<table>
<thead>
<tr>
<th></th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>23</td>
<td>Activity Stream</td>
</tr>
<tr>
<td>24</td>
<td>Glossary</td>
</tr>
</tbody>
</table>
ProjeQtOr is a Quality based Project Organizer, as a web application.
ProjeQtOr focuses on IT Projects, but is also compatible with all kinds of Projects.
Its purpose is to propose a unique tool to gather all the information about the projects.
The fact is that many Project Management softwares just focus on planning. But it is a much too restrictive point of view. Of course, planning is an important activity of Project Management and is one of the keys to Project success, but it is not the only one.
Project Managers need to foresee all what can happen, measure risks, build an action plan and mitigation plan.
It is also important to track and keep traces of all what is happening to the Project : incidents, bugs , change requests, support requests, ...
In this objective, ProjeQtOr gives visibility at all levels of Project Management.
At lower level, the Project follow-up consists in gathering all information, and maintain it up to date. This involves all the operational teams.
At upper level, Project Steering uses the follow-up data to take the decisions and build the action plan. This allows to bring the adjustments needed to target on the objectives of the project.
The goal of ProjeQtOr is to be Project Management Method independent. Whatever your choice of the method, you can use ProjeQtOr.
What’s New in this user guide version?

This section summarizes significant changes made in the user guide document for this version.
To see complete list of changes made to software, visit the ProjeQtOr web site.
Current version is V6.3.0

Activity Stream.

• Activity Stream
• Display of notes on right part of screen.
• Possibility to quickly add note, in chat like mode.
• See: Activity Stream

Configuration Management.

• Versions planning
  – New screen “version planning” to display versions in a Gantt chart according to their delivery dates.
  – See: Versions planning

Review logs.

• Deliverys
  – Added list of deliverables integrated in delivery.
  – Automatic dispatch of delivery status to deliverables.
  – See: Deliverys
List of values.

- Consolidation of status changes.
  - See: Status
CHAPTER 2

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.
2.1 Planning management

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

Project

The project is the main element of ProjeQtOr.

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.

Activity

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

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.

Milestone

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.
Resources

Resources can be assigned to activities.
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.
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 and assignment rate of resources to activities
- planning mode for each activity (as soon as possible, fixed duration, ...)
- dependencies between activities
- priorities of activities and projects

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.
2.2 Resource management

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

Resources

Resources are the persons working on the project activities.
A resource can also be a group of persons (team) for which you do not want to manage individual detail.
You can manage this through the capacity of the resource, that can be greater than 1 (for a group of people) 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).

Assignments

Then you can assign resources to project activities.
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.

Calendars

To manage off days, you have a global calendar.
This calendar can be split into multiple calendars, to manage distinct availability types:

• you can create a calendar “80% ” with every Wednesday as off day
• you can manage distinct holidays when working with international teams.

Each resource is then assigned to a calendar.

Real work allocation

Resources enter their time spent on the Real work allocation screen. 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.
2.3 Tickets management

ProjeQtOr includes a Bug Tracker to monitor incidents on your projects, with possibility to include work on planned tasks of your projects.

Ticket

A Ticket is any intervention not needing to be planned (or that cannot be planned).

It is generally a short activity for which you want to follow advancement to describe (and possibly provide) a result.

For example, bugs or problems can be managed through Tickets:

- You can not schedule the bugs before they are identified and registered
- You must be able to give a solution to a bug (workaround or fix).

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.
2.4 Costs management

All elements related to delays can also be followed as costs (from resources work) and managing other expenses all costs of the project are monitored 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.

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.

Project expenses

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

Individual expenses

Individual expenses can record expenses generated by a given resource.

Quote, Orders, Term, Bill

ProjeQtOr can manage various financial elements found on a project: Quotation (proposals), Orders (received from customers), the invoicing Terms and Bills.
2.5 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.

Delays for tickets

You can define Delays for ticket. This will automatically calculate the due date of the Ticket when creating the Ticket.

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.

Alerts

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

Checklists

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

Reports

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

All is traced

Finally, thanks to ProjeQtOr, everything is traced.

You can follow-up, in a centralized and collaborative way, the various elements you used to follow-up (or not) in many Excel sheets: list of Questions & Answers, recording Decisions impacting the project, management of documents configuration, follow-up of meetings ...

In addition, all updates are tracked on each item to keep (and display) an history of the life of the item.
2.6 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.
2.7 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.
2.8 Documents management

ProjeQtOr offers integrated Document Management.
This tool is simple and efficient to manage your project and product documents.
ProjeQtOr supported only digital document. Document file 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 directories screen.

Document management

- Documents 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.
- See: «Menu» and «Documents» windows.
2.9 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.
2.10 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.
This chapter defines the concepts of ProjeQtOr.
They can be referred in the following chapters.
3.1 Project

A project is the main entity of ProjeQtOr.

Project element is more than a Planning elements, it is also used to:

Gather all project data

- Allows to gather all data depend on project:
  - Planning elements
  - Risk assessment, Risk mitigation, Reserve
  - Ticket, Issue, Bug tracking, Change request, Support
  - Review logs, Meeting, Decision, Action plan
  - Requirement & Test
  - Project expense
  - Quotation, Order, Bill, Payment
  - Document

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

- It is a filter that allows restricting the data visible to a dedicated project.
- See: Top bar
Define the project type

Three project types can be defined:

**Operational project**
- Most common project to follow activity.

**Administrative project**
- Allows to follow the non productive work as holidays, sickness, training, . . .

*Note:*
- All resource will be able to enter some real work on such project, without having to be allocated to the project, nor assigned to project activities.

**Template project**
- Designed to define templates, to be copied as operational project. (See: Copy item)
- Any project leaders can copy such projects, without having to be allocated to them.

*Note:*
- The project type is defined in a project type (See: Projects types screen).
- Which is associated to a project (See: Projects screen).

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.

*Note:*
- The project billing type is defined in a project type (See: Projects types screen).
- Which is associated to a project (See: Projects screen).
3.2 Organization

The notion of organization introduces a way to consolidate projects on a different hierarchic 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

Organization link

- Each project can be linked to an organization

Note:

- Sub-projects are by default attached to the same organization as the parent, but can be integrated into another 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.
3.3 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 Projects and Product Versions screens.

Identifying the version that is the subject of treatment

- Product (component) versions can be identified in these elements: Activities, Milestones, Requirements, Test cases, Test sessions and 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.

3.3.1 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.

![Diagram of product and sub-products relationships](image)

Fig. 3.2: 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.

![Diagram of product and component relationships](image)

Fig. 3.3: Relationships between product and component elements

Relationships between component elements

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

![Diagram of component relationships](image)

Fig. 3.4: 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.
3.4 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.

**Full Time Equivalent (FTE)**

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

3.4.1 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 default 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 developers instead of 4? Just change capacity to 5 and re-calculate planning...
3.4.2 Planning elements

ProjeQtOr offers standard planning elements like Project, Activity and Milestone. But also, it offers two more planning elements: 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, see: *Projects* screen.

**Sub-project**
- Sub-project is used to split the project.
- The project can be split to correspond the organizational breakdown or something else.

**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. 3.6: Separation of duties](image)

---

Chapter 3. Concepts
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.

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.

More detail, see: Activities screen.

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.

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.

More detail, see: Test sessions screen.
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: Milestones 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.
3.4.3 Dependencies

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.

More detail, see: Project planning, Predecessor and Successor element sections.

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).

Delay (days)

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

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 rare scenario used.

  Finish to Finish
  • This dependency type can’t be reproduced in ProjeQtOr.

  • This involves reverse planning and may introduce overloading of resources, what is not possible in ProjeQtOr.
3.4.4 Planning mode

Planning mode allows to define constraints on planning elements: activity, test session and milestone. Planning modes are grouped under two types (Floating and Fixed).

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.

More detail, see: Activity and Test session planning modes and Milestone planning modes.

Note: Because ProjeQtOr does not backward planning, the planning mode “As late as possible” with no constraint date (Floating) is not available.

Note: Default planning mode

• Possibility to define the default planning mode according to element type.
• See: Activities types, Milestones types and Test sessions types screens.
3.4.5 Prioritized planning elements

Planning elements are scheduled in this order of priority:

1. Fixed date (Fixed milestone, Meeting)
2. Recurrent activities - Planning modes “Regular...” (Activity, Test session)
3. Fixed duration (Activity, Test session)
4. Others

3.4.6 Scheduling priority

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

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

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

Note:

- If projects have different priorities, all elements of project with highest priority are scheduled first.

3.4.7 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.
3.4.8 Project scheduling calculation

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

Scheduling

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

1. Dependencies (Predecessor tasks are calculated first)
2. Prioritized planning elements
3. Project priority
4. Task priority
5. 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)
  - Assignment 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.
3.5 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.

Administrator
- An administrator is a user with “Administrator” profile.
  - Has a visibility over all the projects.

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.

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.

Project leader
- A project leader is a resource allocated to a project with a “Project Leader” profile.

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.

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 handled.
• Only resources allocated to the selected project can be a responsible.

**See also:**

GUI behavior

• It is possible to define that responsible field is mandatory on handled status.
• The element type screens allow to set this parameter to several elements.
• More detail, see: *Behavior section*.

**See also:**

Set automatically the responsible

• It is possible to set automatically the responsible.
• More detail, see: *Global parameters*.

**See also:**

Accelerator button

• This button allows to set current user is the responsible.
• More detail, see: *Assign to me button*.

**See also:**

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 *Resources* screen.

**User**

• User allows to connect to 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.
3.6 Profiles definition

The profile is a group used to define application authorization and access rights to the data.
A user linked to a profile belongs to this group who share same application behavior.

Note:

- You can define profiles to be conformed to the roles defined in your organization.
- Access rights management is done on Access rights screens

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.

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 Workflows 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.
3.7 Stakeholder definition

ProjeQtOr allows to define roles of stakeholders. The stakeholder definition is made with profile and a combination with user/resource/contact definition.

The combinations user/resource/contact allow to define:

- Connection to the application or not.
- Data visibility.
- Resource availability.
- Contact roles.

The next matrix shows the different possibilities.

<table>
<thead>
<tr>
<th></th>
<th>Connection</th>
<th>Visibility</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>URC</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>UR</td>
<td>✗</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>UC</td>
<td>✔</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>U</td>
<td>✗</td>
<td>✔</td>
<td>✗</td>
</tr>
<tr>
<td>R</td>
<td>✗</td>
<td>✗</td>
<td>✔</td>
</tr>
</tbody>
</table>

Row legend

- U = User, R = Resource, C = Contact
Data visibility

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

- 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.
3.7.1 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.
3.8 Allocation to project

Allocation to project is used to:

• Defines project data visibility.
• Defines resource availability.
• Defines the period of access to project data by the user.

Note:

• The Allocations screen allows to manage overall allocations to project.

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

3.8.1 User allocation

Allocation to project gives data visibility on a project.
Allocation to project can be defined in the Users screen.

Profile selection

• Selected profile allows to define access rights on project elements.

Hint:

• Selected profile allows to define the role played by the user in a project.
• For instance, the user might be a project manager in a project and it could be a project member in another.

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

• Allow to define the period of project data visibility.

Hint:

– Can be used to limit access period, according to services agreement.
3.8.2 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 Projects and Resources screens. It is also possible to allocate a team to a project in Teams 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 at a specified rate for a period.

**Note:**
- If the period is not specified then the resource is allocated throughout the project.

**Attention:**
- 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 Resources screen, a tool allows to displayed conflicts.

**Hint:** 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.
3.8.3 Contact allocation to project

A contact allocated to a project can be defined as requestor. Allocation to project can be defined in Projects and Contacts screens.
3.9 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).

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

Note:
- Assignment can be done in Activities, Test sessions and Meetings screens.
3.10 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 Resources screen.
3.11 Resource calendar

A calendar defines the working days in 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 Resources screen.
• The calendar is defined in Calendar 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).
3.12 Photo

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.

Note:

• To enlarge, move the cursor over the picture.

Photo management

• Click on + or photo frame to add an image file. To complete instruction see: Attachment file.
• Click on × to remove the image.
• Click on image to display the photo.

Note:

• Photo management can be done in User parameters, Users, Resources, Contacts screens.
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 Global view

ProjeQtOr interface is divided into several areas. Those areas are:

- **Top bar**
- **Logo area**
- «Menu» and «Documents» windows
- «External shortcuts» and «Console messages» windows
- **List window**
- **Detail window**
- **Info bar**

Fig. 4.1: Global view
Area separation

- The splitters allow resizing areas in the interface.
- The green splitter allows to resize the areas «Menu and Documents window» and «Message and Link window».
- The red splitter allows to resize the areas left and right.
- The orange splitter allows to resize the areas «List window» and «Detail window».

Note:

- The position of splitters is saved and retrieved on each connection.

Fig. 4.2: Area separation
4.1.1 Top bar

1 - Project selector

- Allows to select the project to work on.
- Restricted the visibility of all objects of the selected project, including sub-projects if any.
- Defined the “default” project for new items.

**Note:** User parameter: Default project

- Defines the project that will be selected by default.

1.1 - Project selector parameters

- Click on \( \) to display the project selector parameters dialog box, you can select:
  - View closed projects.
  - Change the project list display mode.
  - Refresh the list.

![Project selector parameters dialog box](image)

1.1.a - Standard (reflecting WBS structure)

- List of project and sub-project are displayed according to WBS structure.
1.1.b - 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

1.1.c - Filtering select (with search)

- List of project and sub-project are displayed according to search criteria.
- Search criteria works in a “contains” mode
- Autocompletion is not active
2 - Menu on top bar

Menu on top bar allows a rapid access to elements.

Fig. 4.4: Menu on top bar

Menu selector A

- The menu selector allows to reduce buttons list displayed B in the top bar.
- The arrows C allow to scroll buttons list.
- Move cursor over the menu selector to display menus list. Click on menu to select it.

Note: Predefined menus
- Predefined menus are available and regroup buttons according to the work context.

Custom menu

- A user can define its custom menu in the top bar.
- Move cursor over the menu selector and click on “Custom menu” to select it.

Added an item
1. Select a predefined menu (for example: “All menus”).
2. Move the cursor over icon wanted.
3. Click on the right button, a message appear.
4. Click on the left button and the icon will be added to the custom menu.

Note:
- A star is added on selected icons.

Remove an item
1. Move the cursor over icon (icon with star).
2. Click on the right button, a message appear.
3. Click on the left button and the icon will be removed from the custom menu.
3 - Navigation buttons

- The navigation buttons give access to previous and next pages in the history.

4 - Button «New tab»

- Allows to open a new tab within the same session.
4.1.2 Logo area

![Logo area](image)

Fig. 4.5: Logo area

**Information about the software**

- Click on «Logo Area» will display the software information box.

![Software information box](image)

**Online user manual**

- Click on ![question mark](image) or use shortcut key F1 will open the online user manual, to the page corresponding to the current screen.

**Note:**

- You can change logo with your own.
- Refer to administration guide to replace the logo.
4.1.3 «Menu» and «Documents» windows

Fig. 4.6: «Menu» and «Documents» windows

Note: Toggling between windows

- To toggling between windows, just click on window header.

1 - Menu window

- The menu is proposed as a tree view of reachable items.
- The items presented will depend on the access rights of user to the screens.
- Click on a grouping line will expand-shrink the group.
- Click on an item will display the corresponding screen in the main area (right side of the screen).

Note: User parameter “Icon size in menu”

- This parameter defines the size of icons in the menu.

2 - Documents window

- Document directories give direct access to documents contained in the directory.

3 - Document directories
• This icon 📄 gives direct access to the Document directories screen.
4.1.4 «External shortcuts» and «Console messages» windows

Fig. 4.7: «External shortcuts» and «Console messages» windows

**Note:** Toggling between windows

- To toggling between windows, just click on window header.

1 - External shortcuts window

- Display hyperlinks to remote web pages.
- These links are defined as hyperlink attachments on projects.
- Links displayed here depend on the selected project.

2 - Console messages window

- Displays information about main actions: insert, update, delete.
- The timestamp indicates when the action was done.

**Note:**

- Messages displayed here are not stored and will be flushed when user logout.
4.1.5 List window

List window features

- Quick search
- Advanced filter
- Displayed columns
- Export to CSV format

1 - Element identifier

- Displays the element name and the count of items in the list.
- Each element is identified with a distinctive icon.

2 - Rapid filter

- Rapid filtering fields are proposed: «Id», «Name» and «Type».

Any change on «Id» and «Name»

- Will instantly filter data.
- Search is considered as «contains», so typing «1» in «Id» will select «1», «10», «11», «21», «31» and so on.

Selecting a «Type»

- Will restrict the list to the corresponding type.

Other filter fields

- Depending on the element, other filter fields will be available.
3 - Buttons

- Click on 🔍 to execute a textual search. (See: Quick search)
- Click on 🔎 to define an advanced filter. (See: Advanced filter)
- Click on ☐ to define the columns displayed. (See: Displayed columns)
- Click on ✎ to get a printable version of the list.
- Click on ✎ to export it to PDF format.
- Click on ✎ to export data of the selected items in a CSV format file. (See: Export to CSV format)
- Click on ☐ to create a new item of the element.

4 - Extra buttons

- Click on ✏ to displays status list.

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.

Note:
- Actives ‘quick filtering by status’ in global parameters otherwise this button is hidden.

5 - Checkbox «Show closed items»

- Flag on «Show closed items» allows to list also closed items.

6 - Column headers

- Click a column header to sort the list on that column (first ascending, then descending).

Note:  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.

For instance

- Sorting on the «Status» allows to sort values such as defined in the workflow.

7 - Items list

- Click on a line (any column) will display the corresponding item in the detail window.

4.1. Global view
Quick search

The quick search allows to execute a textual search.

- Click on ✋ to execute the search.
- Click on ✋ to close the quick search.
**Advanced filter**

The advanced filter allows to define clause to filter and sort.

- The advanced filter definition dialog box is divided into two sections.

1 - **Active filter**

- This section allows to define the filter and sort clauses.

  **Add criteria**
  - Define the clauses of filter or sort in «Add a filter or sort clause».
  - Select the name of the field, the operator and the value to the clause.
  - Click on ![button](add) to add additional criteria.
  - Click on ![button](ok) button to apply the filter.
  - Click on ![button](cancel) button to revert to previous filter.

  **Remove criteria**
  - To remove a criteria, click on ![button](remove) on the line.
  - To remove all criteria, click on ![button](remove_all) on the header.
  - Click on the ![button](clear) button to reset the active filter.

  **Save active filter**
  - Active filter can be saved to reuse.
  - Fill the filter name and click on ![button](save) to save the filter definition.
2 - Saved filters

• This section allows to manage saved filters.
• Click on a saved filter to retrieve its definition.
• Click on \(\times\) from a saved filter to delete it.
• Click on the Default button to define the active stored filter as the default, kept even after disconnection.

Note: Default filter

• The default filter is defined for the user.
• The filter will be automatically applied in the next connection.

3 - Shared filters

• Defined filters can be shared with other users.
• Click on \(\leftarrow\) to share the selected filter.
• Click on \(\leftrightarrow\) to unshare the selected filter.

Shared filters are available for all users in their session.

Fig. 4.9: Dialog box - Advanced filter definition with shared filter
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. 🗄
Displayed columns

This functionality allows to define columns displayed in the list for this element.

- Click on OK button to apply changes.
- Click on Reset button to reset the list to its default format.

---

**Note:**

- The columns display is defined for the user.
- The definition will be automatically applied in the next connection.

---

Column selection

- Use checkboxes to select or unselect columns to display.

---

**Note:**

- **Id** and **name** are mandatory fields.
- They cannot be removed from display.

---

Columns order

- Use the selector area to reorder fields with drag & drop feature.
Column size

- Use the spinner button 1 to change the width of the field.
- Width is in % of the total list width.
- The minimum width is 1%.
- The maximum width is 50%.

Note: Field: Name
- The width of the field is automatically adjusted so that the total list width is 100%.
- The width of the field cannot be less than 10%.

Warning: Total width over 100%
- The total width must be limited to a maximum 100%.
- The exceedance will be highlighted beside the buttons. 2
- This may lead to strange display, over page width, on list, reports and PDF export, depending on the browser.
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.

**Note:**

- 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*)
- The export definition is defined for each user.
- The same definition can be applied in the next export.

---

**Fields selection**

- 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.

**Id or name for references**

- For fields that reference another item, you can select to export either the id or the clear name for the referenced item.

**Preserve html format for long texts**

- Box checked indicating that HTML tags in a long text field will be kept during export.
4.1.6 Detail window

**Detail window features**

- Copy item
- Email detail
- Subscribe detail
- Multiple update
- Checklist
- History of changes
- Text editor
- 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

- Information on the item (issuer and creation date) in thumbnail format.
- See: Thumbnails.

**Note:**
- Administrator can change information.
3 - Buttons

• Click on ✖️ to create a new item.
• Click on ✎️ or use shortcut key Control-s to save the changes.
• Click on 📝 to get a printable version of the details.
• Click on 📝 to get a printable version of the details in PDF format.
• Click on 📝 to copy the current item. (See: Copy item)
• Click on ✖️ to cancel ongoing changes.
• Click on ✒️ to delete the item.
• Click on 🔄 to refresh the display.
• Click on ✉️ to send details of item by email. (See: Email detail)
• Click on buttonIconSubscribe to subscribe of item. (See: Subscribe detail)
• Click on ✖️ to update several items in one operation. (See: Multiple update)

Note:

• Some buttons are not clickable when changes are ongoing.
• ✒️ button is clickable only when changes are ongoing.

Warning:

• When changes are ongoing, you cannot select another item or another menu item.
• Save or cancel ongoing changes first.

4 - 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.
5 - 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
- When the section contains a list, the item count is displayed at right of the header.

Fig. 4.10: 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.
Copy item

- Allows copied an item of the element.
- The options displayed in dialog box depends on whether the element is simple or complex.

![Copy element dialog box]

Simple element

- Simple element (environment parameters, lists, ...) can only be copied “as is”.

Complex element

- Complex element (Tickets, Activities, ...), 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).
- It is possible to select:
  - New kind of element.
  - Select new type (corresponding to the kind of element).
  - Change the name.
  - Select whether the initial element will be indicated as the origin of the copied one.
  - For main items, it is also possible to choose to copy links, attachments and notes.
  - For Projects and Activities, it is also possible to copy the hierarchic structure of activities (sub-projects, sub-activities).

Note:

- The new item has the status “copied”.
Email detail

Allows to send an informative email to defined recipients list.

Recipients list

- 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.

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.
Subscribe detail

Subscribe list

Allows to subscribe to tracking of an item.

This icon is checked when you subscribed.

- Ability to subscribe a third party user to the tracking of an element (according to configurable rights).

You can drag the name of selected resources and drop them on the right column for subscribe them.

- Display of list of tracked items.

To display it, click on button “Show list of subscriptions”

- Possibility to send an email to users following the item, when unitary sending detail or on automatic sending or on indicator.
Multiple update

Allows to update several items in one operation.

- The fields that can be updated depends on the element.
- The fields are grouped by section.
- Click on \( \text{QUIT} \) to quit the multiple mode window.

Select items

- The selection of items can be done by selecting them in the list window.
- Or use checkboxes to select/unselect all items in the list.
- The count of items selected is displayed.

Apply updates

- Click on \( \text{SAVE} \) to save updates on selection.
- Click on \( \text{DELETE} \) to delete all selected items.
- The update will be applied to all the items (if possible) and a report will be displayed on the right.

Checklist

Allows to fill a checklist form.

A checklist is available, whether a checklist form is already defined for the element or the element type.

Note:
The checklist forms are defined in Checklists screen.

Note:
- The access to view the checklist depends on your access rights.

Displaying the checklist
- The user parameter «Display checklists» allows to define whether the checklist 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 checklist form.
- With other value the “Checklist” section appears in the detail window.

![Fig. 4.13: Dialog box - Checklist](image)

![Fig. 4.14: Section - Checklist](image)

How to use
- The user just has to check information corresponding to the situation.
- When done, the user name and checked date are recorded and displayed.
- Each line can get an extra comment, as well as globally on the checklist.
History of changes

All the changes items are tracked. They are stored and displayed on each item.

Note:

- On creation, just an insert operation is stored, not all the initial values on creation.

Table 4.1: Fields of changes

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operation</td>
<td>The operation on the item (insert or update).</td>
</tr>
<tr>
<td>Data</td>
<td>The field modified.</td>
</tr>
<tr>
<td>Value before</td>
<td>The value of the field before the update.</td>
</tr>
<tr>
<td>Value after</td>
<td>The value of the field after the update.</td>
</tr>
<tr>
<td>Date</td>
<td>Date of change operation.</td>
</tr>
<tr>
<td>User</td>
<td>Name of the user who operated the change.</td>
</tr>
</tbody>
</table>

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.

Fig. 4.15: Dialog box - History of changes

Fig. 4.16: Section - Change history
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».
Text editor

Text editors are available for editing of long text fields like description, results, notes, ...

**Note**: Parameter “Editor for rich text”
- 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.

![CK Editor](image)

Fig. 4.17: CK Editor

**Note**:  
- Ability to resize the CK Editor height, the size is saved.
- Possibility to deactivate the SCAYT spell checker. It can be modified by each user in user parameters.

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.

Dojo Editor

- Historically first used on ProjeQtOr.

![Dojo Editor](image)

Fig. 4.18: Dojo Editor
Inline editor

- As Dojo Editor.
- Activated only when needed.
- Text zone is extendable.

Fig. 4.19: Inline editor

Plain text editor

- Conventional text input.
- Text zone is extendable.

Fig. 4.20: Plain text editor
Special fields

This section describes the ProjeQtOr special fields.

<table>
<thead>
<tr>
<th>Special fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Accelerator buttons</td>
</tr>
<tr>
<td>• Combo list field</td>
</tr>
<tr>
<td>• Origin field</td>
</tr>
<tr>
<td>• Set color field</td>
</tr>
<tr>
<td>• Thumbnails</td>
</tr>
</tbody>
</table>

Accelerator buttons

Move to next status button

• 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.

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.

**Note:**

- The access to view or create item depends on your access rights.
- Some buttons can be not available.

- Click on 🔽 to get the list of values.
- Click on 🔱 will directly go to the selected item.

**Note:**

- Click on ⬅️ to return to the last screen. (More detail, see: *Top bar*)
• Click on \( \text{\textbullet} \) to access item details.
• The next action depends on whether the field value is filled or not.

Field value is filled
• If the field value is filled, the details of item associated are displayed.

![Fig. 4.21: Dialog box - Item details](image)

• Click on \( \text{\textbullet} \) to re-select an item.
• Click on \( \text{\textbullet} \) to close the dialog box.

Field value is empty
• If the field value is empty, the list of items is displayed, allowing to select an item.

![Fig. 4.22: Dialog box - List of items](image)

• Click on \( \text{\textbullet} \) to select items.
• Click on \( \text{\textbullet} \) to create a new item.
• Click on \( \text{\textbullet} \) to close the window.

**Note:** Window header
• You have access to Rapid filter, Quick search and Advanced filter.

**Note:** Select several items
• Some elements is possible to select several items, use Control or Shift.
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 an origin element.
- Click on x to delete the link.

![Add an origin element dialog box]

Table 4.2: Fields of add an origin element dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of the origin</td>
<td>Type of element to be selected.</td>
</tr>
<tr>
<td>Origin element</td>
<td>Item to select.</td>
</tr>
</tbody>
</table>

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.
**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**

- Displays the user who created or updated the item.
- Move cursor over thumbnail to display the name and a large photo of the user.
  - The user doesn’t have a photo.

**Comment**

- Indicates a comment or description is defined.
- Move cursor over thumbnail to display text.

**Privacy**

Indicates the visibility level defined in a note or attachment.

- Private contents.
- Visible to team.

**Color**

- 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.
4.1.7 Info bar

![Fig. 4.23: Info bar](image)

1 - Log out button

- Allows to disconnect the user.

**Note:** User parameter “Confirm quit application”

- This parameter defines whether a disconnection confirmation will be displayed before.

2 - User parameters button

- Allows to access user parameters.

3 - Hide and show menu button

- Allows to hide or show the menu section.

**Note:** User parameter “Hide menu”

- This parameter defines whether the menu is hidden by default.

4 - Switched mode button

- 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.

**Note:** User parameter “Switched mode”

- This parameter defines whether switching mode is enabled or not.

5 - Database name

- Display database name.

6 - Version button

- Displays the application version.
- Click on button to access to ProjeQtOr site.
7 - “Full-screen” button

- One-click to displays in full Screen view.
4.2 Internal alert

Internal alerts can be sent to users.
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. (See: 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.
- The indicators are defined in Indicators screen.
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. 4.24: Alert on detail window](image)

Alert on Today screen

Just move the mouse over the red line to display, which indicator has been raised.

![Fig. 4.25: Alert on Today screen](image)
4.3 Themes

Users can select Theme to display the interface.

User parameter “Theme”

• This parameter defines the theme to display.
• The new theme is automatically applied when selected.

Note: Default theme

• By default your selected theme is “ProjeQtOr ‘Flat Design’ Blue”.
• Screenshoots has been taken with “ProjeQtOr Standard” theme.

4.4 Multilingual

ProjeQtOr is multilingual.
Each user can choose the language to display all the captions.

**Note:** User parameter “Language”
- This parameter defines the language used to display captions.

### 4.5 Keyboard functionality

**Shortcut keys**
- **Control-s** to save the changes.
- **F1** to open the online user manual, to the page corresponding to the actual screen.
- **ESC** to exit full screen mode of CK Editor.

**Numeric keypad**
- The point will be replaced by a comma if the numeric format requires it.
4.6 Common sections

Some sections are displayed on almost all screens. Those sections allows to set information or add information to an item of the element.

- Description section
- Treatment section
- Allocations section
- Assignment section
- Progress section
- Predecessor and Successor element sections
- Linked Elements section
- Attachments section
- Notes section

4.6.1 Description section

This section allows to identify items of the element.

- Information grouped under this section are:
  - Id
  - Element type
  - Name
  - Description
  - Current situation
  - Stakeholder
  - Objective
  - Reference
  - Link
4.6.2 Treatment section

This section contains information about item treatment. Depending on the element, this section may have a different name.

- Information grouped under this section are:
  - Status and Dates
  - *Responsible*
  - Link
  - Outcome
  - Comment
4.6.3 Allocations section

Concepts

- Profiles definition
- Allocation to project

This section allows to manage resource allocation to projects.

Table 4.3: Fields - Resource allocation list

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the allocation.</td>
</tr>
<tr>
<td>Project</td>
<td>Project allocated to.</td>
</tr>
<tr>
<td>Resource</td>
<td>Name of the allocated resource.</td>
</tr>
<tr>
<td>Profile</td>
<td>Selected profile.</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date of allocation.</td>
</tr>
<tr>
<td>End date</td>
<td>End date of allocation.</td>
</tr>
<tr>
<td>Rate</td>
<td>Allocation rate for the project (%).</td>
</tr>
</tbody>
</table>

Allocation list management

- Click on to create a new allocation.
- Click on to update an existing allocation.
- Click on to delete the corresponding allocation.
- Click on to replace resource on the corresponding allocation. (See: Replace resource on an allocation)
- The icon indicates that allocation to project is closed.

Note: Direct access to information

- From project screen, click on the resource name to go directly to the selected resource.
- From resource screen, click the project name to go directly to the selected project.
Table 4.4: Fields - Allocation dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>Project list.</td>
</tr>
<tr>
<td>Resource</td>
<td>Resource list.</td>
</tr>
<tr>
<td>Profile</td>
<td>Profile list.</td>
</tr>
<tr>
<td>Rate</td>
<td>Rate (in %) of the allocation to the project.</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date of allocation.</td>
</tr>
<tr>
<td>End date</td>
<td>End date of allocation.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the allocation.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that allocation in not active anymore, without deleting it.</td>
</tr>
</tbody>
</table>

* Required field

Fields: Project & Resource

- If the allocation is done on the screen «Projects», the field «resource» will be selectable.
- If the allocation is done on the screens «Resources», «Contacts» or «Users», the field «project» will be selectable.

Field: Resource

- This field can contain a list of users, resources or contacts according to which screen comes from project allocation.

Field: Profile

- The user profile defined will be displayed first.

Field: Rate

- 100% means a full time allocation.

Note:

- Depending on which screen is used to manage project allocations, the behavior of fields will change.
Replace resource on an allocation

- This feature allows to replace a resource by another.
- All tasks assigned to old resource will be transferred to the new resource with assigned and left work.

Note:
- Work done on tasks belongs to always the old resource.

Table 4.5: Fields - Replace allocation dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td>Resource list.</td>
</tr>
<tr>
<td>Capacity (FTE)</td>
<td>The capacity of the resource selected</td>
</tr>
<tr>
<td>Profile</td>
<td>Profile list.</td>
</tr>
<tr>
<td>Rate</td>
<td>Rate (in %) of the allocation to the project.</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date of allocation.</td>
</tr>
<tr>
<td>End date</td>
<td>End date of allocation.</td>
</tr>
</tbody>
</table>

* Required field

Field: Profile
- The user profile defined will be displayed first.

Field: Rate
- 100% means a full time allocation.
4.6.4 Assignment section

Concepts

- Resource function and cost

This section allows to manage assignment of resources to tasks.

Note:

- Only resources allocated to a project can be assigned to its tasks.

Assignment function

- The assignment function allows to define the resource function to task and the daily cost if defined.

Assignment rate

- Assignment 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.

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, but with a different function (different daily cost).
- Allows to add extra work without modifying initial assignment.

Incomplete planned work

- The scheduling process tries to schedule, the remaining work on the assigned task within the allocation to project period.
- The remaining work that can’t be planned is displayed on the right of the resource name.

![Assignment](image)

Fig. 4.26: Assignment section with incomplete planned work
Assignment list

Table 4.6: Fields of assignment list

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td>Name of the resource assigned to the task.</td>
</tr>
<tr>
<td>Rate (%)</td>
<td>Rate planned for this resource to the task.</td>
</tr>
<tr>
<td>Assigned</td>
<td>The work initially planned for this resource to the task.</td>
</tr>
<tr>
<td>Real</td>
<td>Sum of work done by this resource to the task.</td>
</tr>
<tr>
<td>Left</td>
<td>Remaining work to this resource to complete the task.</td>
</tr>
</tbody>
</table>

Note:

• Click on the resource name to directly move to resource detail.

Assignment list buttons

• Click on + to assign a new resource.
• Click on to modify the assignment.
• Click on to delete the assignment.

Note:

• If real work exists for an assignment, it can not be deleted.

Table 4.7: Fields - Assignment dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td>Resource list.</td>
</tr>
<tr>
<td>Function</td>
<td>Function list.</td>
</tr>
<tr>
<td>Cost</td>
<td>Daily cost defined for the resource and its function.</td>
</tr>
<tr>
<td>Rate</td>
<td>The max rate (%) to schedule the resource on the task by day.</td>
</tr>
<tr>
<td>Assigned work</td>
<td>The work initially planned for this resource to the task.</td>
</tr>
<tr>
<td>Real work</td>
<td>Sum of work done by this resource to the task.</td>
</tr>
<tr>
<td>Left work</td>
<td>Remaining work to this resource to complete the task.</td>
</tr>
<tr>
<td>Reassessed work</td>
<td>The new total work planned to complete the task.</td>
</tr>
<tr>
<td>Comments</td>
<td>Any comment on the allocation.</td>
</tr>
</tbody>
</table>

Field: Function

• The main function defined for the resource is the default function selected.
Field: Left work

- \([\text{Left work}] = [\text{Assigned Work}] – [\text{Real Work}]\)
- Project leaders can adjust this value to estimate the work needed to complete the task by the resource.

Field: Reassessed work

- \([\text{Reassessed work}] = [\text{Real Work}] + [\text{Left Work}]\)

Field: Comments

- When a comment exists, 🍆 will appear on the assignment list, and on the description of the activity on the “real work allocation” screen.
- Moving the mouse over the icon will display the comment.
4.6.5 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.

The following sections displayed first a general description of progress data.

Next, description of fields and information in sections will be displayed.
Columns definition

Column “Requested”

- Requested dates allows to define initial dates (wished dates).
- Useful to define preliminary dates in a project, in a change request or other.
- Requested dates can be used:
  - as a first draft of planned dates.
  - with indicators to monitor the respect of start and end dates.

Column “Validated”

- Validated data are used by project leader to define committed dates, work and cost expected.
- Validated data can be used:
  - to fix a limit or a target and for some planning mode they are used to define parameter entries.
  - with indicators to monitor the respect of start and end dates, work and cost expected.
  - like the project’s baseline.

Note: Validated end date (due date)

- The validated end date allows to fix a due date at which the work must be completed.
- If the work is planned or completed beyond this limit, the error field will be highlighted.
- For task and milestone, their Gantt element will be red. (See: Gantt chart view)

Column “Planned”

- Planned dates are the estimated time to complete tasks or the estimated end date of milestones.
- Planned dates can be used to initialize validated and requested dates. (See: Project planning)

Columns: “planned” and “assigned”

- Assigned work is the planned work assigned to resources for completing tasks.
- Planned dates are the estimated duration to complete tasks by resources according to assigned work.
Column “Assigned”

• This column displays the planned work and cost of resources and the planned project expenses.
  
  **Planned work and cost of resources**
  • Scheduled work time assigned to a resource for completing a task.
  • The estimated cost is the scheduled work time assigned to a resource for completing a task multiplied by its current daily cost.
  
  **Planned project expenses**
  • Sum of the planned amount of all project expenses.

Column “Real”

• This column displays the duration, completion date, work done and cost incurred by resources and the project expenses.
  
  **Dates**
  • Allows to determine when a planning element has really begun and completed.
  
  **Work done and cost incurred by resources**
  • Work done by a resource on an assigned task.
  • Work done are entered by resources, on a daily basis by real work allocation screen.
  • The cost incurred is the work done by a resource on a task on daily base multiplied by its daily cost defined for the period.
  
  **Project expenses**
  • Sum of the real amount of all project expenses.

Column “Left”

• This column displays the remaining of planned work and planned amount.
• By default : \( \text{Left} = \text{Assigned} - \text{Real} \)
• Left work should be re-estimated by the resource.
  
  **Work and cost remaining of resources**
  • Scheduled work time assigned to resources for completing tasks minus the work done.
  • The remaining cost is the remaining work by a resource on a task multiplied by the latest daily cost defined for it.
  
  **Project expense**
  • Sum of the planned amount of project expenses not incurred yet.

Column “Reassessed”

• This column displays the resources work reassess and the spending projection.
• Always calculated as : \( [\text{Reassessed}] = [\text{Real}] + [\text{Left}] \)
Work and cost consolidation

Work and cost from tasks (Activity, Test session and Meeting) are summarized for each parent element. Allows to follow-up progress on grouped tasks like phase, delivery, test group, sub-project and project.

Consolidate validated work and cost

- Consolidation can be done on validated work and cost.
- Allows to calculate the scheduled work and budgeted cost from lower planning elements.
- The calculation depends on consolidation method selected and on which level the validated values are entered.

**Consolidation method “Never”**
- Values are not consolidated.

**Consolidation method “Always”**
- Values on the lower levels are consolidate up to project level.

**Consolidation method “Only if set”**
- Zero values at lower levels do not overwrite values on upper level, but non-zero values on the lower level are consolidated up to project level.

**Note:** Selection of consolidation method
- The parameter “Consolidated validated cost & work” in global parameters screen allows to select consolidation method.
Monitoring indicator

The indicators can be defined on the progress data.

Project, Activity and Test session.

- Next indicators defined for Project, Activity and Test session

  **Respect of start or end date for the requested, validated and planned values**
  - These indicators can be programmed as a reminder and an alert, according to the number of days or hours before the start or end date.

  **On resource work and cost**
  - These indicators can be programmed as a reminder and an alert, according to percentage of progress on monitored value compared to the target value.

    **Reassessed cost compared to validated cost**
    - The reassessed cost compared to budgeted (validated) cost.

    **Reassessed cost compared to assigned cost**
    - The reassessed cost compared to cost calculated from assigned work for resources.

    **Reassessed work compared to validated work**
    - The reassessed work compared to scheduled (validated) work.

    **Reassessed work compared to assigned work**
    - The reassessed work compared to work assigned to resources.

    **Real work compared to validated work**
    - The work really done by resources compared to scheduled (validated) work.

    **Real work compared to assigned work**
    - The work really done by resources compared to work assigned to resources.

Milestone

- Next indicators defined for Milestone.

  **Respect of end date for the requested, validated and planned values**
  - These indicators can be programmed as a reminder and an alert, according to the number of days or hours before the end date.
Progress section (Project, Activity & Test session)

Next sections describe each part of progress section display.
Some parts are used only by a specific planning element.
Parts used by planning elements are:

**Project**
- Dates and duration
- Resources (Work & Cost)
- Expense, Reserve and Total
- Progress, Expected, WBS & Priority
- Margin

**Activity**
- Dates and duration
- Resources (Work & Cost)
- Progress, Expected, WBS & Priority
- Planning mode
- Ticket

**Test session**
- Dates and duration
- Resources (Work & Cost)
- Progress, Expected, WBS & Priority
- Planning mode

**Dates and duration**

**Requested**
- Allows to define preliminary planned dates.

**Validated**

Validated dates are used to:
- Define entry parameters according to selected planning mode.
- Define initial planned dates, as a baseline.
- Fix a due date at which the work must be completed.
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 can be 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.

---

**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.

---

**Note:**
- The planned start date is adjusted to the real start date when work began.

---

Real

- The real start date is set when work began (handled).
- The real end date is set when no more remaining work (done).

**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.
Resources (Work & Cost)

Work of resources are calculated by the work assigned to each resource for tasks.

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: Orders

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.
- \[\text{Reassessed} = \text{Real} + \text{Left}\]

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, Reserve and Total

> Used by: Project

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.
Progress, Expected, WBS & Priority

Progress

• Percentage of actual progress.
• Calculated by the sum of the work done divided by sum of work reassessed.
• \([\text{Progress \%}] = \frac{\text{real work}}{\text{reassessed work}} = \frac{\text{real work}}{(\text{real work} + \text{left work})}\)

Expected

• Percentage of expected progress.
• Calculated by the sum of the work done divided by scheduled work.
• \([\text{Expected \%}] = \frac{\text{real work}}{\text{validated work}}\)

WBS

• Hierarchical position in the global planning.

Priority

• Allows to define priority.
• By default, the value is set to “500” (medium priority).
• See: Scheduling priority.
Planning mode

> Used by: Activity & Test session

As soon as possible

• The task is planned to finish as soon as possible.

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.

Constraint by date

** The validated start or end date field must be set.

Must not start before validated date

• The task must not begin before a specific date.

As late as possible

• The task is planned backward from end to start.
• “Floating” backward planning is not possible, validated end date must be defined.
Recurrent activities

- Allows to evenly distribute work between two dates.
- Used for management recurrent activities.
- The validated dates fields must be set.

Note:
- Examples of the planning modes upcoming are based on 2 work days to plan on 10 days.

Regular between dates
- Work will be evenly divided between on working days.
- For instance, 0.2 days during 10 days.

Regular in full days
- Work will be distributed on full day between on working days.

<table>
<thead>
<tr>
<th>Day</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribution</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

Regular in half days
- Work will be distributed on half of the day between on working days.

<table>
<thead>
<tr>
<th>Day</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribution</td>
<td>0</td>
<td>0</td>
<td>0.5</td>
<td>0</td>
<td>0.5</td>
<td>0</td>
<td>0</td>
<td>0.5</td>
<td>0</td>
<td>0.5</td>
</tr>
</tbody>
</table>

Regular in quarter days
- Work will be distributed on one quarter of the day between on working days.

<table>
<thead>
<tr>
<th>Day</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribution</td>
<td>0</td>
<td>0.25</td>
<td>0.25</td>
<td>0.25</td>
<td>0.25</td>
<td>0</td>
<td>0.25</td>
<td>0.25</td>
<td>0.25</td>
<td>0.25</td>
</tr>
</tbody>
</table>

Fixed duration

- The task is planned by duration.
- The task is “floating” depending on predecessors.
- The validated duration field must be set.
- It is not necessary to assign resources to the task.
- If work is assigned to the task, planning behavior is the same as “Regular between dates” but with floating task.

Note:
- If you want fixed duration with fixed start, use “Regular between dates”, or use milestone to define start.
Margin

> Used by: Project

Displays remaining margin.

Note:
- The percentage of remaining margins will be displayed on the right.

Margin (work)

- Calculated by the scheduled work minus the sum of work reassessed.
- \[\text{Margin} = \text{Validated work} - \text{Reassessed work}\]
- \[\text{Margin (\%)} = \frac{\text{Validated work} - \text{Reassessed work}}{\text{Validated work}}\]

Margin (cost)

- Calculated by the budgeted cost (resource & expense) minus the total of reassessed cost.
- \[\text{Margin} = \text{Validated cost} - \text{Reassessed cost}\]
- \[\text{Margin (\%)} = \frac{\text{Validated cost} - \text{Reassessed cost}}{\text{Validated cost}}\]

Ticket

> Used by: Activity

Allows tracking of tickets attached to the activity though the “planning activity” field of tickets.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>Number of tickets attached to the activity.</td>
</tr>
<tr>
<td>Estimated</td>
<td>Sum of estimated work for tickets attached to the activity.</td>
</tr>
<tr>
<td>Real</td>
<td>Sum of work done for tickets attached to the activity.</td>
</tr>
<tr>
<td>Left</td>
<td>Sum of remaining work for tickets attached to the activity.</td>
</tr>
</tbody>
</table>

Field: Estimated

- This field will be highlighted when the sum of estimated work on the tickets is higher than the planned work on the activity.

Field: Left

- This 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 \(\text{\ding{108}}\) to show ticket list attached to the activity.
- Click on a ticket name to directly move to it.
Progress section (Milestone)

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”.

**WBS**

- Hierarchical position of the milestone in the global planning.

**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.
Progress section (Meeting)

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.

Priority

- Allows to define meeting priority.
- By default, the value is set to “1” (highest priority).
- See: Scheduling priority.
4.6.6 Predecessor and Successor element sections

Concepts

- Dependencies

This section allows to manage dependency links between planning elements. A dependency link can be created from a planning element (Predecessor) and to a planning element (Successor).

Note: Gantt chart

- The dependency link can be created in the Gantt chart.
- See: Project planning

Table 4.8: Fields of predecessors and successors lists

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element</td>
<td>Type and id of the element.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the element.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the element.</td>
</tr>
</tbody>
</table>

Note:

- Click on the name of a predecessor or successor will directly move to it.

Predecessors and successors elements list management

- Click on +%20%20 on the corresponding section to add a dependency link.
- Click on %20%20 to edit the dependency link.
- Click on %20%20 to delete the corresponding dependency link.

Fig. 4.27: Dialog box - Predecessor or Successor element

Note:

- Recursive loops are controlled on saving.
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.

Multi-value selection

- Multi-line selection is possible using Control key while clicking.

Delay (late)

- Days between predecessor end and successor start.
4.6.7 Linked Elements section

This section allows to manage link between items of elements.

Used for

- Allows to associate items on different elements in the same project.
- A project can be linked with other.

Note:  
Access to an item

- Click on an item name to directly move to it.
- Click on \( \text{Previous} \) to return to the last screen. (More detail, see: Top bar)

Reciprocally interrelated

- If Item A is linked to Item B, Item B is automatically linked to Item A.

Note:  
- A link between items has no impact on them treatment.

Linked elements list

Table 4.9: Fields of linked elements list

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element</td>
<td>Type and id of the linked element.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the linked element.</td>
</tr>
<tr>
<td>Date</td>
<td>Date of creation of the link.</td>
</tr>
<tr>
<td>User</td>
<td>User who created the link.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the linked element.</td>
</tr>
</tbody>
</table>

Linked elements list buttons

- Click \( + \) to create a new link.
- Click on \( \times \) to delete the corresponding link.

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 \( \text{Search} \) to get the list of elements of all projects.
Link with Document

- When a link to a document is selected. The document version can be selected. (See options below)
- 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.
4.6.8 Attachments section

This section allows to attach files or hyperlinks to items of elements.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the attachment.</td>
</tr>
<tr>
<td>File</td>
<td>File name or hyperlink.</td>
</tr>
<tr>
<td>Date</td>
<td>Date of creation of the attachment.</td>
</tr>
<tr>
<td>User</td>
<td>User who created the attachment.</td>
</tr>
</tbody>
</table>

Select an attachment

- Select an attachment depends on whether is a file or a hyperlink.
  - Click on [download icon] to download attachment file.
  - Click on [link icon] to access to hyperlink.

Document viewer

- Document viewer available for files: image, text, PDF and hyperlinks.
  - Click on the icon.

Delete an attachment

- Click on [delete icon] to delete an attachment.
Add an attachment

- Click on + to add an attachment file to an item.
  - Dialog box “Attachment file” will be displayed.
- Click on ⬅ to add hyperlink to an item.
  - Dialog box “Hyperlink” will be displayed.

Attachment file

Note: To upload a file

- Select file with “Browse” button or drop the file in “drop files here” area.
- Attached files are stored on server side.
- Attachments directory is defined in Global parameters screen.

[Fig. 4.28: Dialog box - Attachment for file]

Hyperlink

Note: Hyperlink

- Enter hyperlink in «Hyperlink» field.

[Fig. 4.29: Dialog box - Attachment for hyperlink]

Table 4.11: Fields - Attachment dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Description of attachment.</td>
</tr>
<tr>
<td>Public</td>
<td>Attachment is visible to anyone.</td>
</tr>
<tr>
<td>Team</td>
<td>Attachment is visible to every member of the creator’s team.</td>
</tr>
<tr>
<td>Private</td>
<td>Attachment is visible only to the creator.</td>
</tr>
</tbody>
</table>
4.6.9 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.

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 screen.

Note visibility

- Public: Visible to anyone.
- Team: Visible to every member of the creator’s team.
- Private: Visible only to the creator.

Notes list

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the note.</td>
</tr>
<tr>
<td>Note</td>
<td>Text of the note.</td>
</tr>
<tr>
<td>Date</td>
<td>Date of creation or modification of the note.</td>
</tr>
<tr>
<td>User</td>
<td>Name of the user who created the note.</td>
</tr>
</tbody>
</table>
Notes list buttons

- Click on ✖️ to add a note to an item.
- Click on ✏️ to edit the note.
- Click on ✖️ to delete the note.
4.7 User parameters

Concepts

- Photo

User parameters screen allows configuration of personal settings.

Note:
- User parameters are efficient even without saving.
- Saving parameters will retrieve the selected parameters on each connection.

Section: Display parameters

- Generic display parameter for user.

Section: Graphic interface behavior

- Selection of graphic interface behavior.

Section: Print & Export parameters

- Selection of printing history for detailed items and destination for printing and PDF export.

Section: Miscellaneous

- Default selected project and choice of character used to indent lists of projects, to represent the WBS structure of projects and sub-project.

Note: Field: Project indent char in lists
- Set to “none” to get a flat list.

Section: Photo

- Photo of the user.

Section: Password

- Changes the user’s password.
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.
5.1 Planning elements

The planning elements Test sessions and Meetings are described in their topics.

5.1.1 Projects

The project is the primary entity of ProjeQtOr.

It is also the top-level of visibility, depending on profiles.

Sub-projects

• You can also define sub-projects on a project.
  • Then, the project may not be real projects, but just organizational breakdown corresponding to the organization.

Fix planning

• When box “fix planning” is checked, the project scheduling won’t be remade.
  • This will avoid change on planned values.

Under construction

• When a project is under construction, no automatic email is sent for the elements of the project.
  • A project can be under construction as long as it isn’t stated (set to handled status).

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.

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.
- See: Monitoring indicator

Project reserve

- Project reserve is an amount reserved based on identifying risks and opportunities.
- 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.
- See: Risks and Opportunities

Other sections

- Progress
- Allocations
- Versions linked to this project
- Types restrictions
- Predecessor and Successor element
- Linked element
- Attachments
- Notes
Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the project.</td>
</tr>
<tr>
<td>Name</td>
<td>Short name of the project.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of project.</td>
</tr>
<tr>
<td>Organization</td>
<td>The organization of the project.</td>
</tr>
<tr>
<td>Customer</td>
<td>The customer of the project.</td>
</tr>
<tr>
<td>Bill contact</td>
<td>Billing contact.</td>
</tr>
<tr>
<td>Project code</td>
<td>Code of the project.</td>
</tr>
<tr>
<td>Contract code</td>
<td>Code of the contract of the project.</td>
</tr>
<tr>
<td>Customer code</td>
<td>Code of the customer of the project.</td>
</tr>
<tr>
<td>Is sub-project of</td>
<td>Name of the top project if this project is a sub-project.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Name of the sponsor of the project.</td>
</tr>
<tr>
<td>Manager</td>
<td>Name of the resource who manages the project.</td>
</tr>
<tr>
<td>Color</td>
<td>Color of the project, to be displayed in some reports.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the project.</td>
</tr>
<tr>
<td>Health status</td>
<td>Global health status of the project.</td>
</tr>
<tr>
<td>Quality level</td>
<td>Estimation of quality level of project (result of audits).</td>
</tr>
<tr>
<td>Trend</td>
<td>Trend of global project health.</td>
</tr>
<tr>
<td>Overall progress</td>
<td>Overall progress to be selected in a defined list.</td>
</tr>
<tr>
<td>Fix planning</td>
<td>Box checked indicates the planning of the project is frozen, and its sub-projects.</td>
</tr>
<tr>
<td>Under construction</td>
<td>Box checked indicates the project is under construction.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates the project is finished.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the project is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the project.</td>
</tr>
<tr>
<td>Objectives</td>
<td>Objectives of the project.</td>
</tr>
</tbody>
</table>

* Required field

Field: Customer

- The value of the field is used in the Quotations, Orders and Bills concerned with the project.

Field: Bill contact

- The value of the field is used in Bills concerned with the project.

Section: Sub projects

- List of sub-projects under for the project.
5.1.2 Activities

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.

Activities regroupment

- Activities can have parents to regroup activities.
- So a WBS (work breakdown structure number) is calculated for the activities.
- Activities can be sorted inside their parent activity, on the Gantt planning view, using drag and drop.
- Parent activity must belong to the same project.

Work on tickets

- Tickets can be linked to an activity (task).
- Work on tickets will be included in the activity.
- More detail, see: Tickets screen.

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.
- The assigned task and the sum of working time entries by resource in tickets will be available in its timesheet.

Monitoring indicator

- The indicators can be defined on the progress data.
- See: Monitoring indicator
Other sections

- Assignment
- Progress
- Predecessor and Successor element
- Linked element
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the activity.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the activity.</td>
</tr>
<tr>
<td>Activity type</td>
<td>Type of activity.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the activity.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference of the activity.</td>
</tr>
<tr>
<td>Requestor</td>
<td>Contact at the origin of the activity.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the activity.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the activity.</td>
</tr>
</tbody>
</table>

* Required field

Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent activity</td>
<td>Parent activity for grouping purpose.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the activity.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the activity.</td>
</tr>
<tr>
<td>Handled</td>
<td>Box checked indicates the activity is taken over.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates the activity has been treated.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the activity is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates the activity is cancelled.</td>
</tr>
<tr>
<td>Target version</td>
<td>The target version of the product allocated in delivery of the activity.</td>
</tr>
<tr>
<td>Result</td>
<td>Complete description of the treatment done on the activity.</td>
</tr>
</tbody>
</table>

* Required field

Field: Target version

- Contains the list of product versions linked to the project.
- More detail, see: Product concept
5.1.3 Milestones

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 on the progress data.
• See: Monitoring indicator

Other sections

• Progress
• Predecessor and Successor element
• Linked element
• Attachments
• Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the milestone.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the milestone.</td>
</tr>
<tr>
<td>Milestone type</td>
<td>Type of milestone.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the milestone.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the milestone.</td>
</tr>
<tr>
<td>Description</td>
<td>Long description of the milestone.</td>
</tr>
</tbody>
</table>

* Required field
## Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent activity</td>
<td>Parent activity for grouping purpose.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Actual status of the milestone.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the milestone.</td>
</tr>
<tr>
<td><strong>Handled</strong></td>
<td>Box checked indicates the milestone is taken over.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Box checked indicates the milestone has been treated.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Box checked indicates the milestone is archived.</td>
</tr>
<tr>
<td><strong>Cancelled</strong></td>
<td>Box checked indicates the milestone is cancelled.</td>
</tr>
<tr>
<td><strong>Target version</strong></td>
<td>The target version of the product allocated in delivery of the milestone.</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td>Complete description of the treatment done on the milestone.</td>
</tr>
</tbody>
</table>

* Required field

### Field: Target version

- Contains the list of product versions linked to the project.
- More detail, see: *Product concept*
5.2 Gantt charts

Gantt charts

- Planning
- Projects portfolio
- Resource Planning
- Export planning to PDF

5.2.1 Planning

This screen allows to define project planning and follow progress.

It is composed with two areas:

- Task list area
- Gantt chart view

Note:

- This screen offers many features that will be described in the next sections.

3 - Activity planning calculation

- Click on \( \text{Add} \) to start the activity planning calculation. (See: Project planning)
4 - Buttons

- Click on \[\text{✓} \] to validate planning.
- Click on \[\text{✓} \] to save baseline of planning. (See: Project planning)
- Click on \[\text{✓} \] to get a printable version of the Gantt chart.
- Click on \[\text{✓} \] to export Gantt chart in PDF format. (See: Export planning to PDF)
- Click on \[\text{✓} \] to export planning to MS-Project xml format.
- Click on \[\text{✓} \] to define the columns of progress data that will be displayed. (See: Progress data view)
- Click on \[\text{✓} \] to create a new item. (See: Project planning)

5 - Show Baseline

- Allows to display one baseline on top and one on bottom of the Gantt chart.

Note:

- Ability to display two baselines on the Gantt chart.
- Baseline can be saved with \[\text{✓} \].
Task list area

The task list area is composed with:

- **Task list**
- **Progress data view**

![Fig. 5.2: Task list & progress data view](image)

3 - Area splitter

The splitter is used to show or hide the progress data view.

**Note:**

- The progress data view is hidden by default.
- Move the splitter on your right to display them.
Task list

The task list displayed planning elements in hierarchical form. Tasks are regrouped by project and activity.

Projects displayed

- Projects displayed depends on selection done with the project selector.
- See: Top bar

![Fig. 5.3: Task list zone](image)

1 - Hierarchical level

- Click on [ ] or [ ] to adjust the hierarchical level displayed.

2 - Icon of element

- An icon is displayed on the left of the corresponding element.

3 - Group row

- Click on [ ] or [ ] on the group row to expand or shrink the group.

4 - Show WBS

- Click on “Show WBS” to display the WBS number before the names.

5 - Item name

- Click on a row will display the detail of the item in the detail window.

6 - Checkbox «Show closed items»

- Flag on «Show closed items» allows to list also closed items.
Progress data view

The progress data view allows to show progress on project elements.
For each planning element, the progress data are displayed at them right.

Fig. 5.4: Progress data view

1 - Group row

- The group row has a gray background.
- Used to display consolidated progress data for tasks.

2 - Task row

- The task row has a white background.
- Used to display task progress data.
3 - Define the columns of progress data that will be displayed

- Click on \textbf{[ ]} to define the columns displayed.
- Click on \textbf{OK} button to apply changes.

\textbf{Column selection}

- Use checkboxes to select or unselect columns to display.

\textbf{Columns order}

- Use the \textbf{[ ]} to reorder columns with drag & drop feature.

![Fig. 5.5: Popup list - Select columns](image)

Fig. 5.5: Popup list - Select columns
Gantt chart view

The Gantt chart view is a graphic representation of progress data. For each planning element, a Gantt bar is displayed at the right.

Fig. 5.6: Gantt chart view

1 - Scale

- Scale available: daily, weekly, monthly or quarter
- The Gantt chart view will be adjusted according to scale selected.

2 - Start and end dates

- Change the starting or ending date to limit the display of Gantt chart view.

3 - Saving dates

- Save previous dates to retrieve them on every connection.
4 - Gantt bars

- Overdue tasks appear in red, others in green.

**Red bar**

**Condition**

Planned end date or (Real end date if completed task) > Validated end date

**Purple bar**

- 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.

**Consolidation bar**

- Displayed at group row level.
- Graphic display of consolidated dates for planning elements group.
- Start with the smallest start date and end with the biggest end date, either with planned or real dates.

**Real work progress**

- The line that cross a Gantt bar displays the percentage of actual progress.
- The length of the line represents the percentage of completion, based on the percentage of actual progress against the length of Gantt bar.

Note: Lighter bar

- Activities without assigned work are lighter bar, pale red or pale green as appropriate.

Note:

- Move the cursor over the bar to display item name and planned dates.

5 - Dependency links

- Dependencies between planning elements are displayed with an arrow.
- To modify dependency link, click on dependency to displays a pop-up

Note: Pop-up

- You can modify the delay, add a comment or remove the dependency.
6 - Milestone

- Milestones appear as diamonds, filled if completed, empty if not.
- Color of diamond depends on milestone progress.

**Ongoing milestone and in times**

**Completed milestone and in times**

**Ongoing milestone and delayed**

**Condition**
- Planned end date > Validate end date

**Completed milestone and delayed**

**Condition**
- Real end date > Validated end date

7 - Show resources

- Click on “Show resources” to display resources assigned to tasks.

**Global parameter “Show resource in Gantt”**

- This parameter defines the option availability and whether the resource name or initial is displayed.

8 - Current date

- Yellow column indicates the current day, week, month or quarter, according to scale selected.
- Red bar in yellow column display the current day and time.
9 - Detail of the work

- Right click on a bar to display the detail of the work for this bar.

Warning:
- You have to select week or day scale to display detail or a message will ask you to switch to smaller scale.
Project planning

Project planning and activity planning calculation can be done in the Gantt.

1 - Add a new planning element

- Allows to create a new planning element.
- The created element is added in the Gantt and detail window is opened.
- The detail window allows to complete entry.

2 - Reorder planning elements

- The selector allows to reorder the planning elements.

Note: Planning elements management

- Planning elements can be managed with their own dedicated screen.
- Test session and Meeting elements can be added to the planning with their own dedicated screen.
3 - Indenting element

- Click on an element, the detail window will be displayed.
- Two new buttons are displayed in the header, they allow to increase or decrease indent of an element.

  **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.

4 - Dependency links

- To create a dependency link, clicked and hold on a graphic element, the mouse cursor changes to '依赖'
- Move mouse cursor on graphic element that will be linked and release the button.

  **Note:** Dependency links management
  - Dependency links can be managed in element screen.
  - See: *Predecessor and Sucessor element sections*.

5 - Activity planning calculation

- Click on '启动' to start the activity planning calculation.

  **Automatic run plan**
  - Check the box to activate automatic calculation on each change.
6 - Store planned dates

• Allows to store planned dates into requested and validated dates.
• In other words, this feature allows to set baseline dates and preliminary dates from calculated planning.

Action available

• **Always**: Always overwrite existing values.
• **If empty**: Store only if the value is empty.
• **Never**: Values are not stored.

![Store planned dates into requested and validated dates](image)
5.2.2 Projects portfolio

This screen displays Gantt chart from projects portfolio point of view.
It displays projects synthesis and project’s dependencies, without project activities.

Note:

- This section describes specific behavior for this screen.
- All others behaviors are similar to Planning screen.

![Fig. 5.9: Gantt (Projects portfolio)](image)

1 - Show milestones

- It is possible to define whether milestones are displayed or not.
- If they are displayed, then it is possible to define the type of milestone to be displayed or displayed all.
5.2.3 Resource Planning

This screen displays Gantt chart from the resources point of view. Assigned tasks are grouped under resource level.

Gantt bars

- For activities, the Gantt bar is split in two:
  - Real work in grey.
  - Reassessed work in green.

  **Hint:**
  - 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 Planning screen.

![Gantt (Resource planning)](image)

**Fig. 5.10: Gantt (Resource planning)**

**1 - Show project level**

- Tasks can be grouped by project.
- Click on “Show project level” to display project level.
2 - Show left work

- Left work can be displayed at right from Gantt bar.
- Click on “Show left work” to display left work for each item.

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.
5.2.4 Export planning to PDF

Allows to export planning to PDF format.
Export contains all details and links between tasks.

![Export planning to PDF dialog box](image)

Table 5.1: Fields - Export planning to PDF dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orientation</td>
<td>Page orientation.</td>
</tr>
<tr>
<td>Zoom</td>
<td>Allows to fit planning on page.</td>
</tr>
<tr>
<td>Repeat headers</td>
<td>Planning can be span multiple pages.</td>
</tr>
</tbody>
</table>

**Note:** Technical points

- This new 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.
- Therefore, this feature is highly dependant to browser compatibility.

**Note:** Browser compatibility

- This new feature is technically complex and it is not compatible with all browsers.
- Compatible with IE11, Firefox, Edge and Chrome.
- Else, the old export feature will be used.

**Note:** Forced feature activation (deactivation)

- To enable this feature for all browsers, add the parameter `$pdfPlanningBeta='true';` in parameters.php file.
- To disable it for all browsers (including Chrome), add the parameter `$pdfPlanningBeta='false';`
- Default (when `$pdfPlanningBeta` parameter is not set) is enabled with Chrome, disabled with other browsers
5.3 Today (Dashboard)

This screen allows user to have a global view of its projects and tasks.

### Sections

- Messages
- Start guide
- Projects
- Tasks
- Extending

### Note: User parameter “First page”
- This parameter defines the screen that will be displayed first on each connection.
- By default, this screen is selected.

5.3.1 Messages

#### Messages

- Messages are displayed depends on some criteria.
- Every message is component by title and message.
- Messages are defined in Messages screen.

#### Automatic refresh

- Allows to refresh data according defined delay.
- Also the screen will be scrolling from top to bottom according defined delay.
- Click on to enable/disable automatic refresh.

#### Print

- Click on to print Today screen.
Parameters

- Click on $\rightarrow$ to access screen parameters.

**Period for task selection**

- Allows to define the period for tasks will be displayed.
  
  **Field: Due date**
  
  – Select only items with due date less than today plus this selected period.

  **Field: Or not set**
  
  – Select also items with due date not set.

**Refresh parameters**

- Allows to define parameters for automatic refresh.

  **Field: Refresh delay**
  
  – Selects the delay between two screen refresh.

  **Field: Scroll delay**
  
  – Selects the delay between two scrolling.

**Items to be displayed**

- Allows to define sections displayed on the screen.

- Allows to reorder sections displayed with drag & drop feature.

- Using the selector area button icon drag $\rightarrow$.
5.3.2 Start guide

- Start page for new installations to assist the administrator in the first configuration steps.

- A progress display allows to determine the percent of complete installation.

- You can hide this section on startup, just unchecked.
  - This section will not be displayed anymore.
  - To show it again, select it as the start page in Users parameters screen.
5.3.3 Projects

A quick overview of projects status.

The projects list is limited to the project visibility scope of the connected user.

1 - Scope of the numbers counted

- Checkboxes allow to filter displayed projects:
  - To do: Projects to do.
  - Not closed: Projects to do and done.
  - All: Projects to do, done and closed.

Projects name

- Click on the name of a project will directly move to it.

Manuel indicators

- Manuel indicator can be set on project.
- Trend and health status indicators are displayed.

2 - Icon: Trend

- This icon allows to display the trend of the project.

3 - Icon: Health status

- This icon allows to display the health status of the project.
Progress

- Calculated progress and overall progress are displayed.
  
  **4 - Calculated progress**
  - Actual progress of the work of project.

  **Note:** On mouse over the bar
  - On each project shows part of “to do” (red) compared to “done and closed” (green).

  **5 - Overall progress**
  - Additional progress manually selected for the project.

**6 - Other measure of progress**

- **Left:** Left work for the project.
- **Margin:** Work margin.
- **End date:** Planified end date of the project.
- **Late:** Number of late days in project.

**7 - Numbers of elements concerned to project**

- Numbers of elements concerned to a project are displayed.

  **Note:** On mouse over the bar
  - On each element shows part of “to do” (red) compared to “done and closed” (green).
5.3.4 Tasks

Here are listed, as a “To do list” all the items for which the connected user is either “assigned to”, “responsible of” or “issuer or requestor of”.

Click on an item will directly move to it.

Note: Parameter: Max items to display

• Number of items listed here are limited to a value defined in Global parameters.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>Unique Id for the item.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the item.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of item.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the item.</td>
</tr>
<tr>
<td>Due date</td>
<td>Planned end date or due date.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the item.</td>
</tr>
<tr>
<td>Issuer</td>
<td>Flag on indicate the user is the issuer for the item.</td>
</tr>
<tr>
<td>Resp.</td>
<td>Flag on indicate the user is the responsible for the item.</td>
</tr>
</tbody>
</table>

Column: Id

• Id column displayed unique Id and specific icon for the item.
5.3.5 Extending

You can select any report to be displayed on the Today screen.

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.

![Fig. 5.11: Report selection](image)

Manage extending section

- Click on 🔄 to access screen parameters.
- You can reorder like any other parts.
- Click on ❌ to completely remove them from the list.
5.4 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.

**Note:** On mouse over the task

- You can see a short information about the task.

**Day colors**

- **Yellow day**: Current day
- **Grey days**: Days off
5.4.1 Calendar selector

1 - Period

- Display the month, week, or day.

2 - 1st day

- Allows to select the displayed calendar.
- The first day of month or the week is displayed.

3 - Resource

- Allows to select the resource calendar.

4 - Show done items & Show closed items

- Allows to display or not the done and closed items.

5 - Top buttons

- Allows to change current month, week, or day.

6 - Left side buttons

- 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.
5.5 Reports

A list of reports is available in different categories.

1. Select a category 1, corresponding reports list 2 will appear.

2. Select a report in the list, this will display specific parameters 3 for the report.

3. Update the parameters to get the information you need.

4. Click on a button to produce the report. 4

5. Click on the arrow to return to the category list. 5

**Buttons**

- Click on to display the report.
- Click on to get a printable version of the report.
- Click on to export the report as PDF format.
- Click on to display this report on the Today screen.
- Click on to define this report as favorite. This report will be available in your favorite reports list.
5.5.1 Favorite reports

Move your cursor over the reports menu icon (in the top bar) to show the popup menu that contains your favorite reports.

Popup menu management

- Allows to reorder reports displayed with drag & drop feature. Using the selector area button icon drag ▶.
- Click on ❌ to remove the report from the list.

Direct display

Select a report to display (in print mode), without leaving the current screen.
Real work allocation

As ProjeQtOr implements Effort Driven planning (work drives planning calculation), one of the key to manage project progress is to enter the real work and re-estimate left work for all ongoing tasks.

ProjeQtOr provides a dedicate screen for this feature, to ease this input so that entering real work is as quick as possible.
6.1 Real work allocation

This screen is devoted to input of real work.
Resource enters work day by day, on each assigned task.
Data entry for one resource, on a weekly base.

Note:
• The corresponding cost to the real work is automatically updated to the assignment, activity and project.

Important: Global parameter: Number of hours per day
• In global parameters screen, you can define whether work will be entered in hours or in days.
• If you enter work in hours, you must define the parameter number of hours per day before some real work has been entered.
• After first work is entered, this parameter will be locked.

1- Selection timesheet
• Allows to select a timesheet for a resource and for a period.
• More detail about selection timesheet, see: Selection timesheet.

2 - Show planned work
• Check this box to display the planned work.
• Planned work is indicated over each input cell, on top left corner, in light blue color.
• Allows to display the planned working time by day, for the resource assigned to the task.

Note:
• The planned work will be deleted if the real work is entered instead of planned work (to avoid duplication of work in reports) to see it you have to refresh the screen.

3 - Filters

• Filters allow to define the list of assigned tasks displayed.

  **Show only current week meeting**
  • Check this box to show only the tasks on meetings of the week.

  **Hide not handled items**
  • Check this box to hide tasks not taken over.

  **Hide done items**
  • Check this box to hide completed tasks.

  **Show closed items**
  • Check this box to show closed tasks.

**Note:** Global parameter “Display only handled tasks”

• If the value of the parameter is set to “Yes”, only tasks taken over (status “handled”) will be displayed.
• The checkbox “Hide not handled items” will be hidden.

4 - Buttons

Buttons of the timesheet:

• Click on to save timesheet data.
• Click on to print timesheet.
• Click on to export timesheet in PDF format.
• Click on to export timesheet in CSV format.
• Click on to undo modification on the timesheet.

5 - Data entry validation

Buttons allow to send and validate real work.

  **Button: Submit work**
  • Users can send works to project leader.

  **Button: Validate work**
  • Project leaders can validate works.

6 - Scroll bar

• Scroll bar allows the scrolling on imputation lines.
• The header of table stays visible.

6.1. Real work allocation
• The footer of the table (with the sum of inputs) remains visible, fixed, as soon as the number of lines is greater than 20.

7 - Input fields

• Input fields in timesheet.
• More detail about, see: Input fields
8 - Tasks list

The list displays the assigned tasks for the resource.

- Only assigned tasks that meet the next criteria will be displayed.
  - Assigned tasks planned during this period.
  - Assigned tasks that meet the criteria of selected filters.

Note:
- Assigned tasks with real work are always displayed, even if closed.
- The goal is to show all lines of the sum for each column, to be able to check that the week is completely entered.

A - Tasks
- Assigned tasks are grouped by project and displayed according the project structure.
- Click on the name of the activity to access it.
- Click on $+$ or $-$ on the line will expand-shrink the group.
- Click on the icon of the activity to display it detail without leaving the current screen.

B - Assigned task function
- The assigned task function is displayed in blue after the name of the activity.

C - Assigned task comments
- The icon $\text{add}$ allows to add a comment.
- The icon $\text{check}$ indicates there is a comment on assigned task.
- Just move the mouse over the icon to see the last comment.

Note: Click on icon $\text{check}$
- to open windows view comments
D - Progress data

- **Planned dates**: Planned start and end dates.
- **Assigned**: Planned work assigned to the resource.
- **Real**: Sum of work done by the resource.
- **Left**: The remaining planned work.
- **Reassessed**: The work needed to complete the task.

---

**Note**: Total of days

| 1 | 1 | 1 | 1 | 1 | 0 | 0 | 5 |

- On the last column is the sum for all days of the week. It is a synthesis displayed for each project and globally for the whole week.
6.1.1 Selection timesheet

Fig. 6.4: Timesheet selector zone

1 - Selection of the resource

• Users can only select themselves as a resource.

Note: Access to other resources timesheet
• Depending on access rights, user can select other resource timesheet.

Selection period

• By default, the period is determined depending on the current day.
• It is possible to change the period of two ways:
  – Select year and week.
  – Or select the first day of the week.

Displayed timesheet

• A timesheet is displayed depends on the resource and period selection.
• The name of the resource and the week are displayed.
• The days of the week are displayed.
• The current day is displayed.
6.1.2 Input fields

[Image of input timesheet zone]

Fig. 6.5: Input timesheet zone

1 - Comments

- A global comment can be added on the weekly follow-up.

Note:

- Possibility to extend the main comment area.
- Can enter a comment on each line of real work allocation screen.

2 - Real work entry

- Area allows to entry real work.
- Week is displayed from monday to sunday.
- It possible put real work in off days.

  Unit time of real work data entry

  - The global parameter “Unit for real work allocation” allows to set the unit time.
  - Unit time available are in “Days” or “Hours”.
  - Selected unit time is displayed on left at bottom window.

  Current day

  - Columns of current day is displayed in yellow.

  Days off

  - Columns of days off is displayed in grey.
  - Days off is determine in resource calendar definition, see: Calendar screen.

3 - Left work

- Left work is automatically decreased on input of real work.
- Resources can adjust this value to estimate the work needed to complete the task.
6.1.3 Input entry validation

This section explains controls done on data entries. These controls are not blocking.

Resource capacity validation

- The total of the day is green whether entries respects the resource capacity of days.
- The total of the day is red whether entries is more than the resource capacity of days.

Resource capacity of days

- The resource capacity is defined by the number of hours per day and the resource capacity.
- The number of hours per day is defined in *Global parameters* screen.
- The capacity of the resource is defined in *Resources* screen.

Entering real work is in excess of the number of days specified

- This alert box appears when the real work to a resource is entering ahead of time.
- The number of days in advance, resource can enter his real work is defined in “max days to book work” parameter in *Global parameters* screen.

![Fig. 6.6: Columns validation zone](image)

![Fig. 6.7: Real work over expected days alert](image)
6.1.4 Automatically changing the status of tasks

The task status can be changed automatically according to data entries on real work and left work.

Global parameter “Set to first ‘handled’ 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 “handled”.

Global parameter “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.

Icons

- 📋 Due to real work is entered, the task status will be changed to the first ‘handled’ 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.

Note:

- Move the cursor over the icon to see the message.

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.
ProjeQtOr integrates an easy to use Document Management feature.
7.1 Documents

Concepts

• Product

A document is a reference element that gives a description of a project or product.
Document item describes general information about the document.
The file document will be stored in the tool as versions.

Document files storage

• Document will always refer to a directory where the file is physically stored.
• Directories are defined in Document directories screen.

Document versioning

• 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.

Approval process

• You can define approvers to a document.
• When all approvers have approved the document version, it is considered as approved and then appears with a check in the list of versions.
• When creating an approver in the list, the approver is also automatically added to the latest version of the document.
• When adding a version to the document, the approvers are automatically added to the version.
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.
Other sections

• Linked element
• Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the document.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the document.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of document.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the document.</td>
</tr>
<tr>
<td>Product</td>
<td>The product concerned by the document.</td>
</tr>
<tr>
<td>Directory</td>
<td>Place where the document is stored to organize document structure.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference of the document.</td>
</tr>
<tr>
<td>Author</td>
<td>User or Resource or Contact who created the document.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the document is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates the document is cancelled.</td>
</tr>
</tbody>
</table>

* Required field

**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: Document reference**

• Document reference name is calculated from format defined in the Global parameters screen.

**Field: Author**

• Positioned by default as the connected user.
• Can be changed (for instance if the author is not the current user).
Section: Versions

This section allows to manage version list of document.

Table 7.1: Version list fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Versioning type</td>
<td>Type of versioning for the document.</td>
</tr>
<tr>
<td>Last version</td>
<td>Caption of the last version of the document.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the last version of the document.</td>
</tr>
</tbody>
</table>

* Required field

Version list management

- Click on + to add a new version.
- Click on ⌘ to modify a version.
- Click on ✗ to delete a version.
- Click on 📡 to download file at this version.

Document viewer

- Document viewer available for image, text and PDF files.
- Click on icon.

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 screen.

Table 7.2: Fields - Document version dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
<td>This button allows to upload locale file.</td>
</tr>
<tr>
<td>Last version</td>
<td>Caption of the last existing version.</td>
</tr>
<tr>
<td>Update</td>
<td>Importance of the update concerned by the new version.</td>
</tr>
<tr>
<td>New version</td>
<td>New caption for the created version.</td>
</tr>
<tr>
<td>Date</td>
<td>Date of the version.</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the version.</td>
</tr>
<tr>
<td>Is a reference</td>
<td>Check box to set this version is the new reference of the document.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the version.</td>
</tr>
</tbody>
</table>
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.
Section: Approvers

This section allows to manage approver list of a document.

Table 7.3: Approver list fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Id of the approver.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the approver.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the approval of the last version of document.</td>
</tr>
</tbody>
</table>

Button: Approve now

- This button appears in approver list.
- Just click on the button to approve the latest version of the document.

Button: Send a reminder email to the approvers

- This button allows to send a reminder email to all the approvers who have not yet approved the document.

Approver list management

- Click on + to add a new approver.
- Click on - to delete the approver.

Section: Lock

This section allows to manage document locking.

Button: 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.
- Only the user who locked the document, or a user with privilege to unlock any document, can unlock it.

Document locked

- When a document is locked the following fields are displayed.

Table 7.4: Fields when the document is locked

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locked</td>
<td>Box checked indicates the document is locked.</td>
</tr>
<tr>
<td>Locked by</td>
<td>User who locked the document.</td>
</tr>
<tr>
<td>Locked since</td>
<td>Date and time when document was locked.</td>
</tr>
</tbody>
</table>
8.1 Tickets

A ticket is a kind of task that cannot be unitarily planned. It is generally a short time activity for a single ticket, that is interesting to follow unitarily to give a feedback to the issuer or to keep trace of result. It can be globally planned as a general activity, but not unitarily. For instance, bugs should be managed through tickets:

- You cannot 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 being involved in their treatment.
- When fields and features are available, the description is similar.

### Planning activity

- Planning activity field allows to link the ticket with a planning activity.
- Work on the ticket will be included in this activity.

**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.
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.
  
  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.

Note:
• More detail, 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: Global parameter: Ticket responsible from product responsible
• This parameter allows to define, if the defined responsible is automatically assigned to the ticket or not.
Other sections

- **Linked element**
- **Attachments**
- **Notes**

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the ticket.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the ticket.</td>
</tr>
<tr>
<td>Ticket type</td>
<td>Type of ticket.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the ticket.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference of the ticket.</td>
</tr>
<tr>
<td>Urgency</td>
<td>Urgency for treatment of the ticket, as requested by the issuer.</td>
</tr>
<tr>
<td>Requestor</td>
<td>Contact at the origin of the ticket.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the ticket.</td>
</tr>
<tr>
<td>Duplicate ticket</td>
<td>Link to another ticket, to link duplicate tickets.</td>
</tr>
<tr>
<td>Context</td>
<td>List of 3 items describing the context of the ticket.</td>
</tr>
<tr>
<td>Product</td>
<td>The product for which this ticket has been identified.</td>
</tr>
<tr>
<td>Component</td>
<td>The component for which this ticket has been identified.</td>
</tr>
<tr>
<td>Original product version</td>
<td>Product versions for which the issue has been identified.</td>
</tr>
<tr>
<td>Original comp. version</td>
<td>Component versions for which the issue has been identified.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the ticket.</td>
</tr>
</tbody>
</table>

* **Required field**

**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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning activity</td>
<td>Activity where global work for this kind of ticket is planned.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the ticket.</td>
</tr>
<tr>
<td>Resolution</td>
<td>Ticket resolution.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the ticket.</td>
</tr>
<tr>
<td>Criticality</td>
<td>Importance of impact on the system, as determined after analysis.</td>
</tr>
<tr>
<td>Initial due date</td>
<td>Initial target date for solving the ticket.</td>
</tr>
<tr>
<td>Planned due date</td>
<td>Actual target date for solving the ticket.</td>
</tr>
<tr>
<td>Estimated work</td>
<td>Estimated workload needed to treat the ticket.</td>
</tr>
<tr>
<td>Real work</td>
<td>Real workload spent to treat the ticket.</td>
</tr>
<tr>
<td>Left work</td>
<td>Left workload needed to finish the ticket.</td>
</tr>
<tr>
<td><strong>Handled</strong></td>
<td>Box checked indicates the ticket is taken over.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Box checked indicates the ticket has been treated.</td>
</tr>
<tr>
<td><strong>Solved</strong></td>
<td>Box checked indicates the ticket has been solved.</td>
</tr>
<tr>
<td><strong>Cancelled</strong></td>
<td>Box checked indicates the ticket is archived.</td>
</tr>
<tr>
<td>Target product version</td>
<td>Product versions for which a resolution of issue will be delivered.</td>
</tr>
<tr>
<td>Target comp. version</td>
<td>Component versions for which a resolution of issue will be delivered.</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td>Complete description of the resolution of the ticket.</td>
</tr>
</tbody>
</table>

* Required field

**Field: Priority**

- Automatically calculated from Urgency and Criticality values. See: *Priority value calculation.*
- Can be changed manually.

**Field: Left work**

- Automatically calculated as Estimated – Real.
- Set to zero when ticket is done.

**Field: Solved**

- The box is automatically checked or unchecked, according to the resolution selected.

**Fields: 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**

- This button is clock on/off timer.
- If connected user is a resource, he has the possibility to start working on the ticket.
- When work is finished, he will just have to stop the timer.

**Note:**

- Closing the application or starting work on another ticket will automatically stop the current ongoing work.
- The spend time will automatically be converted as real work, and transferred on planning activity if it is set (decreasing left work on the activity).

**Button: Dispatch**

This button allows to dispatch ticket.

![Dispatch work dialog box](image)

- Click on + to add a line.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Dispatch date.</td>
</tr>
<tr>
<td>Resources</td>
<td>Work dispatch to a resource.</td>
</tr>
<tr>
<td>Work</td>
<td>Planned work to this resource.</td>
</tr>
</tbody>
</table>

Table 8.1: Fields - Dispatch work dialog box
8.1.1 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.

![Add other versions dialog](image)

8.1.2 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**

- \[[\text{Priority value}] = [\text{Urgency value}] \times [\text{Criticality value}] / 2\]
- For example:
  - Critical priority (8) = Blocking (4) \times Critical (8) / 2

**Default values**

- Default values are determined.
- You can change its values while respecting the equation defined above.
8.2 Tickets dashboard

Allows user to have a tickets global view of his projects. Shows several small reports, listing the number of tickets by item. Filters are available to limit scope.

Direct access to the list of tickets

- In reports, click on an item to get list of tickets corresponding to this item.

Parameters

- Click on to access parameters.
- Allows to define reports displayed on the screen.
- Allows to reorder reports displayed with drag & drop feature. Using the selector area button.

Note:

- Arrange reports on left and right on screen.

8.2.1 Filter clauses

Note: Report: Synthesis by status

- For this report, filter clauses are not applicable.

Scope filters

- All issues
  - All tickets.
- Not closed issues
  - Tickets not closed. (Status <> 'closed')
- Not resolved issues
  - Tickets not resolved. (Status <> 'done')
Recently updated

- Added recently
  - Tickets created within \( x \) last days.
- Resolved recently
  - Tickets treated within \( x \) last days.
- Updated recently
  - Tickets updated within \( x \) last days.

Linked to the user

- Assigned to me
  - Tickets that you are responsible for their treatment.
- Reported by me
  - Tickets that you are the issuer.

No resolution scheduled

- Unscheduled
  - Tickets whose resolution is not scheduled in a next product version (target product version not set).
CHAPTER 9

Requirements & Tests

9.1 Requirements

**Concepts**

- Product

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.

**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 linked element section.
- 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.

**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 initial due date
  - Respect of planned due date
Other sections

- Summary of test cases
- Predecessor and Successor element
- Linked element
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the requirement.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the requirement.</td>
</tr>
<tr>
<td>Requirement type</td>
<td>Type of requirement.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the requirement.</td>
</tr>
<tr>
<td>Product</td>
<td>The product concerned by the requirement.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference for the requirement.</td>
</tr>
<tr>
<td>Requestor</td>
<td>Contact who requested the requirement.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the requirement.</td>
</tr>
<tr>
<td>Urgency</td>
<td>Urgency of implementation of the requirement.</td>
</tr>
<tr>
<td>Initial due date</td>
<td>Initial due date.</td>
</tr>
<tr>
<td>Planned due date</td>
<td>Planned due date.</td>
</tr>
<tr>
<td>Description</td>
<td>Long description of the requirement.</td>
</tr>
</tbody>
</table>

* Required field

### 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.

Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top requirement</td>
<td>Parent requirement, defining a hierarchic structure.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the requirement.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the requirement.</td>
</tr>
<tr>
<td>Criticality</td>
<td>Level of criticality of the requirement for the product.</td>
</tr>
<tr>
<td>Feasibility</td>
<td>Result of first analysis to check the feasibility of the implementation of the requirement.</td>
</tr>
<tr>
<td>Technical risk</td>
<td>Result of first analysis to measure the technical risk of the implementation of the requirement.</td>
</tr>
<tr>
<td>Estimated effort</td>
<td>Result of first analysis to measure the estimated effort of the implementation of the requirement.</td>
</tr>
<tr>
<td>Handled</td>
<td>Box checked indicates the requirement is taken over.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates the requirement has been treated.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the requirement is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates the requirement is cancelled.</td>
</tr>
<tr>
<td>Target version</td>
<td>Version of the product for which this requirement will be active.</td>
</tr>
<tr>
<td>Result</td>
<td>Description of the implementation of the requirement.</td>
</tr>
</tbody>
</table>

* Required field
Field: Target version

- Contains the list of product versions available according to the project and product selected.

Section: Lock

A requirement can be locked to ensure that its definition has not changed during the implementation process.

**Button: 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locked</td>
<td>Box checked indicates the requirement is locked.</td>
</tr>
<tr>
<td>Locked by</td>
<td>User who locked the requirement.</td>
</tr>
<tr>
<td>Locked since</td>
<td>Date and time when the requirement was locked.</td>
</tr>
</tbody>
</table>
9.2 Test cases

Concepts

• Product

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.

Test case run status

• 🔄 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.

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.

Other sections

• Predecessor and Successor element
• Linked element
• Attachments
• Notes
Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the test case.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the test case.</td>
</tr>
<tr>
<td>Test type</td>
<td>Type of test case.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the test case.</td>
</tr>
<tr>
<td>Product</td>
<td>The product concerned by the test case.</td>
</tr>
<tr>
<td>Version</td>
<td>Version of the product or component concerned by the test case.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference for the test case.</td>
</tr>
<tr>
<td>Environment</td>
<td>List of 3 items describing the context of the test case.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the test case.</td>
</tr>
</tbody>
</table>

* Required field

**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.
Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent test case</td>
<td>Parent test case, defining a hierarchic structure for test cases.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the requirement.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible of the test case.</td>
</tr>
<tr>
<td>Priority</td>
<td>Level of priority for the test case.</td>
</tr>
<tr>
<td>Handled</td>
<td>Box checked indicates the test case is taken over.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates the test case has been treated.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the test case is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates the test case is cancelled.</td>
</tr>
<tr>
<td>Prerequisite</td>
<td>List of steps that must be performed before running the test.</td>
</tr>
<tr>
<td>Expected result</td>
<td>Description of expected result of the test.</td>
</tr>
</tbody>
</table>

* Required field

Field: Prerequisite

- If left blank and test case has a parent, parent prerequisite will automatically be copied here.

Section: Test case runs

- 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.

Note:

- To go, click on the corresponding test session.

Table 9.2: Fields - Test case runs list

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test session</td>
<td>Composed of session type, Id and description.</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the test case run in the test session.</td>
</tr>
</tbody>
</table>
9.3 Test sessions

**Concepts**

- **Product**

A test session defines all the tests to be executed to reach a given target. Define in the test case runs all tests 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.

**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 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 on the progress data.
- See: Monitoring indicator

**Other sections**

- Assignment
- Progress
- Summary of test cases
- Predecessor and Sucessor element
- Linked element
- Attachments
- Notes
Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the test session.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the test session.</td>
</tr>
<tr>
<td>Session type</td>
<td>Type of test session.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the test session.</td>
</tr>
<tr>
<td>Product</td>
<td>The product concerned by the test session.</td>
</tr>
<tr>
<td>Version</td>
<td>Version of the product or component concerned by the test session.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference for the test session.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the test session.</td>
</tr>
</tbody>
</table>

* Required field

Field: 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.

Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent activity</td>
<td>Parent activity, to define hierarchic position in the Gantt.</td>
</tr>
<tr>
<td>Parent session</td>
<td>Parent session, to define session of sessions.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the test session.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible of the test session.</td>
</tr>
<tr>
<td>Handled</td>
<td>Box checked indicates the test session is taken over.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates the test session has been treated.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the test session is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates the test session is cancelled.</td>
</tr>
<tr>
<td>Result</td>
<td>Summary result of the test session.</td>
</tr>
</tbody>
</table>

* Required field
Section: Test case runs

This section allows to manage test case runs.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test case</td>
<td>Information about test case (type, Id and name).</td>
</tr>
<tr>
<td>Detail</td>
<td>Detail of test case.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of test case run.</td>
</tr>
</tbody>
</table>

**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.
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.

**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.

![Fig. 9.1: Dialog box - Test case run](image)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test cases</td>
<td>Test cases list.</td>
</tr>
<tr>
<td>Allow duplicate</td>
<td>Check the box, if you allow this test case can be used more than once in a test session.</td>
</tr>
</tbody>
</table>

![Fig. 9.2: Dialog box - Test case run detail](image)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test case</td>
<td>Selected test case.</td>
</tr>
<tr>
<td>Status</td>
<td>List of <strong>test case run status</strong></td>
</tr>
<tr>
<td>Ticket</td>
<td>List of ticket.</td>
</tr>
<tr>
<td>Comments</td>
<td>Comments of test case run.</td>
</tr>
</tbody>
</table>
Field: Ticket

- Field appear only whether status of test case run is **failed**.
9.4 Summary of test cases section

This section summarizes the status of test case runs to requirement and test session.

Requirement

- Summarizes the status of test case runs for test cases are linked to the requirement.

  **Note:** Field: Total
  - 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.

Summary of test case run status

- ☢ Not planned: No test case planned.
- ☑ 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>Number of test case runs whatever the status</td>
</tr>
<tr>
<td>Planned</td>
<td>Number of test case runs with the status <strong>Planned</strong>.</td>
</tr>
<tr>
<td>Passed</td>
<td>Number of test case runs with the status <strong>Passed</strong>.</td>
</tr>
<tr>
<td>Blocked</td>
<td>Number of test case runs with the status <strong>Blocked</strong>.</td>
</tr>
<tr>
<td>Failed</td>
<td>Number of test case runs with the status <strong>Failed</strong>.</td>
</tr>
<tr>
<td>Summary</td>
<td>Summary of test case run status.</td>
</tr>
<tr>
<td>Issues</td>
<td>Number of tickets linked to the requirement or the test session.</td>
</tr>
</tbody>
</table>

**Note:**
- Percent to each status is displayed.
10.1 Expenses

The expenses incurred for the project are monitored.

### Expense

- **Call for tenders**
- **Tenders**
- **Individual expense**
- **Project expense**
- **Expense detail lines**

#### 10.1.1 Call for tenders

Call for tenders stores information about your needs to create a submission to call for tenders. This can for instance be used to detail all the requests and find the best answer. You have the possibility to create some different evaluation criterias. Thereafter you can attribute them a value in Offer.

#### Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the call for tender.</td>
</tr>
<tr>
<td>Name</td>
<td>Short name of the call for tender.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of tender.</td>
</tr>
<tr>
<td>Project</td>
<td>Project link to call for tender.</td>
</tr>
<tr>
<td>Maximum amount</td>
<td>Maximum amount of the call for tender.</td>
</tr>
<tr>
<td>Expected delivery date</td>
<td>Date expected.</td>
</tr>
</tbody>
</table>
Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status of the call for tender.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Person responsible for the processing of this call for tender.</td>
</tr>
<tr>
<td>Sent date</td>
<td>Sent date of the call for tender.</td>
</tr>
<tr>
<td>Expected answer date</td>
<td>Expected answer date, meaning expected tender date.</td>
</tr>
<tr>
<td>Handled</td>
<td>Box checked indicates that the call for tender is handled with date when checked.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates that the call for tender is done with date when checked.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates that the call for tender is archived with date when checked.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates that the call for tender is cancelled.</td>
</tr>
</tbody>
</table>

Section: Submissions of tenders

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>Provider of the tender.</td>
</tr>
<tr>
<td>Contact</td>
<td>Contact for the tender.</td>
</tr>
<tr>
<td>Request date</td>
<td>Request date when tender sent with the hour.</td>
</tr>
<tr>
<td>Expected answer date</td>
<td>Date expected with the hour.</td>
</tr>
<tr>
<td>Tender status</td>
<td>Statut of the tender.</td>
</tr>
</tbody>
</table>

10.1.2 Tenders

Tenders store information about the responses to the call for tenders that you have submitted.

This can for instance be used to detail all the tenders and compare them to choose one of them.

If your call for tenders has evaluation criteria, you can attribute a rating for each criteria.

Evaluation will display a summary of your criterias with their ratings.

Global rating will then be displayed on the call for tender for all concerned tenders.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the tender.</td>
</tr>
<tr>
<td>Name</td>
<td>Short name of the tender.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of tender.</td>
</tr>
<tr>
<td>Project</td>
<td>Project link to tender.</td>
</tr>
<tr>
<td>Call for tender</td>
<td>Link to call for tender.</td>
</tr>
<tr>
<td>Tender statuts</td>
<td>Statut of the tender.</td>
</tr>
<tr>
<td>Provider</td>
<td>Provider of the tender.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference of the tender.</td>
</tr>
</tbody>
</table>

* Required field
Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status of the tender.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Person responsible for the processing of this tender.</td>
</tr>
<tr>
<td>Contact</td>
<td>Contact of the tender.</td>
</tr>
<tr>
<td>Request date</td>
<td>Request date for tender.</td>
</tr>
<tr>
<td>Expected answer date</td>
<td>Expected answer date of the tender.</td>
</tr>
<tr>
<td>Date of receipt</td>
<td>Date of receipt of the tender with the hour.</td>
</tr>
<tr>
<td>Offer validity</td>
<td>Offer validity date.</td>
</tr>
<tr>
<td>Initial</td>
<td>Price</td>
</tr>
<tr>
<td>Negotiated</td>
<td>Price of negotiated.</td>
</tr>
<tr>
<td>Payment conditions</td>
<td>Type of payment conditions.</td>
</tr>
<tr>
<td>Delivery delay</td>
<td>Delivery delay of the tender.</td>
</tr>
<tr>
<td>Expected delivery date</td>
<td>Expected delivery date of the tender.</td>
</tr>
<tr>
<td>Handled</td>
<td>Box checked indicates that the tender is handled with date when checked.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates that the tender is done with date when checked.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates that the tender is archived with date when checked.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates that the tender is cancelled.</td>
</tr>
</tbody>
</table>

* Required field

10.1.3 Individual expense

An individual expense stores information about individual costs, such as travel costs or else.

Individual expense has detail listing for all items of expense.

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.

Planned amount

Planned amount will help to have an overview of project total costs, even before expense is realized.

Other sections

- Expense detail lines
- Linked element
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the expense.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the expense.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of expense.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the expense.</td>
</tr>
<tr>
<td>Resource</td>
<td>Resource concerned by the expense.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the expense.</td>
</tr>
</tbody>
</table>

* Required field
Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status of the expense.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Person responsible for the processing of this expense.</td>
</tr>
<tr>
<td>Planned</td>
<td>Planned amount of the expense (Date is mandatory).</td>
</tr>
<tr>
<td>Real</td>
<td>Real amount of the expense (Date is mandatory).</td>
</tr>
<tr>
<td>Payment done</td>
<td>Box checked indicates the payment is done.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates that the expense is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates that the expense is cancelled.</td>
</tr>
</tbody>
</table>

* Required field

Fields: Planned & Real

Columns:

- **Full**: Amount.
  - Real amount is automatically updated with the sum of the amounts of detail lines.

- **Payment date**:
  - For field “Planned” is the planned date.
  - For field “Real” can be the payment date or else.
10.1.4 Project expense

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.

Purchase request

Allows to manage the purchase request information about the expense. (Purchase order, receipt and payment)

Planned amount

Planned amount will help to have an overview of project total costs, even before expense is realized.

Other sections

- Expense detail lines
- Linked element
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the expense.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the expense.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of expense.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the expense.</td>
</tr>
<tr>
<td>Provider</td>
<td>Provider name.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference of the expense.</td>
</tr>
<tr>
<td>Business responsible</td>
<td>The person who makes the purchase requisition.</td>
</tr>
<tr>
<td>Financial responsible</td>
<td>The person who pays the purchase.</td>
</tr>
<tr>
<td>Payment conditions</td>
<td>Conditions of payment.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the expense.</td>
</tr>
</tbody>
</table>

* Required field
## Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Actual status of the expense.</td>
</tr>
<tr>
<td>Order date</td>
<td>Date of the order.</td>
</tr>
<tr>
<td>Delivery mode</td>
<td>Delivery mode for the order.</td>
</tr>
<tr>
<td>Delivery delay</td>
<td>Delivery delay for the order.</td>
</tr>
<tr>
<td>Expected delivery date</td>
<td>Expected delivery date for the order.</td>
</tr>
<tr>
<td>Date of receipt</td>
<td>Date of receipt of the order.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Box checked indicates that the expense is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates that the expense is cancelled.</td>
</tr>
<tr>
<td>Planned</td>
<td>Planned amount of the expense (Date is mandatory).</td>
</tr>
<tr>
<td><strong>Real</strong></td>
<td>Real amount of the expense (Date is mandatory).</td>
</tr>
<tr>
<td>Payment done</td>
<td>Box checked indicates the payment is done.</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td>Complete description of the treatment of the expense.</td>
</tr>
</tbody>
</table>

* Required field

### Fields: Planned & Real

Columns:

- **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.
10.1.5 Expense detail lines

Section: Expense detail lines

This section is common to individual 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 first detail line.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Date of the detail line.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the detail line.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of expense.</td>
</tr>
<tr>
<td>Detail</td>
<td>Detail depends on the type of expense.</td>
</tr>
<tr>
<td>Amount</td>
<td>Amount of the detail line.</td>
</tr>
</tbody>
</table>

**Detail lines management**

- Click on + to add a detail line.
- Click on ✏️ to modify an existing detail line.
- Click on ✗ to delete the detail line.

Table 10.1: Fields - Expense detail dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Date of the detail.</td>
</tr>
<tr>
<td>Reference</td>
<td>External reference.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the detail.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of expense.</td>
</tr>
<tr>
<td>Amount</td>
<td>Amount of the detail.</td>
</tr>
</tbody>
</table>

* Required field

**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”.
10.2 Quotations

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.

Other sections

- Bill lines
- Linked element
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the quotation.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the quotation.</td>
</tr>
<tr>
<td>Quotation type</td>
<td>Type of quotation.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the quotation.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the quotation.</td>
</tr>
<tr>
<td>Customer</td>
<td>Customer concerned by the quotation.</td>
</tr>
<tr>
<td>Contact</td>
<td>Contact in customer organization to whom you sent the quotation.</td>
</tr>
<tr>
<td>Request</td>
<td>Request description.</td>
</tr>
<tr>
<td>Additional info.</td>
<td>Any additional information about the quotation.</td>
</tr>
</tbody>
</table>

* Required field

Field: Customer

- Automatically updated from project field.
## Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Actual status of the quotation.</td>
</tr>
<tr>
<td><strong>Responsible</strong></td>
<td>Resource who is responsible for the quotation.</td>
</tr>
<tr>
<td>Sent date</td>
<td>Date when quotation is sent to customer contact.</td>
</tr>
<tr>
<td>Send mode</td>
<td>Delivery mode.</td>
</tr>
<tr>
<td>Offer validity</td>
<td>Limit date of the validity of the proposal.</td>
</tr>
<tr>
<td>Likelihood</td>
<td>The probability that the proposal will be accepted.</td>
</tr>
<tr>
<td><strong>Handled</strong></td>
<td>Box checked indicates that the quotation is taken in charge.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Box checked indicates that the quotation is processed.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Box checked indicates that the quotation is archived.</td>
</tr>
<tr>
<td><strong>Cancelled</strong></td>
<td>Box checked indicates that the quotation is cancelled.</td>
</tr>
<tr>
<td>Planned end date</td>
<td>Target end date of the activity object of the quotation.</td>
</tr>
<tr>
<td>Activity type</td>
<td>Type of the activity object of the quotation.</td>
</tr>
<tr>
<td>Payment deadline</td>
<td>The payment deadline is stated on the quotation.</td>
</tr>
<tr>
<td>Amount</td>
<td>Total amount of the quotation.</td>
</tr>
<tr>
<td>Estimated work</td>
<td>Work days corresponding to the quotation.</td>
</tr>
<tr>
<td>Comments</td>
<td>Comment about the treatment of the quotation.</td>
</tr>
</tbody>
</table>

* Required field

### Field: Payment deadline

- If the payment deadline is not set, the value defined for the selected customer is used.

### Fields: Amount

Columns:

- **Ex VAT**: Amount without taxes.
  - The amount is automatically updated with the sum of bill lines.
- **Tax**: Applicable tax.
  - If the applicable tax isn’t set, the tax defined for the selected customer is used.
- **Full**: Amount with taxes.

**Hint**: Activity type

- The activity should be created only after approval.
10.3 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: Resources (Work & Cost)

Bill lines section

- This section allows to detail the order modality.

Other sections

- Bill lines
- Linked element
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the order.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the order.</td>
</tr>
<tr>
<td>Order type</td>
<td>Type of order.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the order.</td>
</tr>
<tr>
<td>Customer</td>
<td>Customer concerned by the order.</td>
</tr>
<tr>
<td>Contact</td>
<td>Contact in customer organization to whom you sent the order.</td>
</tr>
<tr>
<td>External reference</td>
<td>External reference of the order (as received).</td>
</tr>
<tr>
<td>Date of receipt</td>
<td>Receipt date.</td>
</tr>
<tr>
<td>Receive mode</td>
<td>Delivery mode.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the order.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the order.</td>
</tr>
<tr>
<td>Additional info.</td>
<td>Any additional information about the order.</td>
</tr>
</tbody>
</table>

* Required field

Field: Customer

- Automatically updated from project field.
Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Actual status of the order.</td>
</tr>
<tr>
<td><strong>Responsible</strong></td>
<td>Resource who is responsible for the order.</td>
</tr>
<tr>
<td><strong>Handled</strong></td>
<td>Box checked indicates that the order is taken in charge.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Box checked indicates that the order is processed.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Box checked indicates that the order is archived.</td>
</tr>
<tr>
<td><strong>Cancelled</strong></td>
<td>Box checked indicates that the order is cancelled.</td>
</tr>
<tr>
<td><strong>Activity type</strong></td>
<td>Type of the activity object of the order.</td>
</tr>
<tr>
<td><strong>Linked activity</strong></td>
<td>Activity representing the execution of the order.</td>
</tr>
<tr>
<td><strong>Initial</strong></td>
<td>Initial values.</td>
</tr>
<tr>
<td><strong>Amendment</strong></td>
<td>Additional values.</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>Sum of the initial values and amendment.</td>
</tr>
<tr>
<td><strong>Start date</strong></td>
<td>Initial start date of the execution of the order.</td>
</tr>
<tr>
<td><strong>End date</strong></td>
<td>Initial and validated end date of the execution of the order.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Comment about the treatment of the order.</td>
</tr>
</tbody>
</table>

* Required field

**Fields: Initial, Amendment and Total**

Columns:

- **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 line 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

**Hint**: Activity type

- The activity should be created only after approval.
10.4 Bills

A bill is a request for payment for delivered work.
Billing will depend on billing type defined for the project.
Billing types

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 for resources on selected activities, 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 for resources on selected activities, on a selected period.
- Used, for instance for: Capped Time & Materials projects.

Note:
- Taking into account that total billing cannot be more than project validated work.

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.

Note: Billing report
- Only bill with at least status “done” will be available for reporting.
- Before this status, they are considered as a draft.
### Other sections

- Linked element
- Attachments
- Notes

### Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the bill.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the bill.</td>
</tr>
<tr>
<td>Bill type</td>
<td>Type of bill.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the bill.</td>
</tr>
<tr>
<td>Date</td>
<td>Date of the bill.</td>
</tr>
<tr>
<td>Payment deadline</td>
<td>Payment deadline.</td>
</tr>
<tr>
<td>Payment due date</td>
<td>Due date for payment (read only).</td>
</tr>
<tr>
<td>Customer</td>
<td>Customer who will pay for the bill.</td>
</tr>
<tr>
<td>Bill contact</td>
<td>Contact who will receive the bill.</td>
</tr>
<tr>
<td>Recipient</td>
<td>Recipient who will receive the payment for the bill.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the bill.</td>
</tr>
<tr>
<td>Billing type</td>
<td>Project billing type.</td>
</tr>
</tbody>
</table>

* Required field

**Field: Payment due date**

- The value is calculated with date of bill + payment deadline.

**Fields: Customer & Bill contact**

- Automatically updated from project fields.
### Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Actual <em>status</em> of the bill.</td>
</tr>
<tr>
<td><strong>Responsible</strong></td>
<td>Resource who is responsible for the bill.</td>
</tr>
<tr>
<td>Sent date</td>
<td>Date when bill is sent to customer contact.</td>
</tr>
<tr>
<td>Send mode</td>
<td>Delivery mode.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Flag to indicate that the bill has been treated.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Flag to indicate that the bill is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Flag to indicate that the bill is cancelled.</td>
</tr>
<tr>
<td>Amount</td>
<td>Total amount of the bill.</td>
</tr>
<tr>
<td>% of order</td>
<td>Percentage of the bill balance over order amount.</td>
</tr>
<tr>
<td>Payment</td>
<td>Payment of bill.</td>
</tr>
<tr>
<td>Comments</td>
<td>Comments for the bill.</td>
</tr>
</tbody>
</table>

* Required field

**Fields: Amount**

Columns:

- **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**

Columns:

- **Date**: Date of payment.
- **Amount**: Payment amount.
- **Complete**: Flag to indicate that complete payment.
Section: Bill lines

Input for each bill line depends on billing type.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the bill line.</td>
</tr>
<tr>
<td>N°</td>
<td>Number of the line for the bill.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the line.</td>
</tr>
<tr>
<td>Detail</td>
<td>Detail of the line.</td>
</tr>
<tr>
<td>Unit price</td>
<td>Unitary price of billed element.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity of billed element.</td>
</tr>
<tr>
<td>Sum</td>
<td>Total price for the line (Price x Quantity).</td>
</tr>
</tbody>
</table>

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 modify an existing bill line.
- Click on ✗ to delete the bill line.
Bill line: At terms

Fig. 10.1: Bill line - At terms

Table 10.2: Fields - Bill line - At terms

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>N°</td>
<td>Number of the line for the bill.</td>
</tr>
<tr>
<td>Term</td>
<td>Project terms to be selected.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of line.</td>
</tr>
<tr>
<td>Detail</td>
<td>Detail of the line.</td>
</tr>
<tr>
<td>Price</td>
<td>Real amount of term.</td>
</tr>
</tbody>
</table>

* Required field

Field: Description

• Automatically set with the term name.
• Can be modified on update.

Field: Detail

• Can be set on update.
Bill line: On produced work & On capped produced work

![Bill line - On produced work & On capped produced work](image)

Fig. 10.2: Bill line - On produced work & On capped produced work

### Table 10.3: Fields - Bill line - On produced work & On capped produced work

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>N°</td>
<td>Number of the line for the bill.</td>
</tr>
<tr>
<td>Resource</td>
<td>Project resources to be selected.</td>
</tr>
<tr>
<td>Activity price</td>
<td>Project activities price to be selected.</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date of the period to take into account.</td>
</tr>
<tr>
<td>End date</td>
<td>End date of the period to take into account.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of line.</td>
</tr>
<tr>
<td>Detail</td>
<td>Detail of the line.</td>
</tr>
<tr>
<td>Price</td>
<td>Price of the activity.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity of element.</td>
</tr>
<tr>
<td>Amount</td>
<td>Amount for the line (Price x Quantity).</td>
</tr>
</tbody>
</table>

* Required field

**Field: Description**

- Automatically set with selected resource, activity price name and dates.
- Can be modified on update.

**Field: Detail**

- Can be set on update.
Bill line: Manual billing

Table 10.4: Fields - Bill line - Manual billing

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>N°</td>
<td>Number of the line.</td>
</tr>
<tr>
<td>Amendment</td>
<td>Flag to indicate this is an amendment line.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the line.</td>
</tr>
<tr>
<td>Detail</td>
<td>Detail of the line.</td>
</tr>
<tr>
<td>Price</td>
<td>Unitary price of element / measure unit.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity of element.</td>
</tr>
<tr>
<td>Amount</td>
<td>Amount for the line (Price x Quantity).</td>
</tr>
</tbody>
</table>

Field: Amendment

- This field is used for amendment values in order detail.
10.5 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.

Other sections

* Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the term.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the term.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned with the term.</td>
</tr>
<tr>
<td>Bill</td>
<td>Bill name that uses this term.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that term is archived</td>
</tr>
</tbody>
</table>

* Required field

Section: Fixed price for term

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real amount</td>
<td>Defined amount for the term.</td>
</tr>
<tr>
<td>Real date</td>
<td>Defined date for the term.</td>
</tr>
<tr>
<td>Validated amount</td>
<td>Sum of validated amounts of activities defined as triggers (Read only).</td>
</tr>
<tr>
<td>Validated date</td>
<td>Max of validated end dates of activities defined as triggers (Read only).</td>
</tr>
<tr>
<td>Planned amount</td>
<td>Sum of planned amounts of activities defined as triggers (Read only).</td>
</tr>
<tr>
<td>Planned date</td>
<td>Max of validated end dates of activities defined as triggers (Read only).</td>
</tr>
</tbody>
</table>

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.
Section: 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linked element type</td>
<td>Type of element to be selected (Activity, Meeting, Milestone, Project, Test session).</td>
</tr>
<tr>
<td>Linked element</td>
<td>Item to be selected.</td>
</tr>
</tbody>
</table>

Table 10.5: Fields - Add a trigger element to term dialog box
10.6 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**.

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the activity price.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the activity price.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned with the activity price.</td>
</tr>
<tr>
<td>Activity type</td>
<td>Type of activities concerned with the activity price.</td>
</tr>
<tr>
<td>Price of the activity</td>
<td>Daily price of the activities of the given activity type and the given project.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that activity price is archived.</td>
</tr>
</tbody>
</table>

* Required field
10.7 Payments

Allow to define payment of bills.
The bill keeps track of payment.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the payment.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the payment.</td>
</tr>
<tr>
<td>Payment type</td>
<td>Type of payment.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the payment.</td>
</tr>
</tbody>
</table>

* Required field

Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment mode</td>
<td>The mode of payment.</td>
</tr>
<tr>
<td>Payment date</td>
<td>Date of payment.</td>
</tr>
<tr>
<td>Payment amount</td>
<td>Amount of the payment.</td>
</tr>
<tr>
<td>Payment fee</td>
<td>Payment of the fee.</td>
</tr>
<tr>
<td>Payment credit</td>
<td>Balance of payment amount less payment fee.</td>
</tr>
<tr>
<td>Bill</td>
<td>Bill concerned with the payment.</td>
</tr>
<tr>
<td>Bill reference</td>
<td>Reference of bill.</td>
</tr>
<tr>
<td>Customer</td>
<td>Customer of bill.</td>
</tr>
<tr>
<td>Recipient</td>
<td>Recipient of bill.</td>
</tr>
<tr>
<td>Bill amount</td>
<td>Amount of bill.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that payment is archived.</td>
</tr>
</tbody>
</table>

* Required field
10.8 Catalog

Catalog defines items (products or services) that can be objects of a quotation, an order or a bill. This is used on the quotation lines, order lines and invoice lines. See: Bill lines.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the payment.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the catalog.</td>
</tr>
<tr>
<td>Catalog type</td>
<td>Type of catalog.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the catalog.</td>
</tr>
<tr>
<td>Detail</td>
<td>Detail of the catalog.</td>
</tr>
<tr>
<td>Nomenclature</td>
<td>Nomenclature of the catalog.</td>
</tr>
</tbody>
</table>

* Required field

Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Treatment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit price</td>
<td>Type of unit.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity of catalog.</td>
</tr>
<tr>
<td>Product</td>
<td>Type of product.</td>
</tr>
<tr>
<td>Product version</td>
<td>Version of the product.</td>
</tr>
</tbody>
</table>
10.9 Financial Gallery

Allows to display attachments on a financial element as Quotation, Order and Bill. Attachments are displayed grouped by element.

Click on \[\text{button}\] to display attachment list.

Filters

![Fig. 10.4: Financial Gallery Parameters](image)

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.
CHAPTER 11

Configuration Management
11.1 Configuration Management

The product and component is done on screens:

- Products
- Components
- Product Versions
- Component Versions
- Versions planning
11.1.1 Products

Allows to define product and sub-product.
 Allows to link components to product.

Other sections
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the product.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the product.</td>
</tr>
<tr>
<td>Product type</td>
<td>Type of product.</td>
</tr>
<tr>
<td>Designation</td>
<td>Trade name of the product known outside the company.</td>
</tr>
<tr>
<td>Customer</td>
<td>The customer the product should be delivered to.</td>
</tr>
<tr>
<td>Prime contractor</td>
<td>The contact, into customer organization, who will be responsible for the product delivery.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Person responsible for the product.</td>
</tr>
<tr>
<td>Is sub-product of</td>
<td>Name of the top product if this product is a sub-product.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the product is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the product.</td>
</tr>
</tbody>
</table>

* Required field

Section: Product versions

- List of versions defined for the product.
- Product versions are defined in Product Versions screen.

Section: Composition - List of sub-products used by this product

- List of sub-products for the product.

Section: Composition - List of components used by this product

- See: Relationships between product and component elements.

Button: Display structure

- Displays the structure of the product.
- 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.
11.1.2 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.

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.

Other sections

- Projects linked to this version
- Composition - List of component versions used this version
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the version.</td>
</tr>
<tr>
<td>Product</td>
<td>The product on which the version applies.</td>
</tr>
<tr>
<td>Version number</td>
<td>Version number of the product.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the version.</td>
</tr>
<tr>
<td>Prime contractor</td>
<td>The contact, into customer organization, who will be responsible for the version delivery.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource responsible of the version.</td>
</tr>
<tr>
<td>Entry into service</td>
<td>Initial, planned and real entry into service date of the version.</td>
</tr>
<tr>
<td>End date</td>
<td>Initial, planned and real end dates of the version.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the version.</td>
</tr>
</tbody>
</table>

* Required field

Fields: 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.

Field: Prime contractor

- Can be different from product prime contractor.
### Field: Entry into service (Real)
- Specify the date of entry into service.
- The box “Done” is checked when the real date field is set.

### Field: End date (Real)
- Specify the date end-of-service.
- The box “Done” is checked when the real date field is set.
11.1.3 Components

Allows to define product components.
Allows to define products using the component.

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Structure - List of products or components using this component</td>
</tr>
<tr>
<td>• Composition - List of components used by this component</td>
</tr>
<tr>
<td>• Attachments</td>
</tr>
<tr>
<td>• Notes</td>
</tr>
</tbody>
</table>

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the component.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the component.</td>
</tr>
<tr>
<td>Component type</td>
<td>Type of component</td>
</tr>
<tr>
<td>Identifier</td>
<td>Another name to identify the component.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Person responsible for the component.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the component is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the component.</td>
</tr>
</tbody>
</table>

* Required field

Section: Component versions

- List of versions defined for the component.
- Component versions are defined in Component Versions screen.
11.1.4 Component Versions

Allows to define versions of a component.
Allows to link a product version to component version.

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.

Other sections

- Structure - List of product or component versions using this component version
- Composition - List of component versions used by this version
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the version.</td>
</tr>
<tr>
<td>Component</td>
<td>The component on which the version applies.</td>
</tr>
<tr>
<td>Version number</td>
<td>Version number of the component.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the version.</td>
</tr>
<tr>
<td>Entry into service</td>
<td>Initial, planned and real entry into service date of the version.</td>
</tr>
<tr>
<td>End date</td>
<td>Initial, planned and real end dates of the version.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the version.</td>
</tr>
</tbody>
</table>

* Required field

Fields: 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.

Field: Entry into service (Real)

- Specify the date of entry into service.
- The box “Done” is checked when the real date field is set.

Field: End date (Real)

- Specify the date end-of-service.
- The box “Done” is checked when the real date field is set.
11.1.5 Relationships between product and component elements

Allows to manage relationships between products and components to define product structure.

See possible relationships: \textit{Product structure}

Relationships management

- Click on \begin{itemize}
  \item to create a new relationship. The dialog box “Structure” appear.
  \item to delete the corresponding relationship.
\end{itemize}
11.1.6 Link between 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.
11.1.7 Link 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>The project linked to product version or the project list.</td>
</tr>
<tr>
<td>Product</td>
<td>Product linked to the project or the list of products.</td>
</tr>
<tr>
<td>Version</td>
<td>Product version linked to the project or list of product versions.</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date for validity of the link.</td>
</tr>
<tr>
<td>End date</td>
<td>End date for validity of the link.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the link is not active anymore, without deleting it.</td>
</tr>
</tbody>
</table>

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.
11.1.8 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 Actives ‘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.
12.1 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
Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the risk.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the risk.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of risk.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the risk.</td>
</tr>
<tr>
<td>Severity</td>
<td>Level of importance of the impact for the project.</td>
</tr>
<tr>
<td>Likelihood</td>
<td>Probability level of the risk to occur.</td>
</tr>
<tr>
<td>Criticality</td>
<td>Global evaluation level of the risk.</td>
</tr>
<tr>
<td>Cost of impact</td>
<td>Impact cost of the risk.</td>
</tr>
<tr>
<td>Project reserved cost</td>
<td>The reserve amount according to the risk likelihood.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the risk.</td>
</tr>
<tr>
<td>Cause</td>
<td>Description of the event that may trigger the risk.</td>
</tr>
<tr>
<td>Impact</td>
<td>Description of the estimated impact on the project if the risk occurs.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the risk.</td>
</tr>
</tbody>
</table>

* Required field

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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status of the risk.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the treatment of the risk.</td>
</tr>
<tr>
<td>Priority</td>
<td>Expected priority to take into account this risk.</td>
</tr>
<tr>
<td>Initial end date</td>
<td>Initially expected end date of the risk.</td>
</tr>
<tr>
<td>Planned end date</td>
<td>Updated end date of the risk.</td>
</tr>
<tr>
<td>Handled</td>
<td>Flag to indicate that risk is taken into account.</td>
</tr>
<tr>
<td>Done</td>
<td>Flag to indicate that risk has been treated.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that risk is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Flag to indicate that risk is cancelled.</td>
</tr>
<tr>
<td>Result</td>
<td>Complete description of the treatment done on the risk.</td>
</tr>
</tbody>
</table>

* Required field
12.2 Opportunities

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)

Other sections

- Linked element
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the opportunity.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the opportunity.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of opportunity.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the opportunity.</td>
</tr>
<tr>
<td>Significance</td>
<td>Level of importance of the impact for the project.</td>
</tr>
<tr>
<td>Likelihood</td>
<td>Evaluation of the estimated improvement, or positive impact, on the project of the opportunity.</td>
</tr>
<tr>
<td>Criticality</td>
<td>Global evaluation level of the opportunity.</td>
</tr>
<tr>
<td>Expected improvement</td>
<td>Expected amount of the opportunity.</td>
</tr>
<tr>
<td>Project reserved gain</td>
<td>The estimated gain, according to the opportunity likelihood.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the opportunity.</td>
</tr>
<tr>
<td>Opportunity source</td>
<td>Description of the event that may trigger the opportunity.</td>
</tr>
<tr>
<td>Impact</td>
<td>Description of the estimated positive impact on the project.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the opportunity.</td>
</tr>
</tbody>
</table>

* Required field

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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual <em>status</em> of the opportunity.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the opportunity.</td>
</tr>
<tr>
<td>Priority</td>
<td>Expected priority to take into account this opportunity.</td>
</tr>
<tr>
<td>Initial end date</td>
<td>Initially expected end date of the opportunity.</td>
</tr>
<tr>
<td>Planned end date</td>
<td>Updated end date of the opportunity.</td>
</tr>
<tr>
<td><strong>Handled</strong></td>
<td>Flag to indicate that opportunity is taken into account.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Flag to indicate that opportunity has been treated.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Flag to indicate that opportunity is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Flag to indicate that opportunity is cancelled.</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td>Complete description of the treatment of the opportunity.</td>
</tr>
</tbody>
</table>

* Required field*
12.3 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**

- \[ \text{Criticality value} = \text{Severity value} \times \text{Likelihood value} / 2 \]
- For example:
  - Critical (8) = High (4) \times High (4) / 2

**Default values**

- Default values are determined.
- You can change its values while respecting the equation defined above.
12.4 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the issue.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the issue.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of issue.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the issue.</td>
</tr>
<tr>
<td>Criticality</td>
<td>Level of importance of the impact for the project.</td>
</tr>
<tr>
<td>Priority</td>
<td>Priority requested to the treatment of the issue.</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the issue.</td>
</tr>
<tr>
<td>Cause</td>
<td>Description of the event that led to the issue.</td>
</tr>
<tr>
<td>Impact</td>
<td>Description of the impact of the issue on the project.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the issue.</td>
</tr>
</tbody>
</table>

* Required field

Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status of the issue.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the issue.</td>
</tr>
<tr>
<td>Initial end date</td>
<td>Initially expected end date of the issue.</td>
</tr>
<tr>
<td>Planned end date</td>
<td>Updated end date of the issue.</td>
</tr>
<tr>
<td>Handled</td>
<td>Flag to indicate that issue is taken into account.</td>
</tr>
<tr>
<td>Done</td>
<td>Flag to indicate that issue has been treated.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that issue is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Flag to indicate that issue is cancelled.</td>
</tr>
<tr>
<td>Result</td>
<td>Complete description of the treatment of the issue.</td>
</tr>
</tbody>
</table>

* Required field
12.5 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the action.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the action.</td>
</tr>
<tr>
<td>Action type</td>
<td>Type of action.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the action.</td>
</tr>
<tr>
<td>Priority</td>
<td>Priority requested to the treatment of the action.</td>
</tr>
<tr>
<td>Private</td>
<td>Box checked allows to define a private action.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the action.</td>
</tr>
</tbody>
</table>

* Required field
### Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Actual <em>status</em> of the action.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the action.</td>
</tr>
<tr>
<td>Initial due date</td>
<td>Initially expected end date of the action.</td>
</tr>
<tr>
<td>Planned due date</td>
<td>Updated end date of the action.</td>
</tr>
<tr>
<td><strong>Handled</strong></td>
<td>Box checked indicates that the action is taken over.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Box checked indicates that the action has been treated.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Box checked indicates that the action is archived.</td>
</tr>
<tr>
<td>Efficiency</td>
<td>Evaluation of the efficiency the action had on the objective (for instance on the risk mitigation).</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td>Complete description of the treatment of the action.</td>
</tr>
</tbody>
</table>

* Required field
13.1 Meetings

Meeting items are stored to keep track of important meetings during the project lifecycle:

- Progress Meetings
- Steering committees
- Functional workshops

In fact, you should keep track of every meeting where decisions are taken, or questions answered. This will provide an easy way to find back when, where and why a decision has been taken.

### Meeting features

- Periodic meetings
- Attendees section

### Project task

- Meeting is a task.
- You can assign project resources (named attendees).
- You have progress section that allows for followed resources work and cost.

### Other sections

- Attendees
- Progress
- Predecessor and Successor element
- Linked element
Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the meeting.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the meeting.</td>
</tr>
<tr>
<td>Meeting type</td>
<td>Type of meeting.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the meeting.</td>
</tr>
<tr>
<td>Meeting date</td>
<td>Date of the meeting (initially expected date), including start and end time.</td>
</tr>
<tr>
<td>Location</td>
<td>Place (room or else) when meeting will stand.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the meeting.</td>
</tr>
</tbody>
</table>

* Required field

**Field: Name**

- If not set, will automatically be set to meeting type completed with meeting date.

**Hint:** Description can be used to store agenda.

**Button: Email invitation**

- Allows to send the email to attendees.
- They will receive the invitation in their calendar management tool.
Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent activity</td>
<td>Parent activity of the meeting.</td>
</tr>
<tr>
<td>Status</td>
<td>Actual status of the meeting.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the organization of the meeting.</td>
</tr>
<tr>
<td>Handled</td>
<td>Flag to indicate that meeting has been taken into account.</td>
</tr>
<tr>
<td>Done</td>
<td>Flag to indicate that meeting has been held.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Flag to indicate that meeting is cancelled.</td>
</tr>
<tr>
<td>Minutes</td>
<td>Minutes of the meeting.</td>
</tr>
</tbody>
</table>

* Required field

Field: Parent activity

- In the WBS structure, under which the meeting will be displayed in the Gantt planning.

Minutes

- You can enter here only a short summary of the minutes and attach the full minutes as a file.
13.1.1 Periodic meetings

Periodic meeting is a way to define some meetings that will occur on a regular basis.

Note:

- Most fields fit, but some information is not present for periodic meetings, such as Minutes or Status.
- It is because these fields won’t be set through periodic meeting definition, but must be set directly on the meetings.

Periodic meeting process

- When saving periodic meeting, elementary meetings are automatically created.
- Changes can be done in elementary meetings. In most cases, these changes won’t be erased by periodic meeting updates.

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

- Attendees can be defined on a periodic meeting.
- They will be copied on the elementary 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.

Other sections

- Attendees
- Progress
- Predecessor and Sucessor element
- Notes
### Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the periodic meeting.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the meeting.</td>
</tr>
<tr>
<td>Meeting type</td>
<td>Type of meeting.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the meeting.</td>
</tr>
<tr>
<td>Location</td>
<td>Place (room or else) when meeting will stand.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the meeting.</td>
</tr>
</tbody>
</table>

* Required field

### Section: Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent activity</td>
<td>Parent activity of the meeting.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the organization of the meeting.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that periodic meeting is archived.</td>
</tr>
</tbody>
</table>

### Section: Periodicity

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
<td>Start date and end date or number of occurrences to define the range of the periodicity.</td>
</tr>
<tr>
<td>Time</td>
<td>Start and end time for all the meetings.</td>
</tr>
<tr>
<td>Periodicity</td>
<td>Frequency of the meeting, on proposed bases (daily, weekly monthly).</td>
</tr>
<tr>
<td>Only on open days</td>
<td>Specify that meetings will not be set on off days.</td>
</tr>
</tbody>
</table>

* Required field

#### Field: Periodicity

- Several periodicity is proposed:
  - Every day
  - Same day every week
  - Same day every month
  - Same week every month
13.1.2 Attendees section

This section allows to define the list of attendees to the meeting.

Attendee list

- Meeting is a task you can assign project resources.
- A possibility to assign work to some attendees (project resources). So meeting works of these attendees are booked in the project.
- 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.

Attendees entry

- 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.
13.2 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.

Other sections

- Linked element
- Attachments
- Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the decision.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the decision.</td>
</tr>
<tr>
<td>Decision type</td>
<td>Type of decision.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the decision.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the decision.</td>
</tr>
</tbody>
</table>

* Required field

Section: Validation

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status of the decision.</td>
</tr>
<tr>
<td>Decision date</td>
<td>Date of the decision.</td>
</tr>
<tr>
<td>Origin</td>
<td>Origin of the decision.</td>
</tr>
<tr>
<td>Accountable</td>
<td>Resource accountable for the decision.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that decision is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Flag to indicate that decision is cancelled.</td>
</tr>
</tbody>
</table>

* Required field

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.
13.3 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

Other sections

• Linked element
• Attachments
• Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the question.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the question.</td>
</tr>
<tr>
<td>Question type</td>
<td>Type of question.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the question.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the question.</td>
</tr>
</tbody>
</table>

* Required field
### Section: Answer

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Actual status of the decision.</td>
</tr>
<tr>
<td><strong>Responsible</strong></td>
<td>Resource who is responsible for the follow-up of the question.</td>
</tr>
<tr>
<td><strong>Initial due date</strong></td>
<td>Initially expected date for the answer to the question.</td>
</tr>
<tr>
<td><strong>Planned due date</strong></td>
<td>Updated expected date for the answer to the question.</td>
</tr>
<tr>
<td><strong>Replier</strong></td>
<td>Name of the person who provided the answer.</td>
</tr>
<tr>
<td><strong>Handled</strong></td>
<td>Flag to indicate that question has been taken into account.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Flag to indicate that question has been answered.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Flag to indicate that question is archived.</td>
</tr>
<tr>
<td><strong>Cancelled</strong></td>
<td>Flag to indicate that question is cancelled.</td>
</tr>
<tr>
<td><strong>Response</strong></td>
<td>Complete description of the answer to the question.</td>
</tr>
</tbody>
</table>

* Required field
13.4 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the KPI.</td>
</tr>
<tr>
<td>Name</td>
<td>name of the deliverable.</td>
</tr>
<tr>
<td>IdDeliverableType</td>
<td>id of the Deliverable Type.</td>
</tr>
<tr>
<td>IdProject</td>
<td>id of the Project.</td>
</tr>
<tr>
<td>externalReference</td>
<td>name of the external reference.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the deliverable.</td>
</tr>
</tbody>
</table>

Note:

• You can estimated quality value for deliverable and this will produce a KPI.

• See: KPI definitions
13.5 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.

**Note:**

- You can estimated quality value for incoming and this will produce a KPI.
- See: *KPI definitions*
13.6 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the delivery.</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the delivery.</td>
</tr>
<tr>
<td>Deliverable type</td>
<td>Type of deliverable.</td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the delivery.</td>
</tr>
<tr>
<td>ExternalReference</td>
<td>name of the external reference.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the delivery.</td>
</tr>
</tbody>
</table>

* Required field

Other sections

- Deliverables
- Linked element
- Attachments
- Notes

Section: Validation

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery status</td>
<td>Actual status of the delivery.</td>
</tr>
<tr>
<td>Resource</td>
<td>resource of the delivery.</td>
</tr>
<tr>
<td>Planned date</td>
<td>Expected date of delivery.</td>
</tr>
<tr>
<td>Real date</td>
<td>Effective delivery date.</td>
</tr>
<tr>
<td>Validation date</td>
<td>validate the delivery date.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that delivery is archived.</td>
</tr>
</tbody>
</table>

262 Chapter 13. Review logs
CHAPTER 14

Environmental parameters
14.1 Allocations

Concepts

- Profiles definition
- Stakeholder definition
- Allocation to project

Allows to manage allocations to project.

Offers a global view of allocation.

Hint:

- You can use filters.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the allocation.</td>
</tr>
<tr>
<td>Resource</td>
<td>Name of the allocated resource.</td>
</tr>
<tr>
<td>Or contact</td>
<td>Name of the allocated contact.</td>
</tr>
<tr>
<td>Profile</td>
<td>Selected profile.</td>
</tr>
<tr>
<td>Project</td>
<td>Project allocated to.</td>
</tr>
<tr>
<td>Rate</td>
<td>Allocation rate for the project (%).</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date of allocation.</td>
</tr>
<tr>
<td>End date</td>
<td>End date of allocation.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that the allocation is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the allocation.</td>
</tr>
</tbody>
</table>

* Required field

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.
14.2 Users

Concepts

- ProjeQtOr roles
- Profiles definition
- Stakeholder definition
- Photo

The user is a person that will be able to connect to the application.

Note:

- To be able to connect, the user must have a password and a user profile defined.

ProjeQtOr and LDAP users

- ProjeQtOr offers two modes of authentication.
  - **ProjeQtOr users**
    - Users’ information is kept in the application database.
    - Password policy and login behavior are managed by the application.

  **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.

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.
Other sections

- *Allocations*

## Section: Description

### Table 14.1: Users description section fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Id</strong></td>
<td>Unique Id for the user.</td>
</tr>
<tr>
<td><strong>Photo</strong></td>
<td>Photo of the user.</td>
</tr>
<tr>
<td><strong>User name</strong></td>
<td>login id of the user.</td>
</tr>
<tr>
<td><strong>Real name</strong></td>
<td>Name of the user.</td>
</tr>
<tr>
<td><strong>Initials</strong></td>
<td>Initials of the user.</td>
</tr>
<tr>
<td><strong>Email address</strong></td>
<td>Email address of the user.</td>
</tr>
<tr>
<td><strong>Profile</strong></td>
<td>Profile of the user.</td>
</tr>
<tr>
<td><strong>Locked</strong></td>
<td>Flag used to lock the user, to prohibit connections.</td>
</tr>
<tr>
<td><strong>Is a contact</strong></td>
<td>Is this user also a contact?</td>
</tr>
<tr>
<td><strong>Is a resource</strong></td>
<td>Is this user also a resource?</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Flag to indicate that user is archived.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Complete description of the user.</td>
</tr>
</tbody>
</table>

* Required field

### Field: User name

- The user name must be unique.

### Field: Is a contact

- Check this if you want created a contact to this user.
- This user will then appear in the “Contact” list

### Field: Is a resource

- Check this if you want created a resource to this user.
- The user will then also appear in the “Resources” list.
Section: Miscellaneous

**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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t receive team mails</td>
<td>Box checked indicating that the resource doesn’t want to receive mails sent to the team.</td>
</tr>
<tr>
<td>Comes from LDAP</td>
<td>Box checked indicating that the user information come from LDAP.</td>
</tr>
<tr>
<td>API key</td>
<td>Key string used by web service consumer.</td>
</tr>
</tbody>
</table>

**Button: Send information to the user**

- This button allows to send by email to the user the login information.
14.3 Resources

Concepts

- ProjeQtOr roles
- Profiles definition
- Stakeholder definition
- Resource function and cost
- Resource calendar
- Photo

Human and material resource are involved in the project. Project allocation defines its availability.

As group of person

- A resource can be a group of person.
- Useful in initial project planning.
- You create the fictitious resource with capacity > 1.

Example

- If you want a group of three peoples then resource capacity must be set to 3.

Other sections

- Allocations
Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the resource.</td>
</tr>
<tr>
<td>Photo</td>
<td>Photo of the resource.</td>
</tr>
<tr>
<td>Real name</td>
<td>Name of the resource.</td>
</tr>
<tr>
<td>User name</td>
<td>Name of user.</td>
</tr>
<tr>
<td>Initials</td>
<td>Initials of the resource.</td>
</tr>
<tr>
<td>Email address</td>
<td>Email address of the resource.</td>
</tr>
<tr>
<td>Profile</td>
<td>Profile of the user.</td>
</tr>
<tr>
<td>Capacity (FTE)</td>
<td>Capacity of the resource, in Full Time Equivalent.</td>
</tr>
<tr>
<td>Calendar</td>
<td>Calendar defines the availability of the resource.</td>
</tr>
<tr>
<td>Team</td>
<td>The team to which the resource belongs.</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone number of the resource.</td>
</tr>
<tr>
<td>Mobile</td>
<td>Mobile phone number of the resource.</td>
</tr>
<tr>
<td>Fax</td>
<td>Fax number of the resource.</td>
</tr>
<tr>
<td>Is a contact</td>
<td>Is this resource also a contact?</td>
</tr>
<tr>
<td>Is a user</td>
<td>Is this resource also a user?</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that the resource is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the resource.</td>
</tr>
</tbody>
</table>

* Required field

**Field: Capacity (FTE)**

- 1 (full time).
- < 1 (for part time working resource).
- > 1 (for virtual resource or teams, to use for instance to initialize a planning).

**Field: Is a contact**

- Check this if the resource must also be a contact.
- 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.
Section: Function and cost

This section allows to define functions and cost of the resource.

**Main function**
- Main function allows to define the default function.

**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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Function</td>
<td>Function of the resource for the selected cost.</td>
</tr>
<tr>
<td>Cost</td>
<td>Daily cost of the resource for the selected function.</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date for the cost of the resource, for the selected function.</td>
</tr>
<tr>
<td>End date</td>
<td>End date for the cost of the resource, for the selected function.</td>
</tr>
</tbody>
</table>

**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.

![Resource Cost dialog box](image)

Fig. 14.1: Resource cost dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Function</td>
<td>Function to be selected.</td>
</tr>
<tr>
<td>Cost</td>
<td>Daily cost of the resource for the selected function.</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date for the cost of the resource, for the selected function.</td>
</tr>
</tbody>
</table>

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.

Section: Miscellaneous

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t receive team mails</td>
<td>Box checked indicating that the resource doesn’t want to receive mails sent to the team.</td>
</tr>
</tbody>
</table>
14.4 Teams

The team is a group of resources gathered on any criteria.

Note:

• A resource can belong to only one team.

Use for

• To allocate all team members of a project.
• To filter resource data in work, cost and planning reports.
• To set attachment, note and document visibility to the team.

Section: Description

Table 14.6: Description section fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the team.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the team.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that team is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the team.</td>
</tr>
</tbody>
</table>

Section: Team members

• List of the resources members of the team.

Button: Allocate all team members of a project

• This button allows to allocate all team members of a project.
• The allocation dialog box will be displayed.
14.5 Calendar

Concepts

- Resource calendar

This tool allows to define calendars.

How it works

- It allows to define exceptions to the default definition.
- In default definition, week days are days work and weekend days are days off.

Note:

- Exceptions can be defined for the current year and the next years.

Default calendar

- A calendar named “default” is already defined.
- By default, this is the calendar of all resources.
- Days off defined in this calendar is displayed in Gantt, real work allocation and diary.
- It cannot be deleted.

Specific calendar

- A specific calendar can be created to define days off and work to a resource.
- Days off defined in this calendar is displayed in real work allocation and diary.

Import calendar definition

- It is possible to import exceptions definition of a calendar in another.
- Existing exceptions of current calendar are not changed.

Note:

- The calendars are not linked.
- You have to reimport the definition to apply changes.
Section: Description

Table 14.7: Description section fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the calendar.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the calendar.</td>
</tr>
</tbody>
</table>

Section: Year

Field: Year field

- Select year of displayed calendar.

Button: Import this year from calendar

- Copy exceptions of the selected year of the selected calendar into current calendar.

Section: 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.
### 14.6 Customers

The customer 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 customer defined here is not a person. Real persons into a customer entity are called “Contacts”.

#### Other sections
- Attachments
- Notes

#### Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the customer.</td>
</tr>
<tr>
<td>Customer name</td>
<td>Short name of the customer.</td>
</tr>
<tr>
<td>Type of customer</td>
<td>Type of customer.</td>
</tr>
<tr>
<td>Customer code</td>
<td>Code of the customer.</td>
</tr>
<tr>
<td>Payment deadline</td>
<td>The payment deadline is stated on the bill for this customer.</td>
</tr>
<tr>
<td>Tax</td>
<td>Tax rates that are applied to bill amounts for this customer.</td>
</tr>
<tr>
<td>Tax number</td>
<td>Tax reference number, to be displayed on the bill.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that the customer is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the customer.</td>
</tr>
</tbody>
</table>

* Required field

#### Section: Address

- Full address of the customer.

#### Section: Projects

- List of the projects of the customer.

#### Section: Contacts

- List of the contacts known in the entity of the customer.
14.7 Contacts

Concepts

- ProjeQtOr roles
- Profiles definition
- Stakeholder definition
- Photo

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 customer organization.
A contact can be the contact person for contracts, sales and billing.

Other sections

- Allocations

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the contact.</td>
</tr>
<tr>
<td>Photo</td>
<td>Photo of the contact.</td>
</tr>
<tr>
<td>Real name</td>
<td>Name of the contact.</td>
</tr>
<tr>
<td>User name</td>
<td>Name of user.</td>
</tr>
<tr>
<td>Initials</td>
<td>Initials of the contact.</td>
</tr>
<tr>
<td>Email address</td>
<td>Email address of the contact.</td>
</tr>
<tr>
<td>Profile</td>
<td>Profile of the user.</td>
</tr>
<tr>
<td>Customer</td>
<td>The customer the contact belongs to.</td>
</tr>
<tr>
<td>Function</td>
<td>Function of contact.</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone number of the contact.</td>
</tr>
<tr>
<td>Mobile</td>
<td>Mobile phone number of the contact.</td>
</tr>
<tr>
<td>Fax</td>
<td>Fax number of the contact.</td>
</tr>
<tr>
<td>Is a resource</td>
<td>Is this contact also a resource ?</td>
</tr>
<tr>
<td>Is a user</td>
<td>Is this contact also a user ?</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that contact is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the contact.</td>
</tr>
</tbody>
</table>

* Required field

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.

### Section: Address

Full address of the contact.

### Section: Miscellaneous

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t receive team mails</td>
<td>Box checked indicating that the resource doesn’t want to receive mails sent to the team.</td>
</tr>
</tbody>
</table>
14.8 Providers

Allows to manage provider list.

Other sections

• Attachments
• Notes

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the provider.</td>
</tr>
<tr>
<td>Name</td>
<td>Provider name.</td>
</tr>
<tr>
<td>Type of provider</td>
<td>Type of provider.</td>
</tr>
<tr>
<td>Provider code</td>
<td>Code of the provider.</td>
</tr>
<tr>
<td>Payment deadline</td>
<td>The payment deadline is stated for this provider.</td>
</tr>
<tr>
<td>Tax</td>
<td>Tax rate applied for this provider.</td>
</tr>
<tr>
<td>Tax number</td>
<td>Tax reference number.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates that the provider is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the provider.</td>
</tr>
</tbody>
</table>

* Required field

Section: Address

• Full address of the provider.
14.9 Recipients

The recipient is the beneficiary of bill payments.
Recipients are mainly defined to store billing information.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the recipient.</td>
</tr>
<tr>
<td>Name</td>
<td>Short name of the recipient.</td>
</tr>
<tr>
<td>Company number</td>
<td>Company number, to be displayed on the bill.</td>
</tr>
<tr>
<td>Legal notice</td>
<td>Legal notice for the recipient.</td>
</tr>
<tr>
<td>Tax number</td>
<td>Tax reference number, to be displayed on the bill.</td>
</tr>
<tr>
<td>Tax free</td>
<td>Flag to indicate that tax is automatically set to zero for this recipient.</td>
</tr>
<tr>
<td>Contact name</td>
<td>Name of contact for the recipient.</td>
</tr>
<tr>
<td>Contact email</td>
<td>Email of contact for the recipient.</td>
</tr>
<tr>
<td>Contact phone</td>
<td>Phone of contact for the recipient.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that the recipient is archived.</td>
</tr>
</tbody>
</table>

* Required field

Section: International Bank Account Number

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank</td>
<td>Bank name.</td>
</tr>
<tr>
<td>International number (IBAN)</td>
<td>IBAN for the recipient.</td>
</tr>
<tr>
<td>Bank code (BIC)</td>
<td>BIC for the recipient.</td>
</tr>
<tr>
<td>National account number</td>
<td>Full account number defining the BBAN account code.</td>
</tr>
</tbody>
</table>

Section: Address

- Full address of the recipient.
14.10 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**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the context.</td>
</tr>
<tr>
<td>Context type</td>
<td>One of the three context type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the context.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define the order of display in lists</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that the context is archived.</td>
</tr>
</tbody>
</table>

* Required field

**Fields: Context type**

- The list is fixed.
- Captions are translated and so can be changed in language file.
14.11 Document directories

Document directories management allows to define a structure for document storage.

- 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.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the directory.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the directory.</td>
</tr>
<tr>
<td>Parent directory</td>
<td>Name of the parent directory to define hierarchic structure.</td>
</tr>
<tr>
<td>Location</td>
<td>Folder where files will be stored.</td>
</tr>
<tr>
<td>Project</td>
<td>Directory is dedicated to this project.</td>
</tr>
<tr>
<td>Product</td>
<td>Directory is dedicated to this product.</td>
</tr>
<tr>
<td>Default type</td>
<td>Type of document the directory is dedicated to.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that directory is archived.</td>
</tr>
</tbody>
</table>

* Required field

Field: Parent directory

- The current directory is then a sub-directory of parent.

Field: Location

- Location is automatically defined as «Parent directory» / «Name».

Field: Project

- This project will be the default to new stored documents in this directory.

Field: Product

- This 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.

Field: Default type

- This document type will be the default to new stored documents in this directory.
15.1 Emails sent

Users can have a look at the list of the automatic emails sent.
All the information about the email, including the status showing whether the email was correctly sent or not.

15.2 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. 15.1: Alert screen

**Button: Mark as read**

- The button is available if the user alert is not tagged “read” yet.
15.3 Messages

Concepts

- Profiles definition

You can define some message that will be displayed on the Today screen of users.

Optionally, the message can be shown on login screen.

You can limit the display by profile, project and user.

The message will be displayed in a color depending on the message type.

Section: Description

Table 15.1: Message description section fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the message.</td>
</tr>
<tr>
<td>Title</td>
<td>Header of the message.</td>
</tr>
<tr>
<td>Message type</td>
<td>Type of message.</td>
</tr>
<tr>
<td>Profile</td>
<td>The message is limited to users with this profile.</td>
</tr>
<tr>
<td>Project</td>
<td>The message is limited to resources allocated to the project.</td>
</tr>
<tr>
<td>User</td>
<td>The message is limited to this user.</td>
</tr>
<tr>
<td>Show on login screen</td>
<td>Show this message on login screen.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that the message is archived.</td>
</tr>
</tbody>
</table>

* Required field

Section: Message

Table 15.2: Message message section fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message</td>
<td>Complete text of the message.</td>
</tr>
</tbody>
</table>
15.4 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.

Note: 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.

Attention:

• 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.

Note: 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).
15.4.1 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.

Note:

- Names of columns can contain spaces (to have better readability).
- The spaces will be removed to get the name of the column.

Hint:

- Look into the model class. The names are the same.

Date format

- Dates are expected in format “YYYY-MM-DD”.
15.4.2 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.
15.5 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 screen.
- Background task must be started by Administration console screen.

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.

  Hint:
  - 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.
### 16.1 Workflows

**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.

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the workflow.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the workflow.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define the order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that workflow is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the workflow.</td>
</tr>
</tbody>
</table>

* Required field
Button: Select status to show or hide

• This button can be used to hide some unnecessary status.

Section: Workflow Diagram

• The workflow diagram presents a visual representation of the workflow displaying all possible transitions (independently to profile rights).

Fig. 16.1: Workflow Diagram
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.

![Habilitation Table](image)

Fig. 16.2: Habilitation table

In the upper example:

- Anyone can move an item from “recorded” to “assigned” and from “recorded” to “cancelled”.
- No one can move an item from “qualified” status to any other status. In this case, pay attention that it must never be possible to move an item to “qualified” status, because it will not be possible to leave this status.
16.2 Mails on event

The application is able to automatically send mails on updating event. Events are defined on an element and element type.

Note:

• The mail message is formatted to display item information.
• Mail titles is defined in Global parameters screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the event.</td>
</tr>
<tr>
<td>Element updated</td>
<td>Type of elements that will be concerned by automatic emailing.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of the selected element updated.</td>
</tr>
<tr>
<td>New status</td>
<td>Positioning the elements to this status will generate an email.</td>
</tr>
<tr>
<td>Or other event</td>
<td>Other event that will possibly generate an email.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that status mail is archived.</td>
</tr>
</tbody>
</table>

Field: Type

• If not set, the event is valid for every type of the element.

Section: 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.
16.3 Delays for tickets

It is possible to define a default delay for tickets, for each ticket type and each ticket urgency.

**Note:**

- On creation, the due date will automatically be calculated as creation date + delay.

### Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the delay definition.</td>
</tr>
<tr>
<td>Ticket type</td>
<td>Ticket type the delay applies to.</td>
</tr>
<tr>
<td>Urgency</td>
<td>Urgency of ticket the delay applied to.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of delay.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that delay definition is archived.</td>
</tr>
</tbody>
</table>

*Required field

**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.
16.4 Indicators

It is possible to define indicators on each type of element. 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, some on cost. For each indicator a warning value and an alert value can be defined.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the indicator definition.</td>
</tr>
<tr>
<td>Element</td>
<td>The elements the indicator applies to.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of the elements the indicator applies to.</td>
</tr>
<tr>
<td>Indicator</td>
<td>Indicator applies to.</td>
</tr>
<tr>
<td>Reminder</td>
<td>Delay before due date or % of work or % or cost to send a warning.</td>
</tr>
<tr>
<td>Alert</td>
<td>Delay before due date or % of work or % or cost to send an alert.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that delay definition is archived.</td>
</tr>
</tbody>
</table>

Section: 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.

Section: Internal alert 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.
16.5 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the predefined note.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the predefined note.</td>
</tr>
<tr>
<td>Element</td>
<td>Kind of item (Ticket, Activity, ...) for which this predefined note will be proposed on note creation.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of element for which this predefined note will be proposed on note creation.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that delay definition is archived.</td>
</tr>
<tr>
<td>Text</td>
<td>Predefined text for notes.</td>
</tr>
</tbody>
</table>

* Required field

**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.
16.6 Checklists

It is possible to define checklist forms for each type of element. When a checklist form exists for a given element, the checklist is available for the element.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the checklist definition.</td>
</tr>
<tr>
<td>Element</td>
<td>The elements the checklist applies to.</td>
</tr>
<tr>
<td>Type</td>
<td>Type of the elements the checklist applies to.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that checklist definition is archived.</td>
</tr>
</tbody>
</table>

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.

![Choices for the checklist line dialog box](image)

Table 16.1: Fields - Choices for the checklist lines

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the subject of the checklist line.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Order of the line in the list.</td>
</tr>
<tr>
<td>Choice #n</td>
<td>Possible choices (checks) for the list (up to 5 choices).</td>
</tr>
<tr>
<td>Exclusive</td>
<td>Are the choices exclusive (select one will unselect others).</td>
</tr>
</tbody>
</table>

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).
16.7 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.

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.
16.8 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.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the KPI.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the KPI.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the KPI.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the KPI.</td>
</tr>
<tr>
<td>Idle</td>
<td>Statut of the KPI.</td>
</tr>
</tbody>
</table>

Warning:
- Description integrates the formula used to calculate the KPI.

Section: Thresholds

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.

<table>
<thead>
<tr>
<th>Thresholds</th>
<th>name</th>
<th>value</th>
<th>color</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗</td>
<td>not good</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td>good</td>
<td>0.66</td>
<td></td>
</tr>
</tbody>
</table>

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
16.9 JobList

Management of the JobList can be used for each element but it usually used to detail an Activity or Ticket. When a Joblist form exists for a given element, the Joblist is available for the element. It is an indicator to follow the respect of dates values.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the KPI.</td>
</tr>
<tr>
<td>IdChecklistable</td>
<td>Unique Id for the Checklistable.</td>
</tr>
<tr>
<td>idType</td>
<td>Type of the elements the joblist applies to.</td>
</tr>
<tr>
<td>Idle</td>
<td>idle.</td>
</tr>
</tbody>
</table>

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.

Note:

- Looking like CheckLists with no choice.
CHAPTER 17

Access rights

17.1 Profiles

Concepts

- Profiles definition

The profile is a group of authorization and access rights to the data. Each user is linked to a profile to define the data he can see and possibly manage.

Display format

- In the next screens, the name of profiles is displayed in columns.
- Access rights and options are displayed in rows.
- This display format allows to manage easily authorizations for each profile.

Value of Field “Name”

- The value of field “Name” 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.
- See: Translatable name.

New profile

- The value of field “Name” must be a significant name and must not contain spaces or special characters.
- Ideally, the value of the field should start with “profile” (to be easily identified in the translation table).
Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the profile.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the profile.</td>
</tr>
<tr>
<td>Profile code</td>
<td>A code that may be internally used when generating emails and alerts.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that profile is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the profile.</td>
</tr>
</tbody>
</table>

Field: Profile code

- ADM: will designate administrator.
- PL: will designate project leader.
17.2 Access modes

The access mode defines a combination of rights to read, created, update or delete items. Each access is defined as scope of visible and updatable elements, that can be:

- **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 name displayed at right of the field is the translated name.
- See: Translatable name.

**New access mode**

- The value of field “Name” must be a significant name and must not contain spaces or special characters.
- Ideally, the value of the field should start with “accessProfile” (to be easily identified in the translation table).

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the access mode.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the access mode.</td>
</tr>
<tr>
<td>Read rights</td>
<td>Scope of visible items</td>
</tr>
<tr>
<td>Create rights</td>
<td>Scope of possibility to create items.</td>
</tr>
<tr>
<td>Update rights</td>
<td>Scope of updatable items.</td>
</tr>
<tr>
<td>Delete rights</td>
<td>Scope of deletable items.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that access mode is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the access mode.</td>
</tr>
</tbody>
</table>

* Required field
17.3 Access to forms

This screen allows to define screen access for each profile. Users belonging to a profile can see the corresponding screen in the menu.

How to do

- Screens are grouped as seen in the menu.
- Click on checkbox to permit or revoke access to the screen for a profile.

![Access to forms screen](image)

17.4 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.

How to do

- Reports are grouped by report categories.
- Click on checkbox to permit or revoke access to the report for a profile.

![Access to reports screen](image)
17.5 Access to data (project dependant)

This screen allows to set element access mode for each profile. Allows to define scope of visibility and updating of data in elements for users and resources. This screen is only for the elements reliant on a project.

How to do

• For each element, selected the access mode granted to a profile.

Fig. 17.3: Access to data (Project dependant) screen

17.6 Access to data (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.

How to do

• For each element, select the access rights granted to a profile.

Fig. 17.4: Access to data (Not project dependant) screen

17.7 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.

**How to do**

- For each option, select the access granted to a profile.

![Specific access screen](image)

**Fig. 17.5: Specific access screen**

### Section: Real work allocation and Diary

This section allows to:

- Defines who will be able to see and update “real work” for other users.
- Defines who can validate weekly work for resource.
- Defines who have access on diary for resources.

**Note:** Validate real work

- In most cases, it is devoted to project leader.

### Section: Work and Cost visibility

- This section defines for each profile the scope of visibility of work and cost data.

### Section: Assignment management

- This section defines the visibility and the possibility to edit assignments (on activities or else).

### Section: Display specific buttons

- This section defines whether some button will be displayed or not.

  **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).
Access to checklist

- Defines visibility or not to the checklist (if defined).

Section: Planning access rights

- This section defines access to planning functionality.
  
  **Calculate planning**
  - This option defines for each profile the ability to calculate planning or not.

  **Access to resource planning of others**
  - This option defines for each profile the ability to see the resource planning of others.

Section: 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.

Section: Reports

- This section defines for each profile the ability to change the resource parameter in reports.

Section: Specific update rights

- Defines for each profile the ability to force delete items.
- Defines for each profile the ability to update creation information.
17.8 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 [], 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”.
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.

### 18.1 Functions

The function defines the generic competency of a resource.

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of this value.</td>
</tr>
</tbody>
</table>

* Required field
18.2 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: Workflows.

Handled status
- This status specifies that the treatment of item is taken over.
- A responsible can be determined.
- It is possible to require the appointment of a responsible when the status change to “handled”.

Done status
- This status specifies that the treatment of item is done.
- A result can be specify.
- It is possible to require a result when the status change to “done”.

Closed status
- This status specifies that the item is closed.
- This item is archived, and it disappeared in the list.
- Item can reappear when “show closed item” is checked.

Cancelled status
- This status specifies that the item is cancelled.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Handled status</td>
<td>Defines whether ‘handled’ flag is automatically set for this status.</td>
</tr>
<tr>
<td>Done status</td>
<td>Defines whether ‘done’ flag is automatically set for this status.</td>
</tr>
<tr>
<td>Closed status</td>
<td>Defines whether ‘closed’ flag is automatically set for this status.</td>
</tr>
<tr>
<td>Cancelled status</td>
<td>Defines whether ‘cancelled’ flag is automatically set for this status.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the status in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

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 “handled” status, all parents move to the first “handled” 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.
18.3 Resolutions

Allows to define different kinds of resolution for tickets.

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Solved</td>
<td>Box checked indicates the ticket will be automatically marked as “solved” when this resolution is selected.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the resolution in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.4 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the quality level in element lists and on today screen.</td>
</tr>
<tr>
<td>Icon</td>
<td>Icon that can be displayed for this quality level.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

**Field: Icon**

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).
18.5 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the health status in element lists and on today screen.</td>
</tr>
<tr>
<td>Icon</td>
<td>Icon that can be displayed for this health status.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

Field: Icon

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

18.6 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field
18.7 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the trend in element lists and on today screen.</td>
</tr>
<tr>
<td>Icon</td>
<td>Icon that can be displayed for this trend.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

Field: Icon

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

18.8 Likelihoods

The likelihood is the probability of a risk or an opportunity to occur.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of likelihood.</td>
</tr>
<tr>
<td>% value</td>
<td>Value in percent.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the likelihood in element lists</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

Field: % value

- This field is used to calculate a reserve amount according to the likelihood of risk or opportunity.
18.9 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of criticality.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the criticality in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.10 Severities

The severity designs the level of negative or positive impact the risk or opportunity may have for the product.

#### Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of severity.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the severity in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field
18.11 Urgencies

The ticket urgency is an element given by the requestor to indicate the quickness of treatment needed for the ticket.

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of urgency.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the urgency in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.12 Priorities

The ticket priority defines the order to treat different tickets.

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of priority.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the priority in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field
18.13 Risk levels

The risk level measures the technical risk of implementation of a requirement.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the risk level in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.14 Feasibilities

The feasibility defines the first analysis of implementation of a requirement.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this status.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this status.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the feasibility in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this status is archived.</td>
</tr>
</tbody>
</table>

* Required field
18.15 Efficiencies

The efficiency measures the result of an action.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the efficiency in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.16 Payment deadlines

The payment deadline is stated on the bill.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Number of days</td>
<td>Delay in payment (in days).</td>
</tr>
<tr>
<td>End of month</td>
<td>Flag to indicate that delay for payment is set at the end of month.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field
18.17 Payment methods

The mode of payment.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.18 Delivery modes

The mode of delivery.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field
18.19 Measure units

The measure units.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Plural of name</td>
<td>Plural form of name.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.20 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the status in element lists.</td>
</tr>
<tr>
<td>Waiting tender</td>
<td>Status information.</td>
</tr>
<tr>
<td>Tender received</td>
<td>status information.</td>
</tr>
<tr>
<td>Tender not selected</td>
<td>status information.</td>
</tr>
<tr>
<td>Tender selected</td>
<td>status information.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.21 Categories of project

Define your categories of project and you are able to select one in Project screen.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field
18.22 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of incoming weights.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the incoming weights in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.23 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of deliverable weights.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the deliverable weights in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.24 Incoming status

Define your incoming status list and select it in Incoming screen.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of incoming status.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the incoming status in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field
18.25 Deliverable status

Define your deliverable status list and select it in Deliverable screen.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of deliverable status.</td>
</tr>
<tr>
<td>Color</td>
<td>Color to display the deliverable status in element lists.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field

18.26 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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for this value.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of this value.</td>
</tr>
<tr>
<td>Value</td>
<td>Value of deliverable status.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

* Required field
Lists of types

Every element is linked to a type, defining some mandatory data or other GUI behavior.
19.1 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, the global parameter “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**

1. Click on “Restrict types” button to display the dialog box.
2. For each element type, select values that will be in the list of values.

![Restrict types dialog box](image)

Displays element type names where a restriction is applied

![Types restrictions](image)
19.2 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** : Operational project

- Most common project to follow activity.

---

**ADM** : Administrative project

- Type of project to follow non productive work: holidays, sickness, training, . . .
- Every resource will be able to enter some real work on such 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.

**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 can copy such projects, without having to be allocated to them.

---

**Other sections**

- *Behavior*
- *Types restrictions*

---

**Section: Description**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the project type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Billing type</td>
<td>Will define billing behavior (see: Billing types).</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.3 Tickets types

Ticket type is a way to define common behavior on group of tickets.

Other sections
- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.4 Activities types

Activity type is a way to define common behavior on group of activities.

Other sections
- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Default planning mode</td>
<td>Default planning mode for type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.5 Milestones types

Milestone type is a way to define common behavior on group of milestones.

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Default planning mode</td>
<td>Default planning mode for type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.6 Quotations types

Quotation type is a way to define the way the concerned activity should be billed.

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.7 Orders types

Order type is a way to define the way the activity references by the order will be billed.

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.8 Individual expenses types

Individual expense type is a way to define common behavior on group of individual expense.

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.9 Project expenses types

Project expense type is a way to define common behavior on group of project expense.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.10 Expenses details types

Expense detail type is a way to define common behavior and calculation mode on group of expense details.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Value / unit</td>
<td>Define calculation mode for the detail type.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

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.

Section: Scope

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual expense</td>
<td>Details type of individual expense.</td>
</tr>
<tr>
<td>Project expense</td>
<td>Details type of project expense.</td>
</tr>
</tbody>
</table>
19.11 Bills types

Bill type is a way to define common behavior on group of bills.

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.12 Payments types

Payment type is a way to define common behavior on group of payments.

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.13 Risks types

Risk type is a way to define common behavior on group of risks.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.14 Opportunities types

Opportunity type is a way to define common behavior on group of opportunities.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.15 Actions types

Action type is a way to define common behavior on group of actions.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.16 Issues types

Issue type is a way to define common behavior on group of issues.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.17 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

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.18 Decisions types

Decision type is a way to define common behavior on group of decisions.

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.19 Questions types

Question type is a way to define common behavior on group of questions.

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.20 Messages types

Message type is a way to define common behavior on group of messages (appearing on today screen).

Other sections

• Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Color</td>
<td>Display color for messages of this type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.21 Documents types

Document type is a way to define common behavior on group of documents.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.22 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)

Note:

- Only the name of the context types can be changed.
- No new context type can be added.
- No context type can be deleted.

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.23 Requirements types

Requirement type is a way to define common behavior on group of requirements.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.24 Test cases types

Test case type is a way to define common behavior on group of test cases.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.25 Test sessions types

Test session type is a way to define common behavior on group of test sessions.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflows).</td>
</tr>
<tr>
<td>Default planning mode</td>
<td>Default planning mode for type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.26 Customers types

Customer type is a way to define different kinds of customers (prospects or clients).

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.27 Providers types

Provider type is a way to define different kinds of providers.
Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.28 Products types

Product type is a way to define common behavior to group of product.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field

19.29 Components types

Component type is a way to define common behavior to group of component.

Other sections

- Behavior

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the type.</td>
</tr>
<tr>
<td>Code</td>
<td>Code of the type.</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

* Required field
19.30 Behavior section

This section is common to several element types.
Allows to determine some GUI behavior, according to element types.

Note:

- Depending on the element type the following fields can be displayed.

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 “handled”.

Result

- Box checked indicates the field “Result” is mandatory when the status to treatment of the item is “done”.

Flag status

- Fields: Lock handled, Lock done, Lock closed and Lock cancelled
- Those fields allow to determine whether the checkbox fields concerned are locked or not.
- When a flag status is locked, move to this status through status change.

19.30.1 Ticket type

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.
CHAPTER 20

Plug-ins

20.1 Plug-ins management

Plug-ins allows to add non generic features to ProjeQtOr.

Plug-in deployment

• Plug-in will be deployed during installation.
• The result of deployment will be available in the log file (See: Administration console).

Section: Installed plug-ins

This section lists the installed plug-ins.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Plug-in name.</td>
</tr>
<tr>
<td>Description</td>
<td>Plug-in description.</td>
</tr>
<tr>
<td>Version</td>
<td>Plug-in version.</td>
</tr>
<tr>
<td>Deployed date</td>
<td>Deployed date.</td>
</tr>
<tr>
<td>Deployed on</td>
<td>The version when the module has been installed.</td>
</tr>
<tr>
<td>Compatible since</td>
<td>Compatibility version.</td>
</tr>
</tbody>
</table>
Section: Available plug-ins (local)

This section allows to manage local plug-ins.

Available plug-ins list

- The button allows to select plug-in file.
- The file will be uploaded and it will be added in plugin-ins list.

Table 20.2: Detail of available plug-ins list

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
<td>Plug-in file name.</td>
</tr>
<tr>
<td>Date</td>
<td>File date.</td>
</tr>
<tr>
<td>Size</td>
<td>File size.</td>
</tr>
</tbody>
</table>

Plug-in installation

- Click on 🔄 to install plug-in.
- Click on 📈 to display the description of plug-in.

Note:

- Plug-in is removed from the list after installation.

Section: Available plug-ins (remote)

This section allows to manage remote plug-ins.

Note:

- This feature will be available later.
21.1 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.

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Current project</td>
</tr>
<tr>
<td>- Linked element</td>
</tr>
<tr>
<td>- Attachments</td>
</tr>
<tr>
<td>- Notes</td>
</tr>
</tbody>
</table>

Section: Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the Organization.</td>
</tr>
<tr>
<td>Name</td>
<td>Short name of the Organization.</td>
</tr>
<tr>
<td>Organization type</td>
<td>Type of organization.</td>
</tr>
<tr>
<td>Manager</td>
<td>Manager of organization.</td>
</tr>
<tr>
<td>Hierarchy</td>
<td>list of parents organizations.</td>
</tr>
<tr>
<td>Parent organization</td>
<td>parent organization.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the organization is archived.</td>
</tr>
</tbody>
</table>

* Required field
CHAPTER 22

Administration

Note:

• The screens described below are restricted to users with administrator profile.
• Users with others profiles can have access whether access rights is granted.

22.1 Administration console

Administration console allows to execute administration tasks on application.

Section: Background tasks

• Allows to start and stop background task is a specific threaded treatment that regularly checks for indicators to generate corresponding alerts, warnings and automatic import when needed.

Section: Send an internal alert

• Allows to send an internal alert to users.

Section: Manage connections

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

  Button: Disconnect all users

  • Allows to disconnect all connected users except your own connection.
  • The application status is displayed below.

Note:
• Disconnection will be effective for each user when his browser will check 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.

**Button: Open/Close application**

• Allows to open and close application.
• When the application is closed the message below will appear on login screen.

**Section: 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.

**Section: Log files maintenance**

• The administrator has the possibility to:
  – Delete old log files.
  – Show the list and specific log file.

### 22.2 Audit connections

• Audit connection proposes a view of “who is online”.

**Note:**

• The administrator has the possibility to force the disconnection of any user (except his own current connection), see: *Administration console*.
22.3 Global parameters

Global parameters screen allows configuration of application settings.

**Note:** Tooltip

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

**Section: Daily work hours**

- Definition of regular “work hours”.
- Used to calculate delays based on “open hours”.

**Section: 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.

**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.

**Section: Units for work**

- The parameters to real work allocation and workload.

  **Fields: Unit for real work allocation and for all work data**
  - Definition of the unit can be in days or hours.

**Note:**
- 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.

**Number of hours per day**

- Allows to set number of hours per day.

**Section: Planning**

- Specific parameters about Gantt planning presentation.

  **Show resource in Gantt**
  - Select if the resource can be displayed in a Gantt chart, and format for display (name or initials).

  **Max projects to display**
• Defines maximum number of projects to display.
  • To avoid performance issues.

**Print Gantt with ‘old style’ format**
• Propose possibility to display “old style” Gantt.
• May cause performance issues, but could fix some display issue on browsers.

**Consolidate validated work & cost**
• Select if validated work & cost are consolidated on top activities and projects:
  – **Never**: Not consolidate
  – **Always**: Values are replaced on activities and project.
  – **Only is set**: Replaces values, only if not already set.

**Apply strict mode for dependencies**
• Defines if a task can begin the same day as the preceding one.

---

### Section: Generation of alerts if real work is not entered

• Specific parameters about alerts.

**Send reminder on**
• Select a day if you want send a reminder.

---

**Note:**
– It is possible to choose every day or never.

**Send reminder at**
• Select the hour when you want receive the reminder.

**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

---

**Note:**
– 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.

**Send alert to resource**
• Select how send alert to ressource, Internal alert, email, both or none.

**Send alert to project leader**
• Select how send alert to project leader

**Send alert to team manager**
• Select how send alert to team manager
Section: Real work allocation

- Defines behavior of tasks in the real work allocation screen.

  Display only handled tasks
  - Display only tasks with “handled” status.

  Set to first ‘handled’ status
  - Change status of the task to the first “handled” status when real 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.

---

Note:
- 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.

---

Note:
- this parameter does not apply to administrative projects

Alert resource on input done by someone else
- Select your type of alert : Internal, Email, both or none.

Section: Responsible

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

  Auto set responsible if single resource
  - Automatically set responsible if not set and only one resource if allocated to the project.

  Auto set responsible if needed
  - Automatically set responsible to current resource if not set and the responsible is required (depending on status).

  Only responsible works on ticket
  - Only responsible can enter some real work on the ticket.

Section: User and password

- Security constraints about users and passwords.

Section: Ldap management parameters

- Information about LDAP connection and behavior on creation of new user from LDAP connection.
Section: Format for reference numbering

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

  Global parameters for reference formatting
  - Prefix : can contain {PROJ} for project code, {TYPE} for type code, {YEAR} for current year and {MONTH} for current month.

  Global parameters for document reference formatting
  - format : can contain {PROJ} for project code, {TYPE} for type code, {NUM} for number as computed for reference, and {NAME} for document name.
  - Suffix : can contain {VERS} for version name.

Section: Localization

- Localization and internationalization (i18n) parameters.

Section: Miscellaneous

Miscellaneous parameters :
- Auto check (or not) for existing new version of the tool (only administrator is informed);
- Separator for CSV files (on export and export);
- Memory limit for PDF generation.

Section: Display

- Selection of graphic interface behavior and generic display parameter for users.
  - Icon size are default : user can overwrite these values

Section: Files and Directories

Definition of directories and other parameters used for Files management.

Warning: Attachments Directory
Should be set out of web reach.

Warning: Temporary directory for reports
Must be kept in web reach.

Section: Document

Definition of directories and other parameters used for Documents management.
**Warning:** Root directory for documents
Should be set out of web reach.

---

**Section: 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.

**Warning:** Cron working directory
Should be set out of web reach.

**Warning:** Directory of automated integration files
Should must be set out of web reach.

**Defined parameters for the “Reply to” process**

- It will manage connection to IMAP INBOX to retrieve email answers.

**Note:** Email input check cron delay
- Delay of -1 deactivates this functionality.

**Note:** IMAP host
- Must be an IMAP connection string.
- Ex: to connect to GMAIL input box, host must be: {imap.gmail.com:993/imap/ssl}INBOX

---

**Automatic import**

**Field:** Automatic import cron delay

-
Field: Directory of automated integration files

Field: Log destination

Field: Mailing list for logs

Section: Emailing

Parameters to allow the application to send emails.

Section: SSL connection to database

- 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.

Section: Mail titles

- Parameters to define title of email depending on event (1).

(see: *Special fields*)
22.3.1 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
- `${contractCode}`: the contract code of project
- `${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
Activity Stream
23.1 Activity Stream

This screen is devoted to display notes.
To default you will see all visible notes for each items.
There are filters to refine the search.

Note:

- Click on ✅ to hide note comment.
- Click on 🔴 to display note comment.
23.2 Chat

Display of notes on right part of screen.
The chat displays notes on the selected item.
Possibility to quickly add note, write your text and press ‘Enter’ key.
You can change the visibility of the note if you click on the bottom right corner.

- Click on [ ] to hide or display the chat.

![Activity Stream]

```
admin added the note #2 in Ticket #2
05/01/2014 16:32:53

admin added the note #3 in Ticket #2
16/08/2017 16:51:33
```

Enter your text here
24.1 Glossary

Closed

- Flag to indicate that item is archived.
- Item will not appear in lists any more, unless “show closed” is checked.

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

- Flag to indicate that item has been done.
- Date of done is saved.

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 guide.

Handled

- 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).
• 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 an numbering specific for each project and each type of items.

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.

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: Workflows.

See also:
Accelerator button
• This button allows to skip to the next status.
• More detail, see: Move to next status button.

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.
• More detail, see: Behavior section.

WBS

• Work Breakdown Structure.
• Hierarchical position of the element in the global planning.