	Unique Id for the payment.
Name	Short description of the payment.
Payment type	Type of payment.
Description	Description of the payment.

Treatment

Table 34: required field

Field	Description
Payment mode	The mode of payment.
Payment date**	Date of payment.
Payment amount**	Amount of the payment.
Payment fee	Payment of the fee.
Payment credit	Balance of payment amount less payment fee.
Bill	Bill concerned with the payment.
Bill reference	Reference of bill.
Customer	Customer of bill.
Recipient	Recipient of bill.
Bill amount	Amount of bill.
Closed	Flag to indicate that payment is archived.

8.2.7 Activities prices

Activity price defines daily price for activities of a given **activity type** and a given **project**.

This is used to calculate a billing amount for billing type **On produced work** and **On capped produced work**.

Description

Table 35: required field

Field	Description
Id	Unique Id for the activity price.
Name	Short description of the activity price.
Project	The project concerned with the activity price.
Activity type	Type of activities concerned with the activity price.
Price of the activity	Daily price of the activities of the given activity type and the given project.
Sort order	Number to define order of display in lists.
Closed	Flag to indicate that activity price is archived.

8.2.8 Financial Gallery

the financial gallery allows you to display in list form and by elements, the different client quotation, invoices and orders recorded in ProjeQtOr, per date, client or per type, partial, final and complete bill.

Attachments are displayed grouped by element.

Click on to display attachment list.

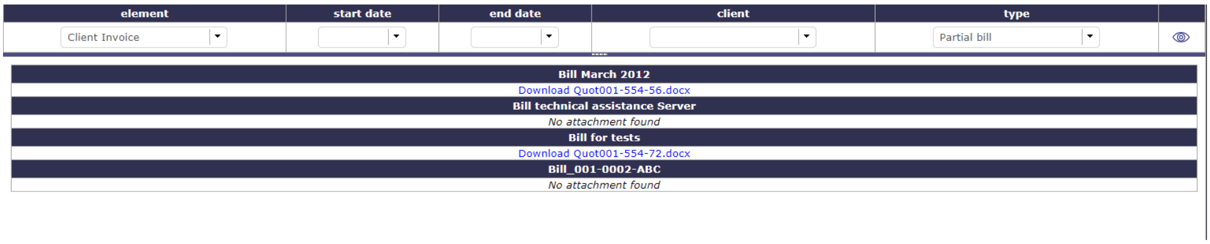


Fig. 32: Financial gallery

Filters

Filters can be applied to the list.

Element

- Displays attachments for this element.

Start and end date

- Displays attachments for this period.
- Attachments will be displayed according a date defined in the element.

  Quotation

  – Done date

  Order

  – Validated start date

  Bill

  – Bill date

Customer

- Displays attachments for this customer name.

Type

- Displays attachments for this element type.

8.2.9 Financial catalog

Catalog defines items (products or services) that can be obects of a quotation, an order or a bill.

This is used on the quotation lines, order lines and invoice lines.

See: *Invoice lines*.

Section Description

Table 36: required field

Field	Description
Id	Unique Id for the payment.
Name	Name of the catalog.
Catalog type	Type of catalog.
Description	Description of the catalog.
Detail	Detail of the catalog.
Nomenclature	Nomenclature of the catalog.
Specification	Specification of the catalog.

Treatment

Field	Treatment
Unit price	Type of unit.
Quantity	Quantity of catalog.
Product	Type of product.
Product version	Version of the product.

8.2.10 Revenue Managment

You can manage the turnover of the project at completion, and its consistency with the orders and invoices on the project.

A "Revenue management" section is visible on the projects screen in the Progress section after activation of the "Revenue management" module under the financial section.

The following information is then accessible:

- The turnover at completion corresponds to the total amount that will be invoiced for this project.
- Display of the sum of the project's customer orders
- Display of the sum of customer invoices for the project
- Method of valuation of turnover

  Method of valuation of turnover fixed

  The turnover is fixed and is entered manually

  Method of valuation of turnover variable

  Variable over time depending on the activities

  The turnover will then be calculated from the turnover of all the activities (not canceled) of the project and possibly of the sub-projects. In this case the activities will also have a turnover field to feed.

  Projects with sub-projects will systematically have a "Variable" valuation mode, this mode will automatically consolidate the turnover of the sub-projects on the parent project.

Consistency with project orders and invoices

For projects with sub-projects, the sum of orders and invoices will consolidate the data of the sub-projects, that is to say, it will integrate the orders and invoices of the sub-projects in addition to the orders and invoices possibly on the project itself.

The sum of the orders is in red if it is lower than the turnover. The sum of the invoices is in red if it is greater than the turnover.

Raise alerts

You can create definable alerts for projects in the "unit indicators" section:

- Revenue upper than command's sums
- Revenue less than invoices sums

In order to integrate this evolution into the community version, without disturbing the users who do not need this functionality, we will condition the behavior:

In order to transcribe the current use of the validated cost, a *global parameter* will determine whether the turnover is automatically reported as validated cost on activities and projects.

Note: This functionality is only visible if the Revenue Management module is activated via the access rights menu in *Modules management*.

The Revenue Managment is a sub-module of the financial module.

This new module will activate / desactivate the management of OUs and everything related to the management of OUs (see below).

This module will be disabled by default.

Work units catalog

You can define catalogs of work units, made up of work units, themselves broken down into several complexities.

This functionality will only be accessible if the *Revenue management* module is activated.

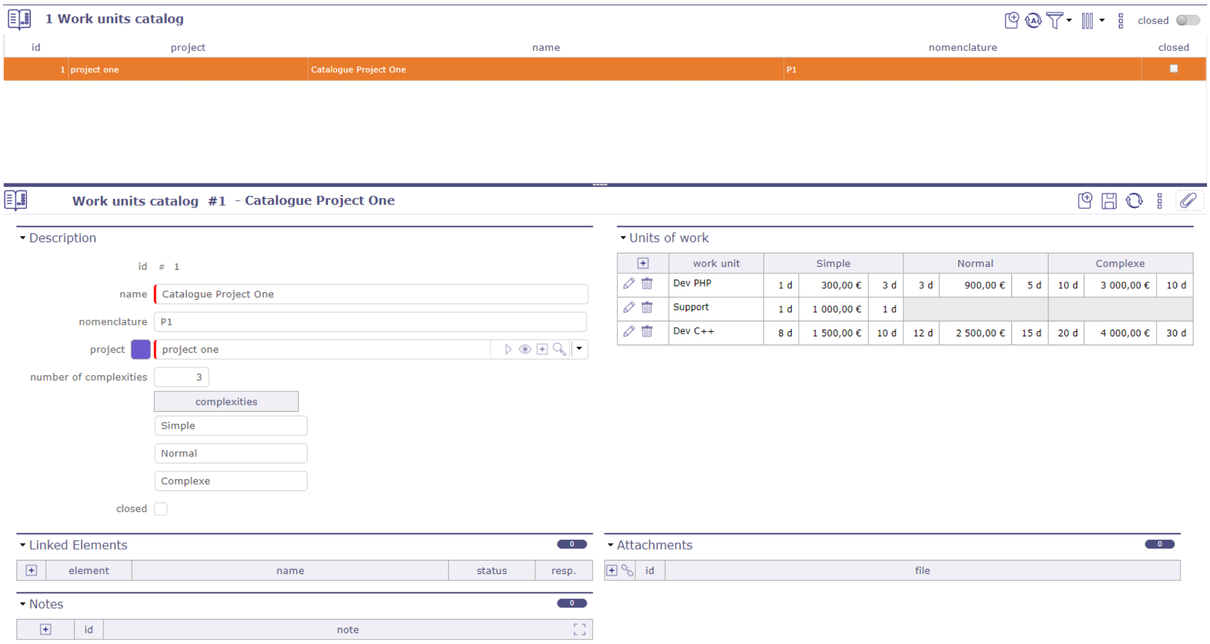


Fig. 33: Work units Catalog screen

You can assign any catalog to a project, whatever its position in the structure, while maintaining the notion of inheritance on the sub-projects.

- A "catalog used" field on the projects screen is available.
- The OUs proposed on the activities of the project will systematically be the OUs of this catalogue.
- When the "catalog used" field is populated (entered or edited) for a project, all subprojects (recursively) that had the same initial catalog value (or no value) are assigned the new catalog value.
- The level of recursion stops at the first project that does not respect this rule.
- When a catalog is created or modified to be attached to a project then the "catalog used" field of the project is updated, and the update is passed on to the sub-projects.

Important: Only profiles who have the right to modify the project catalog will be able to modify it, regardless of the project on which it is used.

Create a catalog

In the Finance menu Incomes section Catalog of work unit screen.

- Click on  to create a new catalog

Field	Treatment
Name	Name of the catalog.
Nomenclature	Code usually a reference shared with the customer.
Project	Project on which to use the catalog
Number of complexities	Maximum number of complexities, set in global parameters.
Complexities	Text fields to fill in the complexities of the catalog

Warning: If the number of complexity isn't filled then the default number set in the *global parameters* is applied.

Then fill in the fields with the name of the complexities managed by this catalog.

Click on + to open the pop-up windows and complete the complexity details.

You can fill in the following fields for each OU:

- Reference
- Description
- Incomes
- Deliverable
- validity date

The description, incoming and deliverable fields are text editors in inline mode. Edit buttons appear when the cursor is in the field.

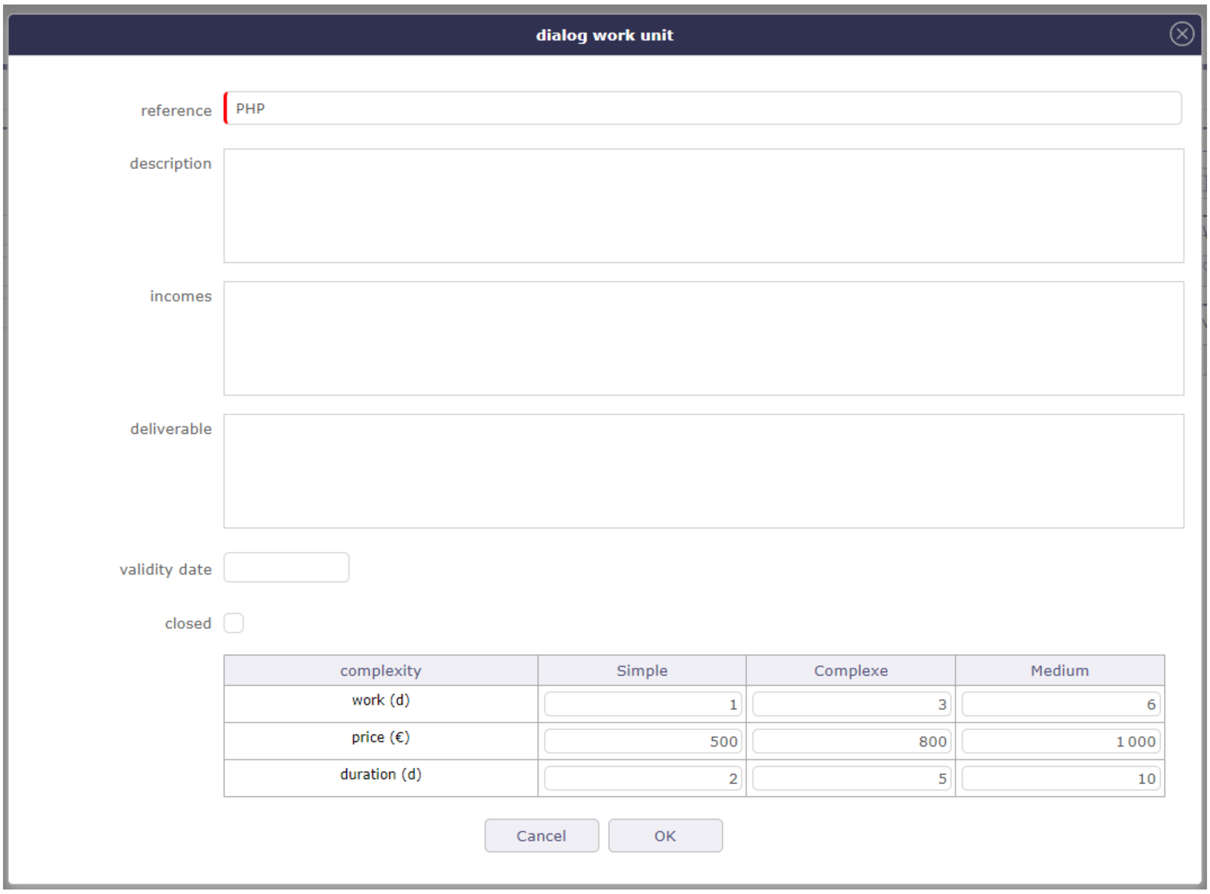


Fig. 34: Pop-up of the complexities details

For each complexity of the OU, we can define:

- Validated workload - 0 is allowed
- Price (CA) of complexity
- Duration in working days - optional

It is not mandatory to fill in all the complexities for an OU.

Revenue

revenue 10 500 €

	work unit	complexity	quantity	work	duration	price
	PHP	Medium	2	10 d	10 d	1 000,00 €
	PHP	Complexe	5	50 d	50 d	5 000,00 €
	JAVA	Medium	3	24 d	36 d	4 500,00 €
			sum	84 d	96 d	10 500,00 €

Fig. 35: Revenue section on the activity screen

Use of a catalog of work units

You can select an OU on an activity, only if the project has a Variable CA valuation mode.

We will inform the OU, its complexity and the number of units:

- Entering the OU in the list of OUs in the catalog linked to the project. This will dynamically populate the list of OU complexities by displaying only those that have a charge and a price that is not zero but may be equal to zero.
- Entering complexity
- Entering the quantity number of work units

An activity will only be associated with a single OU / Complexity pair.

If OU is selected, complexity and quantity are mandatory, otherwise they are prohibited, i.e. not enterable.

The UO / Complexity / Quantity data will make it possible to value:

- The validated load = load of the OU / Complexity x Quantity
- The turnover of the activity = price of the OU / Complexity x Quantity
- The validated duration = duration of the OU / Complexity x Quantity

Entering the validated duration will automatically calculate the validated end date if the validated start date is entered.

Note: This will only determine the planned duration of the activity if it is in "fixed duration" planning mode.

Otherwise, the schedule will determine the planned duration from the assigned load and the availability of assigned resources.

These 3 data (validated load, validated duration, CA) will then go into read-only since they are calculated.

- If the OU's expiry date has passed, an alert will be displayed on the activity, without this blocking the recording of the activity.
- If the global parameter "Report of turnover on the validated cost of activities" is activated, the turnover entered or entered through the OU is recopied in the validated cost of the activity.

  Exportation

  You can export the data of the OUs used on the export of Activities.

  There are as many columns as there are reference/complexity pairs defined in the OU catalog. This is only viable if you only export activities that only use the same catalog.

  A mechanism ensures that exported activities all use the same catalog.

Modification of data

You can modify the catalog on the data of an OU, a Complexity or a Quantity however it is not possible to modify a unit of work from the catalog, if it is already used on an activity.

- Re-calculation of validated data: validated load, validated duration and turnover
- If resources are assigned, application of the variation in the assigned load, in proportion to the load assigned to each resource and updating of the "still to do" accordingly (without ever being able to become negative).

Tip: For example:

In the case of an OU whose complexity generates 5 days of load with a quantity of 1, if A is assigned for 2 days and B assigned for 3 days, if we double the quantity (and therefore the validated load) A is then assigned 4 days and B is assigned 6 days.

Habilitations

The concept of Project on the catalog is not essential, it is present to guarantee the management of rights: only profiles who have the right to modify the catalog of the project will be able to modify it, regardless of the project on which it is used.

A resource with a profile allowing him to instantiate a OU but who does not have the visibility of the costs can continue to instantiate an OU, the value of the turnover will not be displayed, nor the "price" column of the table units of work, regardless of whether the OU carries a charge or a duration (0 included).

Deletion of data

You can delete the catalog on the data of an OU, a Complexity or a Quantity however it is not possible to delete a unit of work from the catalog, if it is already used on an activity.

- The validated load data, validated duration and CA become manually modifiable again
- The calculated data is kept

The project turnover will be updated from the sum of the turnover of the project activities, whether this data is entered from an OU or entered manually.

The turnover of the activities and the UO, Complexity and Quantity data will only be accessible for "basic" activities (which do not have sub-activities). For "parent" activities, the turnover will be consolidated from the turnover of the sub-activities.

You can close an unit of work directly in the OU's window.

If closed, the OU is no longer selectable.

Management of ordered work

The services ordered use the work unit catalog functionality.

You must "activate ordered services" in the *global parameters*

On the activities

In the Turnover section in Progress of the details area, the drop-down menu of the services ordered offers you the list of orders,

only if the project is an activity project, where the unit of work ordered is the same unit of work on the activity and where the complexity is consistent with that of the order.

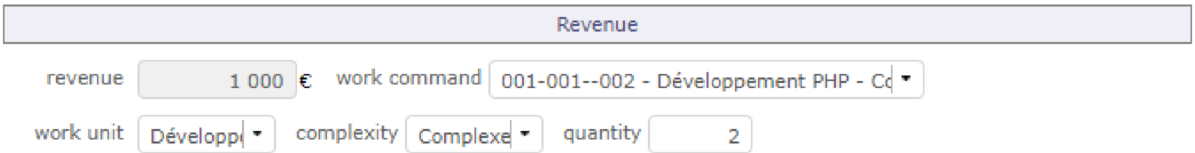


Fig. 36: Ordered work on activities

Select the order corresponding to the setting up of your activity in order to follow the realization and the invoicing of these units of works.

Be careful though, some rules apply:

- the quantity must not be less than the quantity already invoiced,
- the quantity must not be less than the quantity already carried out
- if there is a quantity performed or invoiced, the unit of work and the complexity cannot be changed

On the commands

On the order that you have linked from your activity, you have a summary table indicating the type of units ordered,

those that have been carried out, since the monitoring of your activity,

as well as the number of units and their corresponding amount, already charged.

▾ Work command

Work command			Command		Done		Billed	
+	Work unit	Complexity	Qty	Amount	Qty	Amount	Qty	Amount
	Développement PHP	Complexe	5	2 500,00 €	2	1 000,00 €	0	
	Développement C++	Moyen	2	3 000,00 €	0		0	
Total				5 500,00 €		1 000,00 €		0,00 €

Fig. 37: Ordered work on activities

In the case of invoicing, a table for the invoiced work order will be available.

When copying your order to an invoice, the table of services ordered is also done taking into account the quantity already invoiced.

Please note, some rules apply:

- The sum for the entire invoiced quantity (including current and already invoiced) must not exceed the ordered quantity
- Selecting a work order displays the work unit, complexity, unit quantity and quantities (stored on the work order line)
- The amount is calculated = quantity invoiced x unit amount
- During the update, the reference of the work order cannot be changed
- When data is inserted / updated, the sum of the data on the work order is updated

8.3 Financial situation

Project financial situation

The financial situation screens allow you to follow precisely with your own steps all the financial elements of a project.

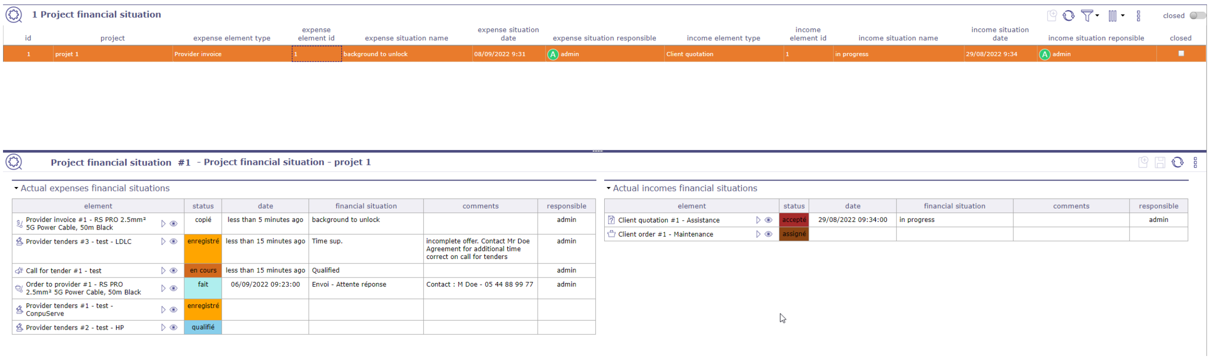


Fig. 38: Project financial situation screen

Find the financial situation in its entirety on the respective screens of the elements.

Financial status screens will only display the most recent transaction.

Project financial situations

On this screen you view all the financial documents related to your projects. To display a situation, you must create them directly on the screen of the document concerned. It is possible to predefine financial situations.

The list box displays the last processed financial document. The detail area displays all the expense and income financial documents in their current state.

You can display only the expenses financial situation or the income financial situation on their respective screen.

Expenses financial situation

The following operations will then be displayed for the expenses.

- Call for tender.
- Provider tenders
- Orders to provider
- Provider bills

Incomes financial situation

The following operations will then displayed for the incomes.

- Client quatations
- Client orders
- Clients bills
- Client paiements

Predefined situation

You create several defined situation than you will can used to defined situations on the financial elements.

Click on [+] to add a new predefined situation

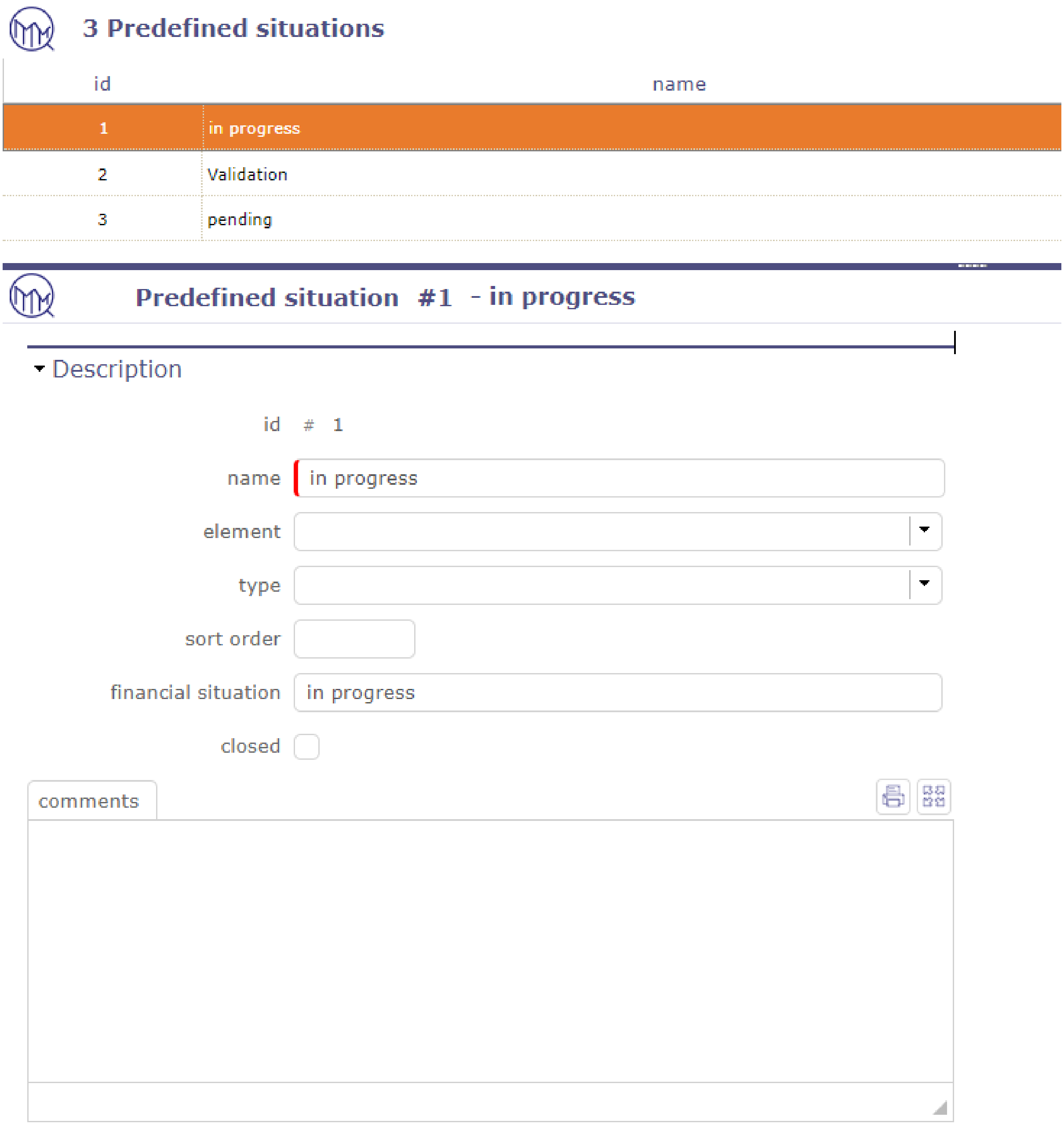


Fig. 39: Predefined situation

You can limited the predefined situation on an element or a type of element.

Financial situation

Click on to create a financial statement on an eligible financial document.

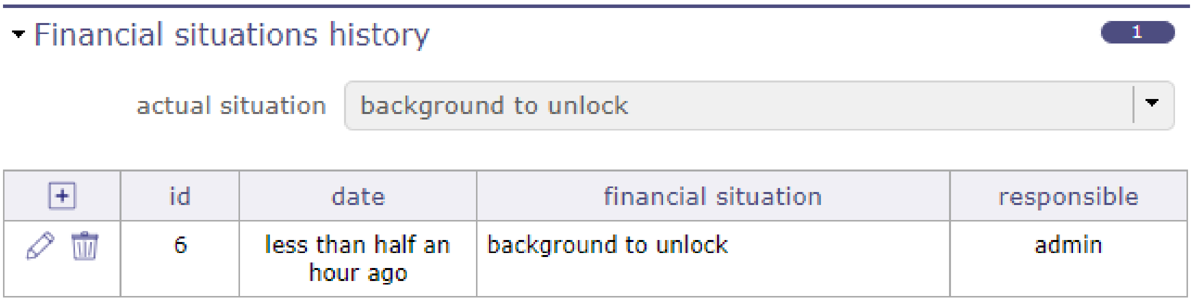


Fig. 40: Financial situation section

If you have created predefined situations, you can choose them from the corresponding drop-down list.

If you do not have predefined situations, then fill in the situation directly manually, respecting the mandatory fields.

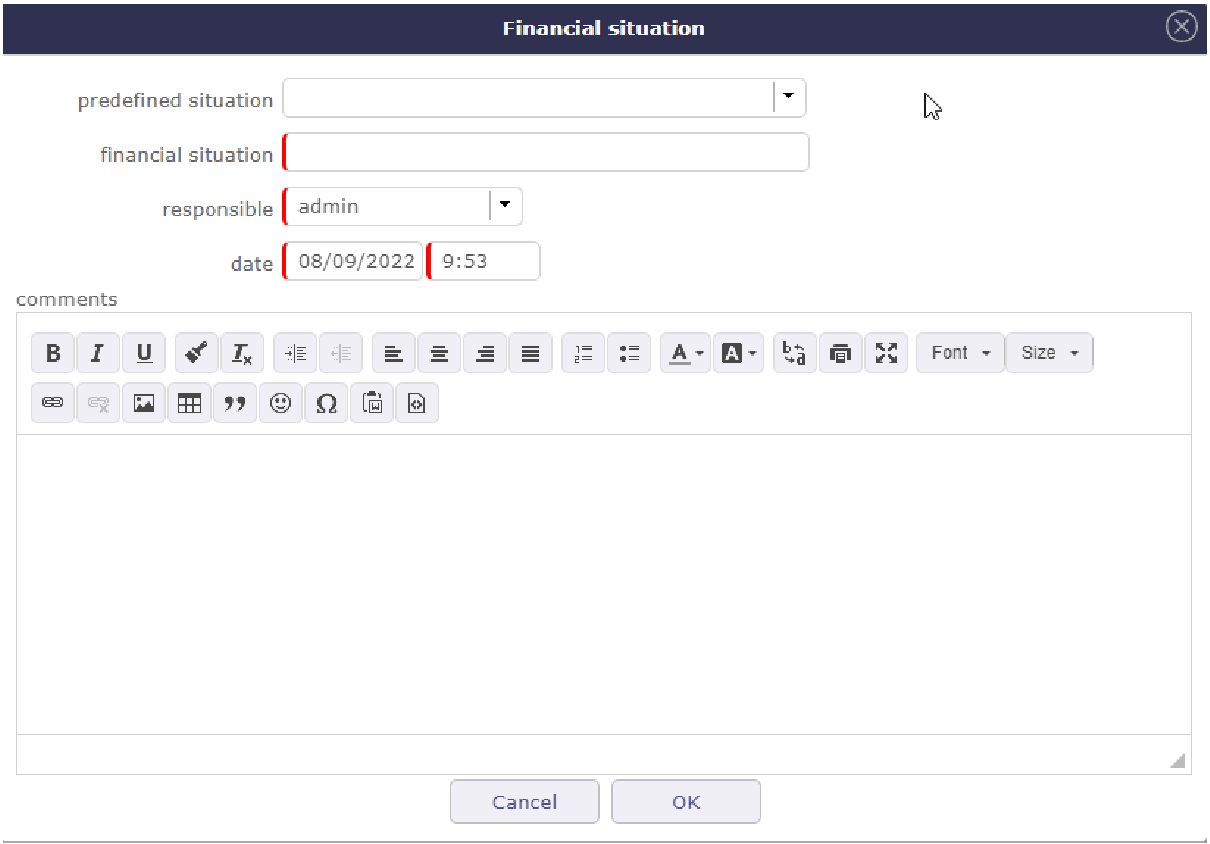


Fig. 41: Financial situation pop-up

8.4 Gantt Contract client & provider

8.4.1 Provider contract Gantt chart

In addition to the contract management screen (list and details area), you can view your contracts in a time view on a Gantt chart. This is the “contract schedule”

Each bar representing the different contracts, going from the start date to the end date of the contract.

Notice dates and due dates are displayed as milestones.

Gantt bars for customer contracts turn red when the due date is higher than the end of contract date.

No calculation is made. This is an indication to show an inconsistency.

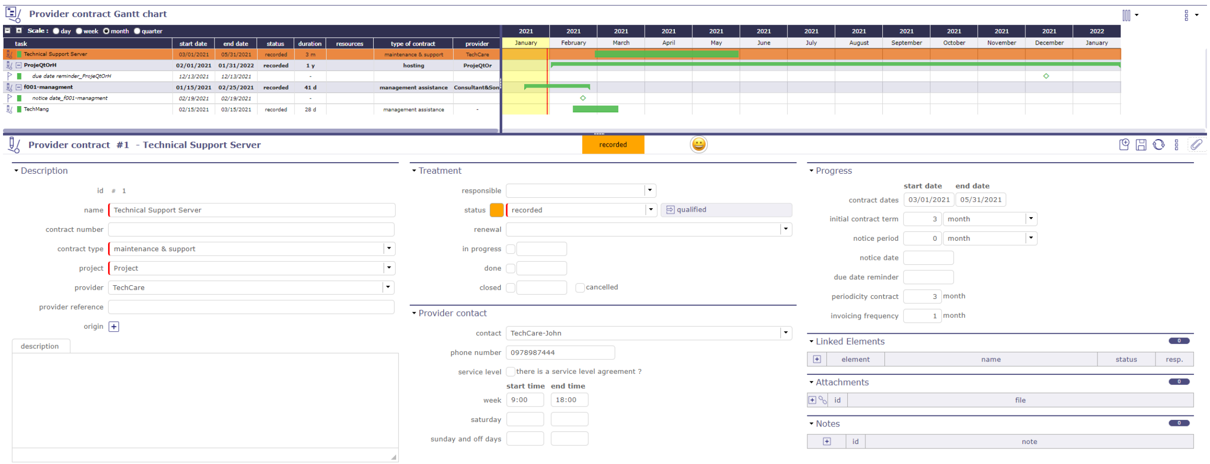


Fig. 42: Supplier contract Gantt chart screen

8.4.2 Client contract Gantt chart

In addition to the contract management screen (list and details area), you can view your contracts in a time view on a Gantt chart. This is the “customer contract calendar”

Each bar representing the different contracts, going from the start date to the end date of the contract.

Notice dates and due dates are displayed as milestones.

Gantt bars for customer contracts turn red when the due date is higher than the end of contract date.

No calculation is made. This is an indication to show an inconsistency.

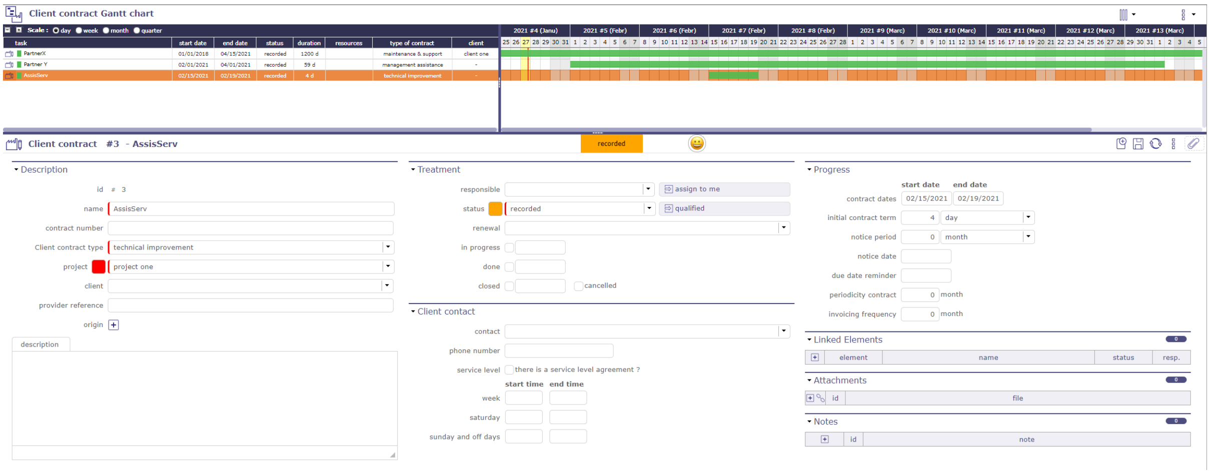


Fig. 43: Client contract Gantt chart screen

CHAPTER NINE

STEERING

9.1 Meetings

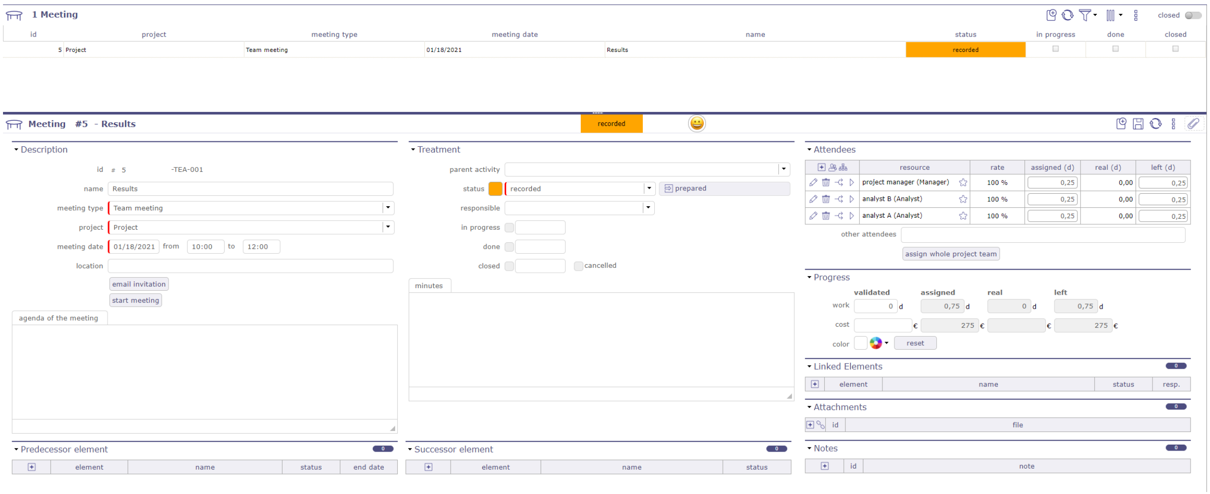


Fig. 1: Meeting screen

Meeting items are stored to keep track of important meetings during the project lifecycle :

- Progress Meetings
- Steering committees
- Functional workshops

Keeping track of each meeting makes it possible to follow the decisions or the answers to questions that are taken during them.

This will provide an easy way to find back when, where and why a decision has been taken.

Each meeting is displayed in the agenda. listed in chronological order during the day.

If the manager is filled in, he is automatically added to the meeting assignments.

If one of the resources is assigned to another meeting on the same day, a non-blocking message is displayed if the times overlap.

Project task

- Meeting is a planned task. they appear in the Gantt diagram and imputation sheets with the date fixed.
- You can assign project resources (named attendees).
- You have progress section that allows for followed resources work and cost.

Section Description

Other sections

- *Attendees*
- *Progress*
- *Predecessor and Sucessor*
- *Linked element*
- *Attachments*
- *Notes*
- *Live meeting*

Table 1: Required field

Field	Description
Id	Unique Id for the meeting.
Name	Short description of the meeting. If not set, will automatically be set to meeting type completed with me
Meeting type	Type of meeting.
Project	The project concerned by the meeting.
Meeting date	The initial date of the meeting, including the start and end time.
Location	Place (room or else) when meeting will stand.
Email invitation	Send an email to the expected participant in the *Attendees* section
Start Meeting button	Allow to go on the *live meeting* screen.
Agenda of the meeting	Description of the meeting and agenda.

Description can be used to store agenda.

Email invitation

- Allows to send the email to attendees.
- They will receive the invitation in their calendar management tool.

Treatment

Table 2: Required field

Field	Description
Parent activity	Parent activity of the meeting. In the WBS structure, under which the meeting will be displayed in the Gantt pla
Status	Actual *status* of the meeting.
Responsible	Resource who is responsible for the organization of the meeting. Attention ! The responsible is not automaticall
In progress	Flag to indicate that meeting has been taken into account.
Done	Flag to indicate that meeting has been held.
Closed	Flag to indicate that meeting is archived.
Cancelled	Flag to indicate that meeting is cancelled.
Minutes	Minutes of the meeting.

Note: Minutes

You can enter here only a short summary of the minutes and attach the full minutes as a file.

Steering

Retrieving the agenda of a meeting from the description of its type

Diary

Viewing meetings in agenda, even if they are not planned

9.1.1 Live Meeting

LiveMeeting you can manage meetings in an *Agile* way.

- Manage written production quickly and easily.
- Recovery in the liveMeeting of the agenda established on the meeting screen.
- Automatic saving of the minutes when leaving the live meeting.
- Automatically share the time between all participants.
- Dynamically measure the speaking time of each participant.
- Easily write minutes while assistants speak.
- Easily manage actions / decisions / questions while writing minutes.
- Manage tickets, activities, actions and requirements with Kanban while writing minutes.
- Saving the items entered in the live in the minutes section of the meeting.

Click on `Start meeting` button to access the Live Meeting Management screen.

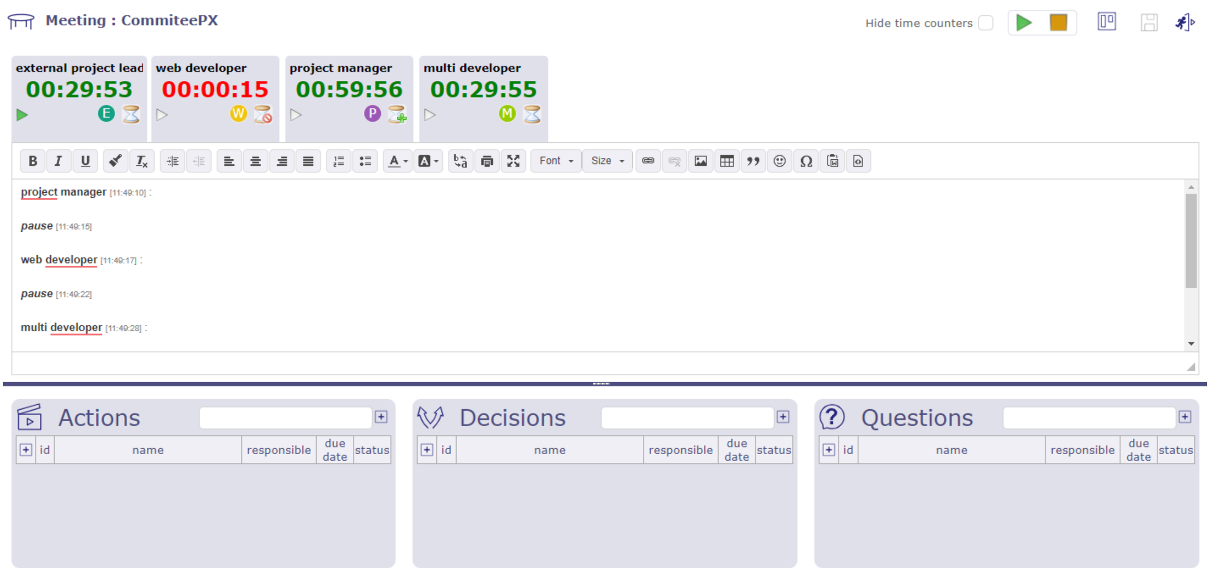


Fig. 2: The Live Meeting screen

- Click on **Hide time counters** to show or hide participants' tabs with their speaking time
- Click on  to start the meeting and to start decrementing the speaking time
- Click on  to stop the meeting and close the LiveMeeting window
- Click on  to exit the LiveMeeting screen
- Click on  to save the live meeting report

See: *Live Meeting*

Kanban Management

Click on [icon] to manage the kanbans

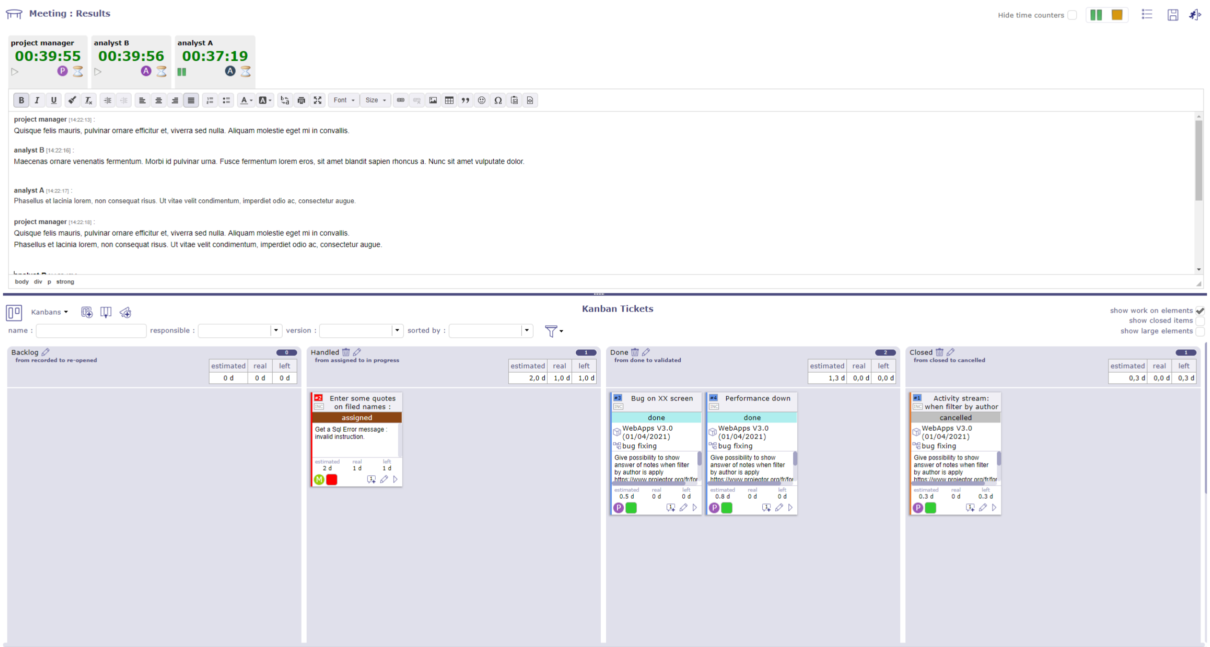


Fig. 3: Kanban management in the Live Meeting

You can manage your Kanban tiles directly in the Live Meeting interface.

See: *KanBan*

9.1.2 Periodic meetings

Periodic meeting is a way to define some meetings that will occur on a regular basis.

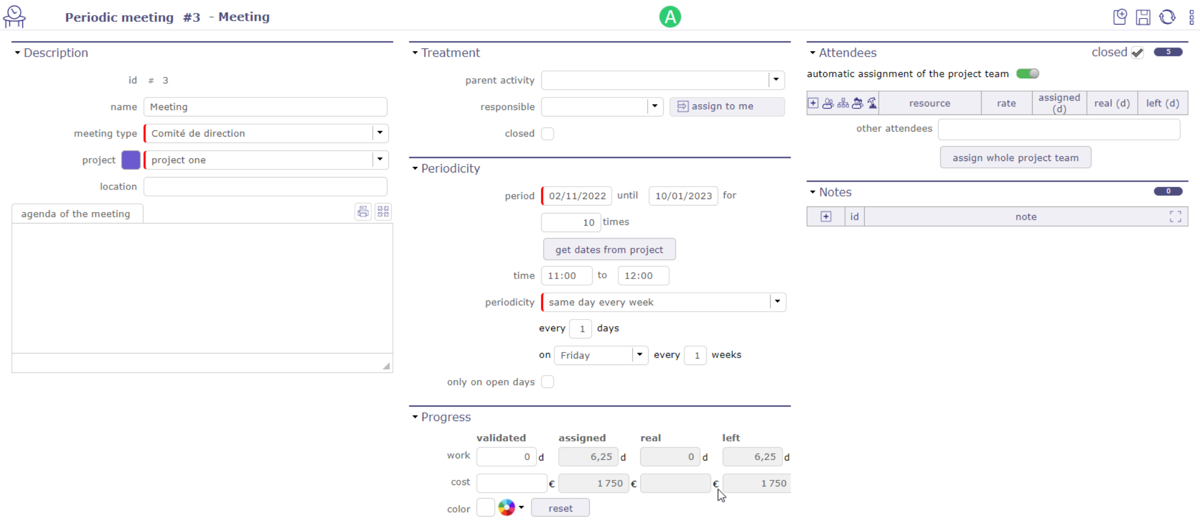


Fig. 4: Periodic meeting screen

> **Warning:** Most fields match between meeting and recurring meeting, but some information is not present for recurring meetings, such as minutes or status.

When recording a recurring meeting, each meeting is automatically created in a parent folder, the recurring meeting.

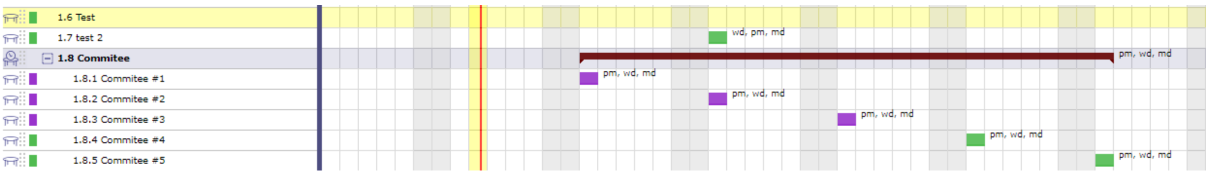


Fig. 5: Display of unit meetings under the parent folder

When the parent folder is closed, the meeting lines are not visible, but they appear on the same line as the folder.

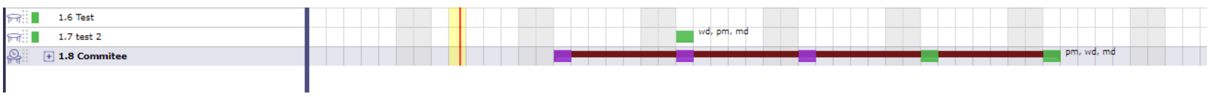


Fig. 6: Display of single meetings on the parent folder bar

Changes can be made on each group meeting.

In most cases, these changes will not be affected or erased by periodic meeting updates.

Meetings created by recording a recurring meeting will also be displayed on the meetings screen.

> **Other sections**
>
> - *Attendees*
> - *Progress*
> - *Predecessor and Sucessor*

- *Notes*

Description section

Attendees can be defined on a periodic meeting.

Assigments of the entire project team to a periodic meeting (as existing for a simple meeting) is possible but the participants will be visible only on unit meetings.

The periodic meetings will not be planned, only elementary meetings will be.

So left work will always be set to zero on periodic meetings.

Resource who is responsible for the organization of the meeting. But the responsible is not automatically assigned.

Update on a periodic meeting

On each update of a periodic meeting, meetings are re-evaluated.

This may lead to deletion of some meetings.

This will also reposition meetings, even if their planned dates were elementary updated.

Attendees assignment section

Attendees can be defined on a periodic meeting.

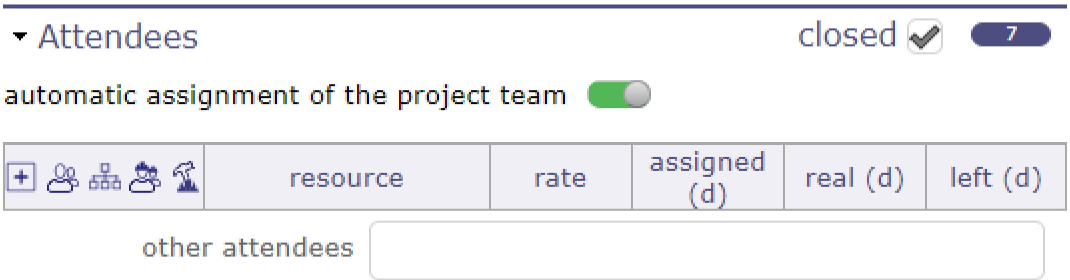


Fig. 7: attendees section

The assignment of a project team to a periodic meeting is possible.

The participants are visible in read-only mode from the recurring meeting but can be modified individually on the unit meeting screens.

Section Treatment

You can defined a parent activity for the meeting.

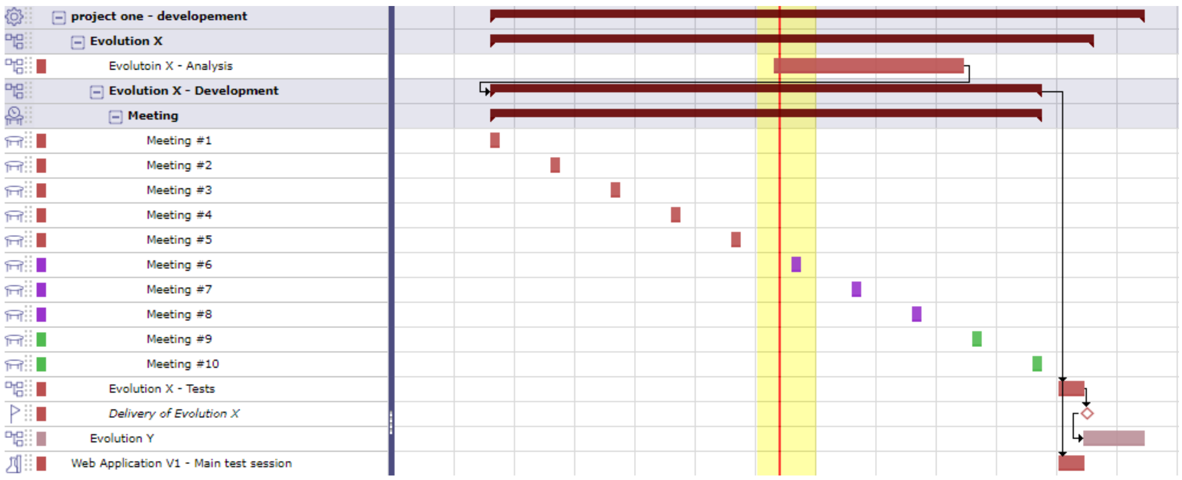


Fig. 8: display of meetings under a parent activity on the Gantt chart

The meetings will be display under the selected activity.

Periodicity section

You can set a time and frequency for your meetings.

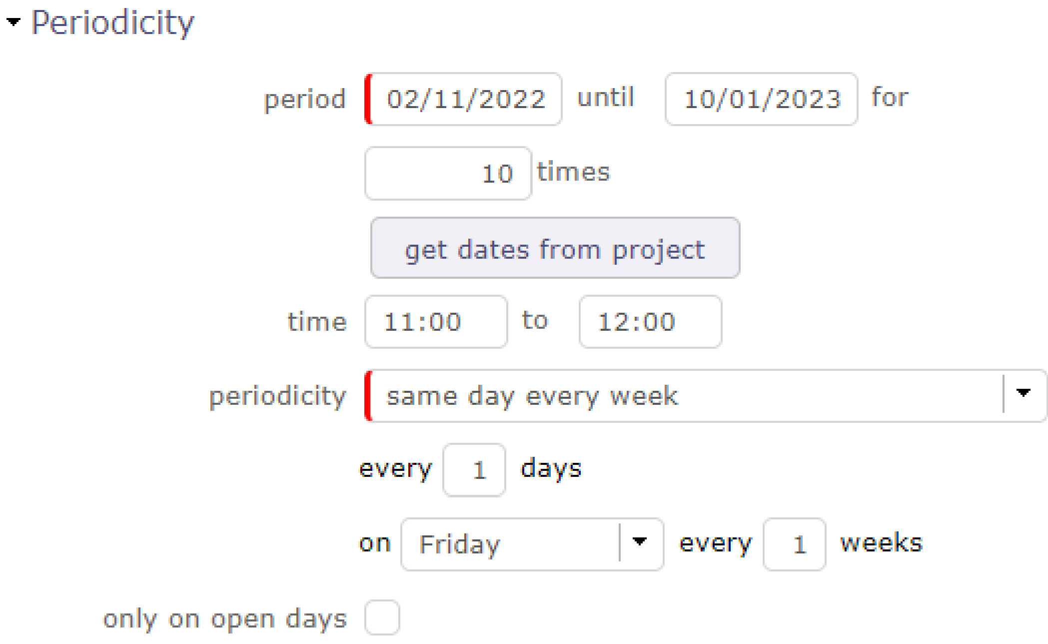


Fig. 9: Periodicity Section

The period of the recurring meetings can be entered manually or you can retrieve the dates of the selected project by clicking on the **get dates from project** button.

The number of occurrences and/or the end date can be completed automatically by entering one or other of these criteria.

Fill in the time - Meeting schedules allows you to automatically calculate and fill in the workload to be assigned to the resources - participants of the meeting in the table of assignments.

Periodicity

Depending on the frequency selected in the drop-down list, the parameter information displayed is different.

Every day

Example –> every **3** days

The number of occurrences being to be personalized

Same day every week

example –> On **Friday** every **2** weeks

Same day every month

example –> day **7** every **2** month

Same week every month

example –> On **1** th **Monday** every **2** months

If the periodicity is likely to include non-working days, check the box to keep only meetings that will fall on a working day.

9.1.3 Attendees section

This section allows to define the list of attendees to the meeting.

- The list of participants is displayed with
  - The assignment rate
  - The time assigned and planned for this activity
  - The real time filled in by the resources
  - The remainder to be done.
- If a resource has an entered entry date then they will be taken into account.
- Resources prior to their entry date will not be displayed on meeting prior to this date.
- So meeting works of these attendees are booked in the project.
- Ability to assign to a meeting a resource or a contact or a user not member of the project team.
- A special icon is placed on resource rows representing a pool of resources.

Fig. 10: Attendees section

You can assigned a team to the pool of resource, one dynamic and the other static.

- The switch button **automatic assignment of the project team** above the assignment table allows you to assign the current project team.

  If a resource is added to the project then they will also be assigned to the meeting.

- The **assign whole project team** button assigns the project team from time to time.

  If a resource is assigned to the project later, it will not be added to the meeting assignment

Attendee list

- Click on to add a new attendee
- Click on modify the assignment of the resource
- Click on to delete the assignment of the resource
- Click on to divide the assignement with another resource
- Click on to go to the resource's timesheet screen for the week the meeting was planned

  Mandatory participant and Optional attendant option

  The icon indicates that the presence of the participant is mandatory

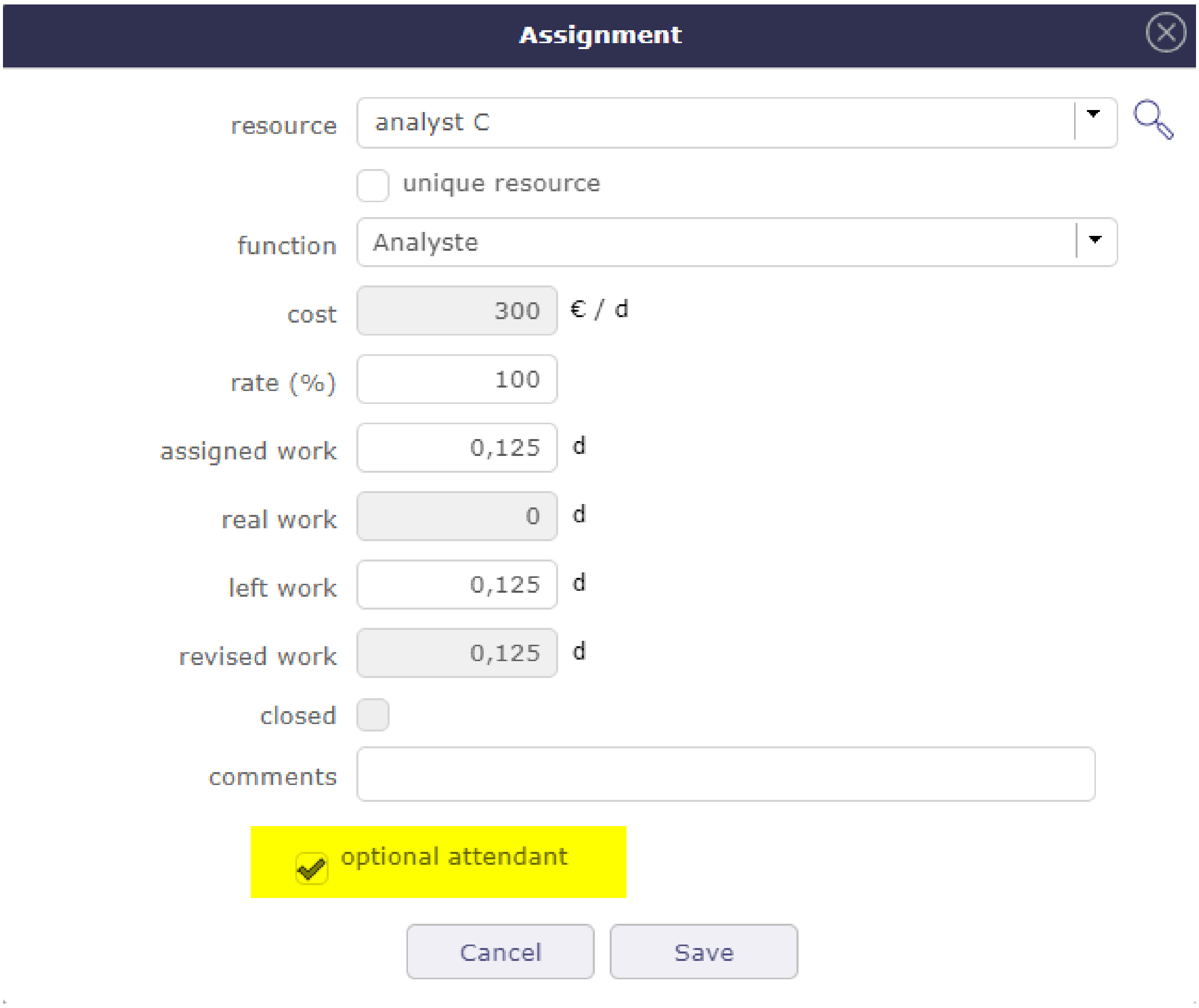


Fig. 11: Optional attendant

More detail about how assigned project resources, see: *Assignment section* section.

Other attendees

Extra list of persons attending (or expecting to attend) the meeting, in completion to resource in the attendee list.

- You can enter attendees by email address, resource or contact name, user name or initial without caring about.

- Just separate attendees with commas or semicolons.

Note: Duplicate email addresses in the attendee list will automatically be removed.

9.2 Change Request

The change request feature provides effective tracking of your customer's change requests.

Its purpose is to describe a process that makes clear how the change is communicated, how decisions will be made and by whom and how the project will adapt accordingly.

A change request is very close to a requirement, it can also generate several requirements. The change request is necessarily linked to a project and can be linked to a product.

Section Description

Table 3: Required field

Field	Description
ID	Request ID number
Name	Fill in the title of the change. It must be understandable at first reading
Change Request Type	define the type of the request
Project	Link the change request to a project
Product	Link the change request to a product
External reference	Name of the external reference
Contact	Name oft the contact
Origin	Link to the item causing the change request
Business Features	Functionality trades whose modification request will need
Urgency	Determine the urgency of the request
Initial due date	Date you committed to the client
Planned due date	Deadline actually planned
Description	Describe the change request you want to initiate
Justification	Justify this change request.
Expected benefit	List the potential benefits that this change request will bring

Section Treatment

Table 4: Required field

Field	Description
Status	Actual *status* of the decision
Responsible	Resource who is responsible for the follow-up of the question
Criticality	how critical is the demand
Feasibility	how feasibility is the demand
Technical risk	what are the technical risks
Priority	What is the priority of the request
Estimate work	Estimate work for the resquest
Estimate cost	Estimate cost for the request
Target Version	The target version affected by the request
In progress	Flag to indicate that question has been taken into account
Approved by	Indicates the date the application was approved and by whom
Done	Flag to indicate that question has been answered
Closed	Flag to indicate that decision is archived
Cancelled	Flag to indicate that decision is cancelled
Result	Enter the result of the implementation of the change request
Efficiency Annalyse	Complete the analysis of the effectiveness of the implementation of the change request

9.3 Decisions

Decisions are stored to keep track of important decisions, when, where and why the decision was taken.

You can link a decision to a meeting to rapidly find the minutes where the decision is described.

Section Description

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Table 5: Required field

Field	Description
Id	Unique Id for the decision.
Name	Short description of the decision.
Decision type	Type of decision.
Project	The project concerned by the decision.
Description	Complete description of the decision.

Section Validation

Table 6: Required field

Field	Description
Status	Actual *status* of the decision.
Decision date	Date of the decision.
Origin	Origin of the decision.
Accountable	Resource accountable for the decision.
Closed	Flag to indicate that decision is archived.
Cancelled	Flag to indicate that decision is cancelled.

Field Origin

It can be either the reference to a meeting where the decision was taken (so also add the reference to the meetings list), or a short description of why the decision was taken.

Field Accountable

The person who took the decision.

9.4 Questions

Question are stored to keep track of important questions and answers.

In fact, you should keep trace of every question and answer that have an impact to the project.

The questions can also afford an easy way to track questions sent and follow-up non-answered ones.

This will provide an easy way to find back when, who and precise description of the answer to a question.

Also keep in mind that some people will (consciously or not) be able to change their mind and uphold it has always been their opinion…

You can link a question to a meeting to rapidly find the minutes where the question was raised or answered.

Monitoring indicator

Possibility to define indicators to follow the respect of dates values.

`Respect of initial due date`

`Respect of planned due date`

Section Description

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Table 7: Required field

Field	Description
Id	Unique Id for the question.
Name	Short description of the question.
Question type	Type of question.
Project	The project concerned by the question.
Description	Complete description of the question.

Section Answer

Table 8: Required field

Field	Description
Status	Actual *status* of the decision.
Responsible	Resource who is responsible for the follow-up of the question.
Initial due date	Initially expected date for the answer to the question.
Planned due date	Updated expected date for the answer to the question.
Replier	Name of the person who provided the answer.
In progress	Flag to indicate that question has been taken into account.
Done	Flag to indicate that question has been answered.
Closed	Flag to indicate that question is archived.
Cancelled	Flag to indicate that question is cancelled.
Response	Complete description of the answer to the question.

9.5 Deliverables

This section allows to define the list of deliverables items.

This will provide an easy way to organize your due to customers.

In fact, you can keep track of every deliverables.

Deliverables links with Milestones.

Note: If you change the responsible of milestones, the responsible of deliverable will automatically changed, and vice versa.

Section Description

Table 9: Required field

Field	Description
Id	Unique Id for the KPI.
Name	name of the deliverable.
IdDeliverableType	id of the Deliverable Type.
IdProject	id of the Project.
externalReference	name of the external reference.
Description	Complete description of the deliverable.

Note: You can estimated quality value for deliverable and this will produce a KPI.

See: *KPI definitions*

Section Validation

Field	Validation
Delivery status	Actual *status* of the delivery.
Deliverable	Weight of the quality of the deliverable.
Responsible	to name
due date	as planned
Closed	Box to indicate that delivery is archived.

To follow life cycle management on deliverables (status managed as a workflow)

9.6 Incomings

This section allows to define the list of incomings items from customers.

It can be an indicator to follow if you can begin an action. For example, if you need an item from customer.

Incomings links with Milestones.

Note: If you change the responsible of milestones, the responsible of Incomings will automatically changed, and vice versa.

You can estimated quality value for incoming and this will produce a KPI. See: *KPI definitions*

9.7 Deliveries

Deliveries items are stored to keep track of deliveries.

Added list of deliverables integrated in delivery.

Note: Automatic dispatch of delivery status to deliverables.

Section Description

Table 10: Required field

Field	Description
Id	Unique Id for the delivery.
Name	Short description of the delivery.
Deliverable type	Type of deliverable.
Project	The project concerned by the delivery.
ExternalReference	name of the external reference.
Description	Description of the delivery.

Section Validation

Other sections

- *Deliverables*
- *Linked element*
- *Attachments*
- *Notes*

Field	Description
Delivery status	Actual *status* of the delivery.
Resource	resource of the delivery.
Planned date	Expected date of delivery.
Real date	Effective delivery date.
Validation date	validate the delivery date.
Closed	Flag to indicate that delivery is archived.

To follow life cycle management on deliveries (status managed by a workflow)

9.8 Mails follow-up

Incoming and outgoing mail allows the dematerialization of mail to facilitate its distribution, allow archiving and monitoring by all employees

Incoming mails

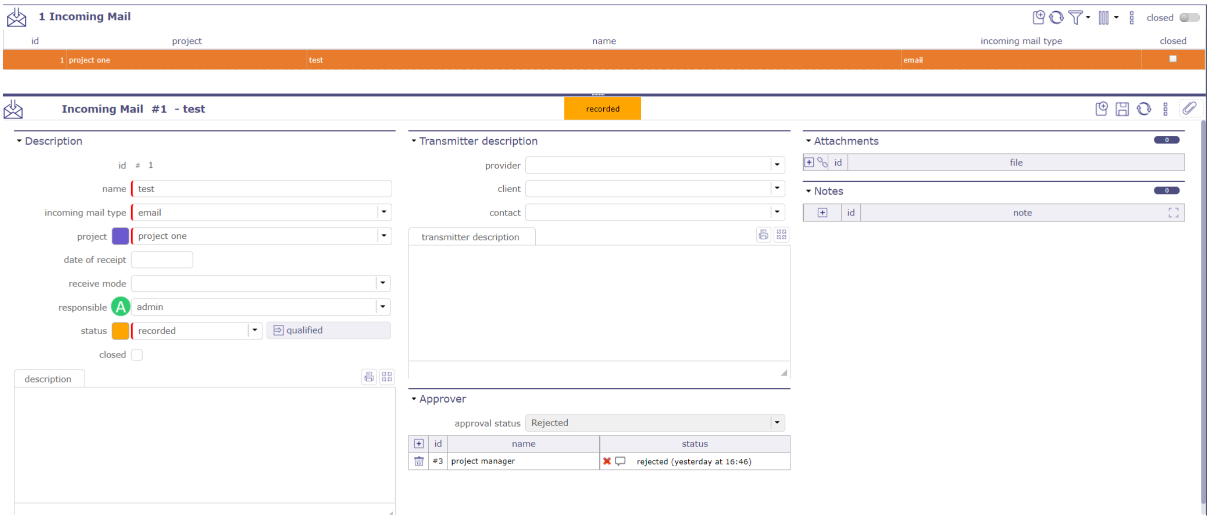


Fig. 12: Incoming mails screen

Table 11: Required fields

Field	Description
Id	Unique Id for the context.
Name	Name of the mail
Incoming mail type	Type of the mail*
Project	Name of the project to which the mail is attached
Date of receipt	Date of receipt of mail
Receive mode	How was the mail received*
Responsible	person handling mail
Status	Status of the mail
Closed	Box checked indicates the mail is archived.
Cancelled	Box checked indicates the mail is cancelled.

* customizable in value lists

Transmitter description

In this section it is possible to indicate which transmitter is.

If it is a contact known to your database, you can select it directly from the lists.

Approvers

You can define approvers for a mail.

- Click on [+] to add an approver
- Click on [trash] to delete an approver

On the incoming mail screen, the approver can approve or reject the maiml.

All approvers of the mail can view the response of other approvers.

Approval status

This status allows you to globally track the status of the approval.

It can be used in a filter, like all the other fields of the mail object.

calculated according to the approval status of the mail it may take the following values:

- **Without approval:** if no approver has been added to the list of approvers
- **Rejected:** if at least one approver rejected the mail
- **Pending approval:** if there is at least one approver who has not approved the document and no one has yet rejected the mail
- **Approved:** if all approvers approved the mail.

Outgoing mails

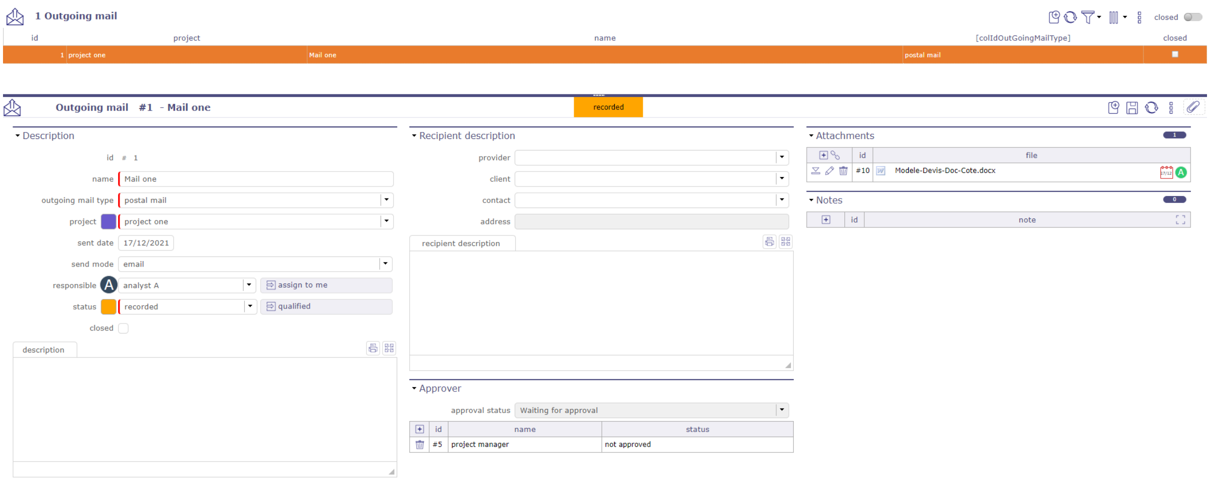


Fig. 13: Outgoing mails screen

Table 12: Required fields

Field	Description
Id	Unique Id for the context.
Name	Name of the mail
Outgoing mail type	Type of the mail*
Project	Name of the project to which the mail is attached
Sent date	Date of mailing
Sent mode	How was the mailing*
Responsible	person handling mail
Status	Status of the mail
Closed	Box checked indicates the mail is archived.
Cancelled	Box checked indicates the mail is cancelled.

* customizable in value lists

Transmitter description

In this section it is possible to indicate which transmitter is.

If it is a contact known to your database, you can select it directly from the lists.

Approvers

You can define approvers for a mail.

- Click on to add an approver
- Click on to delete an approver

On the outgoing mail screen, the approver can approve or reject the mail.

All approvers of the mail can view the response of other approvers.

Approval status

This status allows you to globally track the status of the approval.

It can be used in a filter, like all the other fields of the mail object.

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- **Without approval:** if no approver has been added to the list of approvers
- **Rejected:** if at least one approver rejected the mail
- **Pending approval:** if there is at least one approver who has not approved the document and no one has yet rejected the mail
- **Approved:** if all approvers approved the mail.

9.9 Project Analysis

Projeqtor allows you to record assumptions, constraints and lessons learned.

This involves having several screens to enter this information which can be linked to the project like each element of ProjeQtOr.

These screens will allow you to establish a management plan for your projects, whatever they may be.

9.10 Configuration Management

Configuration management consists of managing the technical description of a system, as well as managing all changes made during the evolution of the system.

It is the set of processes to ensure the conformity of a product to the requirements, throughout its life cycle.

In computing, for example, configuration management can be used for many purposes.

- To store and trace the different versions or revisions of any information intended to be used by a system (hardware, software, document, unit data, etc.).
- To deploy configurations through a computer park in the form of files and data.
- Manage source codes …

9.10.1 Products

Allows to define product and sub-product.

Allows to link components to product.

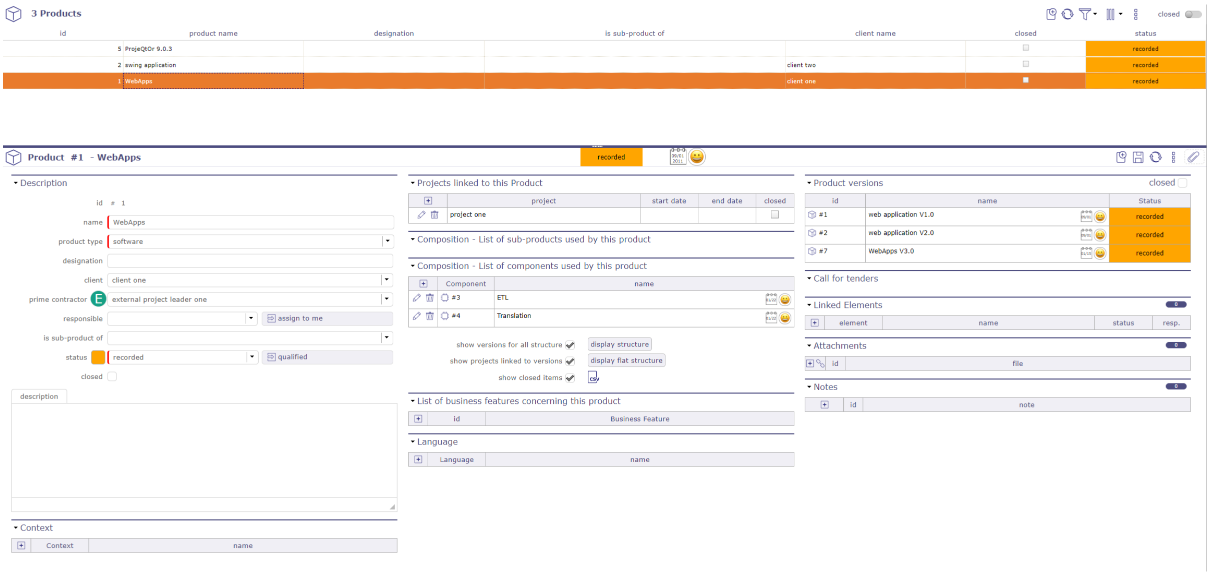


Fig. 14: Product configuration screen

Description

Other sections

- *Attachments*
- *Notes*

Table 13: Required fields

Field	Description
Id	Unique Id for the product.
Name	Name of the product.
Product type	Type of product.
Designation	Trade name of the product known outside the company.
Customer	The customer the product should be delivered to.
Prime contractor	The contact, into customer organization, who will be responsible for the product delivery.
Responsible	Person responsible for the product.
sub-product	Name of the top product if this product is a sub-product.
Status	State to be registered.
Closed	item is closed if checked
Description :	Box checked indicates the product is archived.

Treatment

You can create many links between products, product versions and component

Project linked to this product

Possibility of attaching the products of the list to projects.

When you link a project to a product, all versions of this product are going to be linked.

The start and end date corresponds to the duration of this link.

Composition

List of sub-products and list of components used by this product

See: *Relationships*.

Structure

You can display 2 ways to display the structure. Normal and flat.

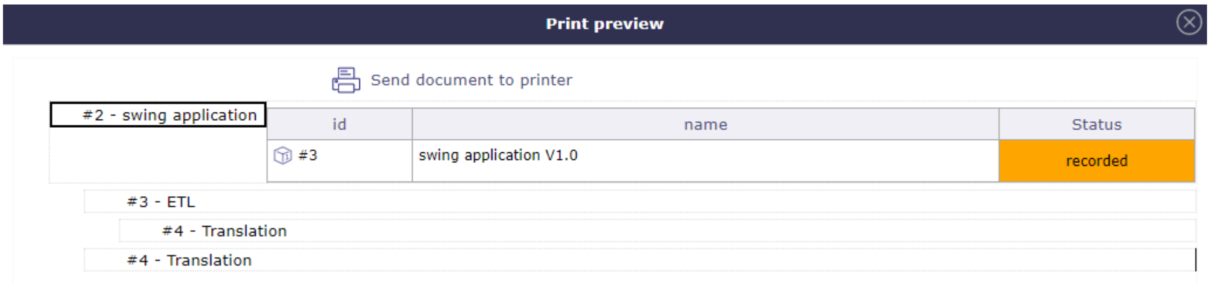


Fig. 15: Normal display the product structure

Box checked "Show versions for all structure" allows to display versions of sub-products and components.

Box checked "Show projects linked to versions" allows to display projects linked.

9.10.2 Product Versions

Allows to define versions of a product.

Allows to link a component version to product version.

Allows to link the product version to a project.

Ability to define the compatibility between product versions (feature activated through a global parameter)

Automatic formatting of version name

Possibility to define if the version name is automatically produced from the product name and version number.

Set *Global Parameters* to activate this feature.

Else, the version name will entered manually.

By profile, possibility to have a different list of the version of the original product according to the status.

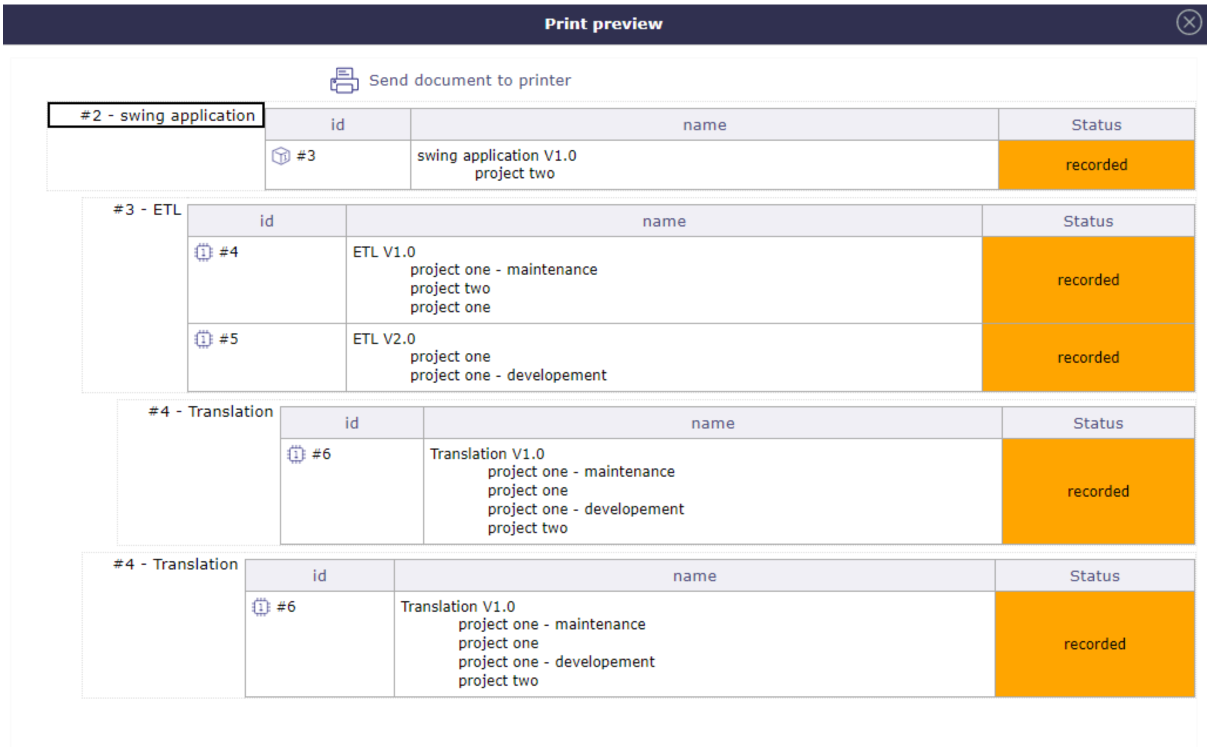


Fig. 16: Display the product structure with the boxes checked

Description

Other sections

- *Projects linked to this version*
- *Composition…*
- *Attachments*
- *Notes*

Table 14: Required field

Field	Description
Id	Unique Id for the version
Product	The product on which the version applies
Version number	Version number of the product
Product v° type	Type of the product version: major, minor, patch
Name	Name of the version
Prime contractor	The contact, into customer organization, who will be responsible for the version delivery
Responsible	Resource responsible of the version.
Sart date	Initial, planned and real start dates of the version
Delivery date	Initial, planned and real delivery dates of the version
Entry into service	Initial, planned and real entry into service date of the version
End date	Initial, planned and real end dates of the version
Status	State to be registered
Description	Complete description of the version

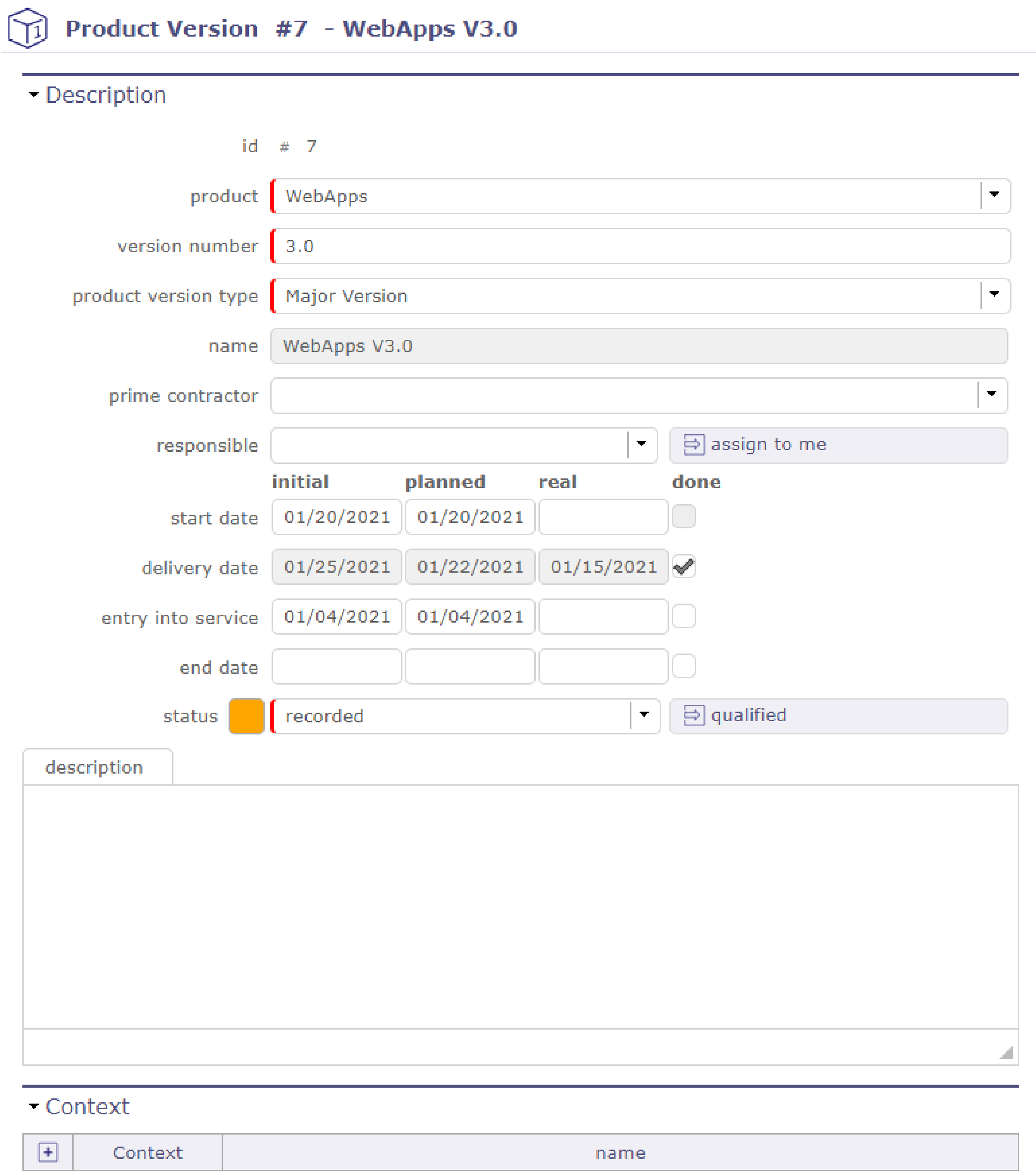


Fig. 17: Product version description

Version number & Name

The field “Version number” appears only if the global parameter “Automatic format of version name” is set to Yes.

The field “Name” will be read only.

Prime contractor

The field “Prime contractor can be different from product prime contractor.

Entry into service (Real)

The field “Entry into service” specify the date of entry into service.

The box “Done” is checked when the real date field is set.

End date (Real)

The field “End date” specify the date end-of-service.

The box “Done” is checked when the real date field is set.

9.10.3 Components

Allows to define product components.

Allows to define products using the component.

Possibility to define component types and component versions that will only be used for definition of structure (not for Version Planning or Tickets)

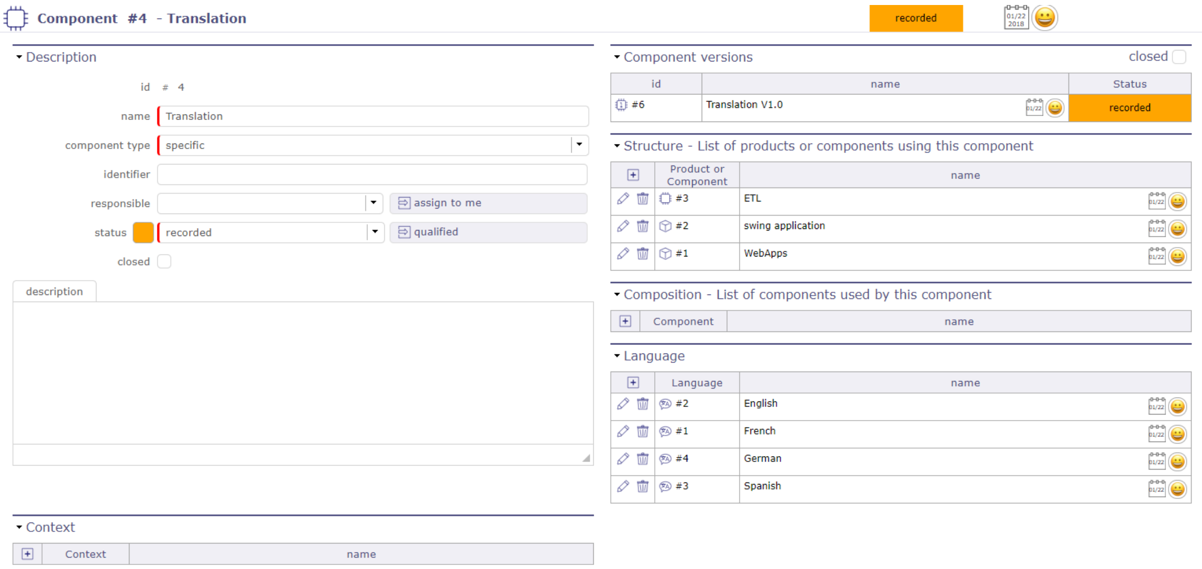


Fig. 18: Component details

Description

Other sections

- *Structure…*
- *Composition…*
- *Attachments*
- *Notes*

Table 15: Required field

Field	Description
Id	Unique Id for the component
Name	Name of the component
Component type	Type of component
Identifier	Another name to identify the component
Responsible	Person responsible for the component
Statut	State to be registered
Closed	Box checked indicates the component is archived
Description	Complete description of the component

Component versions

List of versions defined for the component.

Component versions are defined in *Component Versions* screen.

9.10.4 Component Versions

Allows to define versions of a component.

Allows to link a product version to component version.

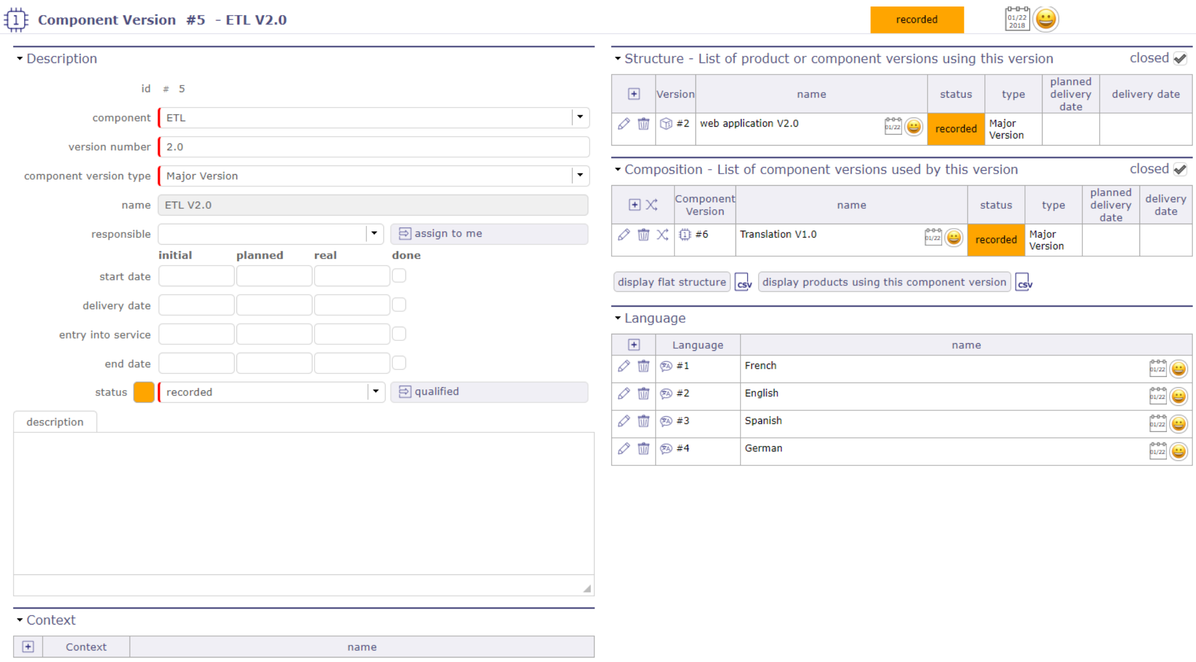


Fig. 19: Component version details

Automatic formatting of version name

Possibility to define if the version name is automatically produced from the component name and version number.

Set global parameters to activate this feature.

Else, the version name will entered manually.

Description

Other sections

- *Structure…*
- *Composition…*
- *Attachments*
- *Notes*

Table 16: Required field

Field	Description
Id	Unique Id for the version
Component	The component on which the version applies
Version number	V° number of the component
Component V° type	Type of the component version: major, minor or patch
Name	Name of the version.
Responsible	Name of the responsible.
Start date	Initial, planned and real start dates of the version
Delivery date	Initial, planned and real delivery dates of the version
Entry into service	Initial, planned and real entry into service date of the version
End date	Initial, planned and real end dates of the version
Statut	State to be registered
Description	Complete description of the version

Note: Initial Date

when the planned date has been set, the initial date (if it is empty only) will be defined

Version number & Name

The field "Version number" appears only if the global parameter "Automatic format of version name" is set to Yes.

The field "Name" will be read only.

Entry into service (Real)

The field "Entry into service" specify the date of entry into service.

The box "Done" is checked when the real date field is set.

End date (Real)

The field "End date" specify the date end-of-service.

The box "Done" is checked when the real date field is set.

9.10.5 Relationships

product and component elements

Allows to manage relationships between products and components to define product structure.

See possible relationships: *Product structure*

Relationships management

- Click on to create a new relationship. The dialog box "Structure" appear.
- Click on to delete the corresponding relationship.

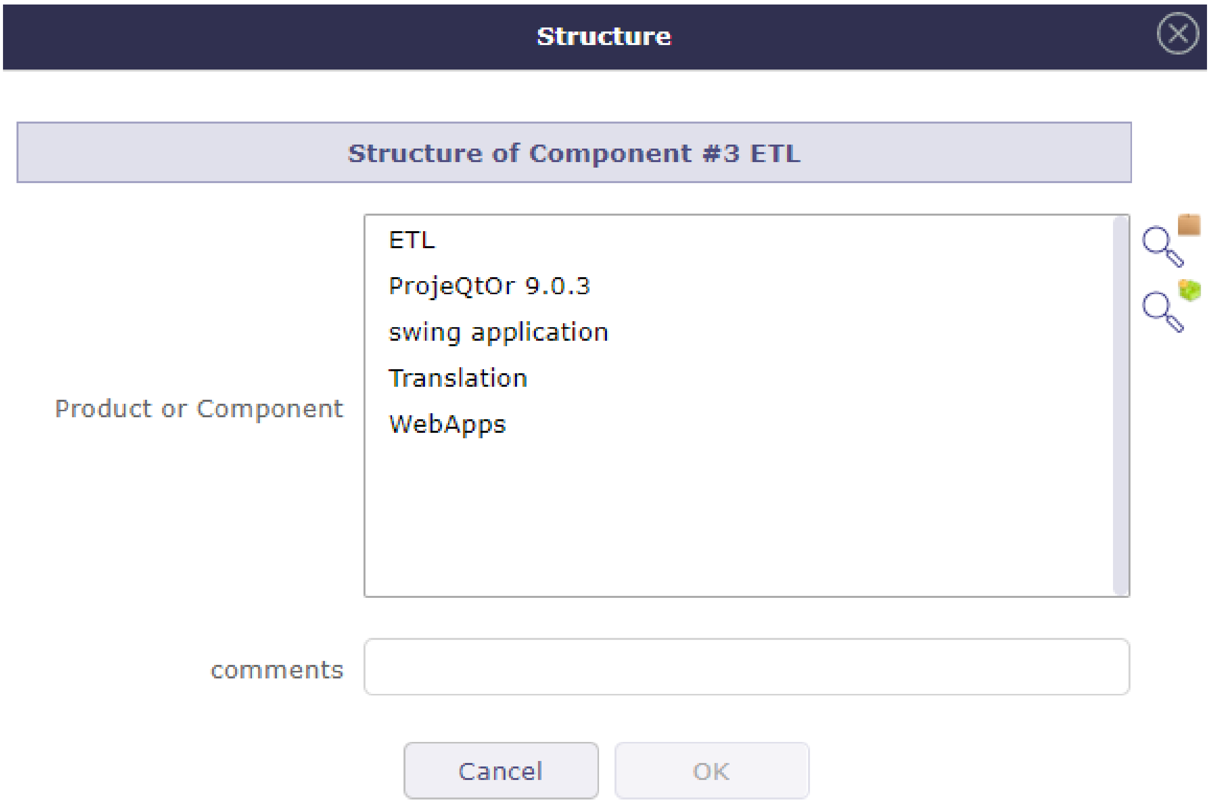


Fig. 20: Structure

versions of products and components

Allows to define links between versions of products and components.

Note: Only with the elements defined in the product structure.

Link management

- Click on to create a new link. The dialog box "Version Structure" appear.
- Click on to delete the corresponding link.

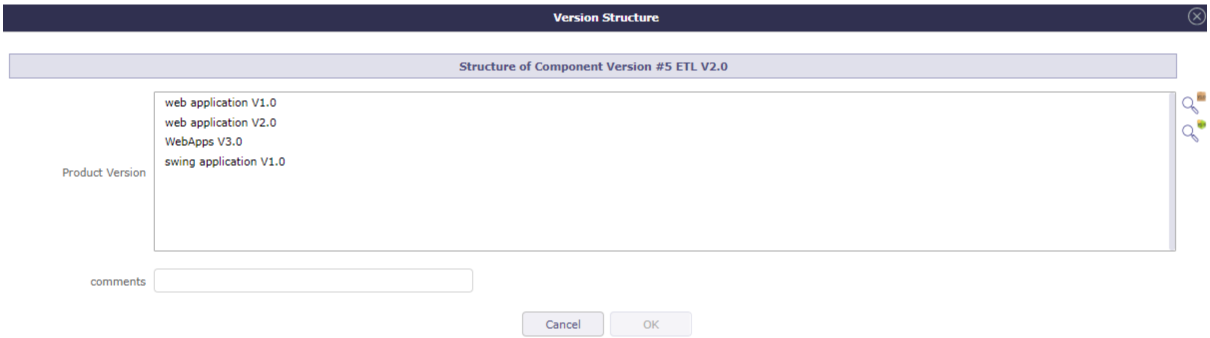


Fig. 21: Version structure

version to projects

This section allows to manage links between projects and versions of products.

Link version to projects management

- Click on to create a new link.
- Click on to update an existing link.
- Click on to delete the corresponding link.

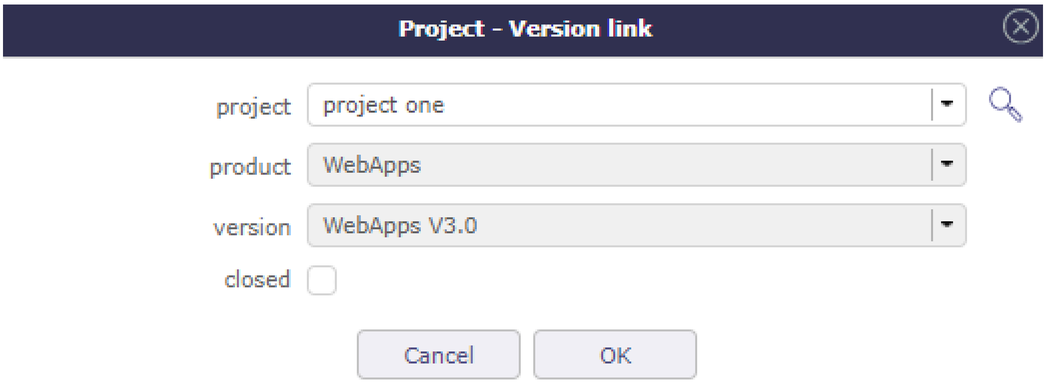


Fig. 22: Project / Version Link

Table 17: Project-Version link dialog box

Field	Description
Project	The project linked to product version or the project list.
Product	Product linked to the project or the list of products.
Version	Product version linked to the project or list of product versions.
Start date	Version start date (Planned start date).
End date	Version end date (release date on the version).
Status	State to be registerd
Closed	Box checked indicates the link is not active anymore, without deleting it.

Fields Project, Product and Version

- From the screen **Projects**, the fields **product and version** will be selectable.
- From the screen **Product versions**, the field **project** will be selectable.

9.10.6 Versions planning

Select one or more product versions and the planning version is displayed.

This planning displays each version of selected product versions and their components from define start date to deliverable date.

To use it define your start and delivery date in Product Version and Component Version.

Note: To insert values you have to activate display the start and delivery milestones' in global parameters otherwise these fields are hidden.

This screen allows to see if the delivery date of Component versions is more later than their Product versions.

Graphically, you can see any delay or incompatibility.

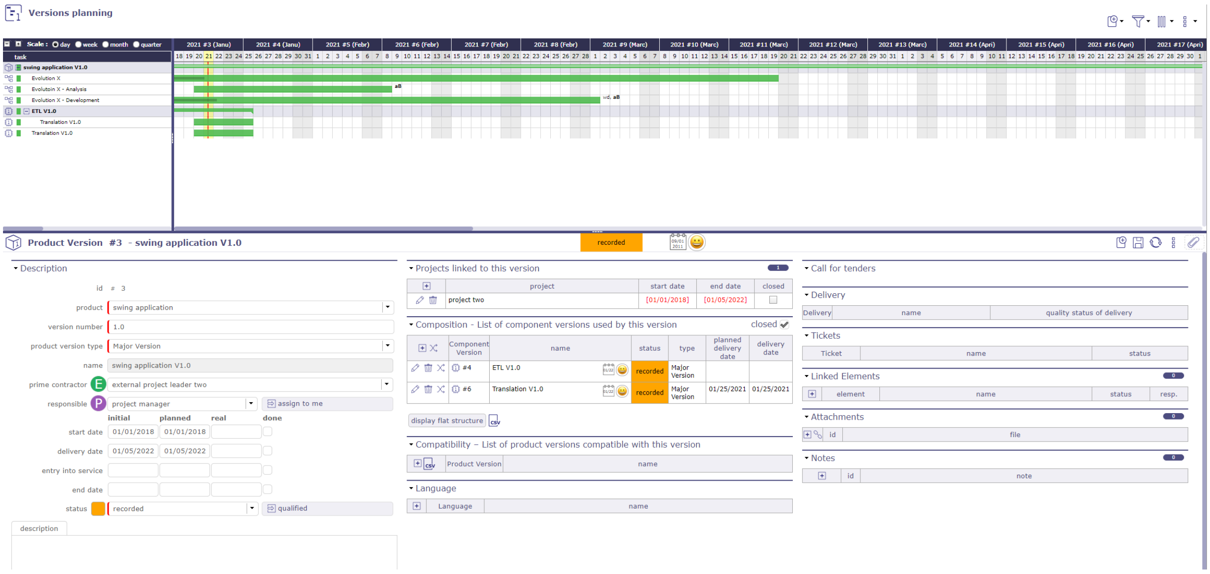


Fig. 23: Planning version

Display options

Click on to add an activity. Click on to filter the version display.

Click on **Show activities from product version** or **Show activities from component version** To display the related activities.

New check boxes will appear: one to show resources and the other to show or hide versions with no activity displayed.

You must select an existing activity to insert the new activity into the WBS structure.

If no activity is selected then the "add new element" icon will be grayed out.

The new activity is automatically inserted after the selected activity.

The new activity is generated on the same project, with the same component, the same component version, and with the same product and the same product version if these elements are filled in on the original activity.

The insertion from the selection of a product and component version will not be possible because we do not know where to insert it in the WBS of the projects.

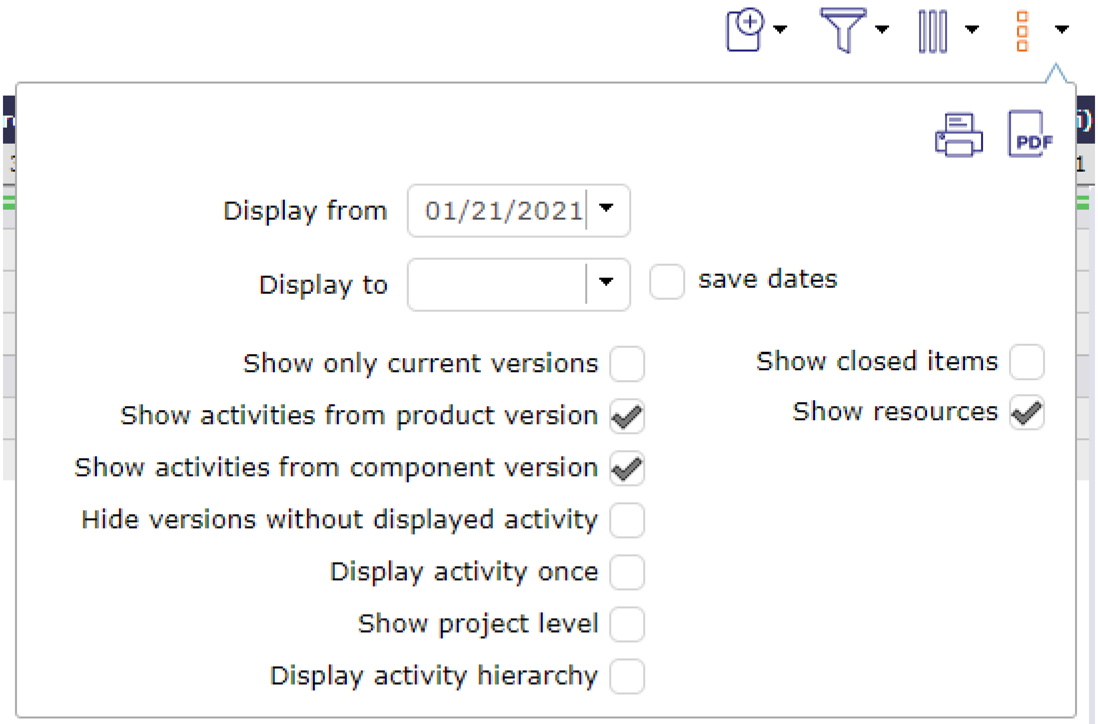


Fig. 24: Version planning options

CHAPTER

TEN

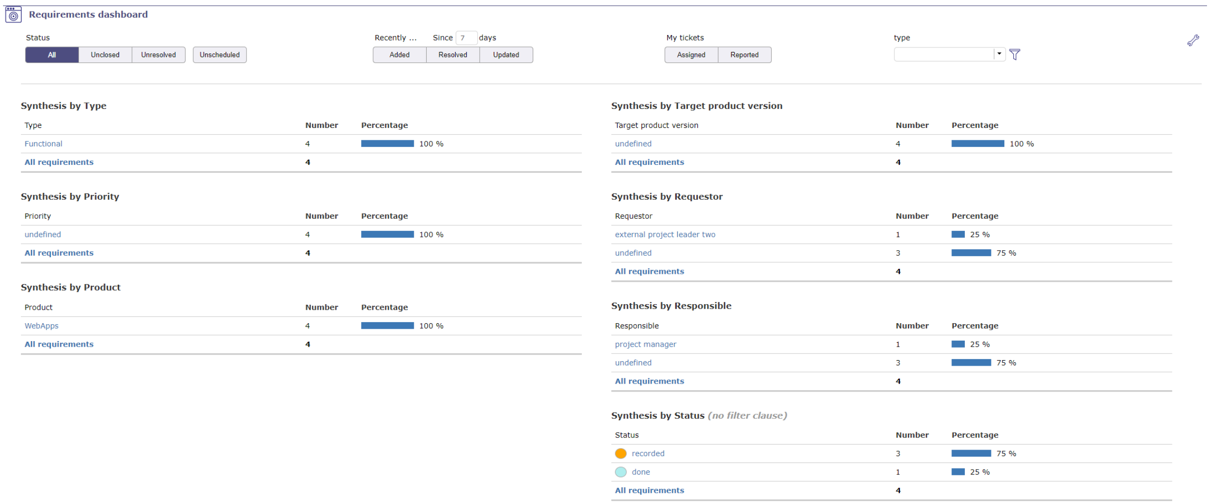
REQUIREMENTS & TESTS

10.1 Requirements dashboard

Allows user to have a requirement global view of his projects.

Shows several small reports, listing the number of requirements by item.

Filters are available to limit scope.



Direct access to the list of requirements

- In reports, click on an item to get list of requirement corresponding to this item.

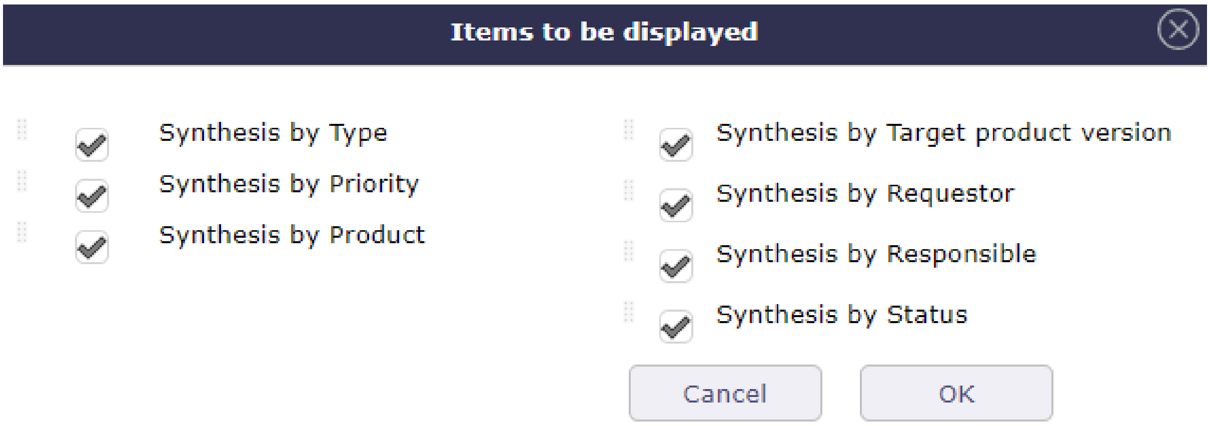
Parameters

- Click on to access parameters.

Important: For **Synthesis by status**, filter clauses are not applicable.

- Allows to define reports displayed on the screen.
- Allows to reorder reports displayed with drag & drop feature.
- Using the selector area button .

  Scope filters



- Filters allow you to restrict the display of saved requirements.
- By status, period, duration, closed element, linked to the user or no related…

No resolution scheduled

- Unscheduled: Requirements whose resolution is not scheduled in a next product version (target product version not set).

10.2 Requirements

Concepts

- *Product*
- *Project*

Requirement is a rule defined for a project or a product.

In most IT projects, requirement can be a functional rule for a software.

It allows to define and monitor cost and delays.

It can be linked to test cases, it's used to describe how you will test that a given requirement.

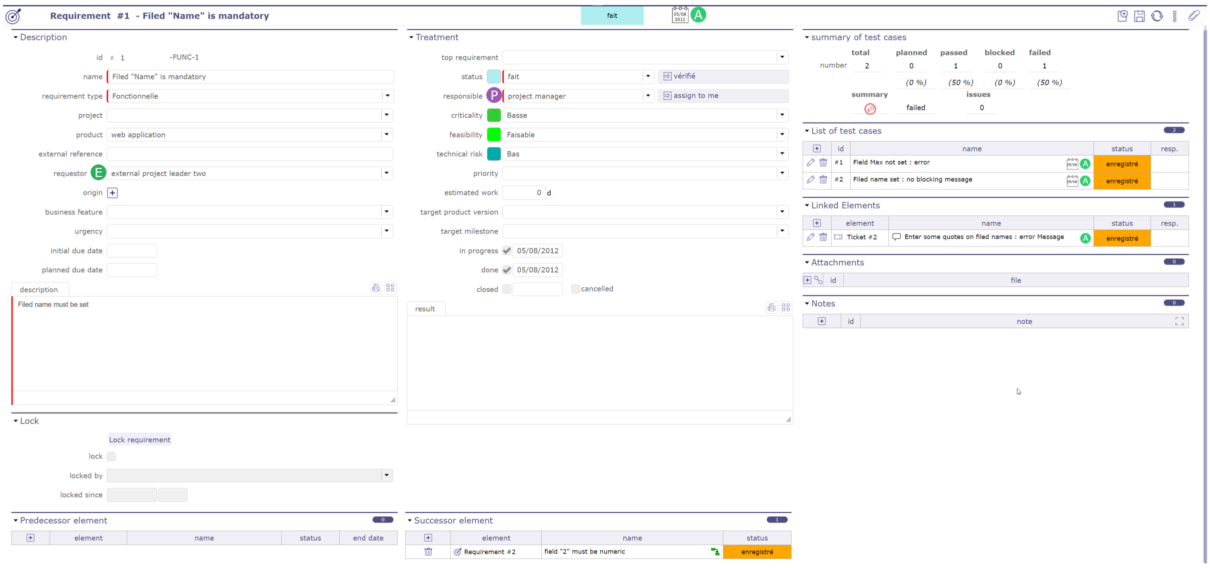


Fig. 1: Requirements screen

Rights management

Linking requirements to a project will limit the visibility, respecting rights management at project level.

Requirement link to test cases

Test cases can be linked to a requirement in **List of test cases**.

Fig. 2: List of test cases section

- Click on to add a test case that will cover the requirement or part of the requirement.
- Click on to search for an item that is not in the list

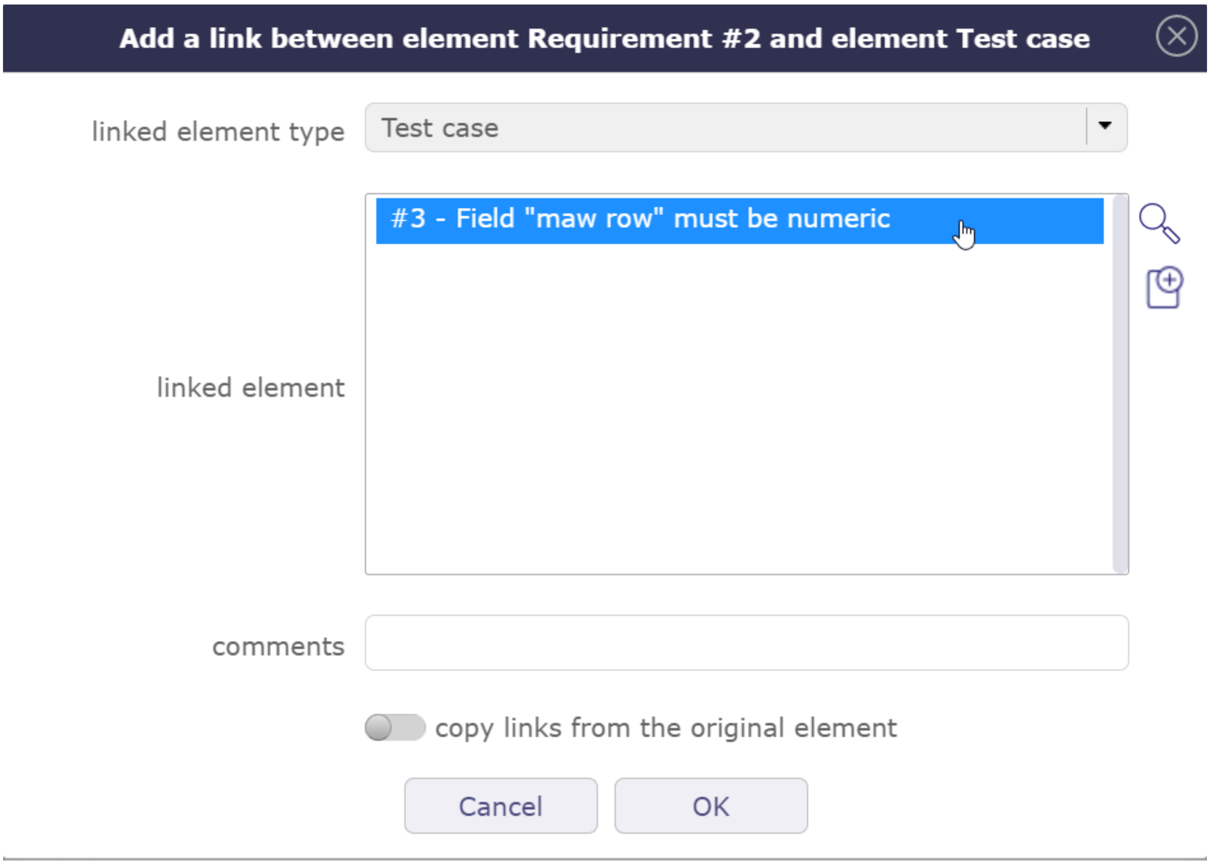


Fig. 3: Add a test case

- Click on to create a new item from the popup

Linking a requirement to a test case will display a summary of test case run (defined in test session). This way, you will have an instant display of test coverage for the requirement.

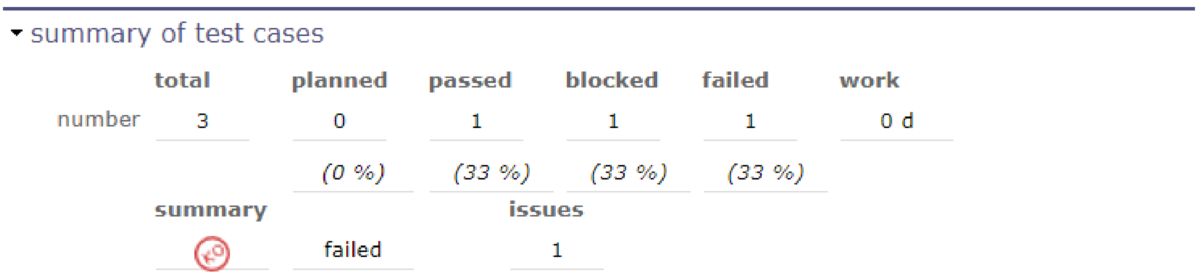


Fig. 4: Summary test cases

This section summarizes the status of test case runs to requirement and test session.

- **Planned:** No test failed or blocked, at least one test planned.
- **Passed:** All tests passed.
- **Failed:** At least one test failed.
- **Blocked:** No test failed, at least one test blocked.

Requirement

Summarizes the status of test case runs for test cases are linked to the requirement.

Because a test case can be linked to several test sessions, total can be greater than linked to the requirement.

Test session

Summarizes the status of test case runs in the test session.

Requirement link to tickets

- When test case run status is set to **failed**, the reference to a ticket must be defined (reference to the incident).
- When the requirement is linked to a test case with this run status, ticket is automatically linked to the requirement.

Predecessor and successor elements

- Requirements can have predecessors and successors.
- This defines some dependencies on the requirements.
- The dependencies don't have specific effects. It is just an information.

Monitoring indicator

Possibility to define *indicators* to follow the respect of dates values.

- Respect of validated end date
- Respect of planned end date
- Respect of requested start date
- Respect of validated start date
- Respect of planned start date
- % final use of validated costs (revised/validated)
- % final use of assigned work (revised/assigned)
- % final use of validated work (revised/validated)
- % final use of assigned work (revised/assigned)
- % progress of validated work (real/validated)
- % progress of assignated work (real/assigned)
- % real progress

Description

Table 1: Required fields

Field	Description
Id	Unique Id for the requirement
Name	Short description of the requirement.
Requirement type	Type of requirement.
Project	The project concerned by the requirement.
Product	The product concerned by the requirement.
External reference	External reference for the requirement.
Requestor	Contact who requested the requirement.
Origin	Element which is the origin of the requirement.
Urgency	Urgency of implementation of the requirement.
Initial due date	Initial due date.
Planned due date	Planned due date.
Description	Long *description* of the requirement.

Fields Project and Product

- Must be concerned either with a project, a product or both.
- If the project is specified, the list of values for field "Product" contains only products linked the selected project.

Treatment

Table 2: Required fields

Field	Description
Top requirement	Parent requirement, defining a hierarchic structure.
Status	Actual *status* of the requirement.
Responsible	Resource who is responsible for the requirement.
Criticality	Level of criticality of the requirement for the product.
Feasibility	Result of first analysis to check the feasibility of the implementation of the requirement.
Technical risk	Result of first analysis to measure the technical risk of the implementation of the requirement.
Estimated effort	Result of first analysis to measure the estimated effort of the implementation of the requirement.
In progress	Box checked indicates the requirement is taken over.
Done	Box checked indicates the requirement has been treated.
Closed	Box checked indicates the requirement is archived.
Cancelled	Box checked indicates the requirement is cancelled.
Target version	Version of the product for which this requirement will be active.
Result	Description of the implementation of the requirement.

Field Target version

Contains the list of product versions available according to the project and product selected.

Lock

A requirement can be locked to ensure that its definition has not changed during the implementation process.

Lock/Unlock requirement

- Button to lock or unlock the requirement to preserve it from being changed.
- Only the user who locked the requirement or a habilitated user can unlock a requirement.

Requirement locked

- When a requirement is locked the following fields are displayed.

Table 3: Fields when the requirement is locked

Field	Description
Locked	Box checked indicates the requirement is locked.
Locked by	User who locked the requirement.
Locked since	Date and time when the requirement was locked.

10.3 Test cases

Test cases are elementary actions executed to test a requirement.

You may define several tests to check a requirement, or check several requirements with one test.

The test case is defined for a project, a product or one these components.

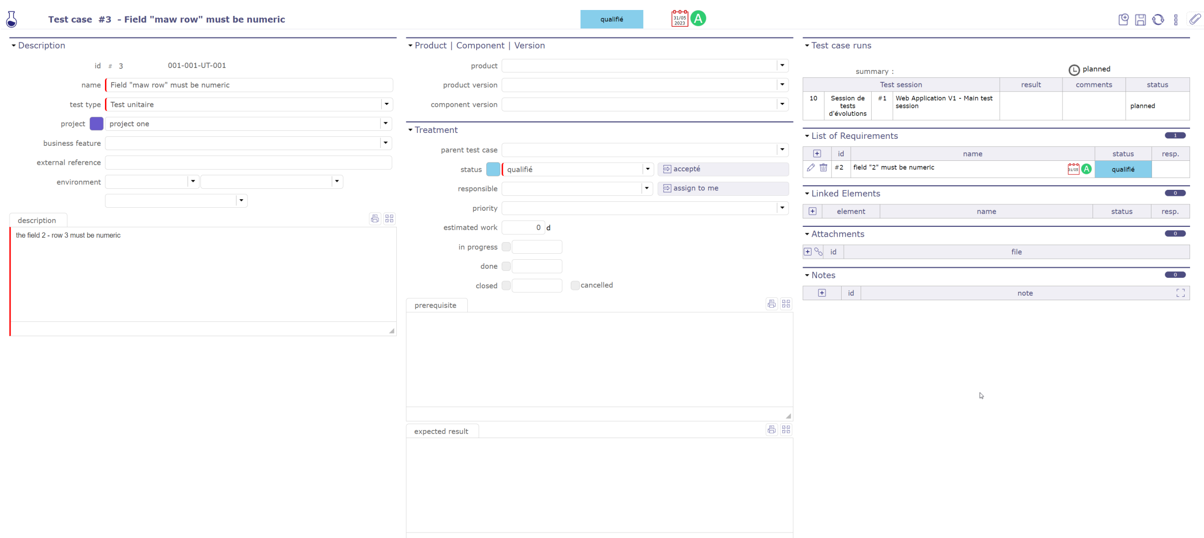


Fig. 5: Test cases screen

Rights management

- Linking test case to a *project* will limit the visibility, respecting rights management at project level.

Predecessor and successor elements

- Test case can have predecessors and successors.
- This defines some dependencies on the test case.
- Dependencies don't have specific effects. It is just an information.

Description

This section allow you to describe the test to run.

Fields Project and Product

- Must be concerned either with a project, a product or both.
- If the project is specified, the list of values for field "Product" contains only products linked the selected project.

Field Version

- Contains the list of product and component versions available according to the project and product selected.

Field Environment (Context)

- Contexts are initialized for IT Projects as "Environment", "OS" and "Browser".
- This can be easily changed values in *Contexts* screen.

Field Description

- The description of test case should describe the steps to run the test.

Treatment

Field	Description
Parent test case	Parent test case, defining a hierarchic structure for test cases.
Status	Actual *status* of the requirement.
Responsible	Resource who is responsible of the test case.
Priority	Level of priority for the test case.
In progress	Box checked indicates the test case is taken over.
Done	Box checked indicates the test case has been treated.
Closed	Box checked indicates the test case is archived.
Cancelled	Box checked indicates the test case is cancelled.
Prerequisite	List of steps that must be performed before running the test.
Expected result	Description of expected result of the test.

Field Prerequisite

If left blank and test case has a parent, parent prerequisite will automatically be copied here.

Test case run

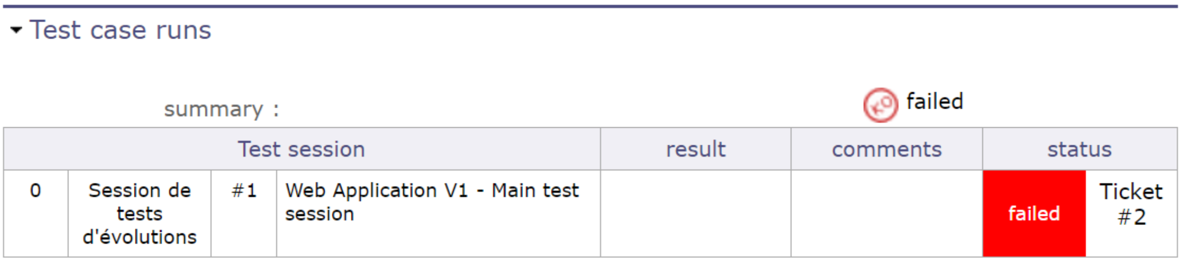


Fig. 6: Test case run

- **Planned:** Test to be executed.
- **Passed:** Test passed with success (result is conform to expected result).
- **Blocked:** Impossible to run the test because of a prior incident (blocking incident or incident on preceding test) or missing prerequisite.
- **Failed:** Test has returned wrong result.

This section allows to display a complete list of test case runs. These are links of the test to test sessions. This list also displays the current status of the test in the sessions.

Field Summary

- An icon whose presents the run status of the test case.
- For detail, see: *Summary of test case run status*.
- To go, click on the corresponding test session.

Table 4: Fields - Test case runs list

Field	Description
Test session	Composed of session type, Id and description.
Status	Current status of the test case run in the test session.

10.4 Test sessions

A test session defines the set of tests to be executed to achieve a given objective, such as covering a requirement.

Define in the test case runs all test cases will be running to this test session.

For each test case run sets the status of test results. (See: *Test case run status*)

The test session is defined for a project, a product or one these components.

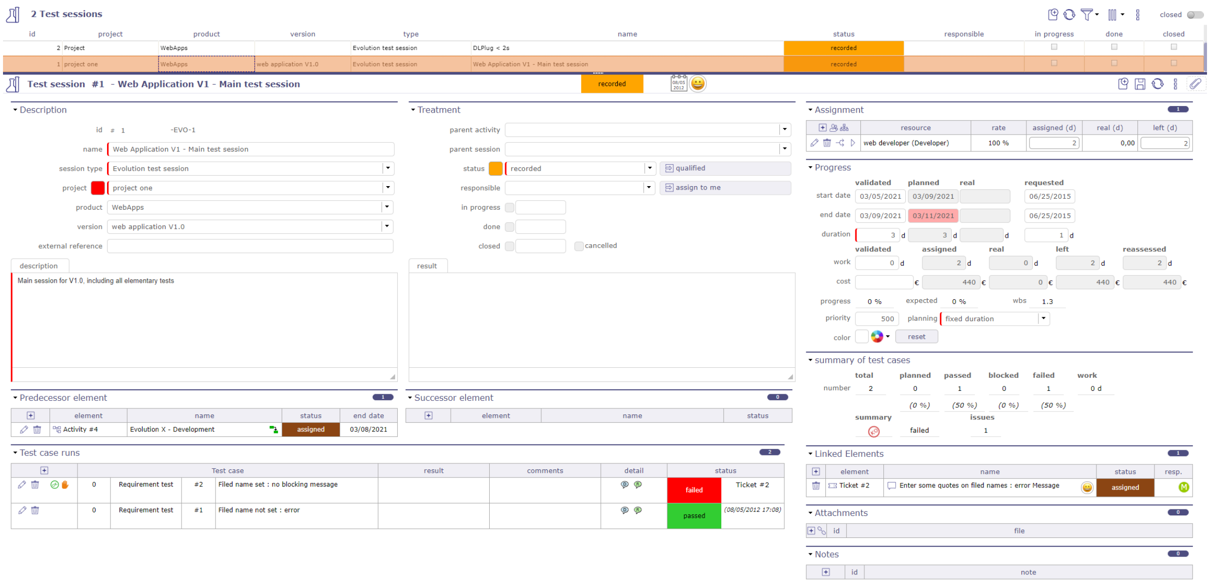


Fig. 7: Test session screen

Rights management

- Linking test session to a *project* will limit the visibility, respecting rights management at project level.

Test sessions regroupment

- Test session can have parents to regroup test sessions.

Planning element

- A test session is a planning element like *Activity*.
- A test session is a task in a *Gantt type project planning*.
- Allows to *assigned* resource and follow up progress.

Predecessor and successor elements

- Test sessions can have predecessors and successors.
- This defines some *dependencies* on test cases or planning constraints.

Monitoring indicator

- The indicators can be defined in the *List of Values*.
- See: *Health status* and *Overall progress*

Other sections

- *Assignment*
- *Progress*
- *Predecessor and Sucessor*

- *Linked element*
- *Attachments*
- *Notes*

Description

Field	Description
Id	Unique Id for the test session.
Name	Short description of the test session.
Session type	Type of test session.
Project	The project concerned by the test session.
Product	The product concerned by the test session.
Version	Version of the product or component concerned by the test session.
External reference	External reference for the test session.
Description	Complete description of the test session.

Fields Project and Product

- Must be concerned either with a project, a product or both.
- If the project is specified, the list of values for field "Product" contains only products linked the selected project.

Field Version

- Contains the list of product and component versions available according to the project and product selected.

Treatment

Field	Description
Parent activity	Parent activity, to define hierarchic position in the Gantt.
Parent session	Parent session, to define session of sessions.
Status	Actual *status* of the test session.
Responsible	Resource who is responsible of the test session.
In progress	Box checked indicates the test session is taken over.
Done	Box checked indicates the test session has been treated.
Closed	Box checked indicates the test session is archived.
Cancelled	Box checked indicates the test session is cancelled.
Result	Summary result of the test session.

Test case runs

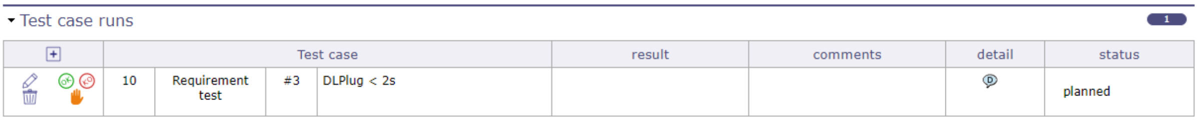


Fig. 8: Test case run section

This section allows to manage test case runs.

Test case runs list management

- Click on to add a test case run. The **Test case run dialog box** will be appear.
- Click on to edit a test case run. The **Test case run detail dialog box** will be appear.
- Click on to remove a test case run.
- Click on to mark test case run as passed.
- Click on to mark test case run as failed. The **Test case run detail dialog box** will be appear.
- Click on to mark test case run as blocked.

Table 5: Fields - Test case runs list

Field	Description
Test case	Information about test case (type, Id and name).
Detail	Detail of test case.
Status	Status of test case run.

Field Test case

- This icon appears when the test case run comment field is filled.
- Moving the mouse over the icon will display the test case run comments.

Field Detail

- Moving the mouse over the icon will display the test case description.
- Moving the mouse over the icon will display the test case expected result.
- Moving the mouse over the icon will display the test case prerequisite.

Field Status

- If status of test case run is **failed**, information about selected ticket is displayed too.

Note:

- When status is set to failed, the reference to a ticket must be defined (reference to the incident).
- The referenced ticket is automatically added in linked element.

- Field ticket appear only whether status of test case run is **failed**.

CHAPTER

ELEVEN

RISK MANAGEMENT & TICKETING

11.1 Risks

A risk is any threat of an event that may have a negative impact to the project, and which may be neutralized, or at least minimized, through pre-defined actions.

The risk management plan is a key point to project management :

- Identify risks and estimate their severity and likelihood.
- Identify mitigating actions.
- Identify opportunities.
- Follow-up actions.
- Identify risks that finally occur (becoming an issue).

Contingency reserve

- Contingency reserve is defined according to monetary impact and likelihood of occurrence.
- Contingency reserve for risks and potential gain for opportunities allow to define the project reserve. (See: *Project reserve*)

Monitoring indicator

- Possibility to define indicators to follow the respect of dates values.

  `Respect of initial due date`

  `Respect of planned due date`

> **Other sections**
>
> - *Linked element*
> - *Attachments*
> - *Notes*

Section Description

Table 1: Required fields

Field	Description
Id	Unique Id for the risk.
Name	Short description of the risk.
Type	Type of risk.
Project	The project concerned by the risk.
Severity	Level of importance of the impact for the project.
Likelihood	Probability level of the risk to occur.
Criticality	Global evaluation level of the risk.
Cost of impact	Impact cost of the risk.
Project reserved cost	The reserve amount according to the risk likelihood.
Origin	Element which is the origin of the risk.
Cause	Description of the event that may trigger the risk.
Impact	Description of the estimated impact on the project if the risk occurs.
Description	Complete description of the risk.

Field Criticality

Automatically calculated from Severity and Likelihood values. See: *Criticality value calculation*. Value can be changed.

Field Project reserved cost

Automatically calculated from the percentage defined for the selected likelihood. (See: *Likelihoods*)

Section Treatment

Table 2: Required fields

Field	Description
Status	Actual *status* of the risk.
Responsible	Resource who is responsible for the treatment of the risk.
Priority	Expected priority to take into account this risk.
Initial end date	Initially expected end date of the risk.
Planned end date	Updated end date of the risk.
In progress	Flag to indicate that risk is taken into account.
Done	Flag to indicate that risk has been treated.
Closed	Flag to indicate that risk is archived.
Cancelled	Flag to indicate that risk is cancelled.
Result	Complete description of the treatment done on the risk.

11.2 Opportunities

Other sections

- *Linked element*
- *Attachments*
- *Notes*

An opportunity can be seen as a positive risk. It is not a threat but the opportunity to have a positive impact to the project.

Potential gain

- The potential gain is defined according to the expected amount and likelihood of occurrence.
- Contingency reserve for risks and potential gain for opportunities allow to define the project reserve.
- See: *Project reserve*

Section Description

Table 3: Required fields

Field	Description
Id	Unique Id for the opportunity.
Name	Short description of the opportunity.
Type	Type of opportunity.
Project	The project concerned by the opportunity.
Significance	Level of importance of the impact for the project.
Likelihood	Evaluation of the estimated improvement, or positive impact, on the project of the opportunity.
Criticality	Global evaluation level of the opportunity.
Expected improvement	Expected amount of the opportunity.
Project reserved gain	The estimated gain, according to the opportunity likelihood.
Origin	Element which is the origin of the opportunity.
Opportunity source	Description of the event that may trigger the opportunity.
Impact	Description of the estimated positive impact on the project.
Description	Complete description of the opportunity.

Field Criticality

Automatically calculated from Significance and Likelihood values. See: *Criticality value calculation* - Value can be changed.

Field Project reserved gain

Automatically calculated from the percentage defined for the selected likelihood. (See: *Likelihoods*)

Section Treatment

Table 4: Required fields

Field	Description
Status	Actual *status* of the opportunity.
Responsible	Resource who is responsible for the opportunity.
Priority	Expected priority to take into account this opportunity.
Initial end date	Initially expected end date of the opportunity.
Planned end date	Updated end date of the opportunity.
In progress	Flag to indicate that opportunity is taken into account.
Done	Flag to indicate that opportunity has been treated.
Closed	Flag to indicate that opportunity is archived.
Cancelled	Flag to indicate that opportunity is cancelled.
Result	Complete description of the treatment of the opportunity.

11.3 Criticality value calculation

Criticality value is automatically calculated from **Severity (Significance)** and **Likelihood** values.

Criticality, Severity (Significance) and Likelihood values are defined in lists of values screens.

See: *Criticalities*, *Severities* and *Likelihoods* screens.

In the previous screens, a name of value is set with numeric value.

Criticality numeric value is determined by a simple equation as follows:

Equation

- [Criticality value] = [Severity value] X [Likelihood value] / 2
- For example:
  - Critical (8) = High (4) X High (4) / 2

Default values

- Default values are determined.
- You can change its values while respecting the equation defined above.

11.4 Issues

An issue is a problem that occurs during the project.

If the risk Management plan has been correctly managed, issues should always be occurring identified risks.

Actions must be defined to solve the issue.

Monitoring indicator

- Possibility to define indicators to follow the respect of dates values.

  Respect of initial due date

  Respect of planned due date

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section Description

Table 5: Required fields

Field	Description
Id	Unique Id for the issue.
Name	Short description of the issue.
Type	Type of issue.
Project	The project concerned by the issue.
Criticality	Level of importance of the impact for the project.
Priority	Priority requested to the treatment of the issue.
Origin	Element which is the origin of the issue.
Cause	Description of the event that led to the issue.
Impact	Description of the impact of the issue on the project.
Description	Complete description of the issue.

Section Treatment

Table 6: Required fields

Field	Description
Status	Actual *status* of the issue.
Responsible	Resource who is responsible for the issue.
Initial end date	Initially expected end date of the issue.
Planned end date	Updated end date of the issue.
In progress	Flag to indicate that issue is taken into account.
Done	Flag to indicate that issue has been treated.
Closed	Flag to indicate that issue is archived.
Cancelled	Flag to indicate that issue is cancelled.
Result	Complete description of the treatment of the issue.

11.5 Actions

An action is a task or activity that is set-up in order to :

- Reduce the likelihood of a risk
- or reduce the impact of a risk
- or solve an issue
- or build a post-meeting action plan
- or just define a "to do list".

The actions are the main activities of the risk management plan.

They must be regularly followed-up.

Private action

- Private actions allow to manage a personal to-do list.

Monitoring indicator

- Possibility to define indicators to follow the respect of dates values.

  Respect of initial due date

  Respect of planned due date

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section Description

Table 7: Required fields

Field	Description
Id	Unique Id for the action.
Name	Short description of the action.
Action type	Type of action.
Project	The project concerned by the action.
Priority	Priority requested to the treatment of the action.
Private	Box checked allows to define a private action.
Description	Complete description of the action.

Section Treatment

Table 8: Required fields

Field	Description
Status	Actual *status* of the action.
Responsible	Resource who is responsible for the action.
Initial due date	Initially expected end date of the action.
Planned due date	Updated end date of the action.
In progress	Box checked indicates that the action is taken over.
Done	Box checked indicates that the action has been treated.
Closed	Box checked indicates that the action is archived.
Cancelled	Box checked indicates that the action is cancelled.
Efficiency	Evaluation of the efficiency the action had on the objective (for instance on the risk mitigation).
Result	Complete description of the treatment of the action.

11.6 Tickets

A ticket is a kind of task that cannot be scheduled in a unitary manner.

This is usually a short-lived activity for a single ticket that gives feedback to the issuer or to keep track of the result.

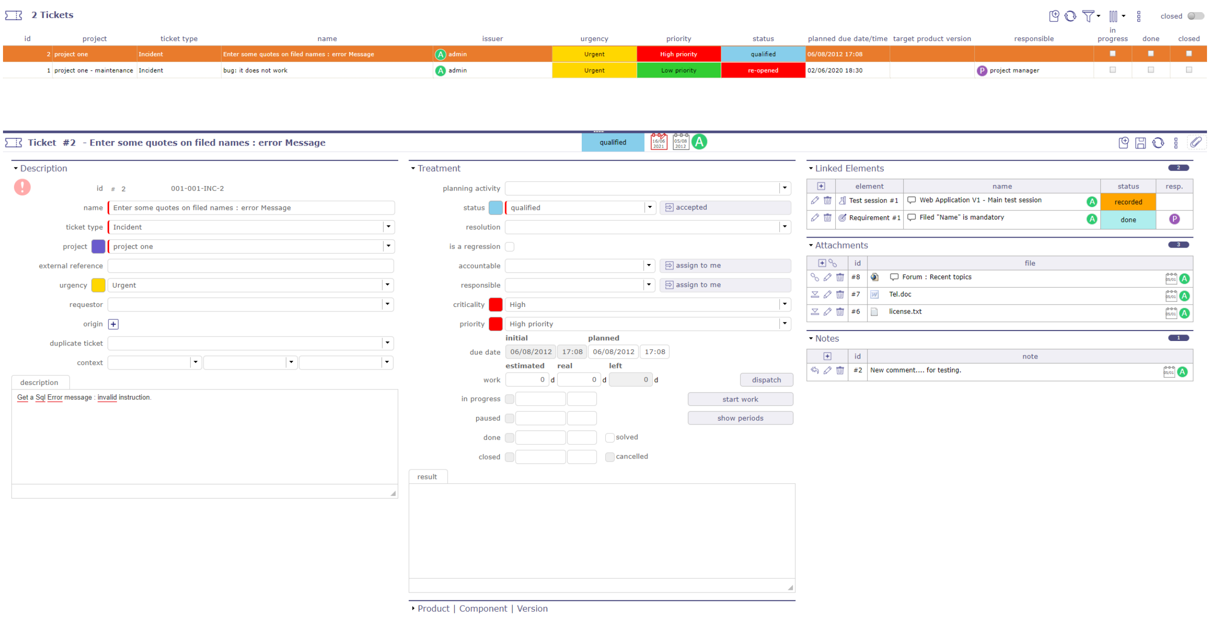


Fig. 1: Tickets management screen

It can be globally planned as a general activity, but not unitarily.

For instance, bugs should be managed through tickets :

- You can not plan bugs before they are registered.
- You must be able to give a feedback on each bug.
- You can (or at least should) globally plan bug fixing activity.

Tickets (simple)

- This screen is a limited version of screen "Tickets".
- It's dedicated to users who want to create and follow their own tickets without be involved in their treatment.
- When fields and features are available, the description is similar.

Restrict the entry of real work in the ticket

- Possibility to define that only the responsible of ticket can enter real work.
- This behavior can be set in *Global parameters* screen.

Due dates

- Initial and planned due date allows to define a target date for solving the ticket.

  Initial due date

  - If a definition of ticket delay exists for giving ticket type and urgency the date is automatically calculated with this delay.
  - *Delays for tickets* screen allows to define ticket delay.

  Note: Initial due date of the ticket set as read only if it is calculated from the setting of "delays for tickets"

  Planned due date

  - Is used to define a target date after evaluation.
  - Automatically initialized to the initial due date.

  Monitoring indicator

  - Possibility to define indicators to follow the respect of dates values.

  `Respect of initial due date/time`

  `Respect of planned due date/time`

Product, component and versions fields

- Allows to identify the product and component relating to the issue.
- Identifies from which versions, the issue occurs and to which versions a resolution will be applied.

  Versions identified

  - A ticket can identify all versions allocated.
  - Possibility to define a main version and the other versions allocated.
  - See: *Product concept*.

Responsible of product

A responsible can be defined for a product or component.

If a product or component is selected, the responsible defined can be automatically assigned to the ticket.

Note: Ticket responsible from product responsible

This parameter, in Global parameters, allows to define, if the defined responsible is automatically assigned to the ticket.

See: *Global Parameters*

Other sections

- *Linked element*
- *Attachments*
- *Notes*

Section Description

Table 9: Required fields

Field	Description
Id	Unique Id for the ticket.
Name	Short description of the ticket.
Ticket type	Type of ticket.
Project	The project concerned by the ticket.
External reference	External reference of the ticket.
Urgency	Urgency for treatment of the ticket, as requested by the issuer.
Requestor	Contact at the origin of the ticket.
Origin	Element which is the origin of the ticket.
Duplicate ticket	Link to another ticket, to link duplicate tickets.
Context	List of 3 items describing the context of the ticket.
Product	The product for which this ticket has been identified.
Component	The component for which this ticket has been identified.
Original product version	Product versions for which the issue has been identified.
Original comp. version	Component versions for which the issue has been identified.
Description	Complete description of the ticket.

Field Context

- Contexts are initialized for IT Projects as “Environment”, “OS” and “Browser”.
- This can be easily changed values in *Contexts* screen.

Product or component

- List of values contains the products and components linked the selected project.

Fields: Original product version & Original comp. version

- The list of values will be filtered depends on the selected value in fields "Product and component".
- Click on [+] to add a other version, see *Multi-version selection*.

Section Treatment

Table 10: Required fields

Field	Description
Planning activity	Activity where global work for this kind of ticket is planned.
Status	Actual *status* of the ticket.
Resolution	Ticket resolution.
Regression	Notion of regression can be added.
Responsible	Resource who is responsible for the ticket.
Criticality	Importance of impact on the system, as determined after analysis.
Priority	Priority of treatment.
Initial due date	Initial target date for solving the ticket.
Planned due date	Actual target date for solving the ticket.
Estimated work	Estimated workload needed to treat the ticket.
Real work	Real workload spent to treat the ticket.
Left work	Left workload needed to finish the ticket. Automatically calculated as Estimated – Real Set to zero when
In progress	Box checked indicates the ticket is taken over.
Done	Box checked indicates the ticket has been treated.
Solved	Box checked indicates the ticket has been solved.
Closed	Box checked indicates the ticket is archived.
Solved	The box is automatically checked or unchecked, according to the resolution selected
Cancelled	Box checked indicates the ticket is cancelled.
Target product version	Product versions for which a resolution of issue will be delivered.
Target comp. version	Component versions for which a resolution of issue will be delivered.
Result	Complete description of the resolution of the ticket.

Note: Priority

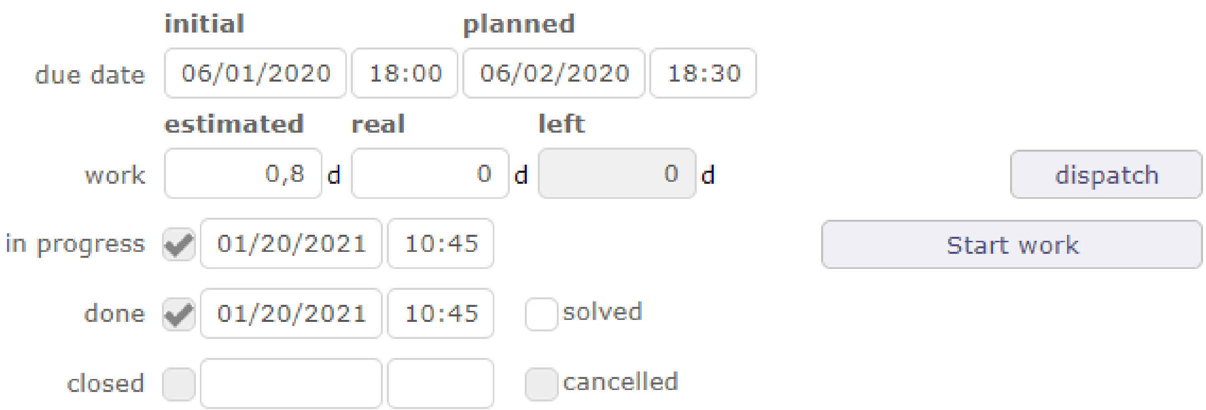
- Automatically calculated from Urgency and Criticality values.

  See: *Priority value calculation*.
- Can be changed manually.

Note: Target product version & Target comp. version

- The list of values will be filtered depends on the selected value in fields "Product and component".
- Click on [+] to add a other version, see *Multi-version selection*.

Button Start/End work



- The start Work / Stop Work button is a clock on / off timer.
- If the logged in user is a resource, he or she has the option to start working on the ticket.
- Click the "Start work" button to start timing the processing time on the ticket.
- The start time is then displayed under the button and the button changes name.

- Once the work is done, press the "stop work" button.
- The spend time will automatically be converted as real work.
- It'll be transferred on planning activity if it is set.
- A decrease in "left work" on activity will be carried out.
- if the ticket goes into a paused state then the work started with the start work button will be stopped.

Important: Closing the application or starting work on another ticket will automatically stop the current ongoing work.

Button Dispatch

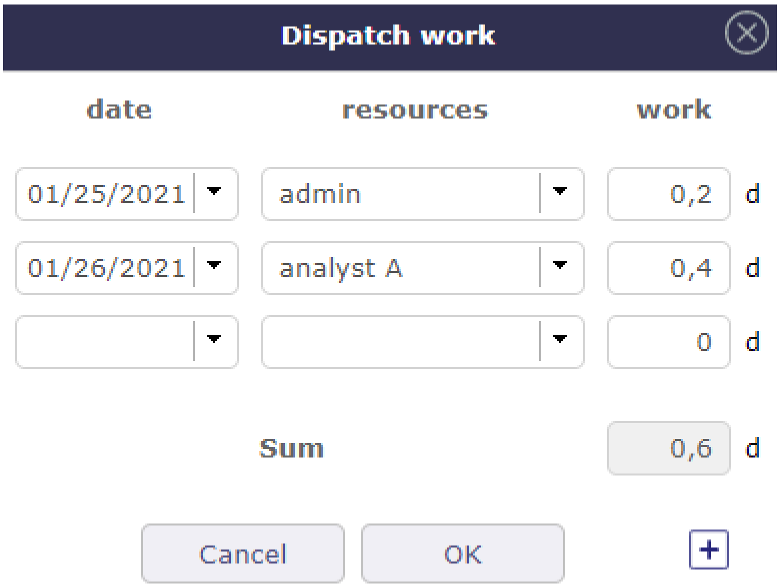
This button allows to dispatch ticket.

- Click on  to add a line.

Button Show periods

You can calculate the time spent between the start of processing, which corresponds to the receipt of the ticket and the end of processing of a ticket, that is to say when it goes to the done state, with the possibility of subtracting waiting periods thanks to the "paused" state macro.

The passages from an active macro-state to a non-active macro-state (paused or done), are recorded thanks to the start and end dates of each period. This table is updated automatically with calculation of the duration in working hours and the duration in calendar hours when the end date of the period is entered.



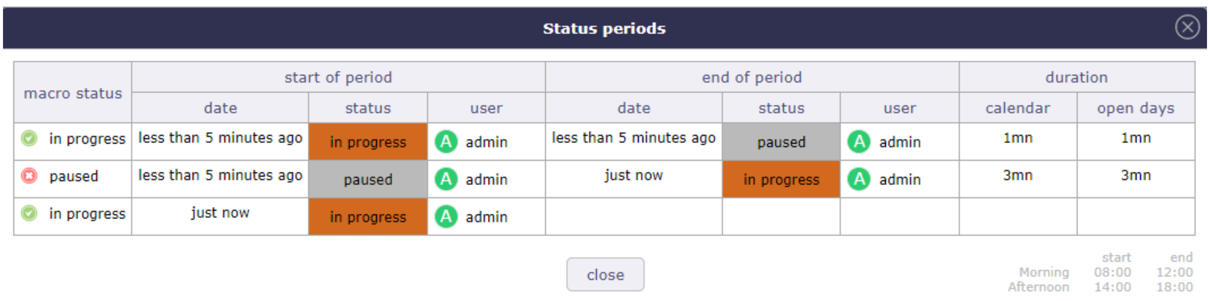


Fig. 2: Status period

11.6.1 Planning activity

Planning activity field allows to link the ticket with a planning activity.

If the global parameter *limit Planning Activity to those with flag* is set to yes then:

- You must check the "Planning activity" box on the activity to be linked.
- It will then be visible in the planning activities list of your ticket.
- Work on the ticket will be included in this activity.
- After saving the option, new fields are displayed.
- You can see the number of tickets linked to this activity and time information corresponding to all of these tickets.

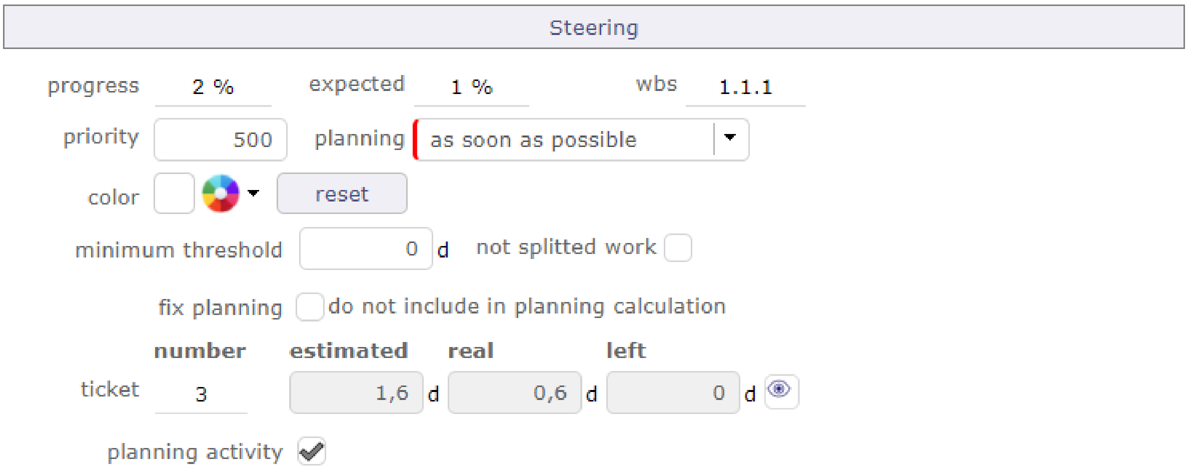
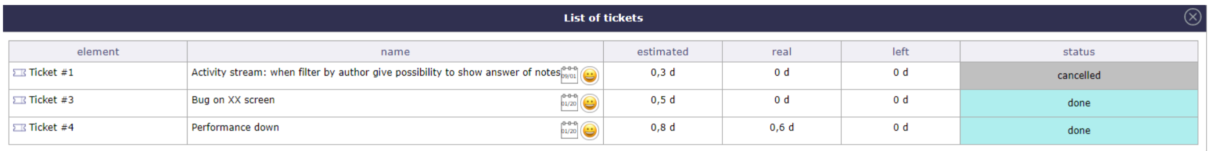


Fig. 3: New fields displayed after saving the Planning activity option

- Click on to open a popup which will display the details of these tickets.


List of tickets

element	name	estimated	real	left	status
Ticket #1	Activity stream: when filter by author give possibility to show answer of notes	0,3 d	0 d	0 d	cancelled
Ticket #3	Bug on XX screen	0,5 d	0 d	0 d	done
Ticket #4	Performance down	0,8 d	0,6 d	0 d	done

Fig. 4: List of tickets linked to the activity

Real work

Put the real work from tickets to the resource timesheet.

- When a resource has entered the real work on the ticket and the ticket is linked to a planning activity.
- The resource is automatically assigned to this activity.
- Real work set on tickets is automatically set in resource timesheet.

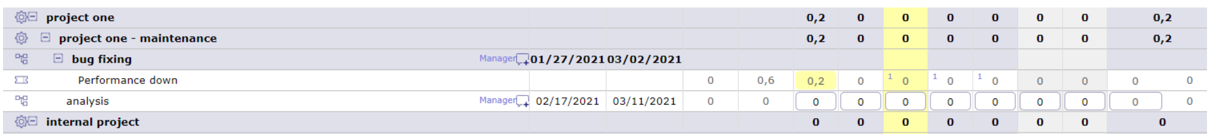


Fig. 5: Imputations real work on related tickets.

- The tickets are very dependent on the planning activity.
- The time indicated by the resources will be decremented to that planned for the activity.

11.6.2 Multi-version selection

In the version fields, it's possible to set several versions.

Main and other version

- The version with smaller id will appear in the select list and is considered as the main version.
- Other versions are listed above.
- It is possible to set an 'other' version as the main version using the button .

- Click on to add a other version.
- Click on to delete a version.

11.6.3 Priority value calculation

Priority value is automatically calculated from **Urgency** and **Criticality** values.

Priority, Urgency and Criticality values are defined in lists of values screens. See: *Priorities*, *Urgencies* and *Criticalities* screens.

In the previous screens, a name of value is set with numeric value.

Priority numeric value is determined by a simple equation as follows:

Equation

- [Priority value] = [Urgency value] X [Criticality value] / 2
- For example:
  - Blocking (4) X Critical (8) / 2 = Critical priority (16)for [Priority value]

Default values

- Default values are determined.
- You can change its values while respecting the equation defined above.

11.6.4 mailbox for tickets

ProjeQtOr offers to save tickets from e-mail directly in the application.

Description section

This section allows you to enter the parameters of your mailbox.

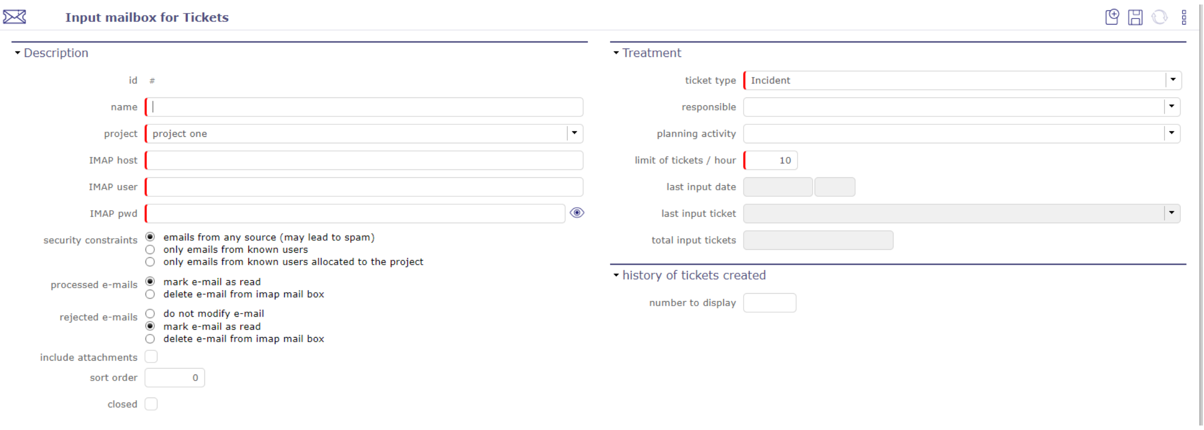


Fig. 6: Receive email from ticket screen

Table 11: Required field

Field	Description
Id	Unique Id for the ticket.
Name	Short description of the ticket.
Project	name of the project to which the ticket is attached.
IMAP host	Name of your IMAP host.
IMAP User	Mail of the IMAP user.
IMAP Password	IMAP user account password entered.

You can create new mailboxes for tickets on projects and for each type of ticket configured in ProjeQtOr.

IMAP Host

The address must be an IMAP connection string.

Example to connect to the GMAIL input area, the host must be

{imap.gmail.com:143}INBOX

No protocol is required

If the certificates are self-signed then you can test to add novalidate-cert in your address

{imap.gmail.com:143/novalidate-cert}INBOX

Security constraints

- **Mails from any source (may lead to spam)** Allow you to receive emails from anyone and therefore can cause spam
- **Only mails from known users** Can only receive emails saved in your ProjeQtOr application
- **Only mails from known users allocated to the project** Only allows you to receive emails saved in your ProjeQtOr application and which are assigned to the project selected in the settings of your mailbox

Processed emails

- **mark e-mail as read** All emails that are authenticated and correct according to the constraints set, are accepted and marked as read.
- **delete e-mail from imap mail box** All emails that are not properly authenticated and that do not meet the set constraints are permanently deleted from the IMAP box.

Rejected emails

- **do not modify e-mail** An email is rejected when it does not meet the criteria for setting up your mailbox. Do not modify the email is an option that will not trigger either deletion or marking. The rejected email remains unread.
- **mark e-mail as read** The rejected email is marked as read.
- **delete e-mail from imap mail box** The rejected email is permanently deleted from the IMAP box.

Other contraints

- **Include attachments** Indicates whether or not you allow your users to attach attachments.
- **Sort order** In case of several mailboxes on a single project, the order of tru of the boxes is important since it is always in ascending order that the mailboxes manage incoming tickets.

  Voir: *Management of several mailboxes*
- **Allow up to** maximum weight allowed for receiving emails.

> **Warning:** Maximum weight
>
> There is no weight limit in ProjeQtOr but probably your mail server.
>
> Most of the time emails are blocked beyond 5 to 10 MB

Treatment

Table 12: Required fields

Field	Description
Ticket type	Type of ticket for which emails will be sent.
Responsible	Name of the person who will work on the default ticket.
Planning activity	Name of the planning activity on which the tickets will be decremented. The parent activity must belon
Limit of tickets / hour	Maximum number of emails per hour allowed.
Last input date	Date of last ticket received
Last input ticket	Display the name of the last ticket received
Total input tickets	Total number of the tickets since the mailbox creation

> **Warning:** Cron must be launched for tickets to be processed in ProjeQtOr. If you do not receive a ticket, try to stop the cron so that it can restart with a refresh of the code.

Some fields can be decisive for the reception of your emails.

Limit of tickets / hour

- This limit allows you to restrict the reception of emails by hour.

  If the number of tickets received is much higher than your limitation then the probability of spam is to be considered or you have incorrectly evaluated the number of tickets to be processed.
- When the maximum number of tickets is reached then the mailbox freezes

  Only manual intervention by the administrator can unlock it

  Its role will consist in reassessing the number of tickets to allow their receipt

- If the maximum number of tickets per hour has been reached then you have a rejection message on the history line: **rejected ticket: ticket limit per hour**

History of ticket created

You can choose the number of tickets to display in the history by filling in the “history to display” field

Table 13: Required fields

Field	Description
Email adresse	address of the ticket sender
Date	date of receipt of the ticket
Result	Indicates whether the ticket has been processed or rejected

Replies from Email

The processing of incoming mailboxes is adapted to simplify their use. The use of the mailbox for new tickets is the same for replies.

The reference of the element from which the email is sent is added in the subject of the email.

In the procedure for determining the origin of an incoming email, ProjeQtOr searches for the reference in the subject of the email.

- If it is not found, ProjeQtOr considers it a new request to be integrated as a new ticket.
- If the reference is found in the subject of the incoming email, then the reply is inserted on the element, like a note.

  Management of processed emails

  In the *global parameters* you can determine, upon receipt of the email, whether you want to mark it as read or delete it.

Receipt of multi-project tickets

You will be able to receive all tickets from different customers on a single IMAP box.

- You define several configurations on the same IMAP box with constraints on the existence of the sender and its assignment to the project concerned.
- You define a configuration on the IMAP box that has no constraint or just a constraint on the existence of the sender
- You set the order in which configurations are processed to ensure that the most permissive configuration is processed last.

Important: Be careful, you will have to be careful to have a “final” configuration that will mark as read or delete emails that are not correctly processed. Otherwise, the IMAP box will keep an increasing amount of emails that will be reprocessed (and rejected) by all configurations on each sequenced cycle of reading IMAP boxes. This will not be controlled by the system.

multi-box example on a single project

BOX 1 Security constraints : only emails from known users allocated to the project processed email: Mark email as read Rejected email: do not modify email

BOX 2 Security constraints : only emails from known users processed email: Mark email as read Rejected email: do not modify e-mail

BOX 3 Security constraints : emails from any source (may lead to spam) processed email: Mark email as read Rejected email: delete e-mail from imap mail box

- An email from a known individual assigned to the project will be processed by box 1
- An email from an individual known as a user in ProjeQtOr will be processed by box 2.
- An email from an individual who is not assigned to the project and who is not a known user of ProjeQtOr will not be processed by box 1 and 2. It will be processed directly by box 3.

11.6.5 Management of tokens on ticket

You can define and integrate tokens on tickets that you can track on your customer contracts.

The use of this feature is configurable and must be activated in the *modules management* to have access to it.

A new screen for the definition of tokens will be accessible via the financial part incomes menu.

Token definition

The objective is to define all types of tokens likely to be ordered by your client.

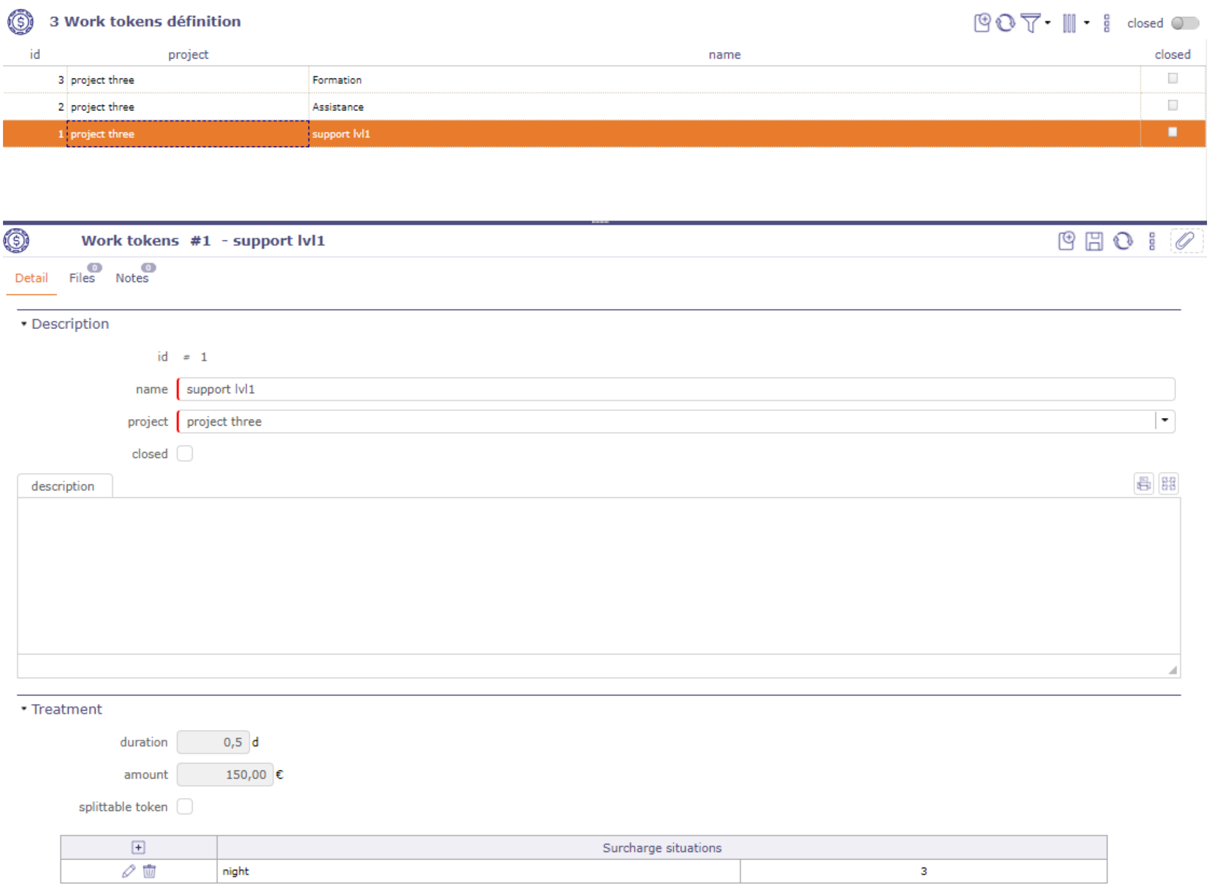


Fig. 7: Token definition screen

You set values for a token.

Duration

Value of the token in days or hours (depending on the time recording unit in global parameters)

Amount

Monetary value of the token in € (depending on the currency recording unit in global parameters)

Splittable token

Defines if the token can be divisible, if half tokens can be entered

Surcharge situations

Enter situations of increase that may apply to tokens, such as night work, or even during days normally not worked

> **Warning:** When a token has been used on a ticket, it becomes impossible to modify it.
>
> Similarly, it is not possible to delete or modify the coefficient for a mark-up situation used on a line of work

Token on the client contract

On the client contract, we will add a table with order management functions.

- Click on [+] to add tokens to the order

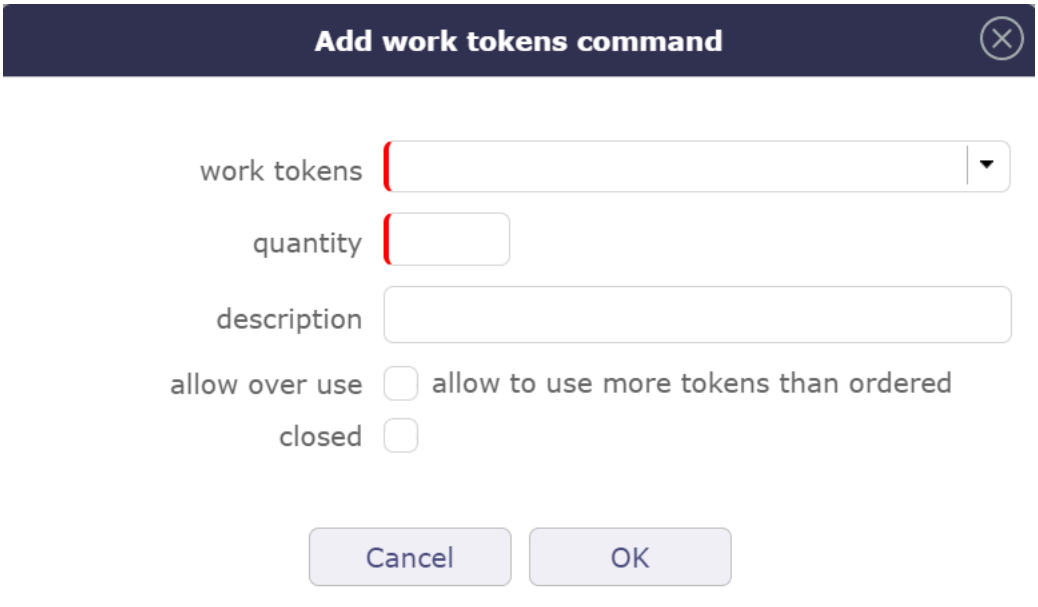


Fig. 8: Add work token command

- Select the token type from those defined on the project or its parent projects.
- Entering the ordered quantity of tokens
- Added a descriptive comment
- Choose if you can exceed the amount of tokens on the order.

When you have entered the order, the table will indicate:

In the tokens ordered section

- The type of tokens ordered and its description
- The total amount of tokens ordered
- the total duration to which the number of tokens corresponds

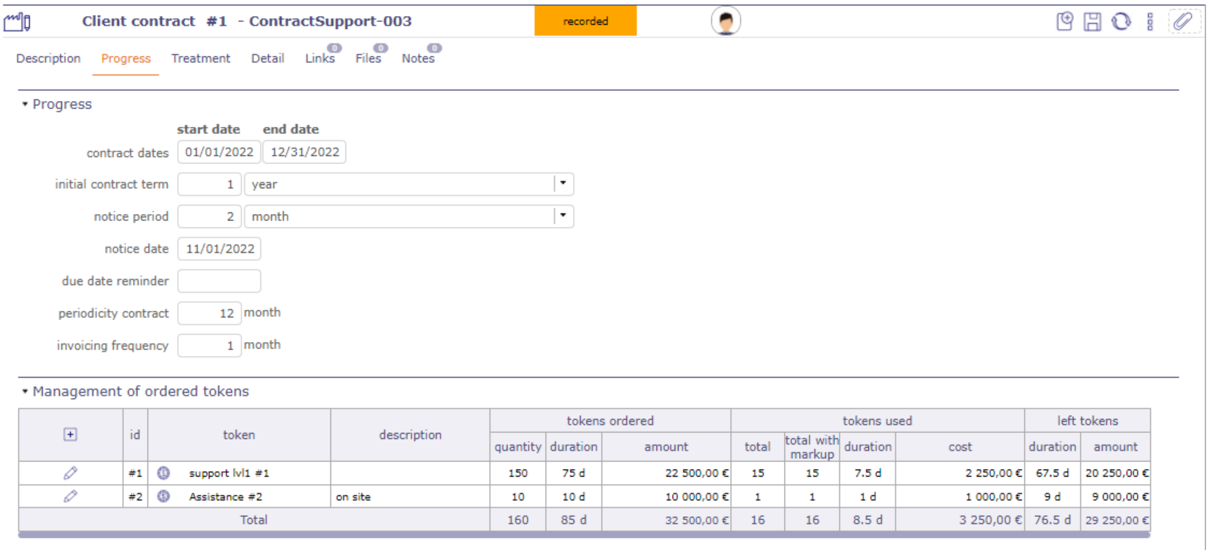


Fig. 9: Management of ordered tokens

- The total amount to which the number of tokens ordered corresponds

In the tokens used part

- The total number of tokens used without surcharges
- The total number of tokens used with markup
- the total duration of the tokens used with and without surcharges
- The total cost of tokens used taking into account markups

In the remaining tokens part

- Display of the remaining duration of the tokens (duration ordered - duration used)
- Display of the number of remaining tokens (amount ordered - amount used)

The Total Line, sums the numbers, amounts and durations (ordered, completed, remaining) for all types of tokens in the contract

Token on tickets

When you create a ticket on the project where the tokens have been defined then you will be able to select these tokens when distributing the work.

You can retrieve these tokens from a parent project.

Click on 

to open the pop-up.

The start date and time are automatically filled in with the current dates and times.

- Select the resource working on the ticket
- Add the workload for this ticket
- Select the token corresponding to the need of the ticket
- Determine if a markup type applies to this ticket
- The quantity of tokens (without decimal if the token is not divisible)
- The mark-up rule, to be chosen from the rules defined on the token
- The number of increased tokens calculated by applying the increase rule

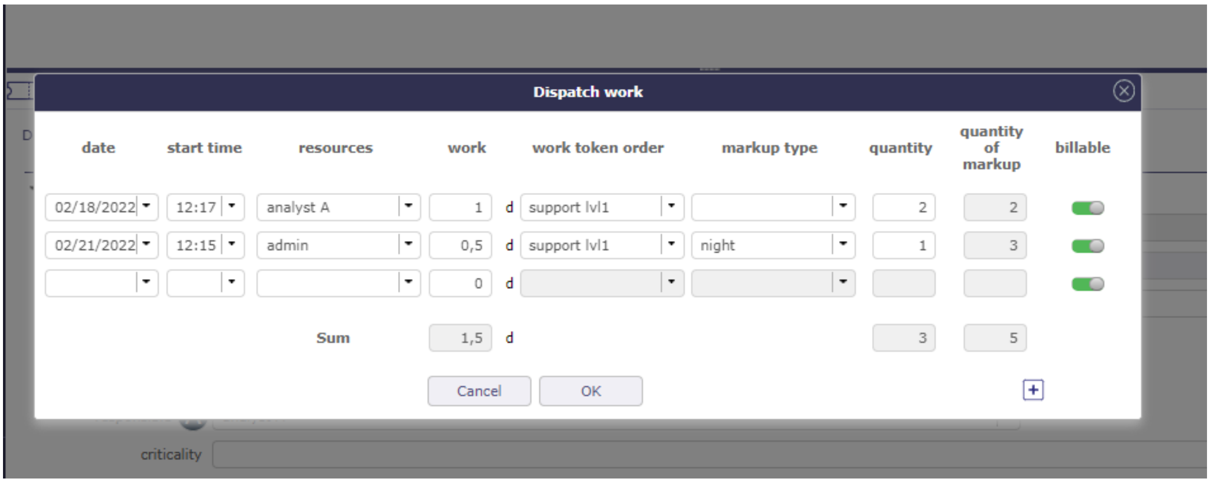


Fig. 10: Dispatch work with selection of tokens

- If the billable box is checked then the tokens will not be counted on the customer contract.

> **Warning:** The "Mark-up situations" are descriptive and may or may not be related to the time of execution. There will therefore be no automatic determination of the increase situation according to the day or time of the entry of the time spent.

11.6.6 synchronize an activity and a ticket

You can sync tickets with activities. So when you enable this option, all tickets are synced like this:

- We attach the activity as a planning activity of the ticket
- We link the activity with the ticket
- The ticket is entered as the origin of the activity
- We modify the state of the element which has the least advanced state to pass it to the state of its binomial (the most advanced).
- The other data is not synchronized (a gap may then exist if the ticket is attached to an existing activity).

Fig. 11: Synchronization of tickets with activities

You activate the option directly on the project. More flexible solution that will allow great flexibility according to potentially different behaviors depending on the project.

This is a one-time link to avoid recursive updates. A ticket is synchronized with a single activity and an activity will be synchronized with a single ticket (unique pair).

Synchronization functionality set on a project is not inherited to subprojects.

Deleting a synced item

Click on **define synchronization** to open the pop-up.

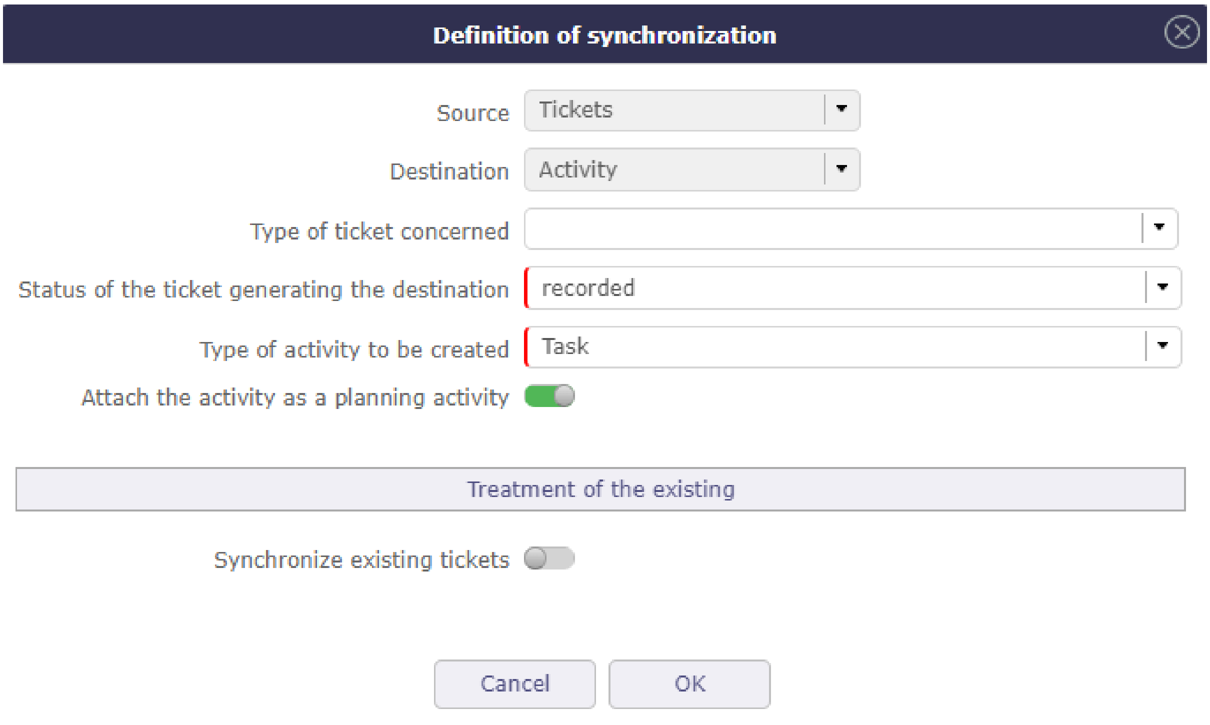


Fig. 12: Definition of synchronization

When activating the function on a project, a pop-up window will be displayed allowing to define:

- The status of the ticket automatically generating the activity
- The type of ticket concerned (optional, to allow all types of tickets to be covered)
- The type of activity to create
- An option to automatically trigger the attachment of the activity as a ticket schedule activity
- An option to sync existing tickets

  Treatment of the existing: Synchronize existing tickets

  When this option is selected, all unclosed tickets whose status is greater than or equal to the trigger status and whose type is the one specified will be synchronized with an activity.

  - If the ticket is already synced with an activity, nothing happens. This is the case of reactivating a previously deactivated rule.
  - If the ticket is attached to an open planning activity, the ticket is synchronized with this activity.
  - If the ticket originates from one and only one unclosed activity, it is synchronized with this activity. Otherwise we will create a new activity that will be synchronized with the ticket.

  In all cases of research of the activity to be attached, we make sure that it is not already synchronized with another ticket and that it does not originate from another ticket

When a Ticket or Activity item is edited and synced to a pair, changes to some fields carry over to their pair:

- Name
- Project
- State

- Responsible
- Product
- Component
- Target product version
- Target component version

  The project

  When you change the project of a ticket attached to a planning activity, a consistency check prevents you from making this modification since the two elements must be linked on the same project.

  In case of synchronization, the control is ignored and you can change the project on one of the two elements, the modification will be passed on to the other.

  - If a ticket changes project or type before its triggered state, it is not synced.

    It is then subject to the new project or new type rule.

    A check is carried out to find out if the ticket is not already in the trigger state for the new project or the new type and to trigger the synchronization in this case.

  - If a ticket changes project or type after its triggered state, it's already synced. He continues to be synchronized with his partner according to the rule of his original project, whether his new project has a synchronization rule or not.

    The change of project of the ticket can also come directly from a modification on the ticket or from a modification of its binomial activity.

    The rule is always the same: pair synchronization is maintained.

  The states and the workflow

  On certain status changes, certain fields may become mandatory and these fields are not necessarily synchronized. Like the description or the result.

  In this case, these fields - not synchronized - are automatically filled in if they are in the element being modified.

  If, despite everything, there are still invalid checks for the element to be synchronized, the update is globally rejected with an explicit message.

  For example, closing a ticket associated with an activity on which there is still work to do should not be done.

  In order for status changes to be consistent, the workflows between the ticket and the related activity should be the same to avoid inconsistencies in status changes.

  A mechanism will still make it possible to override the rules of the workflow for the element which will change state automatically.

  Essential, especially when creating the activity, which must be created directly in the same state as the ticket, but which will also be applied later.

  For example, if an activity has moved into a state that does not belong to the ticket's workflow, the state change is made to keep synchronization.

  Warning: This can lead to placing the ticket in a state from which it can no longer exit (because it is outside its workflow). In this case, only the change of state of the activity can unlock the ticket.

  The same case can be produced on the activity which would be blocked following the change of state of the ticket.

Workload

Attaching the activity as the Ticket's Schedule Activity will impact the load:

- The charge charged in real time to the ticket is recorded in the actual costs of the activity
- The charge charged in real time on the ticket is automatically decremented in the remaining charges of the activity

In the case of synchronized items, you can only enter actual load on the ticket.

This charge will then be properly accounted for on the activity via the Planning Activity mechanism.

Deleting a synced item

When a Ticket or Activity item is deleted and synced to a pair, a confirmation message is displayed to the user.

In this case, the associated item is not deleted, but the synchronization is deleted.

deactivation of the function

In case of deactivation of the function at the project level, a check is carried out and alerts the user if there are tickets synchronized with activities.

- If there are synchronizations in progress, a pop-up window opens to display the number of existing pairs, distinguishing the number of closed and unclosed.
- **If the number of existing pairs is not zero, you can select the existing links that must be kept or deleted.**

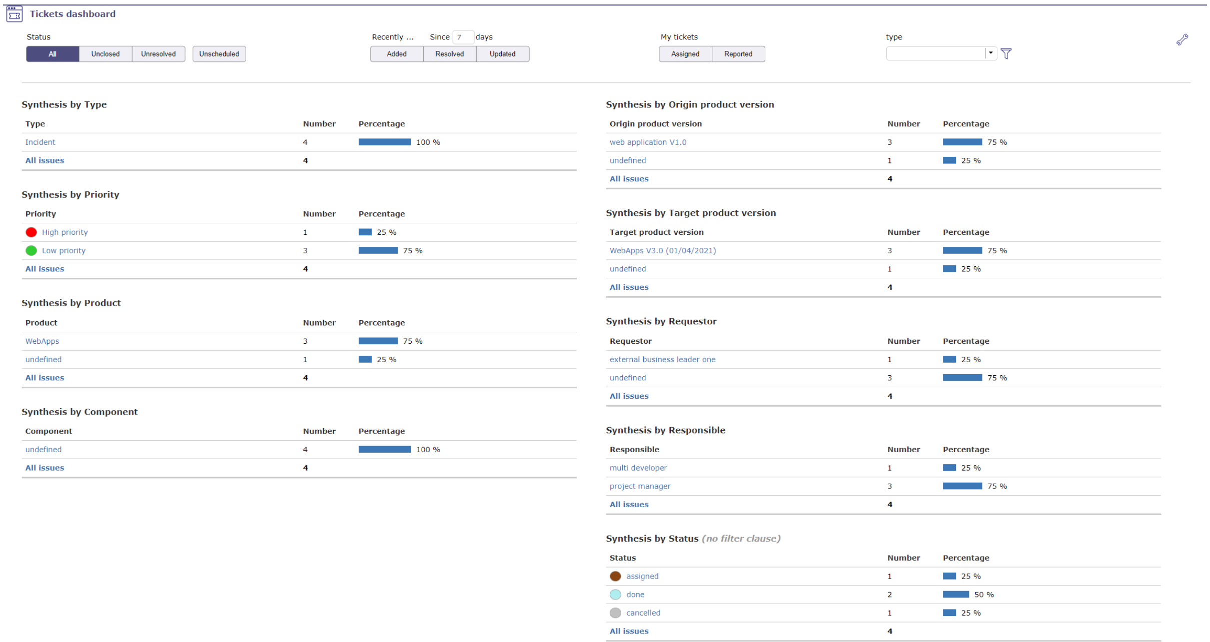
    - In case the links are deleted, the function is completely disabled
    - In case the links are not deleted, the function is disabled only for tickets not yet synchronized. Tickets already synced remain synced.

There is then no longer any way to delete the synchronization (except to delete one of the elements of the pair).

11.6.7 Vote on ticket

Under construction

11.7 Tickets dashboard



Allows user to have a tickets global view of his projects.

Displays several small syntheses that group the tickets by category: type, priority or by product, component or by state.

The number of tickets is listed. The result is displayed with numbers and as a percentage.

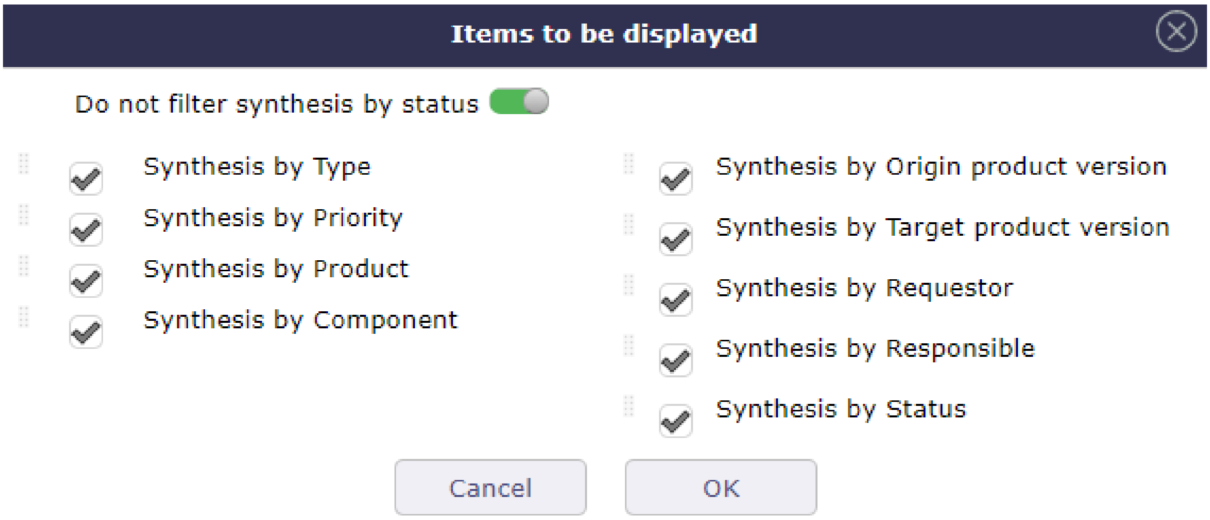
Filters are available to limit scope.

Direct access to the list of tickets

- In the various summaries, click on an element to obtain the list of tickets corresponding to this element.
- you return to the tickets screen

Parameters

- Click on  to access parameters.
- Allows to define reports displayed on the screen.
- Using to reorder reports displayed.
- For Synthesis by status, filter clauses are not applicable.



Filters

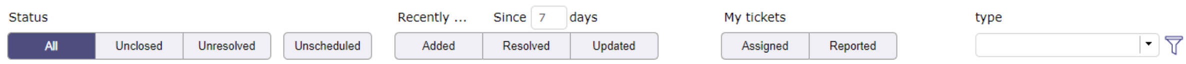


Fig. 13: Filters

Filters allow you to restrict the display of saved requirements

Scope filters

- By status, period, duration, closed element, linked to the user or no related…

No resolution scheduled

- Unscheduled: Requirements whose resolution is not scheduled in a next product version (target product version not set).

CHAPTER

TWELVE

ENVIRONMENTAL PARAMETERS

12.1 Users

The user is a person that will be able to connect to the application.

> **Warning:** To be able to connect, the user must have a password and a user profile defined.

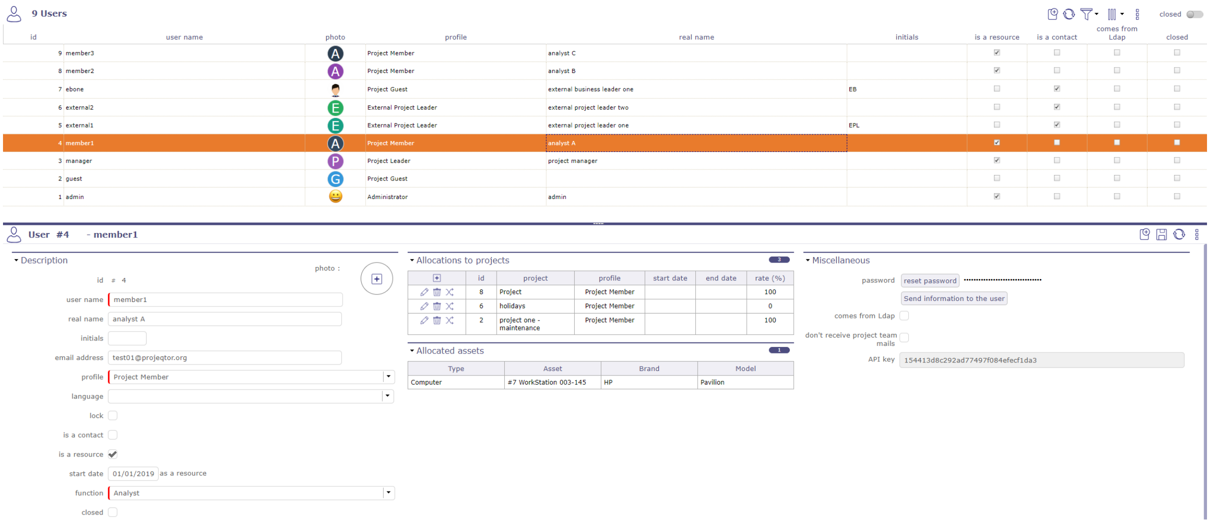


Fig. 1: User screen

ProjeQtOr and LDAP users

ProjeQtOr offers three modes of authentication.

ProjeQtOr users

- Users' information is kept in the application database.
- Password policy and login behavior are managed by the application.
- See: *User and password*

> **Note:** The users "admin" and "guest" are created during installation.

LDAP users

- Allows users defined in an external directory to login at ProjeQtOr by the LDAP protocol.
- Users' information and password policy are managed in the external directory.
- for each user from an LDAP, the word "comes from Ldap" will be displayed next to the user's name with possibility of modification according to the rights of the connected user
- See: *LDAP Management Parameters*

SSO users

- Allows users to connect to ProjeQtOr using the SSO protocol.
- Set entity ID, IDP certificate, unique login and logout, etc.
- Information message on creating a new user from SAML
- User information and password policy are In progress by your SSO solution.

- See *Single Sign On SAML2*

Default user profile

- A default user profile is set during creation of the user.
- A different default profile can be set according to mode of authentication.

Web Service

- ProjeQtOr provides an API to interact with its elements. It is provided as REST Web Service.
- An API key is defined for the user.
- This API key is used to encrypt the data for methods: PUT, PUSH and DELETE.

Section Description

Other sections

- *Allocations*

Concepts

- *ProjeQtOr roles*
- *Profiles definition*
- *Stakeholder definition*
- *Tab Profile*

Table 1: Users description section fields - Required Field

Field	Description
Id	Unique Id for the user.
Photo	Photo of the user.
User name	login id of the user.
Real name	Name of the user.
Initials	Initials of the user.
Email address	Email address of the user.
Profile	Profile of the user.
Locked	Flag used to lock the user, to prohibit connections.
Is a contact	Is this user also a contact?
Is a resource	Is this user also a resource?
Closed	Flag to indicate that user is archived.
Description	Complete description of the user.

Warning: User name

The user name must be unique.

Is a contact

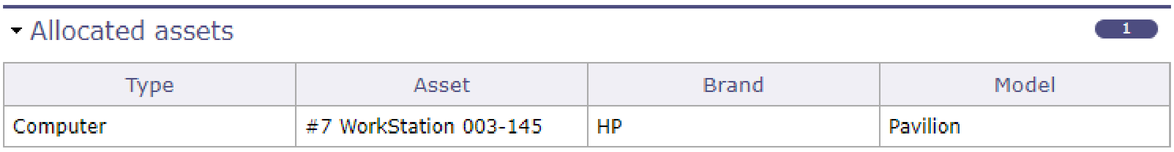
- Check this if you want created a *Contacts* to this user.
- This user will then appear in the "Contact" list

Is a resource

- Check this if you want created a *Resource* to this user.
- The user will then also appear in the "Resources" list.

Allocated asset

This section allows you to view all the equipment connected to the user in the form of a simple table.



Allocated assets 1

Type	Asset	Brand	Model
Computer	#7 WorkStation 003-145	HP	Pavilion

Fig. 2: Allocated asset for the selected user

Each line of equipment is clickable and directs to the element screen.

See:*Asset Management*

Section Miscellanous

Button Reset password

- This button allows to reset password to default password.
- Default password value is defined in *Global parameters* screen.
- Reset password button is available only for ProjeQtOr users.

Table 2: Users miscellaneous section fields

Field	Description
Don't receive team mails	Box checked indicating that the resource doesn't want to receive mails sent to the team.
Comes from LDAP	Box checked indicating that the user information come from LDAP.
API key	Key string used by web service consumer.

Button Send information to the user

This button allows to send by email to the user the login information.

12.2 Resource

Concepts

- *ProjeQtOr roles*
- *Profiles definition*
- *Stakeholder definition*
- *Resource function and cost*
- *Resource calendar*
- *Tab Profile*

The resources of a project can be human or material Resource availability is defined by assigning it to a project.

- Resources are needed for project planning

  See: *Assignment section*

- A resource can be a group of people

  or a fictitious resource with a FTE> 1

  See: *Pool of Resources*

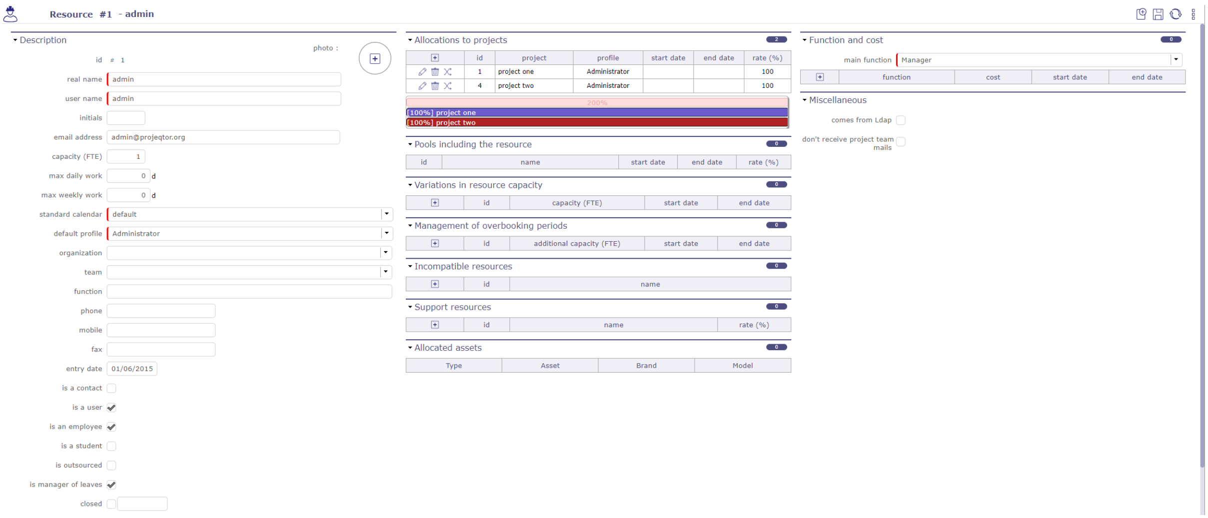


Fig. 3: Details area of the resources screen

Description zone

Other section

- *Allocations*
- *Assignment*
- *Resource planning*

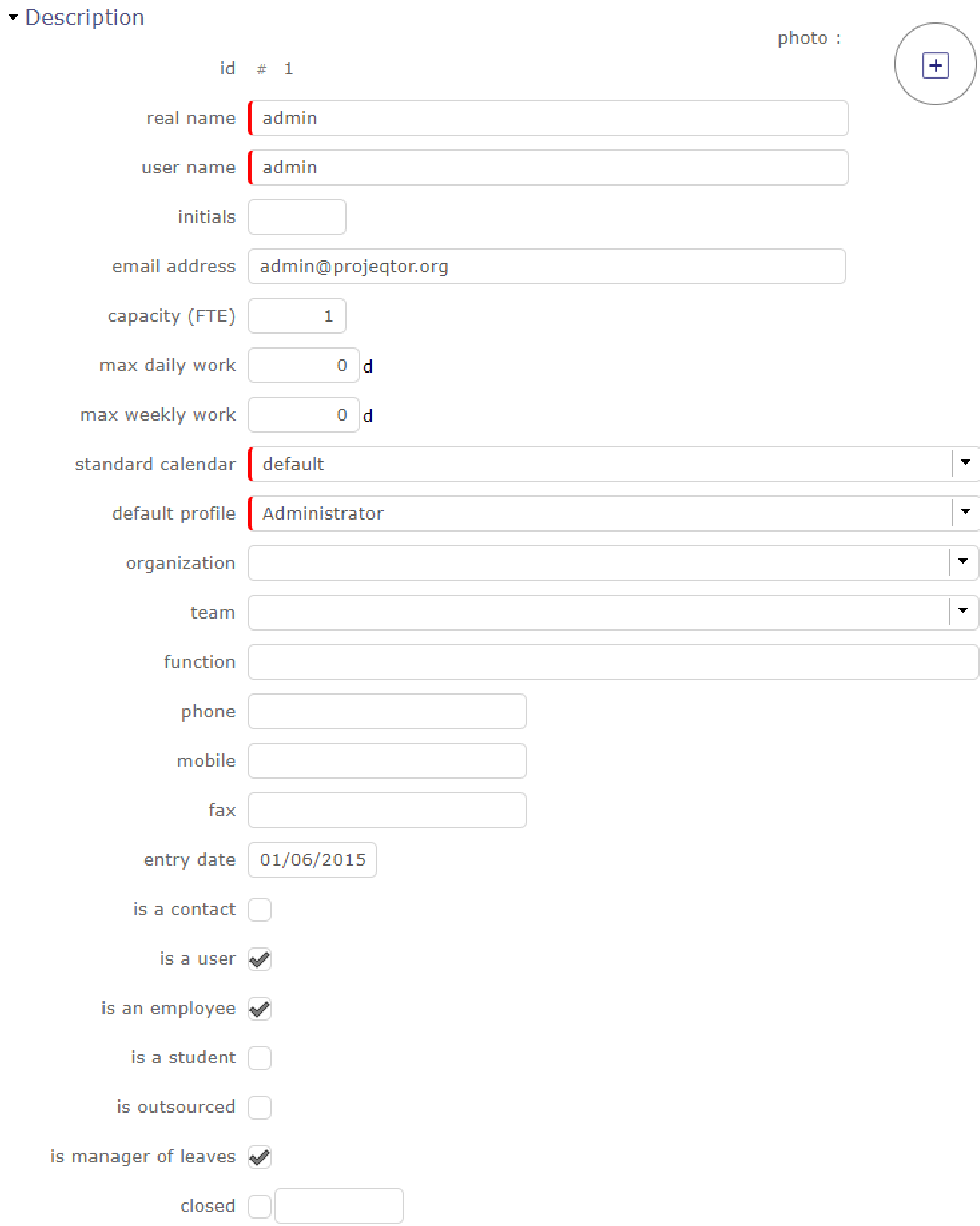


Fig. 4: Description field for creating a resource

Table 3: Required fields

Field	Description
Id	Unique Id for the resource.
Photo	Photo of the resource.
Real name	Name of the resource.
Users name	Name of user.
Initials	Initials of the resource.
Email address	Email address of the resource
Capacity (FTE)	Capacity of the resource in Full Time Equivalent.
Max daily work	Maximun daily work for the resource.
Max weekly work	Maximun weekly work for the resource.
Calendars	Calendar defines the availability of the resource.
Profile	Default profile of the user.
Organization	The organization to which the resource is attached
Team	The team to which the resource belongs.
Phone	Phone number of the resource.
Mobile	Mobile phone number of the resource.
Fax	Fax number of the resource.
Entry date	Date to which the resource arrived The start and end dates are taking into account in planning and reports
Is a contact	Is this resource also a contact? if the resource is created from a contact, the function entered is retrieved or
Is a user	Is this resource also a user?
Is an employee	used for the humans resources module
is a student	The resource is a student
is outsourced	The resource is an outsourced
is manager of leaves	Allow absence management. Used for the humans resources
Closed	Flag to indicate that the resource is archived.
Description	Complete description of the resource.

Full Time Equivalent

FTE stands for "full-time equivalent". This is the number of hours worked by a single employee in a day.

- 1 FTE (full time equivalent)
- < 1 for part time working resource or variations of capacity
- > 1 for virtual resources or teams, pool of ressource or variations of capacity

Note: If you want a resource pool of three people, the FTE capacity must be set to 3

Max work

- You can set a maximum value beyond which no charge can be entered.
- For example, being able to define that a user cannot enter more than 12 hours per day.
- You can set a limit per day and a limit per week.
- The resource will not be able to enter more than the number of hours authorized on its timesheets.

See: *Real work entry*

Field is a contact

- Check this if the resource must also be a *Contacts*.
- The resource will then also appear in the "Contacts" list.

Field is a user

- Check this if the resource must connect to the application.
- You must then define the **User name** and **Profile** fields.
- The resource will then also appear in the *Users* list.

Field is a employee

- Check this box if the resource needs to be linked to the human resources module.
- The resource will then also appear in the *Environmental parameters* list.

Concepts

- *Allocations*
- *Assignment*

Allocations to projects

This Zone allows to allocated the ressources to the project.

- Click on to allocate a new resource to the project.
- Click on to update an existing resource cost.
- Click on to delete the resource cost.

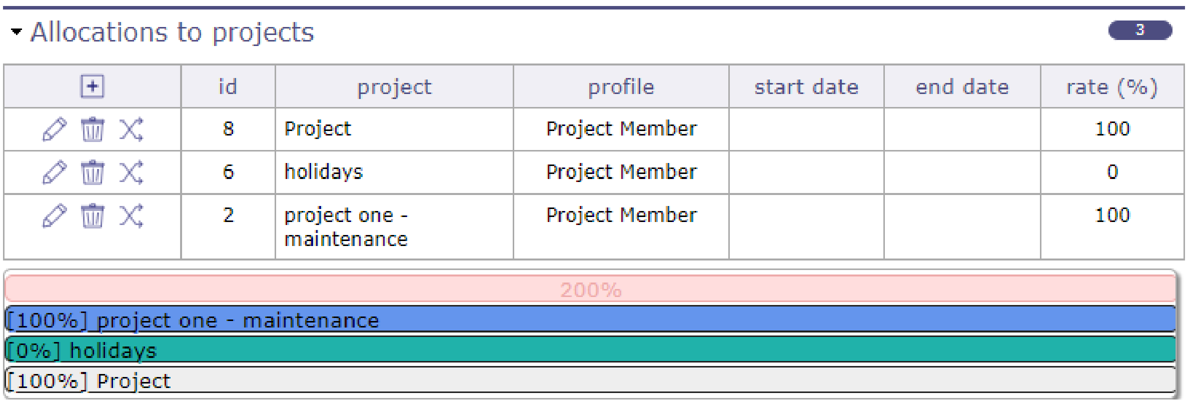


Fig. 5: Resource assigned to the project

12.2.1 Variations in resource capacity

You can record dates (start and end) to indicate that the capacity (FTE) of your resource will vary during this period.

This allows you to reserve and enter additional working time (overtime) or to withdraw hours at standard capacity (recovery).

The resource will then enter its imputations, the exact value of its variable capacity for the given period. 1 + XX hours for the status of the day to go green

The surcapacity of a resource is directly visible on the Gantt chart.

A thin red stripe overcomes the resource work allocation bars and you will find the exact capacity added at the end of the resource detail.

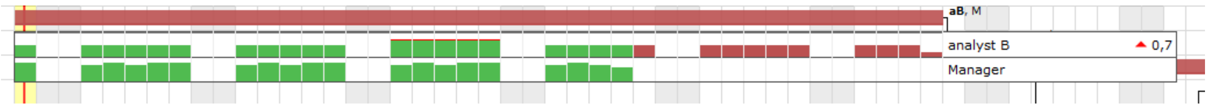


Fig. 6: Variations in the capacity

12.2.2 Managment of surbooking periods

Surbooking in planning allows you to add extra work time on the standard capabilities of your resources to plan more projects that you will not process.

You can also subtract this work time to not plan the full availability of resources.

The resource will continue to report their charges normally, with no extra or reduced work time, to change the status of their day to green.

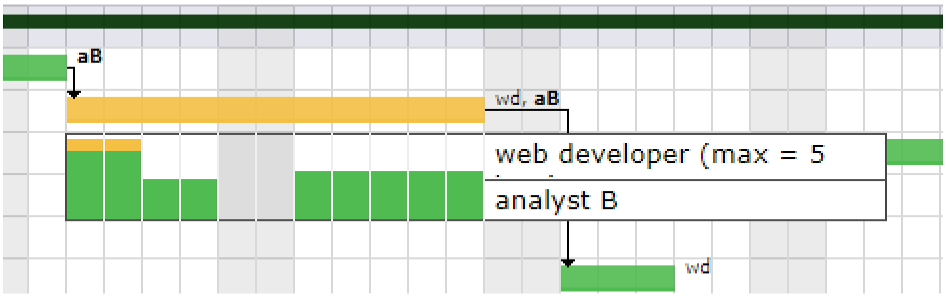


Fig. 7: Variations in the capacity

Warning: variable capacity and overbooking do not behave in the same way.

Variable capacity will be more used to control and record periods of actual overtime and the behavior of imputations will be adapted to this ability.

overbooking is a way of planning in the future without interacting with the behavior of the working time of the resources

12.2.3 Function and cost zone

This section allows to define functions and cost of the resource.

update-resource-cost

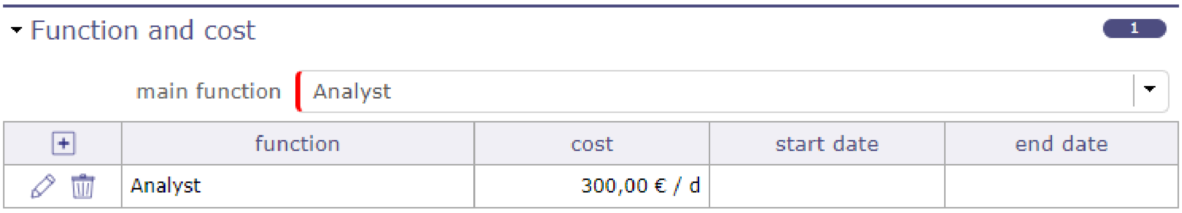


Fig. 8: Function and cost zone

Main function

- The main function allows you to enter the default functions that will be used in the assignments of the activities.
- A resource can have several functions and different costs depending on the function.
- A cost is proposed by default if you have entered the costs in the *list of values - Functions*.
- This cost can be modified at any time from the function table of the resource screen, or with the resource *Update resource cost*

Resource cost definition

- Allows to define the daily cost according to the functions of the resource.
- The daily cost can be defined for a specific period.

Table 4: **Function and cost section fields**

Field	Description
Function	Function of the resource for the selected cost.
Cost	Daily cost of the resource for the selected function.
Start date	Start date for the cost of the resource, for the selected function.
End date	End date for the cost of the resource, for the selected function.

Field End date

- The end date is set when a new resource cost is defined in the same function.
- The end date is the day before the start date in the new resource cost entry.

Resource cost management

- Click on to create a new resource cost.
- Click on to update an existing resource cost.
- Click on to delete the resource cost.

Fig. 9: Resource cost dialog box

Table 5: Resource cost dialog box fields

Field	Description
Function	Function to be selected.
Cost	Daily cost of the resource for the selected function.
Start date	Start date for the cost of the resource, for the selected function.

Field Function

The default value will be the main function.

Field Start date

Start date must be set when a new resource cost is created for the same function.

Table 6: Miscellanous section fields

Field	Description
Don't receive team mails	Box checked indicating that the resource doesn't want to receive mails sent to the team.

12.2.4 Incompatible resources

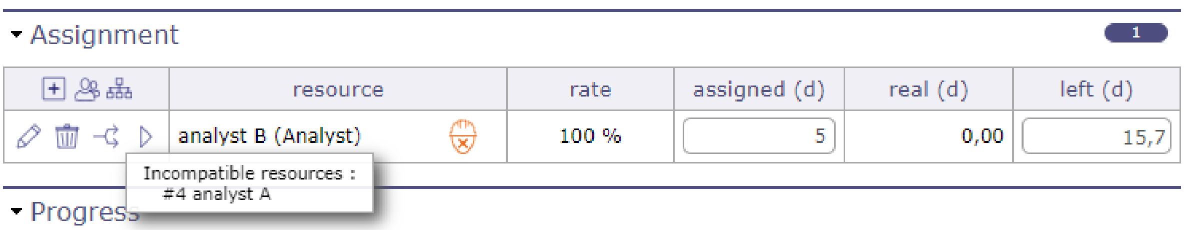


Fig. 10: Assignment with incompatible resource

Two resources A and B are incompatible.

If A is scheduled at a given time, B can not be scheduled on the same day as for a load less than or equal to the remaining availability of To date, that is, the minimum of [capacity of the resource-load already planned] for each incompatible resource and reciprocally with the relation is bijective.

Exemple

Example with two FTE resources = 1

Day x, A is scheduled 0.6 d so B can be scheduled only 0.4 d on all the activities on which A is scheduled

12.2.5 Support resources

Assignment 2

	resource	rate	assigned (d)	real (d)	left (d)
	analyst C (Analyst)	100 %	5	0,00	0
	analyst A (Analyst)	100 %	5	5,00	0

Fig. 11: Assignment with incompatible resource

If resource B is the resource resource of resource A, if A and planned at a given moment, B must also be automatically planned pro-rata indicated as employment rate in the definition of the support resource.

If A's support resource B is not available (in part or in full), we plan for A only the part that is available taking into account the employment rate.

The display of the scheduled load for the support resource, although it is not assigned to the activity, is visible on the detail of a right-click Gantt bar.

Exemple

Example with B support resource of A with a 50% employment rate

- Day x, A is available 1.0 d and B 1.0 d: A is planned 1.0 d, B is planned 0.5 d.
- Day y, A is available 0.5 d and B 1.0 d: A is planned 0.5 d, B is planned 0.25 d
- Day z, A is available 1.0 d and B 0.2 d: A is planned 0.4 d, B is planned 0.2 d

12.2.6 Others

Allocated asset

Allocated assets 1

Type	Asset	Brand	Model
Computer	#7 WorkStation 003-145	HP	Pavilion

Fig. 12: Allocated asset

This section allows you to view all the equipment connected to the resource in the form of a simple table.

Each line of equipment is clickable and directs to the element screen.

See: *Asset Management*

12.3 Pool of Resources

A pool is a group of resources that can work as any of the assigned resources.

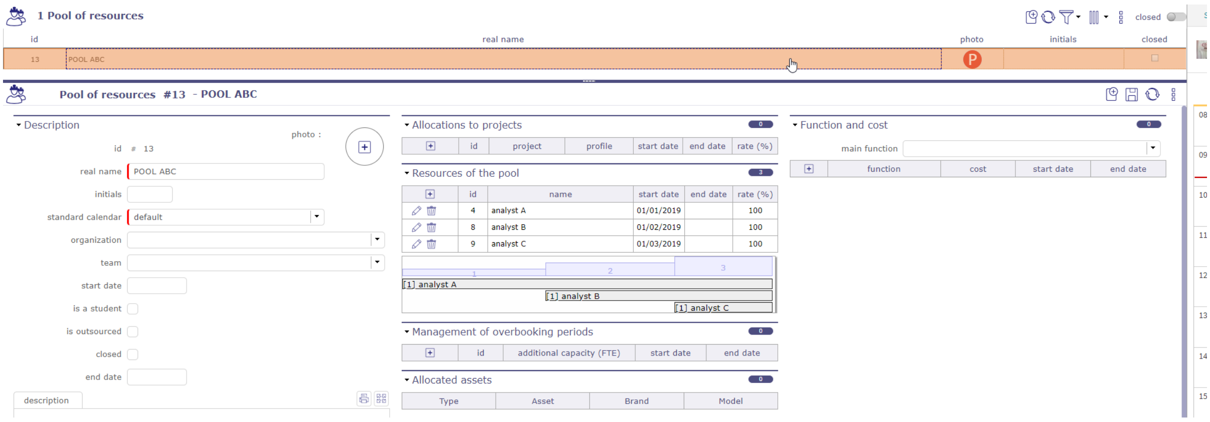


Fig. 13: Pool of resources screen

The use cases for a resource pool can be many :

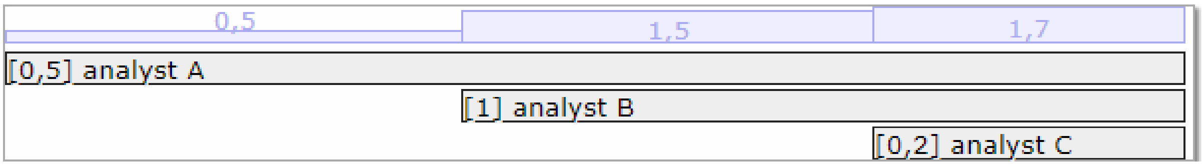
- When you have a group of resources that may work on same tasks, but you don't know in advance who will work. For instance a maintenance team that may work on maintenance tasks and other project tasks.
- For macro planning.
- Define a poll for each group of resources (depending for instance on competencies).
- On first step, assign fake resources to the pools, and plan your project with the pools : you get a first draft of your project, even before knowing who will work on the project, and without needing to go to a very detailed level of tasks (it's macro planning, you just have macro tasks).
- Then when you know who will work on the project : just replace the fake resource with real resources : you immediately get a realistic planning taking into account availability of real resources already booked on other projects. It's still a macro planning, but realistic.
- Then you can draw you detailed planning, just adding sub-activities to your macro tasks, and assigning real resources to the lowest level activities : when you add assigned work, it is automatically subtracted from assigned work on the pool on the macro task, and golbal assigned work on the project is constant.

12.3.1 Planning

- You assign resources to the pool at a given rate for a given period.
- A pool can be allocated to projects like any resource.
- A pool can be assigned to activities like resources. The difference is that when you assign a pool, you don't specify the rate but the FTE (Full Time Equivalent) assigned to the activity. It means the number of resources that can work at the same time on the activity.
- A pool does not have a specific capacity. Its maximum capacity is calculated from the capacity and the rate of the resources composing it.
- When planning a pool, availability of unitary resources already booked on other tasks is taken into account.
- When planning an unitary resource, availability already booked through the pool on other tasks is also taken into account (globally for all the resources of the pool).

▾ Resources of the pool 3

+	id	name	start date	end date	rate (%)
	4	analyst A	01/01/2019		50
	8	analyst B	01/02/2019		100
	9	analyst C	01/03/2019		20



Rate and FTE

A resource cannot be assigned on pools for more than 100% on a given period.

A resource, if assigned on 2 pools. It is the fraction of the FTE of the resource.

A resource with an ETP of 1, if assigned 50% on a pool, will only be scheduled at a maximum of 0.5 per day.

A 20% resource will only be scheduled up to 0.2 of its FTE per day…

Automatic decrement for assigned work

- When you assign a pool to an activity, and then assign a resource of the pool to the same activity, then assigned work on the resource is automatically subtracted from assignment of the pool.
- The same way, when you assign a pool to an activity, and then assign a resource of the pool to a sub-activity of this activity, then assigned work on the resource is automatically subtracted from assignment of the pool.
- When you assign a pool to an activity, and then assign the same pool to a sub-activity of this activity, then assigned work on the pool on the sub-activity is automatically subtracted from assignment of the pool on the parent activity.
- When deleting an assignment, the remaining job is reassigned within the pool.
- When a resource provides work on an activity with no remaining work, but on the same activity there is an allocation for a pool of the resource assigned to the same function, the remaining work on the pool is decremented. * This is an option in the *global parameters*

Important: Limits of a pool of resources

A pool can not be a user and does not have a profile as it may not connect to the application.

A pool can not be a contact

A pool cannot be the responsible of an item

You can choose how the pool and its resources can be allocated and assigned. See: *Pool of resource allocation*

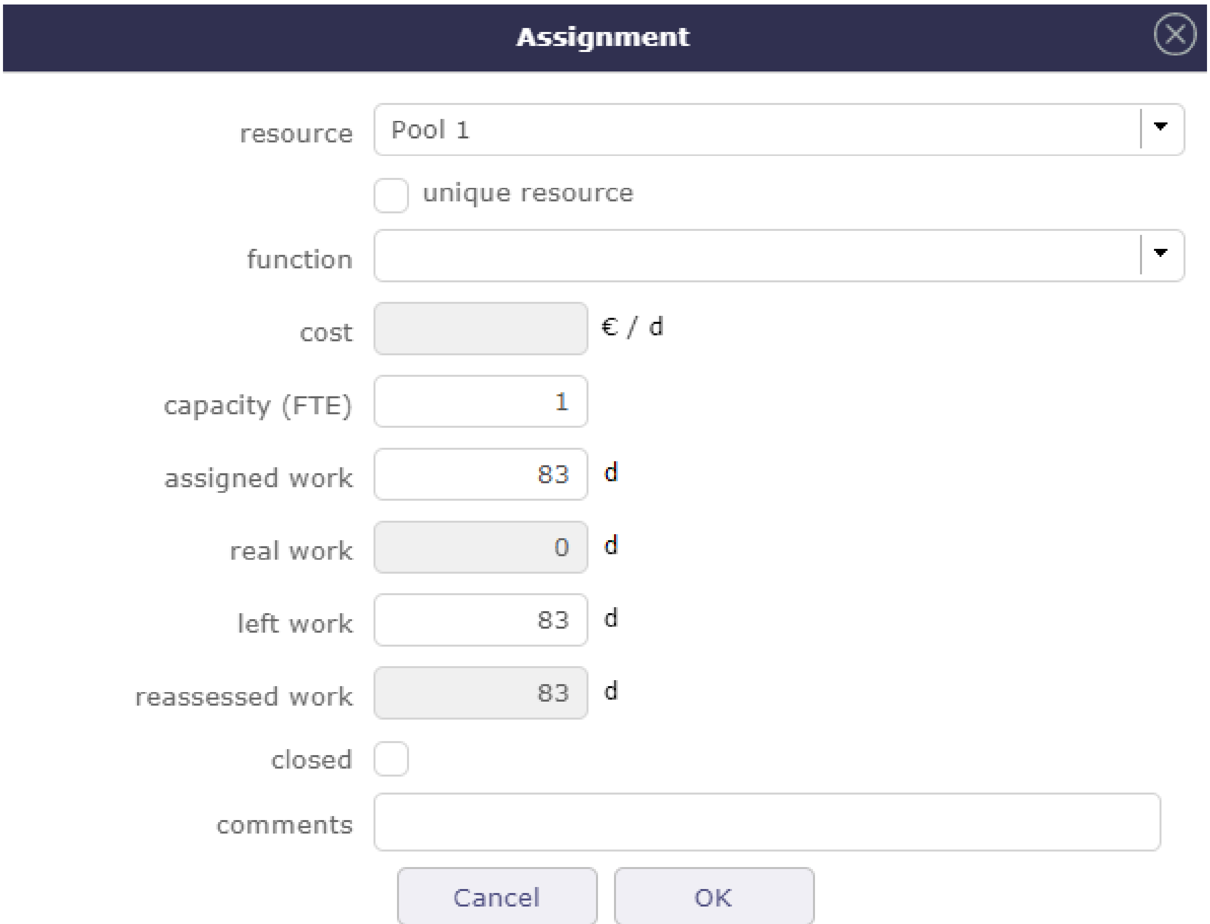
12.3.2 Aggregated resource

The aggregated resource allows you to choose a single resource from a resource pool.

When you assign a resource pool to an activity, a check box appears: single resource.

If you select single resource then you will have no FTE capacity to fill in but a busy rate on the activity.

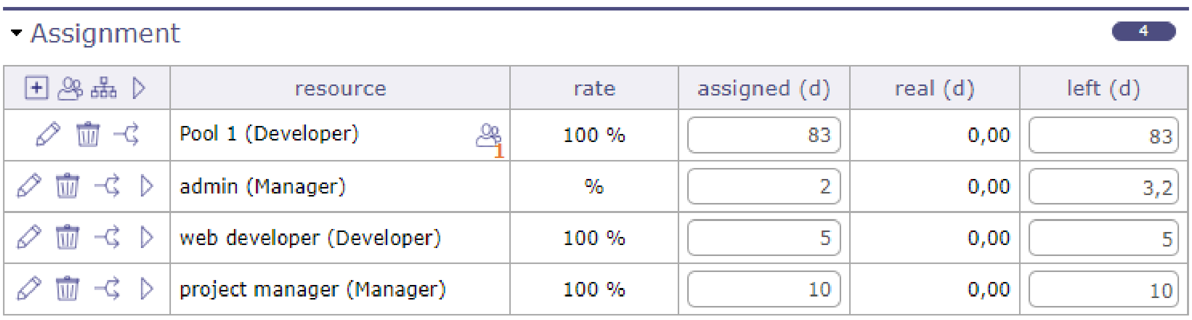
Check the box and confirm to close the pop up.



When the pool is allocate, the pool icon appears on the board.

If you chose the **unique resource** then the 1 number will be displayed on the icon.

Similarly, the function of the resource chosen from the pool is indicated in brackets.


Assignment 4

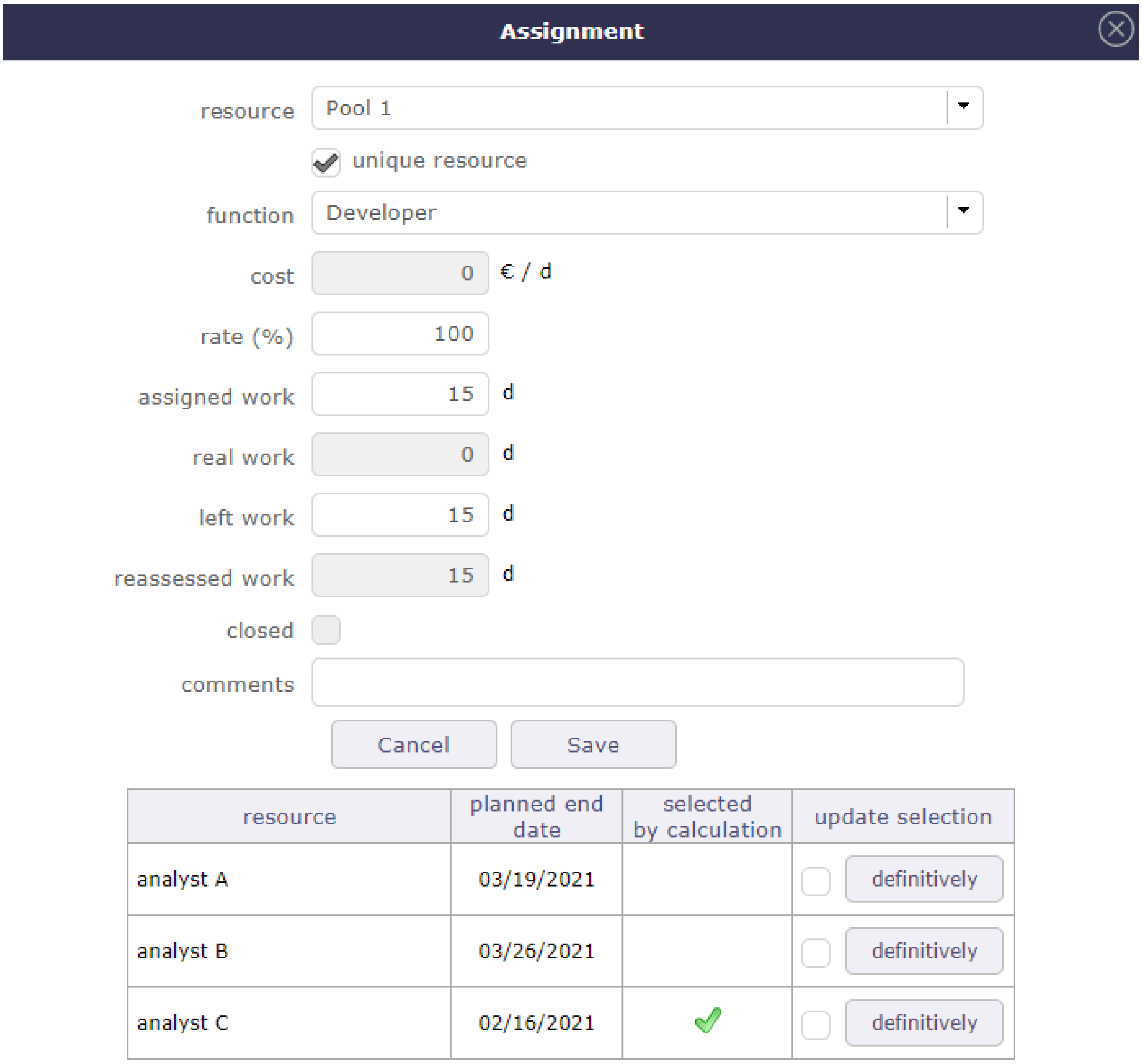
	resource	rate	assigned (d)	real (d)	left (d)
	Pool 1 (Developer)	100 %	83	0,00	83
	admin (Manager)	%	2	0,00	3,2
	web developer (Developer)	100 %	5	0,00	5
	project manager (Manager)	100 %	10	0,00	10

Click on to edit the allocation.

The pop up opens again and this time you have the summary table showing you the resources of your pool and the dates each resource can or should finish the activity.

You must fill in the activity load to see the end dates of the pool resources.

Otherwise the message ‘not planned work’ appears instead of the dates.



Choose the appropriate resource by selecting the corresponding line and confirm.

Basic, ProjeQtOr will automatically select the fastest resource to complete the task.

The selected resource will then be the only one to be planned on this activity from the pool.

12.4 Teams

The team is a group of resources gathered on any criteria.

A resource can belong to only one team.

> **Use for**
>
> - To allocate all team members to a project.
> - To filter resource data in work, cost and planning reports.
> - To set attachment, note and document visibility to the team.

Team members

List of the resources members of the team.

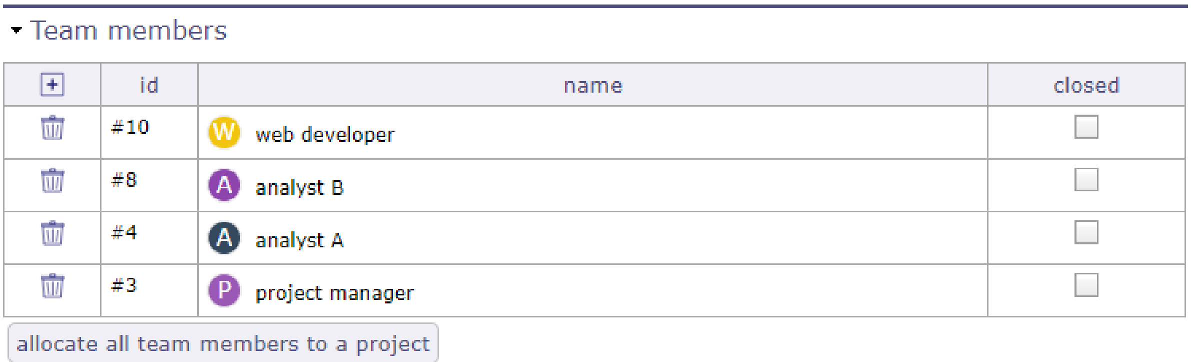


Fig. 14: Team members section

- Click on to add one or more members to the team
- Use in the pop-up window to search for specific resources
- Click on to delete the member to the team

> **Button Allocate all team members of a project**
>
> - This button allows to allocate all team members of a project.
> - The *allocation dialog window* will be displayed.

12.5 Material resources

It is possible to create a resource that is "material" so that it can be reserved with work. But this work will not add to the project. On the other hand, if this resource has a cost, it is added.

This material resource will be able to be planned just like a human resource with a capacity (ETP) of 1 that you will not be able to modify.

The human, overcapacity and overbooking fields are not available for this type of resource.

However, a hardware resource can have a supporting but unsupported resource or an incompatible resource. For example a trailer could support a truck. Or an automatic car may be incompatible with a resource that does not know how to drive this type of car.

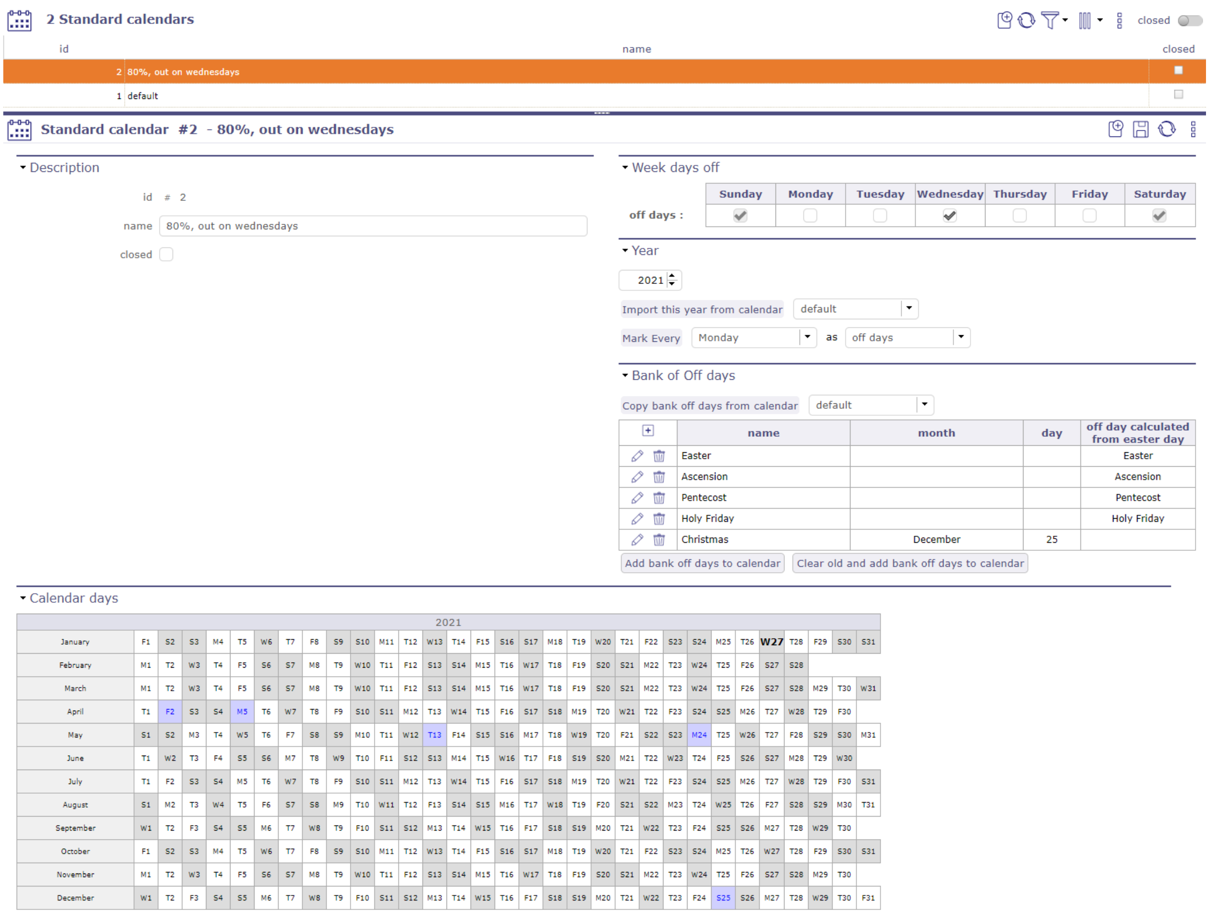
A hardware resource cannot be part of a resource pool. Exclusively human.

12.6 Calendars

Concepts

- *Resource calendar*

This tool allows to define calendars.



- It allows to define exceptions to the default definition.
- In default definition, week days are days work and weekend days are days off.

- You can change the standard calendar or create other calendars by allowing any day of the week to be a holiday

Note: Exceptions can be defined for the current year and the next years.

Default calendar

A calendar named "default" is already defined. Days off defined in this calendar is displayed in Gantt, real work allocation and diary. By default, weekend days are indicated as non-working days and cannot be unchecked via calendars. You must go to global settings > work time section > Open day and select your choice (on or off) in the drop-down list opposite the day. The default calendar cannot be deleted.

A specific calendar can be created to define days off and work to a particular resource.

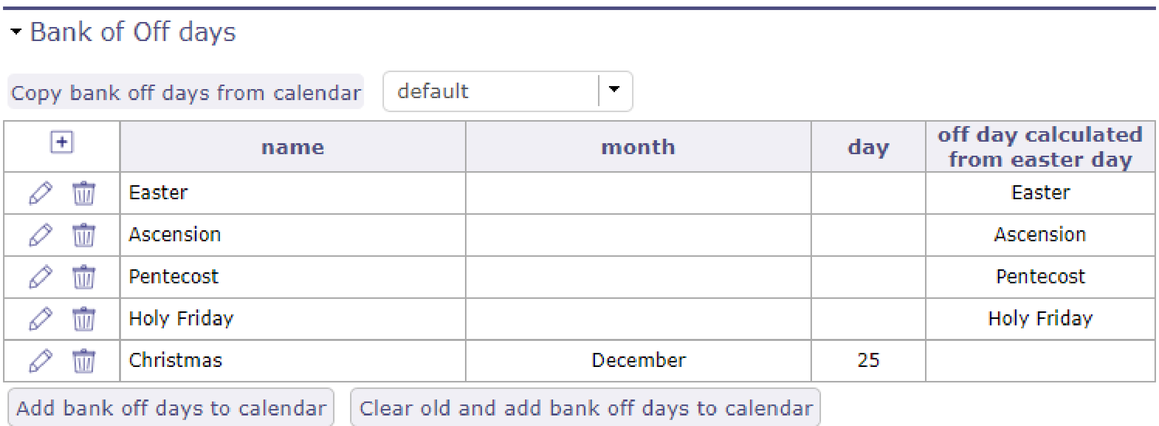
- It is possible to import exceptions definition of a calendar in another.
- You can also import the public holiday
- Existing exceptions of current calendar are not changed.

Note:

- The calendars are not linked.
- You have to re import the definition to apply changes.

Bank Of OFF Days

Holiday bank definition that can be easily added each year.



	name	month	day	off day calculated from easter day
	Easter			Easter
	Ascension			Ascension
	Pentecost			Pentecost
	Holy Friday			Holy Friday
	Christmas	December	25	

Click on to create a public Holiday

A Pop Up open and you can defined the Off day

Week days off

- By default, Saturday and Sunday are non-working days
- Check the boxes corresponding to non-working days if the default settings do not suit the structure of your company

Year

- Select the calendar year to create.

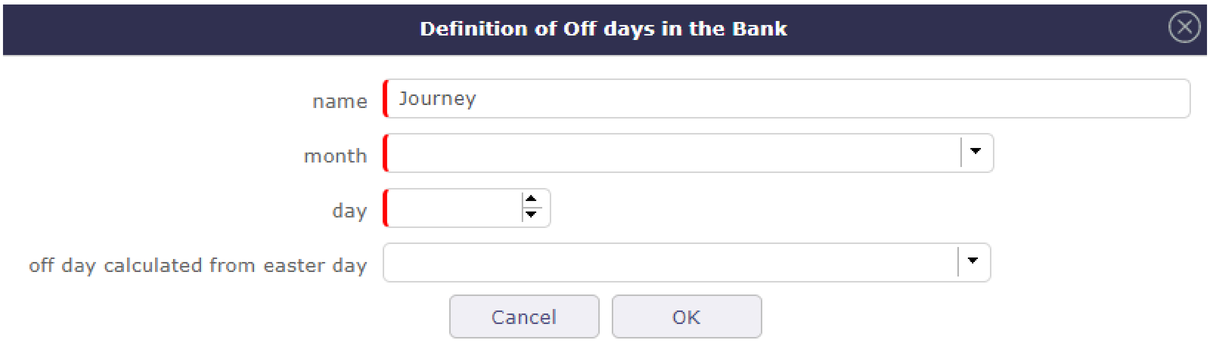


Fig. 15: Bank OFF days

Year field

- Create the calendar from the specified year with all the features of the calendar called.

Button Import this year from calendar

- Copy exceptions of the selected year of the selected calendar into current calendar.

Calendar days

A calendar of selected year is displayed to give a global overview of the exceptions existing.

- In white: days work.
- In gray: days off.
- In red: exception days work.
- In blue: exception days off.
- In bold: current day.

Just click on one day in the calendar to switch between off and work day.

Calendar on project

This calendar is not cumulative with resource calendars and it does not have priority.

the schedule attached to the project is ideal when managing by duration and to be operated on activities without assigned workload.

If the workload exists over a period where the project calendar indicates unavailability, but the resource's calendar has a calendar that indicates availability, then this resource will indeed be planned.

12.7 Clients

The client is the entity for which the project is set.

It is generally the owner of the project, and in many cases it is the payer.

It can be an internal entity, into the same enterprise, or a different enterprise, or the entity of an enterprise.

The client defined here is not a person. Real persons into a client entity are called "Contacts".

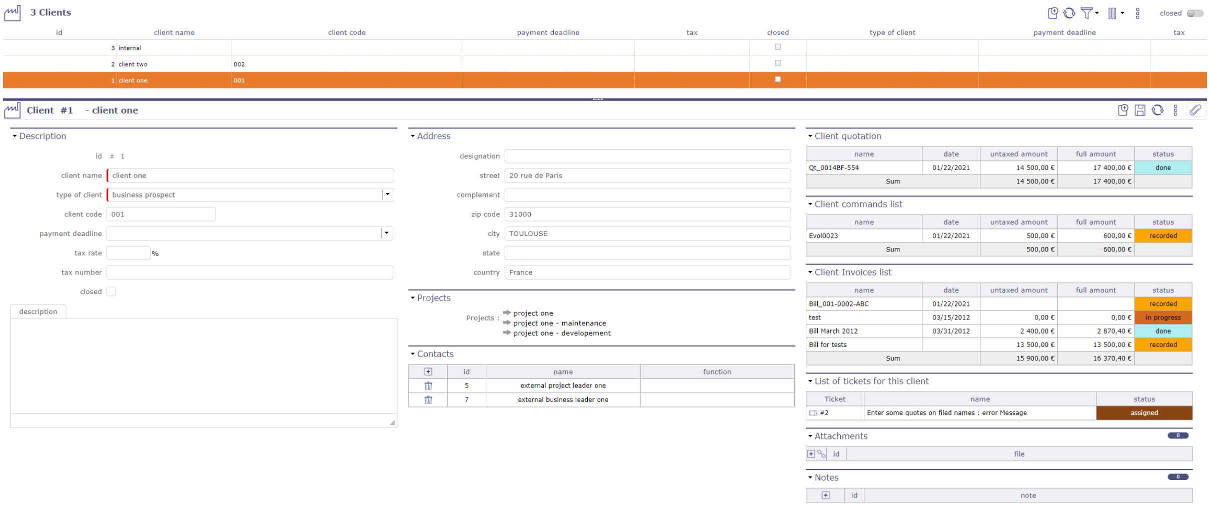


Fig. 16: Clients screen

Section Description

Other sections

- *Attachments*
- *Notes*

Table 7: Required field

Field	Description
Id	Unique Id for the client.
client name	Short name of the client.
Type of client	Type of client.
Client code	Code of the client.
Payment deadline	The payment deadline is stated on the bill for this client.
Tax	Tax rates that are applied to bill amounts for this client.
Tax number	Tax reference number, to be displayed on the bill.
Closed	Flag to indicate that the client is archived.
Description	Complete description of the client.

Address section

Full address of the client.

Projects section

List of projects related to the client.

Contacts section

Displays the names of client-related contacts.

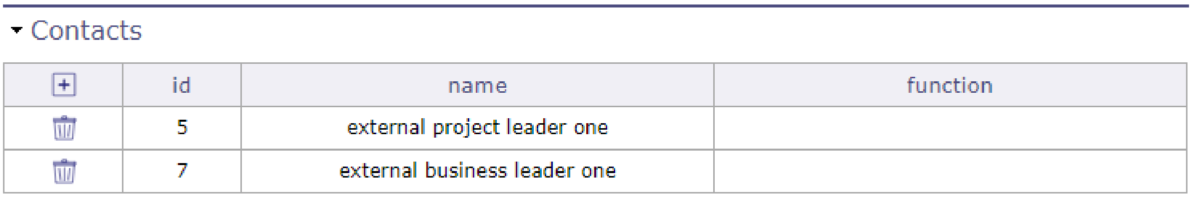


Fig. 17: Contacts section

You can create the contacts directly on the contact screen.

But you can create the contacts directly into the contact section

- Click on to create the contact
- Click on to delete the contact

When you want to add a contact, the window with the existing list of clients is displayed.

You can select or create a contact from this window, the information will be reflected directly in the contact screen.

Client quotation, client commands list and client bill list

These sections allow you to have a summary of the various financial documents concerning the client selected.

You find the list of quotes, orders and invoices of this client in tables for easy reading

List of tickets

This section allows you to see all open tickets for the selected client.

Note: To display these sections, you must set the options "list quotes, commands and bills on client form" on yes in the global parameters but also in the user parameters.

See: *Global Parameters* See: *Users Parameters*

Client quotation

name	date	untaxed amount	full amount	status
Qt_0014BF-554	01/22/2021	14 500,00 €	17 400,00 €	done
Sum		14 500,00 €	17 400,00 €	

Client commands list

name	date	untaxed amount	full amount	status
Evol0023	01/22/2021	500,00 €	600,00 €	recorded
Sum		500,00 €	600,00 €	

Client Invoices list

name	date	untaxed amount	full amount	status
Bill_001-0002-ABC	01/22/2021			recorded
test	03/15/2012	0,00 €	0,00 €	in progress
Bill March 2012	03/31/2012	2 400,00 €	2 870,40 €	done
Bill for tests		13 500,00 €	13 500,00 €	recorded
Sum		15 900,00 €	16 370,40 €	

Fig. 18: Financial monitoring sections

List of tickets for this client

Ticket	name	status
#2	Enter some quotes on filed names : error Message	assigned

Fig. 19: List of tickets for this client

12.8 Contacts

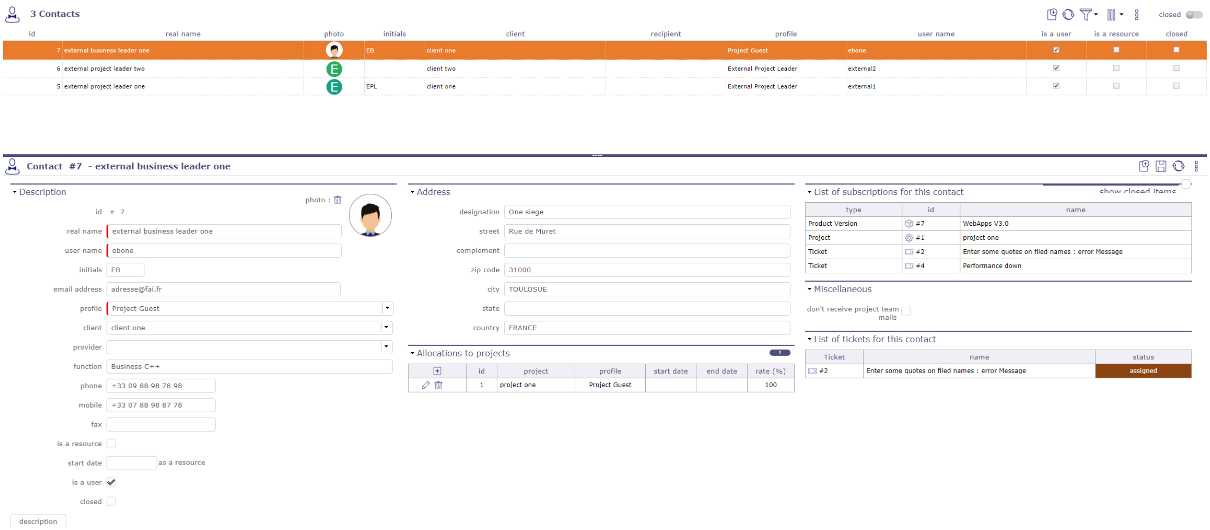


Fig. 20: Contacts screen

Other

- *ProjeQtOr roles*
- *Profiles definition*
- *Stakeholder definition*
- *Tab Profile*
- *Allocations*

A contact is a person in a business relationship with the company.

The company keeps all information data to be able to contact him when needed.

A contact can be a person in the client organization.

A contact can be the contact person for contracts, sales and billing.

Field Is a resource

- Check this if the contact must also be a resource.
- The contact will then also appear in the "Resources" list.

Field Is a user

- Check this if the contact must connect to the application.
- You must then define the **User name** and **Profile** fields.
- The contact will then also appear in the "Users" list.

See: *Ressource Contact User*

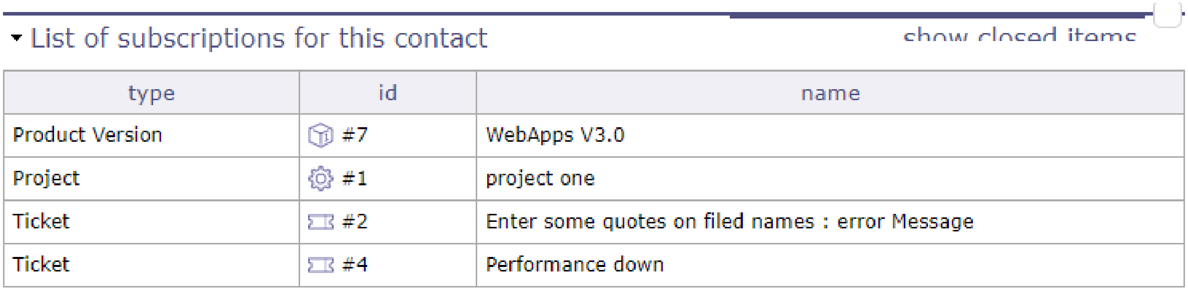
Section Allocations to project

Allows to allocate your contact to a project

see: *Allocations*

Section List of subscription for this contact

You can see the items followed by your contact in this section



List of subscriptions for this contact

show closed items

type	id	name
Product Version	#7	WebApps V3.0
Project	#1	project one
Ticket	#2	Enter some quotes on filed names : error Message
Ticket	#4	Performance down

Fig. 21: list of elements followed by your contact

Section Miscellanous

if the box is checked, the contact will not receive the mails sent to the team

12.9 Providers

Allows to manage provider list.

Section Description

Other sections

- *Attachments*
- *Notes*

Table 8: Required fields

Field	Description
Id	Unique Id for the provider.
Name	Provider name.
Type of provider	Type of provider.
Provider code	Code of the provider.
Payment deadline	The payment deadline is stated for this provider.
Tax	Tax rate applied for this provider.
Tax number	Tax reference number.
Closed	Box checked indicates that the provider is archived.
Description	Description of the provider.

Section Address

Full address of the provider.

Section Contact

Displays the names of provider-related contacts.

You can create the contacts directly on the contact screen.

But you can create the contacts directly into the contact section

- Click on to create the contact
- Click on to delete the contact

12.10 Recipients

The recipient is the beneficiary of bill payments.

Recipients are mainly defined to store billing information.

Section Description

Table 9: Required fields

Field	Description
Id	Unique Id for the recipient.
Name	Short name of the recipient.
Company number	Company number, to be displayed on the bill.
Legal notice	Legal notice for the recipient.
Tax number	Tax reference number, to be displayed on the bill.
Tax free	Flag to indicate that tax is automatically set to zero for this recipient.
Contact name	Name of contact for the recipient.
Contact email	Email of contact for the recipient.
Contact phone	Phone of contact for the recipient.
Closed	Flag to indicate that the recipient is archived.

Section International Bank Account Number

Field	Description
Bank	Bank name.
International number (IBAN)	IBAN for the recipient.
Bank code (BIC)	BIC for the recipient.
National account number	Full account number defining the BBAN account code.

Section Address

Full address of the recipient.

12.11 Organizations

Management of organizations

- Management of organizations allows to edit the structure of the company in the frame of organizations (Departments, Units, Location, . . .)
- The organization summarizes the data of the projects in progress for the organization.

Depending on the profile, you can limit the visibility of resources to people in the same organization or team as the current user.

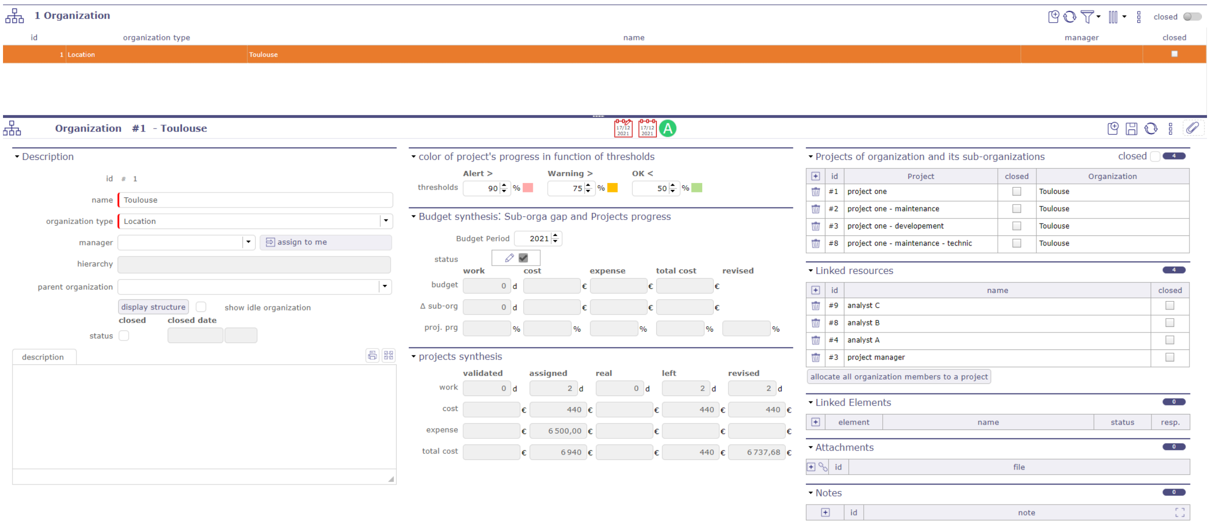


Fig. 22: Organization global view

Section Description

Other sections

- *Current project*
- *Linked element*
- *Attachments*
- *Notes*
- *Organization*

Table 10: Required fields

Field	Description
Id	Unique Id for the Organization.
Name	Short name of the Organization.
Organization type	Type of organization.
Manager	Manager of organization.
Hierarchy	list of parents organizations.
Parent organization	parent organization.
Display the structure	Displays the structure of the selected organization in a popup.
Show idle organization	Show closed organizations in the structure display.
Closed	Box checked indicates the organization is archived.
Closed dates	Displays the closing date and time of the organization.
Description	Description of the organization

Display the structure

Click on the button to open a pop-up which will display in a more graphic way the structure of the organization you have selected.

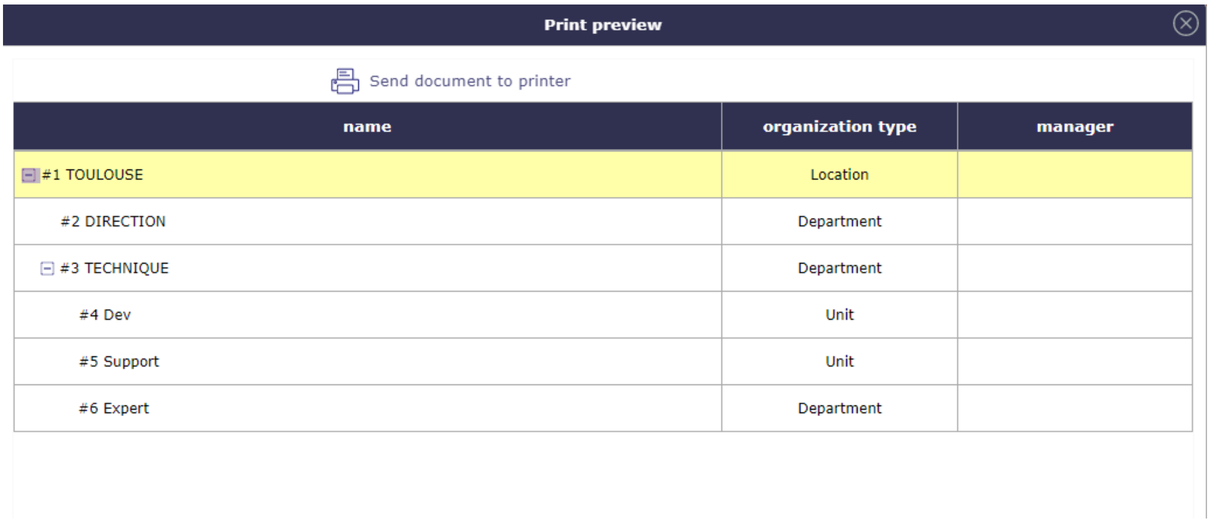


Fig. 23: Structure display

Project Synthesis

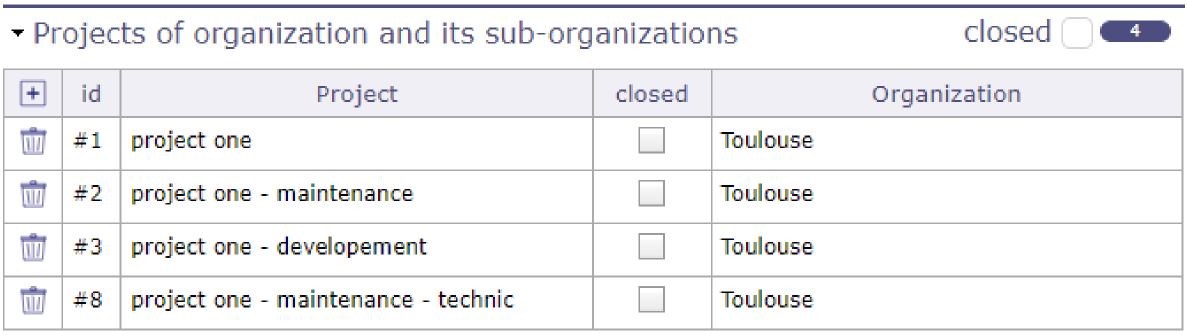
Fig. 24: Project financial synthesis

This section displays a summary of the costs recorded on the projects related to the selected organization.

Projects of organization and its sub-organizations

In this section you will find the list of projects and sub-projects linked to the selected organization.

A button allows you to display or hide closed organizations.



▾ Projects of organization and its sub-organizations — closed — 4

	id	Project	closed	Organization
	#1	project one	☐	Toulouse
	#2	project one - maintenance	☐	Toulouse
	#3	project one - developement	☐	Toulouse
	#8	project one - maintenance - technic	☐	Toulouse

Fig. 25: list of projects and its sub-projects

Linked resources

This section allows you to see the resources attached to the selected organization.

- Click on to add a new resource in the organization
- Click on to delete a resource of the organization
- Click the `allocate all organization members to a project` button to assign all of an organization's resources to a project.
- The project assignment pop-up opens and allows you to choose your resources.

See: *Allocations section*

Linked elements

This section allow you to linked any element of ProjeQtOr to the selected organization.

See: *Linked Elements section*

Attachments

This section allows you to attach elements external to the selected organization. Whether documents or url addresses.

See: *Attachments section*

Notes

This section allows you to add notes on elements linked to the selected organization

See: *Notes section*

12.12 Humans Resources

Important: Documentation

The human resources module was developed by an external contributor SALTO CONSULTING. The explanations below have been taken from the instructions, provided in French only, with the module. * French documentation on the implementation of regulated absences is available on the download page.

The HR module was created in order to be easily adapted to French law, but it can be fully parameterized according to the rights of any country.

This section allows to manage the society's Humans Resources.

This system comes in addition to the standards of the management of absences.

Used to manage absences that must be validated, controlled and have values to be regulated according to French law.

Start to define the:

- *employee and the manager*
- *Leaves types*
- *Employment contract type*

You can choose the leave entitlement standard for each type of contract. The employee may reserve periods of leave of absence according to his rights.

you will be able to manage:

- The quantities acquired over a period of time.
- The period of validity of a quantity of absence.
- The possibility to take earlier absences over the period being acquired.
- The number of days before and after which the absence request can be made.
- Define specific acquisition rules.
- validate or reject an absence request.

Note: A project dedicated to these regulated absences is created and makes it possible to store the requested days of absence as planned time and the days of absence validated as working time thus making it possible to integrate these absences in the planning.

Note: The calculation of the number of days represented by absence is done on the basis of working days.

The working days are defined in *Global Parameters* and *calendar* associated with employee: holidays, non-working days.

12.12.1 Environmental parameters

The properties below is visible only when the *HR module* is enabled.

Employee

An employee is a *Resource* whose property **“is an employee”** is checked in the screen resources.

Once the resources are saved as employees, you can manage them from the employee screen. You find the same fields of description as the resources. In this section, the employee can see the person who manage its leaves periods.

Each time an employee is defined, a default contract is automatically created on the entry date of the resource if it is filled in. If the date is not specified, the current date on creation is retrieved.

Important: A calculation error may occur if the entry date is not entered. In this case, on the resource screen:

1. uncheck the box **is an employee**,
2. fill in the date of entry,
3. save,
4. check again **is an employee**.

The calculation of the rights will then be reset with the new date.

Employee manager

A manager is a resource whose properties **“is an employee”** and **“is absence manager”** are checked.

The management of an employee is dated, which allows to change manager or temporarily delegate management to another manager (absences).

A manager must be an employee.

An employee manager can make absence requests in lieu of employees.

He can validate or reject employee absentee requests that he manages.

Important: The absence manager manages the absences of the employees attached to him. He does not have access to the module settings. He does not have an administrator role.

Leave system Administrator

He is the administrator of the Leave System. He will define Leave Types, Contract Types, …

In order to be able to manage and configure the human resources module after its installation, you must access the *global parameters*.

A special additional HR section allows you to define the administrator of absences and regulated rights.

If an employee does not have a manager, the administrator of the Regulated absence module acts as manager.

The administrator is obligatorily a leave manager

Warning: When a resource is no longer **“used”**, all the elements of the Regulated absence module are deleted by the module:

- Assignments to activities associated with type of absence

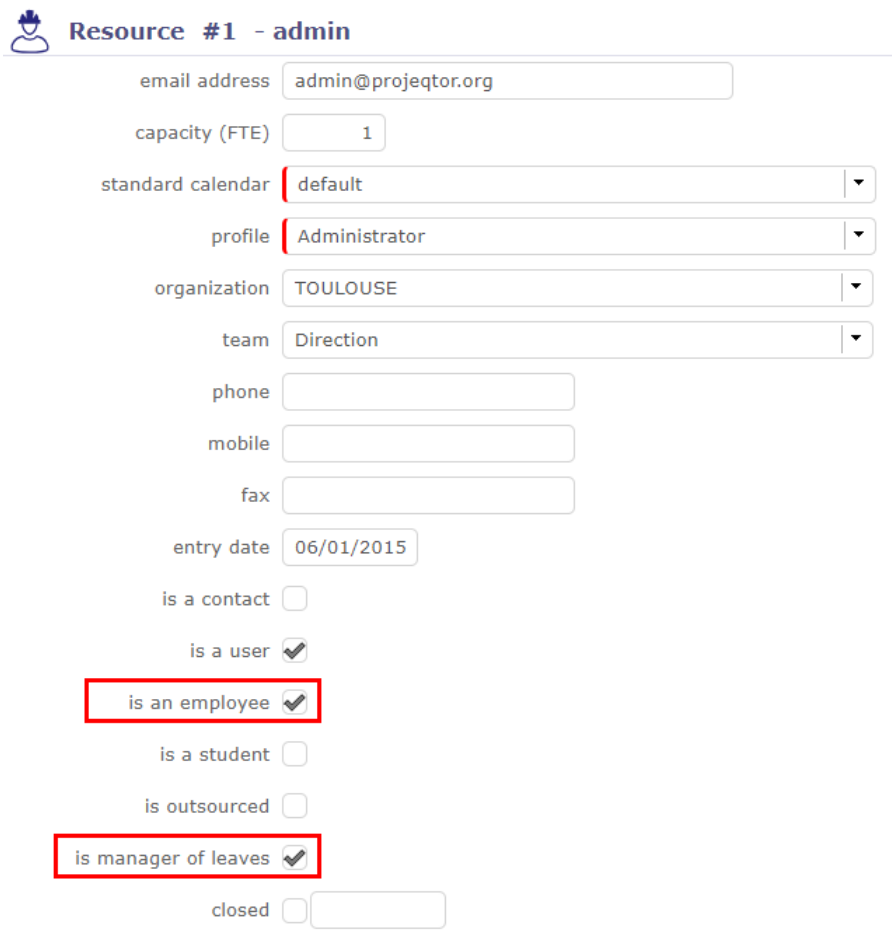


Fig. 26: Box **"is an employee"** and **"is manager of leaves"** is checked

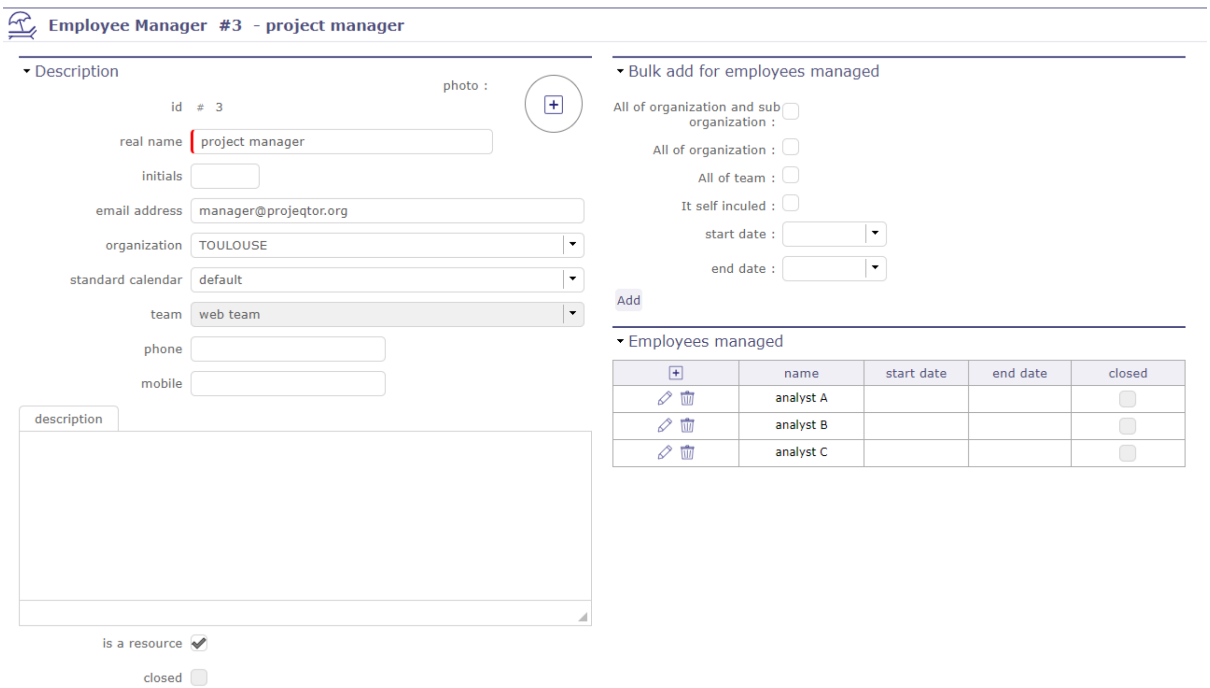


Fig. 27: Manager Screen

- Time spent generated following validated absence requests
- Planned times generated due to absence requests not yet validated
- Absence requests
- Acquired rights
- Contracts
- Links with his managers

Leaves Dashboard

A dashboard is available to absence managers

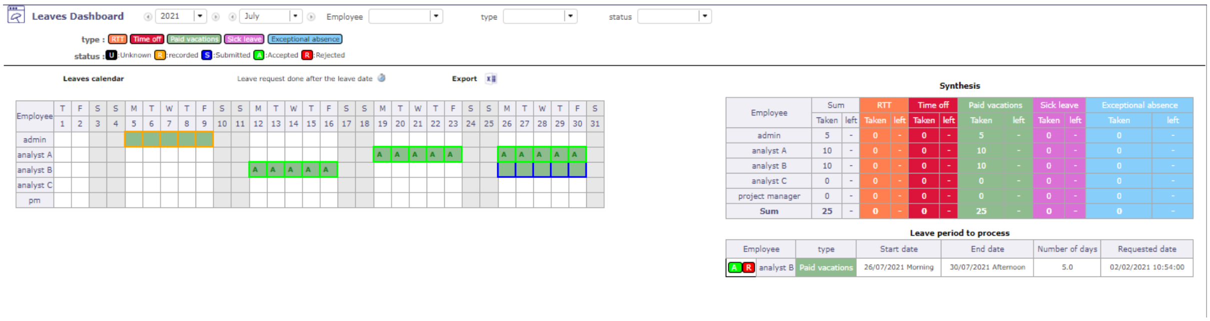


Fig. 28: Leaves dashboard

The filter bar allows you to filter the information presented in the dashboard

Fig. 29: Filter bar

Leaves Calendar displays informations based on filters applied by managed employee

The  tells you that the request was made late

You can export the calendar into Excel format

Synthesis

The synthesis is also displayed according to the filters selected beforehand,

and gives the number of days remaining to be taken by type of leave and managed employees

Leave period to process

In this section, appears the list of absences to be processed, that is to say under the "recorded" status

12.12.2 Leaves types

This part allows you to create the types of absences regulated.

A corresponding activity (= name of absence type) is created on the project dedicated to absences management.

All employees (resource registered as employee) are assigned to this activity

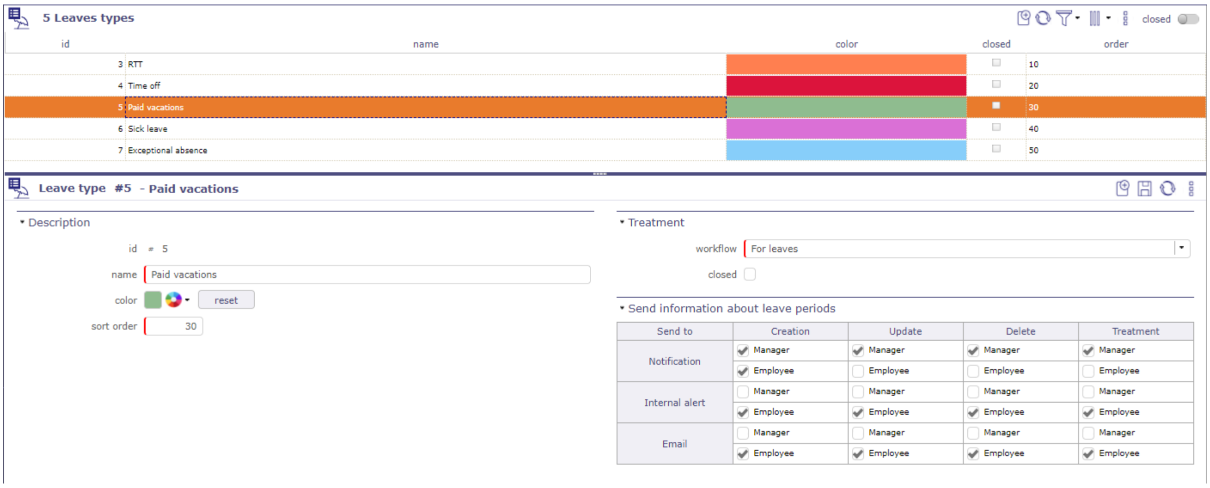


Fig. 30: Leaves types screen

- You can choose the workflow that will be attached to human resources
- you can defined who received an internal alert or an email on the creation, the update, the delete and/or the treatment of the leaves

See also:

More detail about **Contractual values**, see *Earned rights*

12.12.3 Employment contract type

This section allows you to create the different contracts that are in effect in your company

The types of contracts allow to have rules of acquisition of different regulated absences according to the contract of employment of an employee

You can only have one type of default contract

Note: example in France

- Executive contract = No acquisition rule
- Full-time frame contract = RTT
- Part time frame contract = No RTT
- etc.

See also:

More detail about **contractual values**, see *Earned rights*

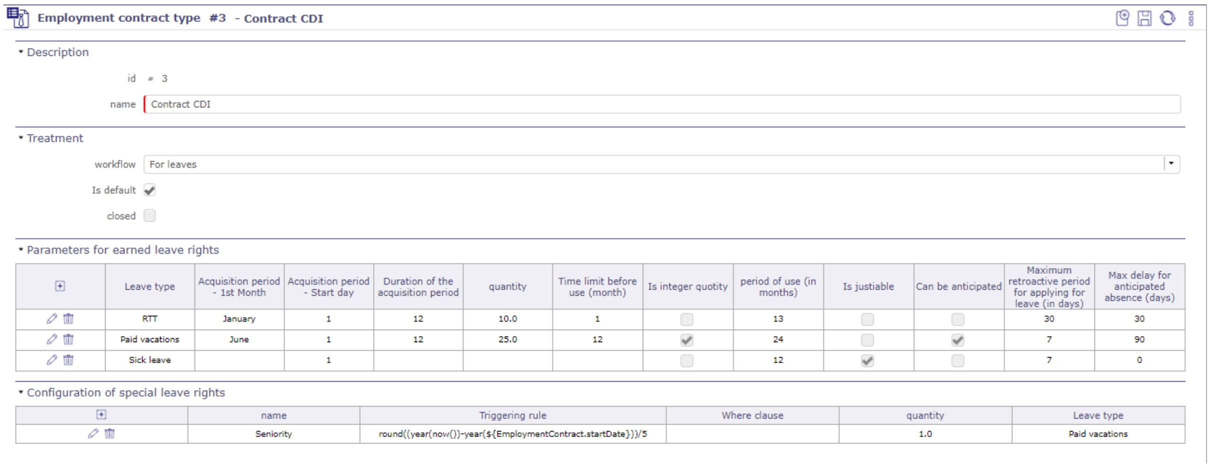


Fig. 31: Screen of Employment contract type

Parameters for earned leave rights

- In this section you can define which types of regulated absences will be attached to this type of contract.
- If you have created several types of regulated absences and attached them to all your contracts (check box **on default** or **on everything**), these types will be visible in this section.

If you are missing types of absences, you can create them from this screen:

- Click on the [+] button
- A pop up opens and proposes to fill in the same fields as on the screen of the types of regulated absences

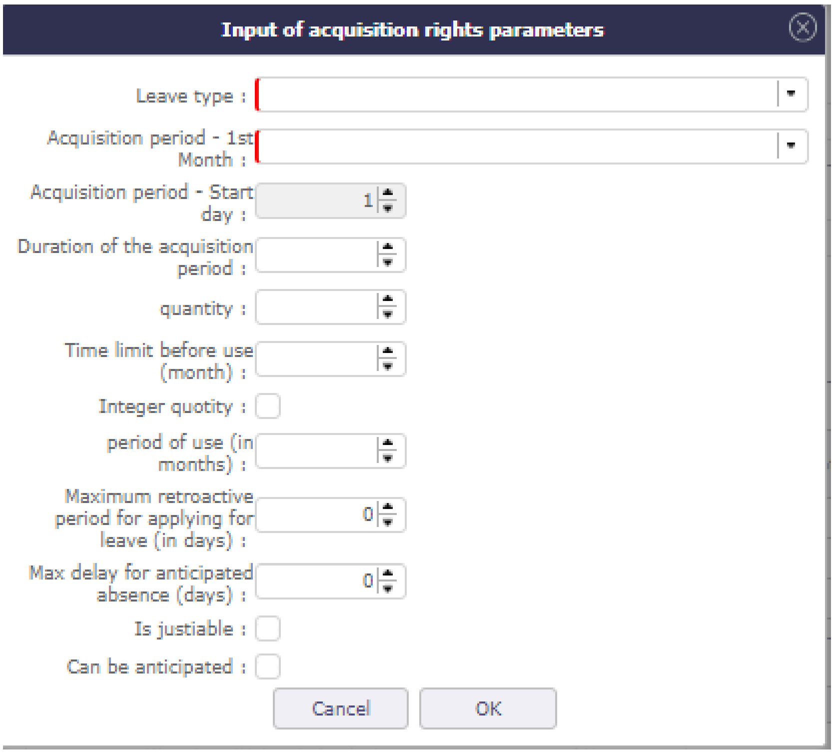


Fig. 32: Special leaves rights

See also:

More detail about **Specific values**, see *Earned rights*

Configuration of special leave rights

Special acquisition rules are rules that can not be expressed with the values of the standard acquisition rules

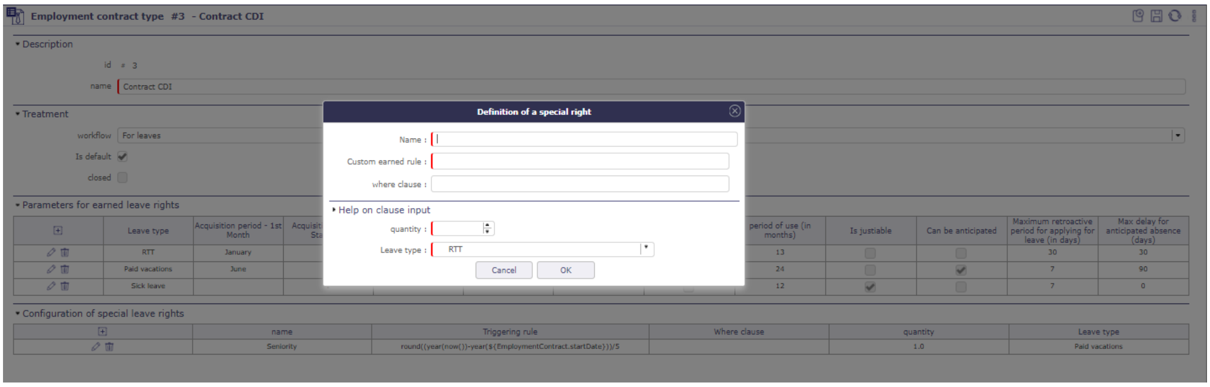


Fig. 33: Special leaves rights

custom earned rules:

Define the special acquisition rule based on the attribute values of a ProjeQtOr entity.

This rule follows the vocabulary of the SQL language

where clause

Condition of application of the special right

this clause follows the vocabulary of the SQL language

Important: for help with the SQL functions you can use, click on the section bar **help on clause input**

A new part appears and proposes drop-down menus with prerecorded SQL queries

---

Quantity

Number of additional acquired days calculated following the application of the special acquisition rule

This rule follows the vocabulary of the SQL language

Leave type

The type of regulated absence to which will be attached, the rule of special absence.

Employment contract end reason

Allows you to record the different types of end of contract.

Note: Why end a contract?

- Resignation
- Change of the status (non managment -> management)
- Change of the quotity (100% -> 80%)
- Going to retire…

These different reasons may lead to changes in the rules governing the acquisition of the rights of absence.

12.12.4 Leave Rights earned

On this screen, you can see your leaves rights earned since your contratc's beginning.

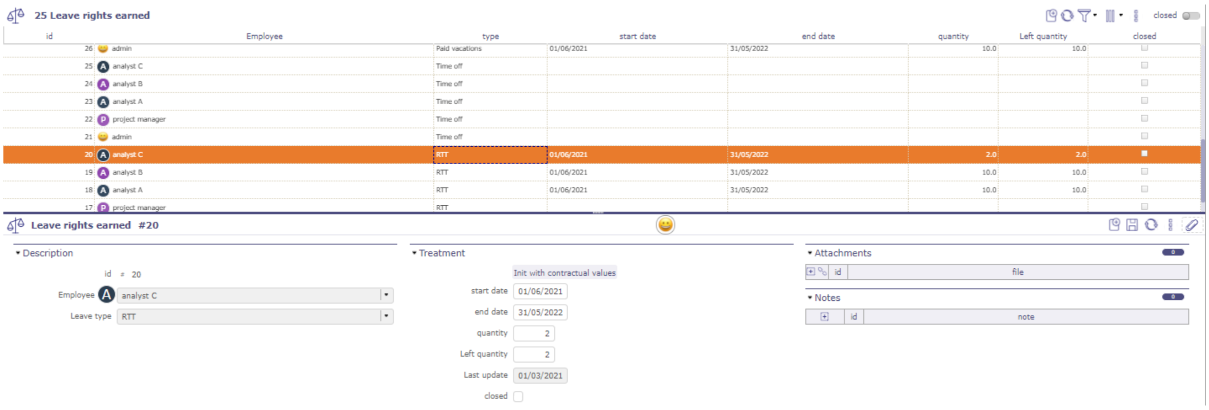


Fig. 34: Leaves rights earned

The start and end dates correspond to the period on which the days of leave are calculated

The numbers of the acquired and left days to each types

If your holidays over the reference period and according to the type of leave, then the checkbox "closed" is validated.

You no longer have this type of holiday available and can not ask any more

12.12.5 Employment contract

You can see the details of the contracts and which employee is attached to them.

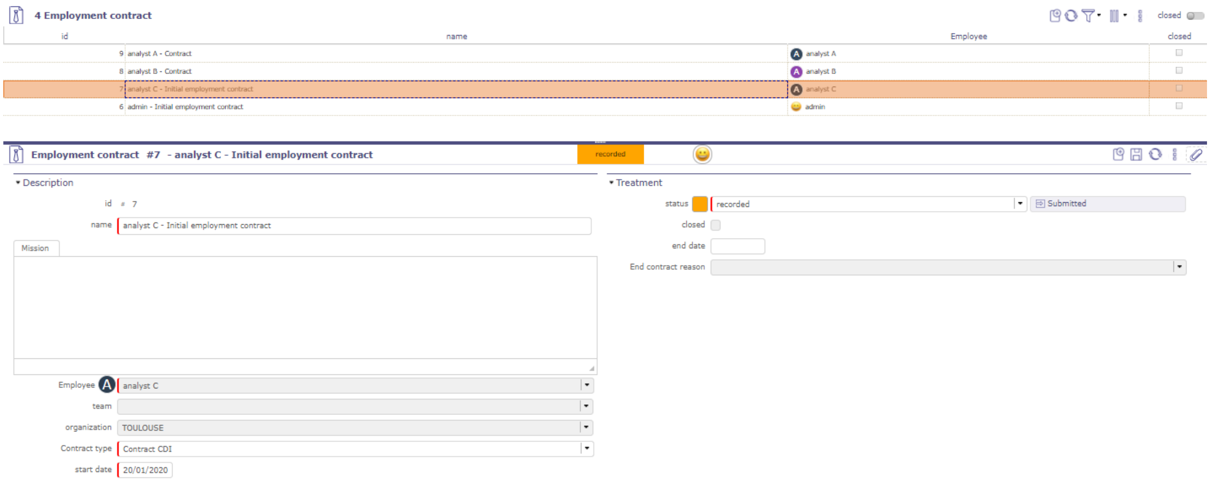


Fig. 35: Leaves rights earned

Regulated leaves parameters

The regulation of absences is based on the rights to take absences acquired over a given period.

It is therefore based on values to be given to attributes of regulation according to the type of absence (ex: Paid leave, RTT, sick leave, legal leave, etc.), and the type of contract associated with the employee (Ex: Full time, Part time).

General acquisition of rights

When you create a *Employment contract type*, you have several contractual values to fill in.

> **Warning:** Check box **"On default"** and **"on everything"**
>
> - If you check on **"default"** the entered values will be reflected on the default contract type only.
> - If you check on **"all"** the entered values will be on all contract types.
> - These values can not be changed after they are saved.
>
> For any change, the creation of a new type of absence is necessary.

Field	Description
start month period	month starting the reference period of paid holidays in your country.
start day period	day starting the reference period of paid holidays in your country.
period duration	The length of the period gives the number of months over which your reference period
quantity	the number of days of leave that will be paid during the period reference.
period of leave rights earned	the number of months before you can use your acquired days.
integer *quotity*	Possibility of rounding up earned leave.
validity duration	period during which the days of leave acquired will be retained. Beyond this period th
is justiable	defines if the absence must be the subject of a request for proof
can be anticipated	If leave can be taken before the vesting period
max delay for retroactive absence (days)	allows, or not, to record absences on paid leave after being actually absent.
max delay for anticipated absence (days)	Number of days before which an application can be made

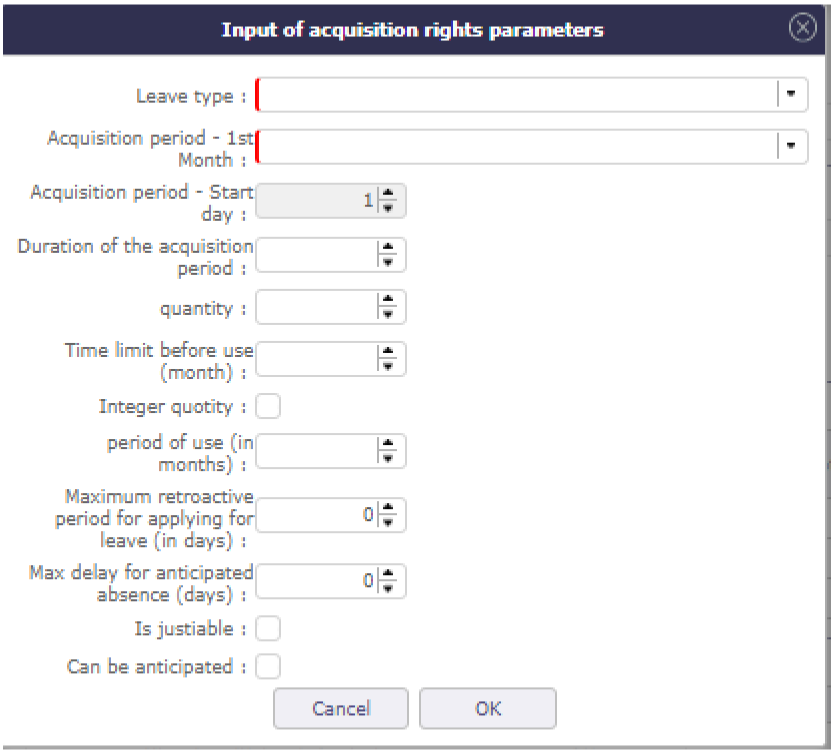


Fig. 36: Contractual values for the leaves type

Note: In France, an employee is entitled to 2 and a half days of leave per month of actual work at the same employer, wether 5 weeks per full year of work (from June 1st to May 31st)

Specific acquisition of rights

To integrate specific rights of absence, the concept of special rights has been put in place.

Usable entities are:

- Absences
- Employees
- Contracts
- Acquired rights

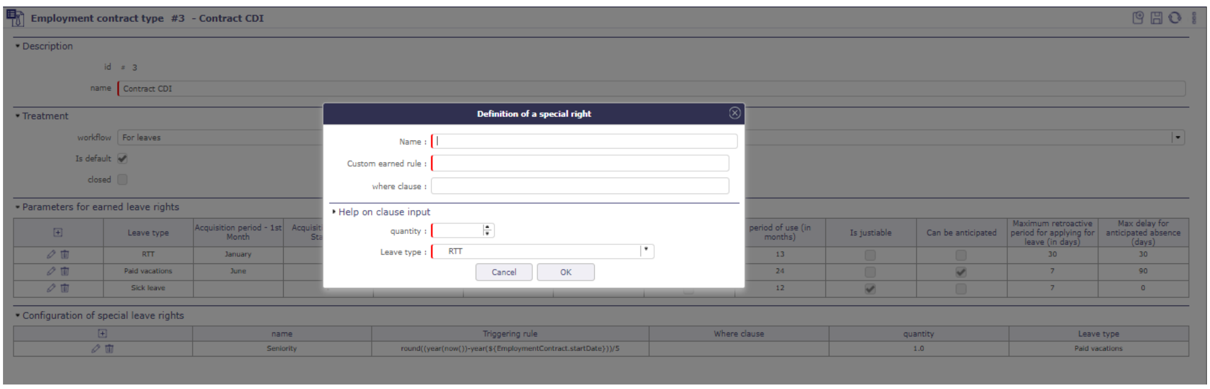


Fig. 37: Contractual values for the leaves type

Field	Description
Name	The name to give to the special right
custom earned rule	The rule allowing the calculation of a number of times to apply the quantity of right to absence
where clause	Condition of application of the special right
Quantity	The elementary quantity of the special right
Leave type	The type of absence to which the special duty applies

12.12.6 Absence recording

Leaves Calendar

Regulated absences are done either by the employees or by their manager

Absences can be recorded from the leaves calendar

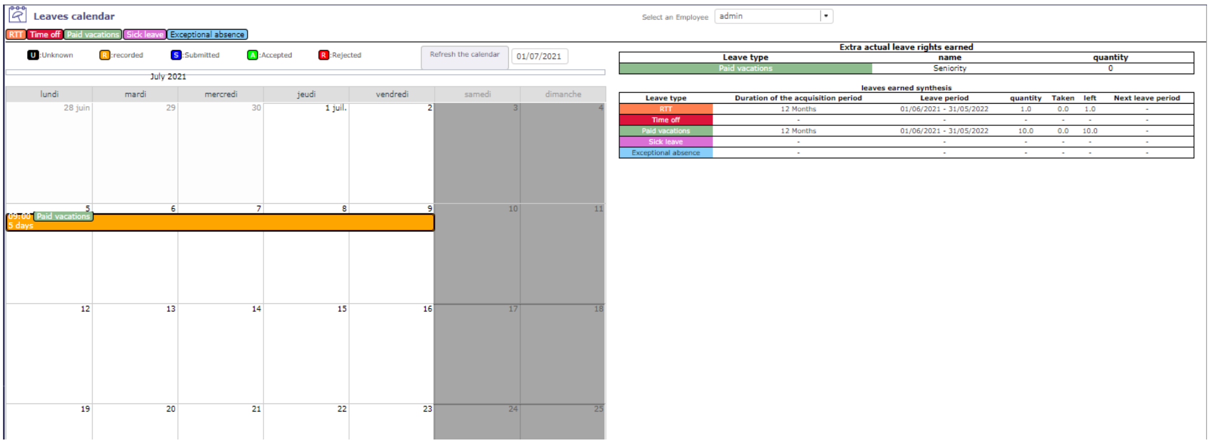


Fig. 38: Leaves calendar

To record or change your absences, double clicking on an existing date or absence

A pop up opens to display the properties of an absence (date and type of absence . . .)

The type of absences visible in the drop-down list depend on those recorded in the employee's contract.

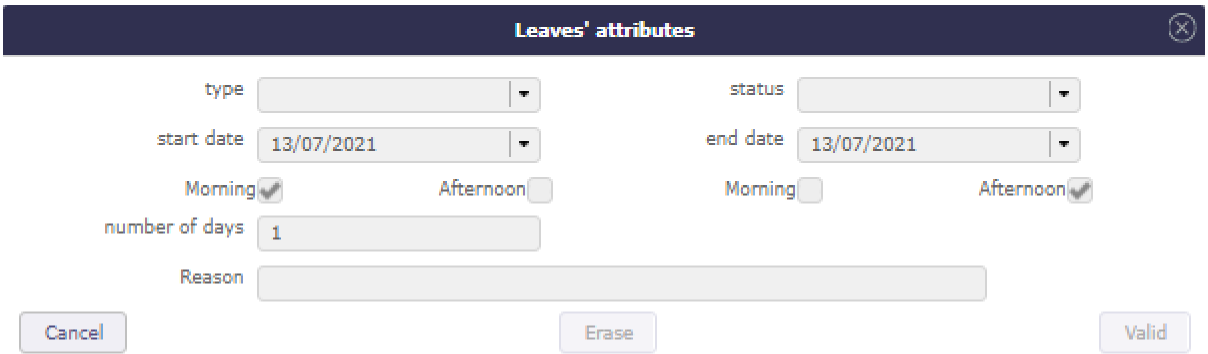


Fig. 39: Leaves attributs

After validation, the holiday appears in the calendar.

The manager (and / or administrator) can validate or not, the leave of the employees.

When the leave period is rejected, it is impossible to add a new leave on these same dates

The color of the holidays will change according to the validation.

Leaves Periods

Regulated absences are done either by the employees or by the manager of leaves.

Absences can be recorded from the leaves Periods screen.

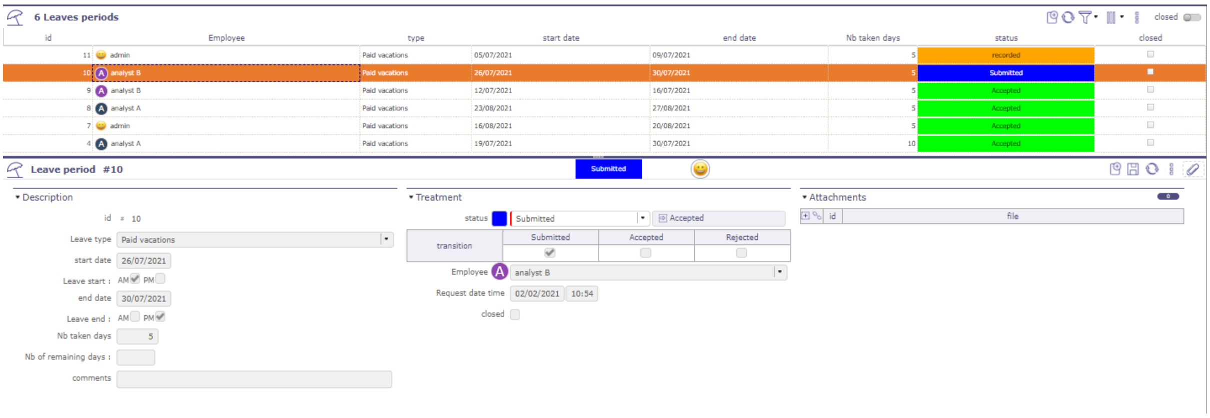


Fig. 40: Leaves periods

On this screen, you can save, edit, delete a holiday request, as in the holiday calendar.

The employee can record and submit his leaves.

Only the **Manager of leaves** and **Leaves system administrator** can change the status of a request for the absence of subject to accepted or rejected.

12.12.7 Leaves System

habilitation

Allows you to restrict or restrict the view of Human Resources module screens to employee profile types.

They can view - read - create - update and/or delete access

Workflows and values

- When you install the regulated absences module, a workflow for absences is created.
- You can edit and delete it like any other workflow.
- A new section is available in the list of values for the reports.
- The regulated leaves section allows you to determine the behavior of the absence workflow states.
- It can also trigger an alert and / or send mail

Leaves Status

With the activation of the HR module, an absence workflow is added with 3 states, which are accessible and customizable in the *automation systems*.

Recorded

Creation status. In this state all the data of the absence can be modified.

Submitted

This status means that the employee has sent his leave request to his hierarchy for validation.

Validated

State that only the manager and the administrator of the module can be enabled.

When the leave request is validated or refused, the status of the request cannot be changed

Cancelled

State that only the manager and the administrator of the module can be enabled.

The number of days the absence represents are not taken.

When the leave request is validated or refused, the status of the request cannot be changed

12.12.8 Skill Management

Skills management will make it possible to inform the skills of each resource with a very specific skill level.

You can then search for the appropriate resources for an activity at a given time for the skill of your choice.

Skills

Record the different skills that you find in your field of activity.

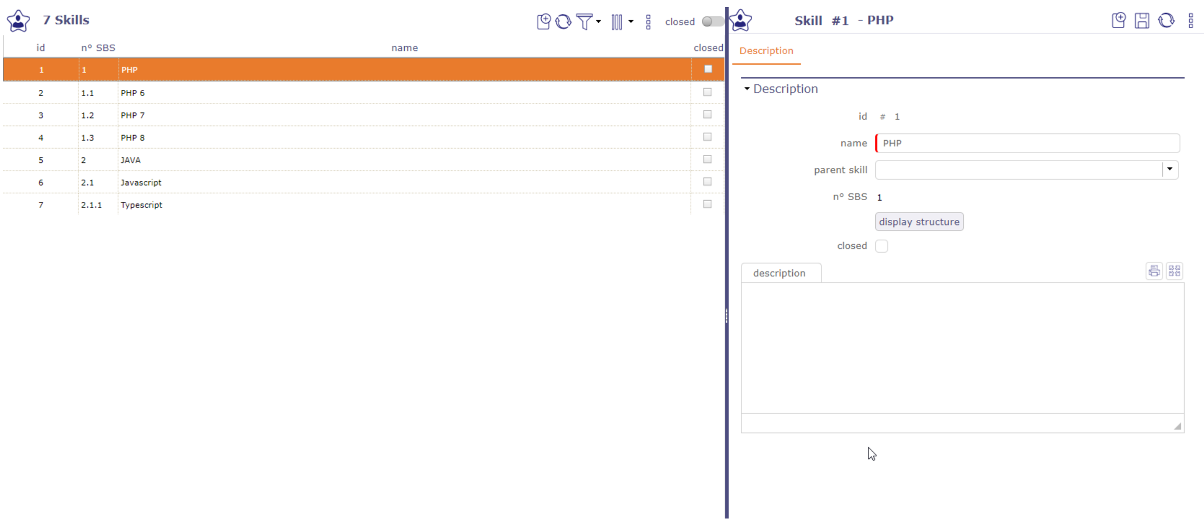


Fig. 41: Skill management screen

Skills can be split into sub-skills without level limitation.

The "display the structure" button allows you to display the SBS (skill Breakdown Structure) of the selected skill with an indentation of the sub-skills for better visibility.

Skills level

The Skill Levels screen allows you to save levels for each skill.

For example beginner, average, good, expert…

You then define for each of the resources the skills and the level associated with it.

An icon can be associated with the skill level. ProjeQtOr has provided icons for a maximum of 4 levels.

You can create your own icons and place them in www\projeqtorVX.xx\view\icons.

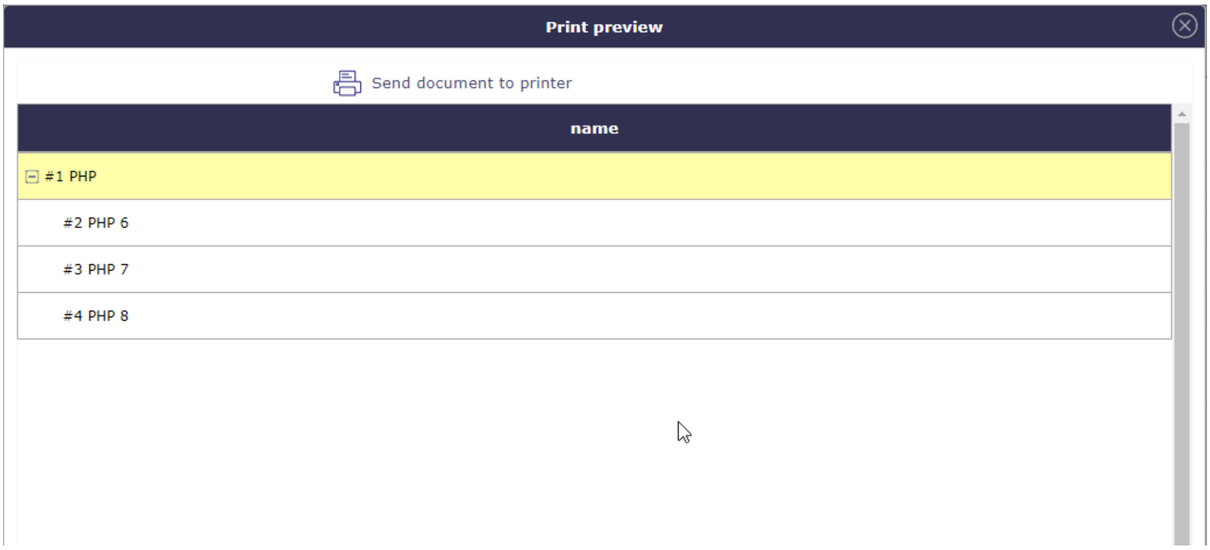


Fig. 42: SBS - Skill breakdown structure

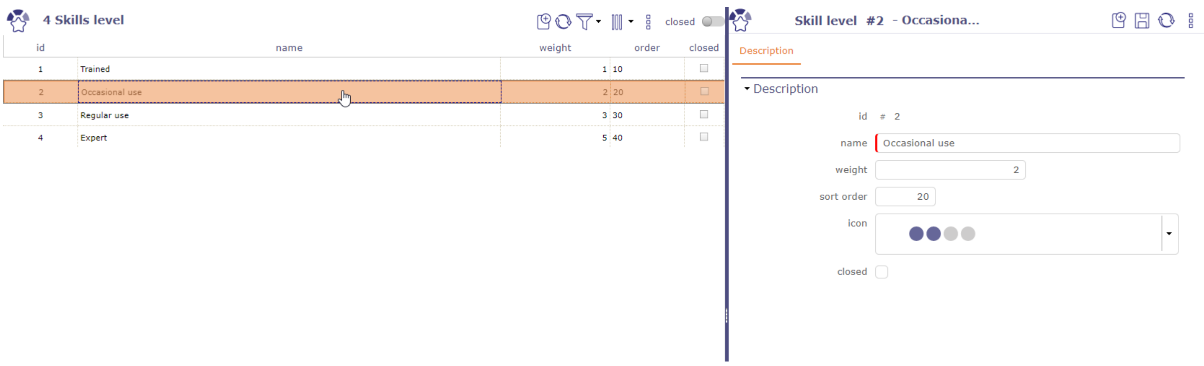


Fig. 43: Skill level screen

Skills resources

When skills and skill levels are defined, you can associate them with your resources.

Fig. 44: Resources screen with several skills and skill levels

Resources with skills will appear on the skill search screen.

Hierarchical skill

On this screen you see all the skills and their hierarchy. This is the complete structure of the structure for all skills combined.

You can move and rearrange them using the handles in front of the names.

The SBS (skill breakdown structure) breakdown indices are dynamic and will be modified according to the ascending order they occupy.

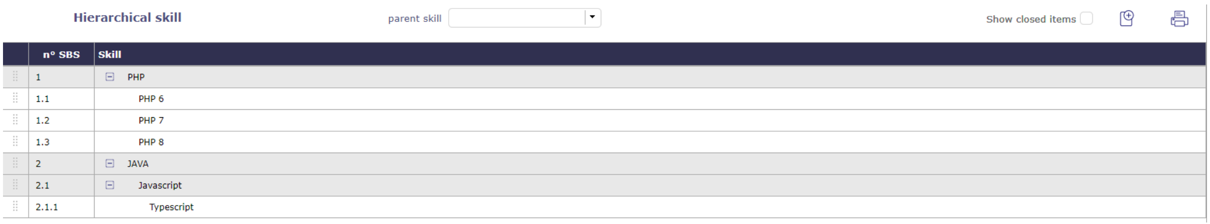


Fig. 45: Hierarchical skill screen

Search by skill

When you need a particular skill over a period of time, the skill search screen displays all the resources.

Select the skill you need with a skill level (optional).

The start and end dates are pre-filled and correspond to the current date for a period of one month.

If you choose a particular project, then the validated dates of the project are retrieved.

The corresponding resources are displayed and indicate their availability over the periods entered.

Click on [+] to assign a resource to the project of your choice.

Click on [pencil] to modify the assignment of the resource on the project.

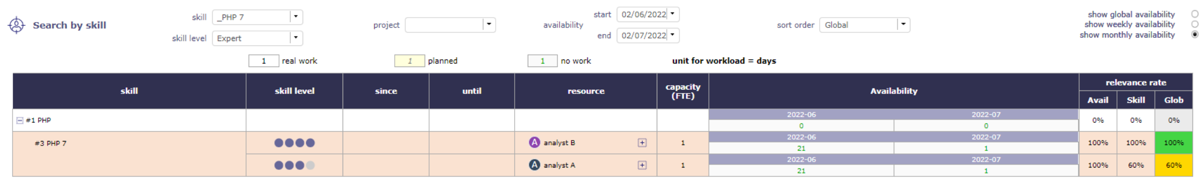


Fig. 46: Search by skill screen

Tip: The calculation of the relevance rate takes into account the resource parameters (FTE, planning, multi-project, etc.) and the level of skill requested.

The relevance rate is defined using a simple calculation. Availability rate x competence rate / 100.

Filters

Fig. 47: Filters

You can search skill with or without skill level.

You can display only the resources corresponding to the selected skill.

Choosing the skill level will allow you to display a more relevant availability rate.

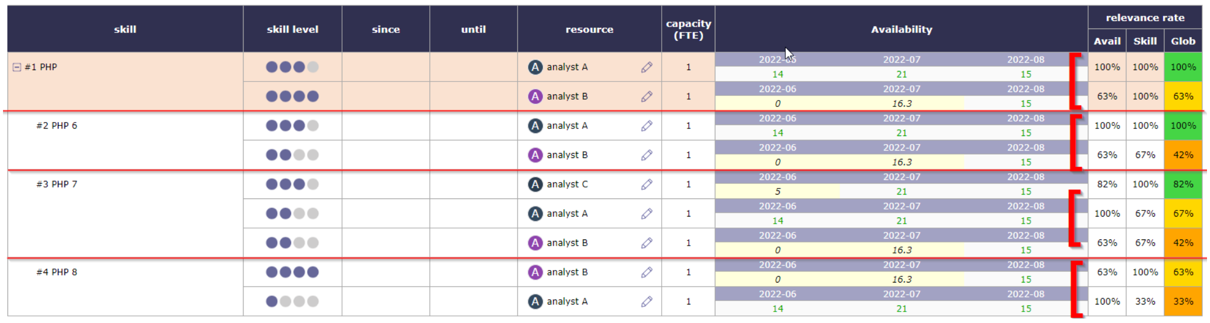
When you select a project in the display filters, its start and end dates are retrieved from the start and end fields of availability.

Sort order

You have the option of ranking the rates in ascending order for each skill line.

You can choose to sort by Global values (availability x skill), availability value or skill.

Sorting will be done for each skill line



skill	skill level	since	until	resource	capacity (FTE)	Availability			relevance rate Avail	Skill	Glob
#1 PHP				analyst A	1	2022-06 14	2022-07 21	2022-08 15	100%	100%	100%
				analyst B	1	2022-06 0	2022-07 16.3	2022-08 15	63%	100%	63%
#2 PHP 6				analyst A	1	2022-06 14	2022-07 21	2022-08 15	100%	100%	100%
				analyst B	1	2022-06 0	2022-07 16.3	2022-08 15	63%	67%	42%
#3 PHP 7				analyst C	1	2022-06 5	2022-07 21	2022-08 15	82%	100%	82%
				analyst A	1	2022-06 14	2022-07 21	2022-08 15	100%	67%	67%
				analyst B	1	2022-06 0	2022-07 16.3	2022-08 15	63%	67%	42%
#4 PHP 8				analyst B	1	2022-06 0	2022-07 16.3	2022-08 15	63%	100%	63%
				analyst A	1	2022-06 14	2022-07 21	2022-08 15	100%	33%	33%

Fig. 48: Sorting for each skill line

Availability

You can view resource availability for a given skill in different ways.

globally over the requested period :

Availability
02/06/2022 - 02/07/2022
0
02/06/2022 - 02/07/2022
22
02/06/2022 - 02/07/2022
22

Fig. 49: Skill global availability

Per week over the requested period :

Monthly over the requested period :

Availability				
2022-23	2022-24	2022-25	2022-26	2022-27
1	5	5	5	5
2022-23	2022-24	2022-25	2022-26	2022-27
0	*0*	*0*	*0.3*	*4*
2022-23	2022-24	2022-25	2022-26	2022-27
1	5	5	5	5
2022-23	2022-24	2022-25	2022-26	2022-27
0	*0*	*0*	*0.3*	*4*

Fig. 50: Skill weekly availability

Availability	
2022-06	2022-07
15	6
2022-06	2022-07
0	*4.3*
2022-06	2022-07
15	6
2022-06	2022-07
0	*4.3*

Fig. 51: Skill monthly availability

On an activity

You can have a decision support directly on the activities.

You select the skills needed on the activity. Save them in the Details tab > Section skill for activity.

The skills are elements who can be copied in the copy options of an activity.

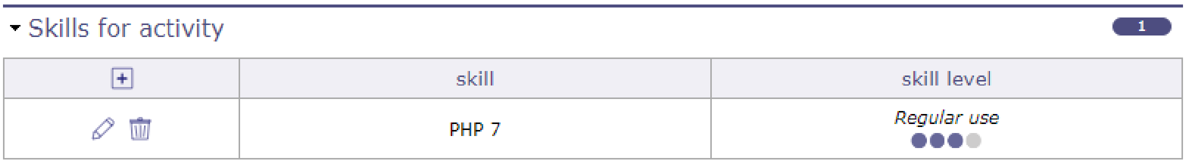


Fig. 52: Skills for activity

Once the skills are linked to the activity, in the assignments table, click on [+] to add a resource.

Click on the magnifying glass to access the skills table

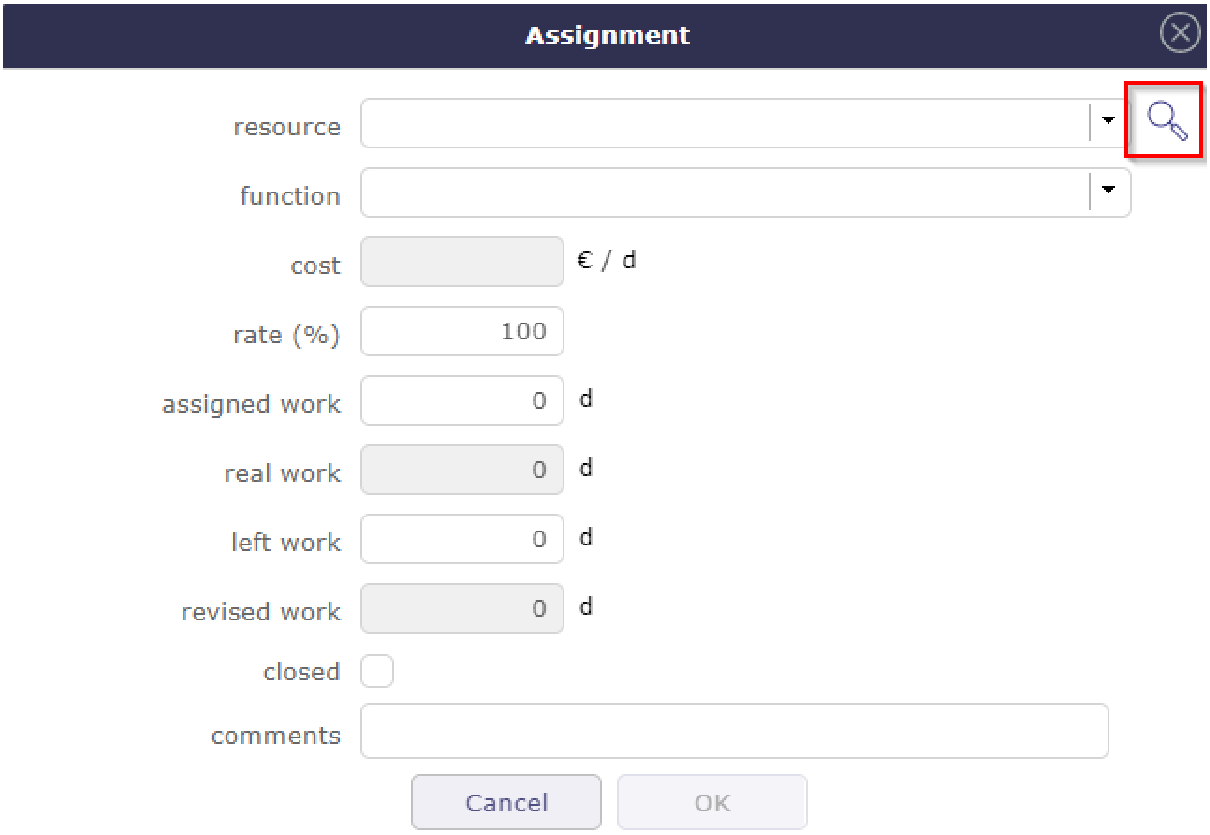


Fig. 53: Skill for activity

You have access to the skills table.

Click on the resource you want to assign to the activity.

Resource by searched skill

resource	skill	relevance rate
A analyst C	PHP 7	100%
A analyst B	PHP 7	67%
A analyst A	PHP 7	67%
A admin		0%
P project manager		0%

Cancel

Fig. 54: Resource search by skill

CHAPTER

THIRTEEN

PLUG-INS

13.1 Plug-ins management

Plugins are complements for the ProjeQtOr application.

They add non-generic features to ProjeQtOr

You will find the complete list of plugins in the ProjeQtOr online store

Plug-in installation

The section **Installed plugins** lists the installed plug-ins.

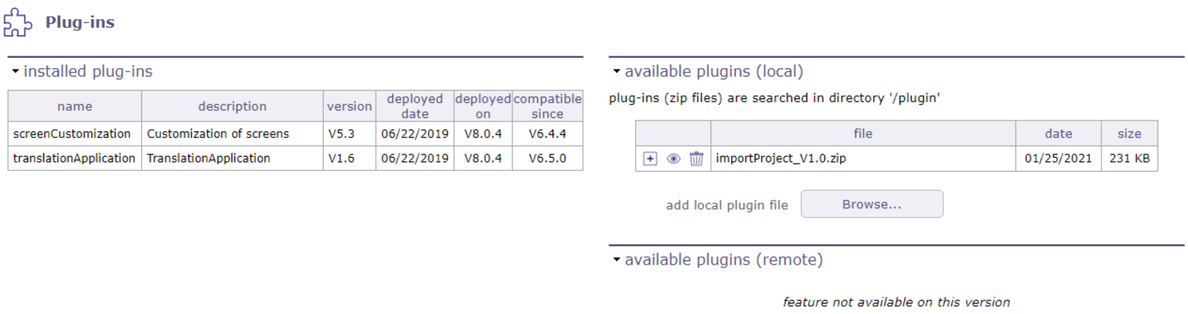


Fig. 1: Plugin management screen

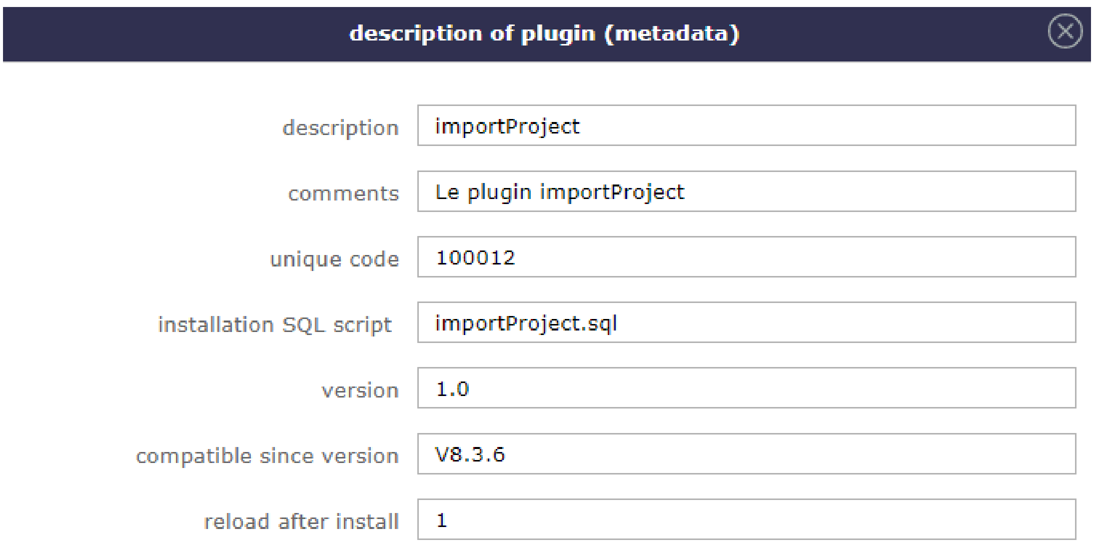


Fig. 2: Description plug-in

Available plug-ins list

The section **Available plugins** allows to manage local plug-ins

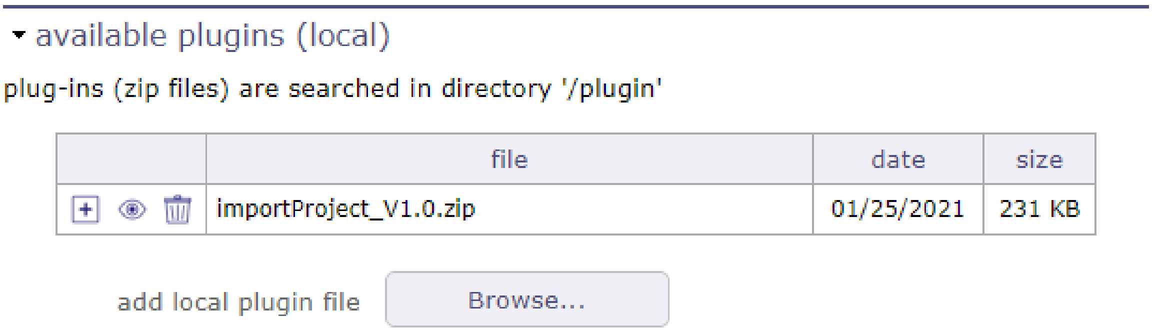


Fig. 3: Add a plugin

- The `Browse` button allows to select plugin file .zip.
- The file will be uploaded and it will be added in plugin-ins list.
- Click on to install plug-in.
- Click on to display the description of plug-in.
- Click on to remove the plugin from the installation table.
- Plug-in will be deployed during installation.
- The result of deployment will be available in the log file (See: *Administration Console*).
- Plug-in is removed from the list after installation.

CHAPTER

FOURTEEN

GLOSSARY

14.1 Glossary

Action Stocks are used in anticipation of risk. They serve to reduce the risks.

The analysis of these risks consists in defining actions. There are two types of actions:

- Preventive action aimed at removing the risk or
- Corrective action that has been earned on the occurrence of a risk

Activity An Activity can be likened to the key stages of the project: it is the skeleton of your project that organizes the main phases of a project

- They have a start and end date
- They designed for the planning phases of a project
- They serve to organize the milestones and tasks of a project
- They can allocated to a or many resources
- They can be prioritized and have sub-activities

Administrator An administrator is a *user* with “Administrator” profile. Has a visibility over all the projects.

Agile methods Agile methods are groups of practices of piloting and realization of projects. They originate from the Agile manifesto, written in 2001, which uses the term ‘agile’ to refer to multiple existing methods

Client The client is the person on whose behalf the work is carried out. It is the sponsor and the one who bears the financial cost. The client is a natural or legal person, public law or private law

Closed Closed is a micro state in ProjeQtOr

- Flag to indicate that item is archived.
- Item will not appear in lists any more
- You can display them again by checking the box “Show closed items”
- You can setting their default display in the *user’s Parameters*

Contact A contact is a person in a business relationship. A contact can be a person in the customer organization. Used as contact person for contracts, sales and billing. Contacts management is performed on *Contacts* screen.

Coordinator coordinator is the person who oversees and reports. It corresponds to the accountable in the RACI method In ProjeQTOr, the responsible is the person who works.

CRON cron is a program that allows users of Unix systems to automatically execute scripts, commands or software at a date and time specified in advance, or according to a cycle defined in advance.

CRUD It is an English computer acronym for Create, Read, Update, Delete. It designates the four basic operations for data persistence, in particular the storage of information in a database.

Decision A good decision helps move towards the end goal. It is in the general interest, the interest of the greatest number as well as in the interest of the project

a good decision is a suitable solution, put in place with the tools and resources available at a given moment.

Description

- This field allows to define a description on an item.
- Depending on the element type, name of field can be different.

See also:

GUI behavior

- It is possible to define that description field is mandatory.
- The element type screens allow to set this parameter to several elements.
- More detail, see: *Behavior section*.

Done Done is a micro state in ProjeQtOr

- Flag to indicate that item has been done.
- Date of done is saved.
- A result can be specify.
- It is possible to require a result when the status change to "done".

External reference

- This field allows fill free input.
- It uses to refer information from an external source.
- External reference value can be put in email message with **externalReference** special field.
- More detail, see: *Administration*

FTE Full Time Equivalent The full-time equivalent (FTE) is a unit of measurement: a workload or more often, a capacity for work or production.

Gantt chart Description The Gantt chart is a tool used in scheduling and project management and allowing to visualize in time the various tasks composing a project.

It is a representation of a connected graph, evaluated and oriented, which makes it possible to graphically represent the progress of the project

In Progress

- Flag to indicate that item has been taken into account.
- Date of handling is saved.
- This generally means that responsible has been named.

Id

- Every item has a unique Id, automatically generated on creation.
- Id is chronologically allocated, for all kind of items (Activity, Ticket).
- Id is shared for all projects and all types (i.e. incident) of the same kind items (i.e. Ticket).

Incident Any event that is not part of the standard operation of a service and that causes, or may cause, an interruption or decrease in the quality of that service

Issuer An issuer is a *user* who created the item.

See also:

Creation information

The issuer name and creation date of an item are displayed in the *Creation information zone*.

Key Performance Indicator (KPI) Indispensable to the project manager, an indicator makes it possible to evaluate a situation and to make an adapted decision. Key performance indicators measure the performance of your projects. You choose them together with your team. They must be simple, reliable, easily understandable by all and relevant

If the indicator is green, all is well, you will need to continue the actions in progress to maintain this good result. If the indicator is red, then you must take the necessary corrective action. If the indicator is orange, it should be monitored.

- Each indicator is associated with a specific goal.
- An indicator necessarily implies a decision.
- An indicator is never silent.
- A relevant indicator must be simple

Objective An objective is a goal to achieve by carrying out different tasks. For example, building a new plant in order to produce more and meet the growing demand. It is essential to precisely define the goal (s) to reach so that you and your team know where you are going. A good goal must be *SMART*.

Origin

- Determines the element of origin.
- The origin is used to keep track of events (ex.: order from quote, action from meeting).
- More detail, see : *Origin field*.

PERT chart (Program Evaluation and Review Technique) provides a practical method and means to describe, represent, analyze and logically follow the tasks and the network of tasks to be carried out as part of an action to be undertaken or to be followed. The PERT diagram represents the work schedule by a dependency graph. His network formalism focuses on the interconnection of the tasks to be performed and the calculation of critical paths.

An important difference with the Gantt chart is the conventional time scale of the PERT chart which represents a sequence of tasks and not durations or a calendar

Project A project is defined as a finite set of activities and actions undertaken in order to meet a defined need within a set timeframe and within the limits of an allocated budget envelope

See: *project*

Project Leader A project leader is a *resource* allocated to a project with a "Project Leader" profile. person responsible for leading a project and managing its smooth running. In general, he leads a team during the duration of the various projects for which he is responsible

Project manager A project manager is a *resource* defined as the manager on a project.

See also:

Accelerator button

This button allows to set current user is the project manager. More detail, see: *Assign to me button*.

Project team All *resources* allocated to a project.

Quotity A quotity is the amount of a quota. This term of right refers to the fraction of a whole, a proportional sum in a share. A quota can be to pay or to collect.

RACI R - Responsible - he realizes A - Accountable - he oversees and reports C - Consulted - he advises I - Informed - he is informed

In projeQtOr the accountable is defined as *coordinator*

Reference

- Reference is displayed after id, automatically generated on creation.
- Reference depends on defined format, see under "Format for reference numbering" section in *Global Parameters* screen.

- Default format defines a specific numbering format that can provide unique numbering sequence for each project and/or each type of items.

Requestor A requestor is a *contact*. Used to specify the requestor for ticket, activity and requirement. Only contacts allocated to the selected project can be a requestor.

Responsible A responsible is a *resource* in charge of item treatment. Usually, the responsible is set when the status of the item is *In progress*. Only resources allocated to the selected project can be a responsible.

seealso:

```
**GUI behavior**
```

It is possible to define that responsible field is mandatory on In progress status.

The element type screens allow to set this parameter to several elements.

More detail, see: *Behavior section*.

Set automatically the responsible

It is possible to set automatically the responsible.

More detail, see: *Global parameters*

Accelerator button

This button allows to set current user is the responsible.

More detail, see: *Assign to me button*.

Access rights

It is possible to define a combination of rights to permit access for elements the user is responsible for.

More detail, see: *Access modes* screen.

Resource

- Human or material resource involved in the projects.
- It is possible to define the resource availability to the projects.
- Resources management is performed on the *Resource* screen.

Result

- A result is a description of the treatment of an item.
- Usually, the result is set when the status of the item is *done*.

See also:

GUI behavior

It is possible to define that result field is mandatory on done status.

The element type screens allow to set this parameter to several elements.

Risks The risk is a hazard, an undesirable event whose appearance is not certain, resulting in the possibility that the project does not achieve the objectives of:

- Completion date
- Costs
- Specifications (techniques, quality, performance , reliability …)
- Others: Image of the company, environment, legal, social …

The risk can put in danger the project, deviations from forecasts the making it unacceptable or totally unacceptable. We distinguished the risks exogenous (external at now ; suppliers, evolution regulation, political, social, meteorology…)

Quality The Quality approach consists in finding the match between the answer to the needs of the project, the correct expression of these needs by adequate specifications which go through a careful listening of the customer, and a realization answering the expression of the needs.

User

- User is a person who logs into the application.
- User profile define general access rights. But it does not necessarily give access to project data.
- Users management is performed on the *Users* screen.

SLA A service level agreement (SLA) is a contract between a service provider and its customers that documents the services that the provider will provide and defines the service standards that the provider is required to meet.

SMART it is an acronym or mnemonic device that stands for 'Specific, Measurable, Acceptable, Realistic and Temporally Defined'. These terms apply mainly to the determination of the most suitable objectives in order to complete a given project. Setting appropriate targets will help accelerate project completion and improve its chances of success.

Status

- The status determines the life cycle of items.
- It defines the progress of the treatment of the item.
- Item is linked to a element type, element type is linked to a workflow.
- A workflow defines the possibility to go from one status to another one, more detail, see: *Workflow*.

Ticketing Ticketing is an anomaly tracking system : bugs, incidents, problems, requests…

WBS

- Work Breakdown Structure.
- Hierarchical position of the element in the global planning.
- WBS also defines the index of an item in the WBS structure. This index is calculated like paragraphs in a word document.

Work

- **Assigned:** The work initially planned for this resource to the task.
- **Left:** Assigned Work – Real Work
- **Real:** Sum of work done by this resource to the task.
- **reassessed:** Real Work + Left Work

> **Warning:** Except for some planning modes, the planning does not take into account the validated load but that affected.

Workflow A workflow is the representation of a series of tasks or operations carried out by a person, a group of people, an organization, etc.

The term flow refers to the passage of an element, from one stage to another.