ProjeQtOr is an open source project management software that combines in one tool all the functionalities needed to organize your projects. It is simple, easy to use and covers a maximum of project management features. Its particularity, in addition to its completeness, is to be oriented towards quality. This means you can record all the events of your projects and thus simplify compliance with leading standards in quality management, be they ISO, CMMI, ITIL or other.
Find in this manual, every 3 months, the latest features integrated into ProjeQtOr.

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

**Do not start project before Validated Start Date**

When this global parameter is activated, Projects with validated start date will not be planned before this date.

*Do not start... Dates and duration*

**Improvement of Todo lists**

Better display, input large values in textarea, auto-set responsible of todo-item from responsible of item.

*Todo list*

**Access rights management for document**

Define access rights per profile for each document directory.

*Directory access rights*

**Translation**

New functionality to request a translation for a text with translators with skill levels.

translation
ProjeQtOr is a “Quality based Project Organizer”.
It is particularly well suited to IT projects, but can manage any type of project.
It offers all the features needed to different Project Management actors under a unique collaborative interface.
1.1 Features

ProjeQtOr is a “Quality based Project Organizer”.
It is particularly well suited to IT projects, but can manage any type of project.

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

1.1.1 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.
- To show it again, select it as the start page in users parameters screen or session menu.

1.1.2 Planning management

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

Multiple Access

Users can edit the same item (if they get the right to do it) at the same time, without disturbing each other, as long as they do not change the same fields.
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.
Projects and sub-projects appear on the Gantt Planning view.

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.

Milestones

A milestone is an event or a key date of the project.
Milestones are commonly used to track delivery dates or force a start date of activity.
They can also be used to highlight the transition from one phase to the next one.
Unlike activities, milestones have no duration and no work.
But on ProjeQtOr, you can specify deadlines (positive or negative) to apply to your milestones
See: Milestones

Resources

Resources can be assigned to activities.
This means that some work is defined on this activity for the resource.
Only the resources allocated to the project of the activity can be assigned to the activity.

Real work allocation

Resources enter their time spent on the Real work allocation screen in their timesheet.
This allows for a real-time monitoring of work.
Moreover, updating the left work allows to recalculate the planning taking into account the actual progress on each task.

Planning

The planning is based on all the constraints defined:
• left work on each activity
• availability of resources
• rate of resource allocation to projects

1.1. Features
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.

### Global Planning

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

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

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

### Resource Planning

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

### More details

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

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

Resources

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

A resource can also be a group of persons (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 working and non-working days, for resources with reduced working hours or with a different rhythm from the French calendar, for public holidays or holidays, you have configurable calendars.

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

• you can create a ‘80% ’calendar with every Wednesday closing day, for example.

• you can manage separate vacations when working with international teams.

• 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.
• Pool of Resources
• CommonSections
1.1.4 Tickets management

ProjeQtOr offers a Ticketing environment.
With its bug tracking to monitor incidents on your projects, you with the ability to include work on scheduled 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 progress to describe (and possibly provide) a result.
For example, bugs or problems can be managed through Tickets:

• You can not program bugs before they are identified and saved
• You must be able to give a solution to a bug (workaround or solution).
• You can schedule deadlines, estimate the load, assign coordinators and / or manager.
• It is possible to attach external documents, to link other elements (requirements, test sessions, actions...),
  to leave notes

Simple tickets

Simple tickets are just simplified representations of Tickets for users that will “create” tickets but not “treat” them.
Elements created as simple tickets are also visible as Tickets, and vice versa.

more details

• Tickets
• Tickets dashboard
1.1.5 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),
- Invoicing Terms
- Bills.

more details

- Expenses
- Incomes
- Client invoices
- Financial Gallery
1.1.6 Quality management

The specificity of ProjeQtOr is that it is Quality Oriented: it integrates the best practices that can help you meet the quality requirements on your projects. This way, the approval stage of your Quality Systems are eased, whatever the reference (ISO, CMMI, ...).

Workflows

Workflows are defined to monitor changes of possible status. This allows, among other things, to restrict certain profiles from changing some status. You can, for instance, limit the change to a validation status to a given profile, to ensure that only an authorized user will perform this validation.

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

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

1.1. Features
1.1.7 Risks management

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

Risks

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

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

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

Opportunities

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

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

Issues

Issue is a risk that happens during the project.

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

Actions

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

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

More details

- Risks
1.1.8 Perimeter management

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

Meetings

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

Periodic meetings

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

Decisions

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

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

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

Questions

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

Product and Version

ProjeQtOr includes Product management and Product Versions.

Each version can be connected to one or more projects.

This allows you to link your activities to target version.

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

More details

- concept
- common-sections
- type-restriction-section
- Meetings
1.1.9 Documents management

ProjeQtOr offers integrated Document Management. This tool is simple and efficient to manage your project and product documents. ProjeQtOr support only digital document. A document will be stored in the tool as versions. Document can be versioning and an approver process can be defined.

Directories structure management

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

Document management

• Document screen allows to manage documents.

Document access

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

More details

• Documents

• Document directories

14 Chapter 1. Features
1.1.10 Commitments management

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

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

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

Requirements

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

Test cases

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

Test sessions

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

More details

- Requirements
- Requirements dashboard
1.1.11 Asset Management

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

Licenses

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

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

Equipment

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

But also the suppliers and the locations of this equipment.

More details

- Module Management
- Requirements dashboard
1.1.12 Humans Resources

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

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

Humans Resources Sections

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

Variable capacity

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

More details

- *humans resources*

1.1.13 Tools

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

Imports

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

CSV and PDF exports

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

The details of each item can be printed or exported in PDF format.
MS-Project export

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

Alerts

Internal alerts can be generated automatically based on defined events.

Emails

These alerts can also be dispatched as emails.
It is also possible to manually send emails from the application, attaching the details of an item.
It is also possible to retrieve answers to this type of email to save the message in the notes of the relevant item.

Administration

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

CRON

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

More details

• Tools
• Administration

1.2 Activity Stream

The Activity stream allows you to display certain information about each of the elements of ProjeQtOr.
It is a kind of light history which allows you to quickly see the information of creation, deletion, changes of state of the element or the comments left by users according to their right of visibility.
The screen dedicated to the Activity Stream allows you to view all the feeds.

Filter system
This filter allows you to restrict the display by . . .
• Type of element
• Its id
• Author
• Team
• Periods
• With or not option: closed item, only notes
You can also select the amount of information to display and restrict the list to the screen.

**Elements displayed**

We can see on this summary several elements:

- The element and its ID
- The name given to this element
- The creator of change
- The date and the hour of the change
- The name of the person responsible for the change
- The type of creation, change or deletion that was carried out
- The ID number into the history

**Activity Stream on element screen**

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

The items displayed depend on your visibility rights.
Fig. 5: Activity stream on the screen of a Project element

Activity stream zone

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

Activity stream information

Fig. 6: Activity stream details

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

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

Icon for type of information

- Note/Comment
- Creation
- Change of state
Email sending

Add a note

You can add a note simply by clicking in the text box at the bottom of the activity stream area. By default, your note is visible to all users assigned to the project linked to the item.

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

Show/Hide notes

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

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

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

- Click on Show only notes on activity feed to display only notes type information.
1.3 Global view

Fig. 7: Global view screen

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

You can also choose to display only certain items through the list to display
Create a new item

- Action
- Activity
- Decision
- Deliverable
- Delivery
- Incoming
- Issues
- Meeting
- Milestone
- Opportunity
- Project
- Question
- Requirement
- Risk
- Test case
- Test session
- Ticket

Fig. 8: Display one or more items
This chapter defines the concepts of ProjeQtOr. They can be referred in the following chapters.

## 2.1 Concepts

### 2.1.1 Project

A project is the main entity of ProjeQtOr. Project element is more than a *Planning elements*.

**Gather all project data**

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

- Planning element
- Risk assessment, Risk mitigation, Reserve
- Ticket, Issue, Bug tracking, Change request, Support
- Steering, 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 also:*

*Profiles definition and Allocation to project*
Project selector

The project selector works as a filter.

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

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

See also:

Top bar and User parameters

The project type

Three project types can be defined:

1 - Operational project

Most common project to follow activity.

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

2 - Administrative project

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

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

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

3 - Template project

Designed to define templates, to be copied as operational project.

Any project manager can copy these projects without having to be assigned to them. On the other hand they will not be able to modify it and will have to copy the project in OPE for that.

For modifying a template project, the modifier must be assigned to the project.

See: Copy an item

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

Which is associated to a project. See: Project

Define billable project

A project can be billable or not.

Non billable project

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

Billable project

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

The actual work done and billed is locked

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

Which is associated to a project. See: Project

Chapter 2. Concepts
Warning: When deleting a project, also delete the indicators, Emails and Delays for the tickets of this project.

**Hat project**

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

![Project type Behavior](image)

**Fix the planning**

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

Concepts

- Profiles definition
- Stakeholder definition

Allocation to project is used to:

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

Table 1: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id of the resource.</td>
</tr>
<tr>
<td>Resource</td>
<td>Resource name.</td>
</tr>
<tr>
<td>Or contact</td>
<td>Contact name.</td>
</tr>
<tr>
<td>Or user</td>
<td>User name.</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>

Allocation behavior

Example 1

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

Example 2

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

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

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

**User allocation**

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

**Profile selection**

The selected profile allows you to define the rights on all the elements of the project.
The profile displayed first will be the default
The profile given to an assignment for a user / resource / contact may be different on each project
These rights are applied only on the said project

**Note:** Profile defined in allocation to project does not grant or revoke access to users.
General access to application functionalities and data is defined by user profile.

**Period selection**

Allows you to define the visibility period of the project data.
Can be used to limit the access period, in accordance with the service agreement.
Resource allocation to project

Allocation to project allows to define the resource availability on project.
A resource may be allocated to projects at a specified rate for a period.
Allocation to project can be defined in Project and Resources screens.
You can also allocate a team or an organization to a project in Teams and Organization screens.

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

Period & Rate selection

A resource may be allocated to a project or assigned to a task at a specified rate for a period.
This rate is used to keep some scheduling time for other tasks.
For instance, if rate is 50%, the resource will not be planned more than half days on the task.
If the period is not specified then the resource is allocated throughout the project.

Warning: The planning calculator tries to plan, the remaining work on the task assigned to a resource within the allocation to project period.
If remaining work on the task can’t be planned, a purple bar appears in the Gantt view.

Change resource on an allocation to project

A resource can be changed on allocation to project.
All tasks assigned to old resource will be transferred to the new resource with planned work and remaining work.
Work done on tasks belongs to always the old resource.

Multi-allocation to project

A resource can be allocated to multiple projects in the same period.
Make sure that the allocation to projects for a period not exceeding 100%.
In the section Allocations in Resources screen, a tool allows to displayed conflicts.

Tip: How resolve conflicts?
You can change allocation period to avoid overlap between projects.
You can change the rate of allocation for it does not exceed 100% for the period.

Contact allocation to project

A contact allocated to a project can be defined as requestor.
Allocation to project can be defined in Project and Contacts screens.
2.1.2 Activity

An activity is a kind of task that can be planned or that groups other activities. This is usually a long-term task that can be assigned to one or more resources. Activities will appear on the Gantt schedule view. For example, you might consider an activity:

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

Activities can be grouped as a Mother / Daughter link. The parent activity must belong to the same project.

A WBS structure is applied and a dynamic index is calculated for all activities. The WBS Activity Index can be changed in the Gantt schedule view using drag and drop.

**Planning Activity**

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

This option allows you to assign a time pool that will be scheduled and to link tickets to this tank. The time spent on tickets will then be decremented to that of the planning activity.

See: *Planning activity*
Assignment

The assignment is used to assign resources to project tasks (activity, test session, meeting).
Consists to assign a resource to a task in a specific function. The function allows to define the resource daily cost.
A resource assignment contains data about work on task (planned, real, left and reassessed work).
Basic, you cannot delete a resource assignment after the resource has entered actual work on the activity.
This assignment can be deleted by a profile including the option “Can delete items with real work” in the access rights menu in the specific access.
Similarly, if the resource has completed its activity, deletion is not possible.
You keep track of the resources that have been assigned and worked on the activity.

Note: Only resources allocated by the project can be assigned to project tasks.
Assignment can be done in Activity, Test sessions and Meetings screens.
2.1.3 Organization

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

Fig. 2: distribution within organizations

Organization link

Each project can be linked to an organization.

Resources can be linked to an organization.

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

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

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

Composition of product

A product can have a complex structure that can be composed of sub-product and components. A product and its components can have several versions that represent each declination.

See: Product structure

Linked to a project

A product is an element delivered by a project. The link with the project have no impact on project planning. Indicates only that project is devoted to a specific product versions. The link management is done in Project and Product Versions screens.

Identifying the version that is the subject of treatment

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

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

The purpose is to identify which product (component) and its version that is the subject of the treatment. Depending on the element, it has the possibility identifying version of origin, target version or both.

Document management

Documents can be identified to products.

See: Documents

Management of product and component elements

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

The product structure is defined depending on the relationships defined between product and component elements. The rules defining a product structure are:

**Relationships between product elements**
- A product can have several sub-products.
- A sub-product can be in the composition only one product.

![Fig. 4: Relationships between product elements](image)

**Relationships between product and component elements**
- A product can be composed of several components.
- A component can be in the composition of several products.

![Fig. 5: Relationships between product and component elements](image)

**Relationships between component elements**
Components can be linked between them (N to N relationships).

![Fig. 6: Relationships between component elements](image)

**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.
2.1.5 Planning

ProjeQtOr implements work-driven planning method.
Based upon resource availability and their capacity.

Resource availability

Resource availability is defined by calendars and project allocation period.

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

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

Resource capacity

Resource capacity is defined on daily base.
The scheduling tool does not exceed the daily resource capacity.

**Note:** Full Time Equivalent (FTE)
- This indicator is defined for each resource.
- It allows to define the daily capacity.
- More detail, see: 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.

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...
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: Project

Sub-project

Sub-project is used to split the project.

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

Note: Separation of duties

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

![Separation of duties](image)

Activity

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

An activity can grouped other activities or be a task.

More detail, see: Activity screen

Grouping of activities

- An activity can be the parent of activities.
- This allows to define the structure of phases and deliveries.
- Dates, works and costs of activities (child) are summarized in the activity (parent).
Task

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

Test session

This planning element is a specialized activity aimed for tests. A test session allows to define a set of test case that must be run. A test session can grouped other test sessions or be a task. More detail, see: Test sessions screen.

Grouping of test sessions

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

Task

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

Milestone

This planning element is a flag in the planning, to point out key dates. May be a transition point between phases, deliveries. ProjeQtOr offers two types of milestone floating and fixed. More detail, see: Milestone screen.

Meeting

This planning element acts like a fixed milestone, but it’s a task. Like a milestone, a meeting can be a transition point. But also, like a task because it’s possible to assign resources and planned work. More detail, see: Meetings screen.
Role of an dependency

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

All planning elements can be linked to others.

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

Note: Global parameter “Apply strict mode for dependencies”

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

Dependency types

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

  ▶️ Start to Start

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

  ▶️ Start to Finish

  This dependency type can’t be reproduced in ProjeQtOr.
  This is a very weird scenario.

  ▶️ Finish to Finish

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

  Anyway, the successor can end before the predecessor. Note that the successor “should” not end after the end of predecessor, but in some cases this will not be respected:
  - if the resource is already 100% used until the end of the successor
  - if the successor has another predecessor of type “End-Start” or “Start-Start” and the remaining time is not enough to complete the task
  - if the delay from the planning start date does not allow to complete the task.

Delay (days)

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

Planning mode

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

Milestones planning mode

Planning modes are grouped under two types for milestone:

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

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

See also:
Activity and Test session planning modes and Milestone planning modes.

Planning element planning mode

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

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

Prioritized planning elements

Planning elements are scheduled in this order of priority:
1. Manual planning
2. Fixed date (Fixed milestone, Meeting)
3. Recurrent activities - Planning modes “Regular…” (Activity, Test session)
4. Fixed duration (Activity, Test session)
5. Others

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

Default planning mode

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

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

The planning priority allows to define planning order among planning elements. Possible values: from 1 (highest priority) to 999 (lowest priority). Planning priority value is set in progress section of planning element.

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

**Project structure**

Work breakdown structure (WBS) is used to define project structure. Breakdown can be done with sub-projects, activities and test sessions.

**Structure management**

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

**WBS element numbering**

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

**Project planning calculation**

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

**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.
2.1.6 ProjeQtOr roles

A stakeholder can play many roles in ProjeQtOr. Roles depend on Stakeholder definition.
Specific roles are defined to allow:

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

Use to

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

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

**Workflow definition**

The profile is used to define who can change from one status to another one. You can restrict or allow the state transition to another one according to the profile. Workflow definition is managed in Workflow screen.

**Predefined profiles**

ProjeQtOr offer some predefined profiles.

**Administrator profile**

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

**Supervisor profile**

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

**Project leader profile**

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

**Project member profile**

- A project member is working on projects allocated to it.
- The user linked to this profile is a member of team projects.

**Project guest profile**

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

Predefined profiles (External)

ProjeQtOr allow to involve client employees in their projects.

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

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

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

These combinations are used to define:

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

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

The next matrix shows the different possibilities.

<table>
<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>

Data visibility

![Diagram of data visibility](image)

Fig. 9: Data visibility diagram
User profile

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

All projects

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

Own projects

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

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.
Shared data

For a stakeholder, data on user, resource and contact are shared. Allocation to project and user profile are also shared.

**Note:** For a stakeholder, you can define and redefine the combination without losing data.
2.1.9 Resource function and cost

**Function**

The function defines the generic competency of a resource. It is used to define the role play by the resource on tasks. In real work allocation screen, the function name will be displayed in the real work entry. A main function must be defined to resource and it is used as default function. A daily cost can be defined for each function of the resource. The *Functions* screen allows to manage function list.

**Resource cost definition**

Allows to define the daily cost, according to the functions of the resource. The daily cost is defined for a specific period.

**Real cost calculation**

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

**Planned cost calculation**

When the project planning is calculated, resource cost is used to calculate planned cost. Planned cost is calculated with planned work of the day and current daily cost.

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

A calendar defines the working days in a the year.
A calendar is defined for a type of resources and each resource is attached to a calendar.

Planning process

Calendars are used in the planning process which dispatches work on every working day.
During the planning process, the assigned work to a resource is planned in its working days.

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

Shows the availability of resources

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

Default calendar

The default calendar is used to define the working days in the year.
By default, this calendar is defined for all resources.

Specific calendar

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

Note: A calendar is set in Resources screen.
The calendar is defined in Calendars screen.

Use case

Public holiday
You can use the default calendar to set public holidays.

Work schedule
You can define a different work schedule to some resources.
This calendar defined exceptions to normal working days.
For instance, you can define a calendar for resources on leave on Wednesdays.

Important: Personal calendar
Even if you can create a specific calendar to each resource, this is not the advised way to manage personal days off and vacations.
You’d better use Administrative projects (enter real work in advance).
2.1.11 Contexts

The contexts defines a list of elements selectable to define ticket context and test case environment. Contexts are initially set to be able to define contexts for IT Projects, for three context types:

- Environment
- Operating System
- Browser

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

**Section Description**

<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>

**Fields Context type**

The list is fixed.

Captions are translated and so can be changed in language file.
This chapter includes ProjeQtOr features that allow you to practice agile methods.
3.1 Agile Methods

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

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

3.1.1 KanBan

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

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

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

The main objective is to balance production and demand.

With Kanban, you can create a new Kanban board for

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

Dashboard management

Interface areas:
- The Drop-down list
- Create a new table
- Create a new column
- Create a new element
- Fields restriction
- Kanban filters
- Other options

The Drop-down list
You can see the complete list of created tables by clicking on the Kanbans drop-down list in the My Kanbans section.
The icon used for kanban tables created corresponds to the type of elements selected.
You can see the shared kanban tables by others users on the shared Kanbans section.

Fig. 2: Header area

Fig. 3: List of existing kanban

• Click on \( \text{copy kanban} \) to copy this kanban
• Click on \( \text{edit kanban} \) to edit this kanban
• Click on \( \text{share kanban} \) to share this kanban
Create a new table

When using kanban for the first time, a kanban map is created for the current user.
It’s a kanban of tickets where the columns are based on the status.

• Click on to create a new Kanban

![Add a new Kanban](image)

Fig. 4: Add a new kanban table

You will need to define:

• **Name** for the new Kanban board

• **Type of item**: you can define a Kanban of Tickets, Activities, Actions or Requirements

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

• **Status**: you will manage the most standard “status based” kanban board

• **Target product version**: you can distribute the tickets among the target product version

• **Planning activity**: You will be able to send tickets among planning activities, which can be your Sprints in the Scrum method.

See also:
See **Planning activity** on the tickets screen

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

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

![Kanbans](image)

Each time you access the Kanban screen, the last selected Kanban map is displayed.
Create a new Column

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

- Click on to create a new Column

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

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

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

Fig. 5: Details header column

Each column indicates the number of elements contained in.

Click on to edit the column name.

Create a new element

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

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

Fields restriction

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

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

Advanced filters

Click the icon to set an advanced filter.

The advanced filter is used to define a clause to filter and sort for more information on advanced filters

see: Advanced filters in Graphic User Interface

Show / Hide informations

Show work on elements

You can view the work information of items on each column.
The estimated work, actual work, and work remaining information on the selected item can be displayed.

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

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

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

Show closed items

You switch to archive mode. You can view the closed elements.

Show large element

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

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

---

Hide backlog

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

The tiles then appear in a Backlog column.

You have the option to hide this column.

---

**Element management**

Find below the details of the tiles of your kanbans

Details of an element

- ID of the element with in the background the project color
- The type of the element
- The name of the element
- Status in which the tile is located in relation to your *Workflow*
- The target product version
- The planning activity or parent activity related to the element
- The description of the element
- Estimated work | Real work | Left work
Responsible of work Photo - The name is displayed on mouse over

Priority of the element - Priorities are customizable. See list of values

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

Edit the element

Go to the element screen

Edit an element

Click on \( \) to save the modification.

If a checklist is available then click on the icon to display it.

Moves an element

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

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

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

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

Forbidden moves

Displacements will change the value of the corresponding field for the moved element.
Fig. 7: Edit element window

Fig. 8: Move an element
But the “status” change must respect the workflow configuration for the given item type. This is why some movements are prohibited.

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

Updating

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

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

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

3.1.2 Live Meeting

LiveMeeting allow you to manage meetings in an agile way:

- Manage minutes of meetings quickly
- Automatically share the time between all participants
- Dynamically measure the speaking time of each participant
- Easily write minutes while assistants speak
- Easily manage actions / decisions / questions while writing minutes
- Manage tickets, activities, actions and requirements with Kanban while writing minutes.

Fig. 9: The Live Meeting button

Click this button to access the Live Meeting Management screen.

- Click on Hide time counters to show or hide participants’ tabs with their speaking time
- Click on to exit the LiveMeeting screen
- Click on to manage your kanbans since the livemeeting
- Click on to display the Questions / Actions and Decisions
Starting a meeting

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

- Click on \( \square \) to save the live meeting report

- Click on \( \square \) to start the meeting and to start decrementing the speaking time

- Click on \( \square \) To stop the meeting and therefore close the LiveMeeting window to return to the current meeting screen

- Click on \( \square \) to pause the speaker’s time

Set the organizer

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

To designate it, click twice on the hourglass \( \bigcirc \) to obtain the symbol \( \bigcirc \) on the icon.

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

Note that only one participant can be defined as an organizer.
Fig. 12: The designated organizer has a PLus on the hourglass icon of his tab

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

Speaking Time

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

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

- Click on $\begin{array}{c} \text{Stop} \\ \end{array}$ to prevent a speaker from speaking
- Click on $\begin{array}{c} \text{Resume} \\ \end{array}$ to give him the floor again

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

Write a meeting report

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

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

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

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

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

**Actions, Decisions and Actions**

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

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

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

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

There is a slight difference with related items, when you click on the name of an item, you are not redirected to it. It simply opens in a pop-up form, allowing you to update it without leaving the LiveMeeting screen.
Fig. 13: Field with the speaker’s name

Fig. 14: The meeting report is copied in the minutes field in the treatment section

Fig. 15: Actions, Decisions, Questions Management
New element
You can create, edit, or delete an action, decision, or question from the live meeting screen.

Click on + at the top right of each section to add a new element
A pop up opens and allows you to create and edit the selected element.

Fig. 16: Creating a new element

- Click on \( \checkmark \) to select an item into the list by
- Click on + to create an item
- Click on \( \leftarrow \) to undo the current manipulating and close the window
- Click on \( \text{filter} \) to restrict display

You can also create a new item directly.

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

Fig. 17: Add a new element

The line is displayed directly in the corresponding section without opening the pop up
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 similar structure and position.
4.1 User parameters

The User Settings screen allows you to configure personal settings, that is, for your personal session. The parameters are organized by tab. You can access the user parameters by going through the Configuration menu or through the connection window.

See: Menu session

Note: User parameters are efficient even without saving.

Saving parameters will retrieve the selected parameters on each connection.

4.1.1 Tab Display

Generic display parameter for user. Choose your theme - Language or size of icons… Allows you to define the display of some elements of the interface like the history, the checklists, the closed elements or the style of the notes

or choose default behaviors like closing the page or flipping mode

![Display Parameters](image)

Fig. 1: Display Parameters

4.1.2 Tab Export

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

4.1.3 Tab Automation

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

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

A photo can be defined for a user, a resource and a contact.
It is a visual identification associated with the name.
To default, the first letter of the name appear as long as you don’t add photo.

Photo management

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

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

Note:

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

Section Password

Click on Change Password to set a new one.

4.2 Global Parameters

Global parameters screen allows configuration of application settings.
depending on the modules installed, some tabs may not appear.

Tip: Good to know
Moving the mouse over the caption of a parameter will display a tooltip with more description about the parameter.

### 4.2.1 Tab Work time

#### Work time sections

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

#### Daily work hours

Definition of the working hours applied in your company. Used to calculate the time based on “hours worked”.

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

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

![Daily work hours](image)

Fig. 3: Workflow screen

#### Open days

Possibility to define the working days in the company.

For each day of the week, you can choose between open days or off days.
See: Resource section Calendars

Note: This parameter are taken into account in: working days on calendars, the working days on the calculation and the display, the working days on the display of real work allocation.

Units for work

Parameters to determine the units used to calculate the actual work

- Unit for Timesheet (real work) & Unit for Workload
- Parameters to real work allocation and workload.
- The fields Unit for real work allocation and for all work data can be in days or hours.
- Number of hours per day
- Allows to set number of hours per day.

Warning:

- If both values are different, rounding errors may occur.
- Remember that data is always stored in days.
- Duration will always be displayed in days, whatever the workload unit.

Timesheet

Defines behavior of tasks in the real work allocation screen.

- Display only started tasks
- Display only tasks with the Macro status activated.
- Set to first ‘in progress’ status
- Change the status of the task to the first “in progress” status when actual work is entered.
- Set to first ‘done’ status
- Change status of the task to the first “done” status when no left work remains.
- Max days to book work (warning):
- Number of days that user can enter real work in the future before getting a warning.
- Leave blank if you do not want warning.
- This parameter does not apply to administrative projects
- Max days to book work (blocking):
- Number of days that user can enter real work in the future. This limit is blocking.
- Leave blank if you do not want blocking.
- This parameter does not apply to administrative projects.
- Alert resource on input done by someone else
- Alert the resource when some real work is entered by someone else.
- Select your type of alert: Internal, Email, both or none.
- Alert when timesheet canceled by other
Send an alert or mail when timesheet is cancelled by another resource.
Select your type of alert: Internal, Email, both or none
Display pools on timesheet
Possibly to display the pool whose the resource belongs to.
You can manage different trigger settings per recipient

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

After submit, alert to project leader
After submission what type of alert would you want to send to the project leader
After submit, alert to team manager
After submission what type of alert would you want to send to the team manager
After submit, alert to organism manager
After submission what type of alert would you want to send to the organism manager

### 4.2.2 Tab Activity

**Activity tab’s sections**

- *Tickets*
- *Organization*
- *Todo list*
- *Control and restriction*
- *Leaves system*

**Tickets**

Specific behavior for ticket management

- Only responsible works on ticket
- Only responsible can enter some real work on the ticket.
- Ticket responsible from product Responsible
- Select if the product Responsible is displayed (always, if empty, never) as Ticket Responsible on that screen
- Limit planning activity to those whit flag
- Display planning activity selected for the ticket
- Enable to filter ticket reports by priority
- Can display tickets on Report screen by level of priority
- Display ticket at customer level
- Display of tickets on the Customer screen and on the Contacts screen
- Display ticket at version level
- Display of tickets on the version screen
Manage accountable on ticket
Display the coordinator as Accountable, so the Responsible is the current actor

**Organization**

Specific parameter for Organization management

Use budget feature for organizations
If yes, can display and work on budget for an organization.

**Todo list**

Specific parameter for the todo list display

Activate todo list management
If yes, the common section *todo list* is displayed in the details area.

**Controls and restrictions**

Specific parameters for the control and management of restrictions

Allow the type restriction on project
Allow to define additional restriction’s type on each project additionally to restrictions defined at project type level.
If so, a Restrict Types button appears in the detail area and allows you to define the type restriction.

- **Types restrictions**

  (when restricting types, only these types will be displayed for the projects of this type)

  restrictions exist for

Restriction on types by profil hides items
If set to yes, users with profiles won’t see items of unselected types
If set to no, users will just not have possibility to create new items with such types
Limit the functions to those of the resource
On assignments limit functions to those of the resource. Ones with cost and default one.

**Leaves system**

Allows you to determine who will be the administrator of regulated absences.
The administrator of regulated absences can define the parameters and authorizations of the screens in this module.

### 4.2.3 Tab Planning

**Display tab’s sections**

- *Planning*
- *Milestones*
### Fig. 4: Restrict type box

When restricting types, only these types will be displayed for the projects of this type.

<table>
<thead>
<tr>
<th>Actions type</th>
<th>Project</th>
<th>Customer</th>
<th>Internal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities type</td>
<td>Task</td>
<td>Development</td>
<td>Evolution</td>
</tr>
<tr>
<td>Budget type</td>
<td>Initial</td>
<td>Additional</td>
<td></td>
</tr>
<tr>
<td>Catalogs type</td>
<td>Product</td>
<td>Service</td>
<td></td>
</tr>
<tr>
<td>Change requests type</td>
<td>Recurring problem</td>
<td>Functional improvement</td>
<td>Technical improvement</td>
</tr>
<tr>
<td>Client contract type</td>
<td>Management assistance</td>
<td>Hosting</td>
<td>Technical improvement</td>
</tr>
<tr>
<td>Client invoices type</td>
<td>Partial bill</td>
<td>Final bill</td>
<td>Complete bill</td>
</tr>
<tr>
<td>Component Version Types</td>
<td>Major Version</td>
<td>Minor Version</td>
<td>Patch</td>
</tr>
<tr>
<td>Components type</td>
<td>Specific</td>
<td>On the shelf</td>
<td></td>
</tr>
<tr>
<td>Decisions type</td>
<td>Functional</td>
<td>Operational</td>
<td>Contractual</td>
</tr>
<tr>
<td>Deliverable type</td>
<td>Document</td>
<td>Software</td>
<td>Hardware</td>
</tr>
<tr>
<td>Delivery type</td>
<td>Document</td>
<td>Software</td>
<td>Hardware</td>
</tr>
<tr>
<td>Documents type</td>
<td>Contract</td>
<td>Management</td>
<td>General</td>
</tr>
<tr>
<td></td>
<td>Need expression</td>
<td>Specification</td>
<td>Review</td>
</tr>
<tr>
<td></td>
<td>Test Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incoming type</td>
<td>Document</td>
<td>Software</td>
<td>Hardware</td>
</tr>
<tr>
<td></td>
<td>Resource management issue</td>
<td>Quality non-conformity</td>
<td>Delay non respect</td>
</tr>
<tr>
<td>Meetings type</td>
<td>Steering Committee</td>
<td>Progress Meeting</td>
<td>Team meeting</td>
</tr>
<tr>
<td>Milestones type</td>
<td>Deliverable</td>
<td>Incoming</td>
<td>Key data</td>
</tr>
<tr>
<td>Notifications type</td>
<td>ALERT</td>
<td>WARNING</td>
<td>INFO</td>
</tr>
<tr>
<td>Opportunities type</td>
<td>Contractual</td>
<td>Operational</td>
<td>Technical</td>
</tr>
<tr>
<td>Organizations types</td>
<td>Department</td>
<td>Unit</td>
<td>Location</td>
</tr>
<tr>
<td>Products type</td>
<td>Software</td>
<td>Service</td>
<td></td>
</tr>
<tr>
<td>Products version type</td>
<td>Major Version</td>
<td>Minor Version</td>
<td>Patch</td>
</tr>
<tr>
<td>Questions type</td>
<td>Functional</td>
<td>Technical</td>
<td></td>
</tr>
<tr>
<td>Requirements type</td>
<td>Functional</td>
<td>Technical</td>
<td>Security</td>
</tr>
<tr>
<td>Risks type</td>
<td>Contractual</td>
<td>Operational</td>
<td>Technical</td>
</tr>
<tr>
<td>Test cases type</td>
<td>Requirement test</td>
<td>Unit test</td>
<td>Non-regression</td>
</tr>
<tr>
<td>Test sessions type</td>
<td>Evolution test session</td>
<td>Development test session</td>
<td>Non-regression test session</td>
</tr>
<tr>
<td>Test sessions type</td>
<td></td>
<td>Non-regression test session</td>
<td></td>
</tr>
<tr>
<td>Tickets type</td>
<td>Incident</td>
<td>Support</td>
<td>Anomoly / Bug</td>
</tr>
<tr>
<td>provider contract type</td>
<td>Management assistance</td>
<td>Hosting</td>
<td>technical improvement</td>
</tr>
</tbody>
</table>
Planning

Specific parameters about Gantt planning presentation.

- do not start before the validated start date

  If no other priority constraint has been determined on one of the elements of the project, then you can apply a start date to the whole of the latter.

  - The planning must only start from this date, as if there was a fixed milestone preceding the project.
  - Resources cannot be charged to the project before the specified date (as with a project under construction).
  - This option must be enabled in the global parameters.

Show resource in Gantt

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

Max projects to display

Defines maximum number of projects to display.

To avoid performance issues.

Apply strict mode for dependencies

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

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

Manual progress of fixed-duration activities

Choose whether the progress should be calculated or entered manually.

Technical progress in number of unit.

Displays a technical progress in unit of work independent of the planning progress by the load.

See: Technical progress

possibility of managing activities on real time

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

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

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

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

Manual planned interventions enter work as

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

See: Manual planning mode

See: Planned Interventions
Effect of capacity on planned interventions

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

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

- **none**
  A resource with capacity 0.8 can be planned on 2 half-days of 0.5d each

### Milestones

Specific parameters for Milestones management

- **Manage target milestone**
  It updates the target (planned) date of the element (on Requirements, Tickets, Product Versions, Incomings, Deliverables and Deliveries) from the planned date of the milestone.

- **Auto link the milestone**
  It optionally allows you to display the element linked to the milestone (The option above should be on “yes” to have access to the selection of milestone targeted)

- **Set milestone from product version**
  It optionally allows you to automatically retrieve the milestone from the milestone of the Project Version.

- **Update milestone from deliverable (Have to link elements)**
  Update milestone Responsible automatically when the Responsible of deliverable has changed.

- **Update milestone from incoming (Have to link elements)**
  Update deliverable from milestone (have to link elements)
  Update deliverable Responsible automatically when the Responsible of deliverable has changed.

- **Update incoming from milestone (have to link elements)**
  Update incoming Responsible automatically when the Responsible of milestone has changed.

### Pool of resource

Specific parameter for Pool of resource

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

  The explicit allocation will generate visible allocations that won’t be changed afterwards (if allocation of pool changes).

  The implicit allocation will generate invisible allocations that will follow changes of the pool (allocation of the pool to the project or of resources to the pool).
Automation

Parameters to manage automations

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

- Never: Not consolidated
- Always: Values are replaced on activities and project (erase parents)
- Only is set: Replaces values (excepted if set by null or stay not indicated, do not erase parents)

Auto set Responsible if single resource:

Behavior about management of responsible, including automatic initialization of responsible.
Automatically set Responsible if not set and by the only one resource allocated to the project
Auto allocated the Manager to the project:
Automatically create an allocation for the project Manager to the project. He should be a resource.
Auto set a Responsible if needed:
Automatically set Responsible to current resource (as using the element) if not set and if a Responsible is required (respecting access rights)
Auto assign Responsible to activity:
Assign automatically the Responsible to activities
Auto set parent activity status:
Auto set status of parent activity from the status of children activity.

4.2.4 Tab Display

Display tab’s sections

- Display
- Localization
- Default values

Display

Graphic interface behavior and generic display parameters.

Name of the instance
Change the window’s name. The name appears at the top center of the window.
Max number of projects on today
Limit the display of the “today list”. Items are generally ordered by issue date increasing.
Max items to display in Today lists
Limit the display of items displayed in sections of the Today screen. Items are generally ordered by ascending issue date.
Quick filtering by status
Display one button. Allow to filter on lists the element by status checking boxes. Refresh to make appear on boxa a new state just created on list.
Localization

Choose how the monetary units behave in your area

Currency
Choose your symbol displayed on each monetary box
Currency position for cost display
Symbol sets before or after each monetary box

Default values for user parameters

Default values for user

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

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

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

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

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

They are accelerators to apply your themes.

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

Default theme (only available with version 8.6)
More than 30 themes choices.

First page
Choice of the first visible screen after the connection.

menu top mode view
You choose how your favorites will be displayed. As text, icons, or both.

Menu left view
The top menu is invisible or not at each connection.

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

Tip: Menu v9.0
To show or hide the icons of the new menu, right click on the menu.

Icone size in menu (only available with version 8.6)
Icon size are default: user can overwrite these values.

Display of the upper menu (only available with version 8.6)
The top menu is invisible or not at each connection.
Display of the left menu (only available with version 8.6)
The top menu is invisible or not at each connection.
Create new item on pop-up
You determine if the global creation button will open a pop up or go directly to the screen of the element you want to create.

Display history
• No
• Yes
• yes with work
• On request through specific button

To show or hide the icons of the new menu, right click on the menu.
The button will then be displayed in the menu of the details area of each element.

Editor for rich text
Choose your favorite text editor.
Activate the spell checker in CK editor
No will no longer allow highlighting of misspelled words.

**Warning:** your browser also has an autocorrect option which may continue to highlight misspelled words

Not applicable value
Choice of the symbol defining the non-applicable values.
On the global view the value of the field that has no applicable value for the given column will display this symbol

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

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

Displaying notes in discussion mode
Display of notes in discussion mode with indentation for answers
Show only notes on Activity Stream
if so, you will not see the status change and item update.

Not receive own emails
You don’t receive the emails you create.

Order notes ascending in mail model

4.2. Global Parameters
Choice of display of notes in the mail model.
List quotations, commands and invoices on client
Display or not the list of financial elements related to the customer on the screen of the latter.
Please note that the parameter also exists on the user side. If the latter is not activated also then the financial elements will not be visible.

4.2.5 Tab References

References tab’s sections

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

Format for reference numbering

Sections for format references
Prefix format for reference
Allows to define reference formats for items of element, documents and bills.
Can contain prefix:
- {PROJ} for project code,
- {TYPE} for type code,
- {YEAR} for current year
- {MONTH} for current month.
Number of digits for reference number
Indicate the number of digits you want to appear in your reference.
Change reference on type or project change
Change the reference on type change of element will generate missing numbers in reference.

Document reference format

Sections for document format references
Document reference format
Format can contain:
- {PROJ} for project code,
- {TYPE} for type code,
- {NUM} for number as computed for reference,
- {NAME} for document name.
You can allow or forbid downloading locked files in this section.
Version reference suffix
Suffix can contain:
• {VERS} for version name.
Separator for draft in version name
Choose the sign for the separator of the draft.
Preserve uploaded file name
If yes, the file is downloaded with the name of original file.
If no, the document take the reference formatted name.
Forbid download of locked document
Forbid document download if yes is checked.

Bill reference format

Sections for bill format references
Bill reference format
Reference format : can contain {NUM} for version name.
Number of digit for bill number
Choice of the number of digits to display in an invoice.

4.2.6 Tab Configuration

References tab’s sections

• Product and component
• Versions

Product and Component

This menu contains all the parameters for configuration management
Display Business features
Filter on date.
Display language in Product/Component (Version)
Enable language.
Display contexts in Product/Component (Version)
Enable contexts.
Display Tenders on Products, Components, Versions
Display a section to list linked Tenders on products, component, product version and component versions.
Include sub-products in structure
Include sub-products in display of product structure (flat or not).
Versions section

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

Display the start and delivery milestones
Display start and delivery milestones for product/component version and delivery dates in flat structure.
List of activity on component version
Display the list of activity.
Direct access to product / component full list
When selecting a component, we go directly to the full list (with filter capacity), without going through the pop-up window.
Automatic format of version name
Ability to choose a preformatted format for version names.
Separator between name and number
Choose the character of the separator for version names.
Auto subscription to versions
Subscription automatic to versions or components when you suscribe to product or component.
Types of copy of Component Version
You can choose between:
  • Free choice
  • Copy structure from origin version
  • Replace the origin version with new copied one
Enable Product Versions compatibility management
Display compatibility section in product version details.
Display product version on delivery
Allows to link a delivery to product version.
Sort versions combobox in descending order
Change sort order for versions in combobox to have more recent first (descending on name).
Sort version composition and structure on type
Sort version composition and structure by type ascending and name descending.
Manage component on requirements
Manage component and target component version on requirements.
Do not add closed and delivered versions to a project
When adding a product to a project, do not add its closed and delivered versions.
Allow activities on delivered version
Include delivered products versions in target product version list for activities.
Automatically set component version if unique
Automatically set component version if there is only one component version of the selected component that is linked to the selected product version.
4.2.7 Tab Financial

References tab’s sections

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

Input of amounts for expenses

Parameters for choosing the input method for expenditure amounts.

- Input mode for amounts
  Defined for expenses items if the amounts must be entered without taxes and calculated in with taxes or vice versa.
- Input mode for bill lines
  Defined for expenses items if the total bill lines feed the total with or without taxes. The parameter is priority if there a bill lines.

Input of amounts for incomes

Parameters for choosing the method of entering income.

- Input mode for amounts
  Defined for incomes items if the amounts must be entered without taxes and calculated in with taxes or vice versa.
- Input mode for bill lines
  Defined for incomes items if the total bill lines feed the total with or without taxes. The parameter is priority if there a bill lines.

Automation of financial

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

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

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

Revenue and Work unit managment

Parameters used in the unit of work catalog.

- Number of complexities
  Parameter used to define the default maximum number used in the unit of work catalog.
- Copy revenue into validated cost of activities.
- Copy revenue into validated cost of activities.
Enable work command.
You link your activities managed by the work units to an order.
This will be decremented by units of work already carried out and invoiced. You can then invoice precisely for the work already done.

4.2.8 Tab Mailing

References tab’s sections

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

**Emailing**

Parameters to allow the application to send emails.
You define the administrator’s email with the possibility of choosing a different address for “from” and “reply to” and the name to display.
You configure the SMTP server and port - the login name and password.
You can also define the sendmail path or the send method.
The maximum size not to be exceeded for sending emails is in bytes by default if you do not fill in the units.
You can use bytes (O), megabytes (M) and gigabytes (G).

**Mail titles**

Parameters to define title of email depending on event.
*See: Automatic emails grouping*
It is possible to use special fields to call a function or data of the project.
*See: Special Fields*

**Automatic emails grouping**

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

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

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

- **Grouping period (in seconds)**
  - Defines the period (in seconds) during which if an email is sent after another on same item.
  - Then emails are grouped into single one.
  - How to treat different formats
### Mail titles

- **Title of mail for new items**: 
  \[ \$\{dbName\} \$\{item\} \$\{id\} has been created: \$\{name\} \]

- **Title of mail for modified items**: 
  \[ \$\{dbName\} \$\{item\} \$\{id\} has been modified: \$\{name\} \]

- **Title of mail on status change**: 
  \[ \$\{dbName\} \$\{item\} \$\{id\} moved to status \$\{status\}: \$\{name\} \]

- **Title of mail on responsible change**: 
  \[ \$\{dbName\} \$\{item\} \$\{id\}: \$\{name\} is now responsible of \$\{item\} \$\{id\}: \$\{name\} \]

- **Title of mail on modified description**: 
  \[ \$\{dbName\} Description has been modified on \$\{item\} \$\{id\}: \$\{name\} \]

- **Title of mail on modified result**: 
  \[ \$\{dbName\} Result has been modified on \$\{item\} \$\{id\}: \$\{name\} \]

- **Title of mail on note add**: 
  \[ \$\{dbName\} New note has been posted on \$\{item\} \$\{id\}: \$\{name\} \]

- **Title of mail on note change**: 
  \[ \$\{dbName\} A note has been modified on \$\{item\} \$\{id\}: \$\{name\} \]

- **Title of mail on assignment add**: 
  \[ \$\{dbName\} New assignment has been added on \$\{item\} \$\{id\}: \$\{name\} \]

- **Title of mail on assignment change**: 
  \[ \$\{dbName\} An assignment has been modified on \$\{item\} \$\{id\}: \$\{name\} \]

- **Title of mail on attachment add**: 
  \[ \$\{dbName\} New attachment has been posted on \$\{item\} \$\{id\}: \$\{name\} \]

- **Title of mail when sending manual email**: 
  \[ \$\{dbName\} message from \$\{sender\}: \$\{item\} \$\{id\} \]

- **Title of mail to user**: 
  \[ \$\{dbName\} message from \$\{sender\}: \$\{item\} \$\{id\} \]

- **Body of mail to user**: 
  \[
  \$\{url\},
  Your login is \$\{login\}.
  Your password is initialized to \$\{password\}.
  You will have to change it on first connection.

  In case of an issue contact your administrator at \$\{adminMail\}.
  \]

- **Title of mail to approvers**: 
  \[ \$\{dbName\} message from \$\{sender\}: \$\{item\} \$\{id\} \]

- **Body of mail to approvers**: 
  \[
  Document \$\{id\}: \$\{name\}.
  Please access this document and follow approval process.
  \]

- **Title of email on allocation add**: 
  \[ \$\{dbName\} New allocation of resource \$\{ responsible\} has been created on Project \$\{project\} \]

- **Title of email on allocation change**: 
  \[ \$\{dbName\} Allocation of resource \$\{ responsible\} has been changed on Project \$\{project\} \]

- **Title of mail to scheduled reports**: 
  \[ \$\{dbName\} Report \$\{report\} - \$\{date\} \]

- **Body of mail to scheduled reports**: 
  \[ \$\{dbName\} Report \$\{report\} - \$\{date\} \]

---

Fig. 5: Mail titles section
If grouped emails refer to different templates, you can:

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

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

**Test email configuration**

You can test the settings of your email submissions.

Send email to

Sent a email to check sptm configuration.

**Warning:** This operation saves global parameters.

### 4.2.9 Tab Authentication

**Authentication’s sections**

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

**User and password**

Parameters to manage how the connection behaves

- **default profile on user creation**
  You can choose the default profile and password when you create a new resource/user/contact.
  This profile can be changed on each project.
- **Password strength**
  You define the difficulty of your password.
  Password length, if special characters or numeric characters are used.
  Password min length
  You define the length of your password.
- **Lock user after wrong tries**
  You can choose to block the user after x connection attempts.
  Lock user after wrong tries
  You can define the validy period of your password. After this period, you will have to renew your password.
- **Allow ‘remember me’**
  You can display or no the check box on the login screen “remember me”
- **Initialize password on user creation**
You can initialize password on user creation. The application will define a new password to random value.

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

### LDAP Management Parameters

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

#### Ldap management parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>connection with LDAP user</td>
<td>No</td>
</tr>
<tr>
<td>LDAP base dn</td>
<td></td>
</tr>
<tr>
<td>LDAP host</td>
<td></td>
</tr>
<tr>
<td>LDAP port</td>
<td></td>
</tr>
<tr>
<td>LDAP version</td>
<td>2</td>
</tr>
<tr>
<td>LDAP user</td>
<td></td>
</tr>
<tr>
<td>LDAP password</td>
<td></td>
</tr>
<tr>
<td>LDAP user filter</td>
<td></td>
</tr>
<tr>
<td>default profile for Ldap users</td>
<td>Project Guest</td>
</tr>
<tr>
<td>message on creation new user from Ldap</td>
<td>Internal alert</td>
</tr>
<tr>
<td>on LDAP user creation</td>
<td>keep user as user only</td>
</tr>
<tr>
<td>Project to allocate automatically</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 6: LDAP

Set the base dn, host, port, version...

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

Actions on LDAP user creation

Project to allocate automatically...

### Single Sign On SAML2

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

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

This avoids having to connect to applications one by one.

In concrete terms, the site or service to which the user is trying to connect makes a request to the server or the identity provider’s site. This one asks if the user is connected. If so, he transmits the information.
Fig. 7: With the single sign on you do not go through the login screen of projeqtor but by a screen dedicated to single sign-on

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

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

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

Parameters

This is an SSO connection via the SAML2 protocol

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

### 4.2.10 Tab Automation

**Authentication’s sections**

- Management of automated service
- Automatic import of files
- Automatic import of replies to emails
- Automatic planning calculation
- Automatic archiving of history
- Generation of alerts for real work
Fig. 8: Disconnection screen
Management of automated service (CRON)

Parameters for the *Cron* process.

Defined frequency for these automatic functions

It will manage:

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

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

Automatic archiving of history

This section allows you to manage the behavior of the history

- Archive history older than (in days)
- Determines how often your history is archived.
- Start time of daily archiving
- Choose the time at which the daily archiving will start.
- Archive all history for idle items
- Choose whether the history of closed items should be archived or not.

Automatic import of files

Automatic import settings for *cron* processes.
Automatic import of files

- directory of automated integration files: `../files/import`
- automatic import cron delay (in seconds): 60
- log destination: `log as file`
- mailing list for logs

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

Automatic import of replies to emails

- Defined parameters for the “Reply to” process
- It will manage connection to IMAP INBOX to retrieve email answers.
  - Email input check cron delay (in seconds)
  - Delay of -1 deactivates this functionality.
- Email reception
  - When you have completed the IMAP settings for receiving emails, you receive your email with a new header. See the image below.
  - You always find the name of the item that is related to your application. A single click takes you to the item page.
  - The line in the header tells you where your answer should be positioned to allow you to retrieve the response text in your ProjeQtOr instance without the original message.
- Signing start identifier
  - When you have completed the IMAP settings for receiving emails, you receive your email with a new header. See the image below.
  - The fields allows you to identify the beginning of your signature in order to avoid retrieving the signature in the response.
  - For example, enter, so that ProjeQtOr recognizes that your signature begins with this word. He will not take back everything behind.

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

Automatic planning calculation

Activated or desactivated this feature by simple click

4.2. Global Parameters
Fig. 11: receiving an email settings

Automatic planning calculation

- differential calculation
  - start date for differential planning: first day of current week

- complete calculation
  - start date for complete planning: first day of current week
  - Automatic feeding of the real: No
Differential calculation

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

Complete calculation

All projects planning are recalculated.

Automatic feed of the real

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

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

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

**Warning:** For security, and to avoid overlapping with a manual input of reality, if the resource has reality for a given date, we do not copy the possible planned existing in reality.

For each scheduled job found, if no job exists for the relevant resource on the date of the scheduled job, copies the scheduled job to an actual job.

We will mark the actual work entered automatically (technical zone type label) to distinguish between automatic feeding and manual feeding.

This area will not be processed for screen renderings, but will analyze any unexpected behavior.

Frequency

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

Start date for

<table>
<thead>
<tr>
<th>frequency</th>
<th>value</th>
<th>define parameters</th>
<th>activate</th>
</tr>
</thead>
<tbody>
<tr>
<td>minute</td>
<td>0</td>
<td>defined parameters</td>
<td>activate</td>
</tr>
<tr>
<td>hour</td>
<td>all</td>
<td>defined parameters</td>
<td>activate</td>
</tr>
<tr>
<td>day of month</td>
<td>all</td>
<td>defined parameters</td>
<td>activate</td>
</tr>
</tbody>
</table>

For differential calculation:

- first day of current week
- first day of current month
- today
- yesterday
- 2 days before today
- 3 days before today
- 7 days before today
- 10 days before today
- 15 days before today
- 30 days before today

For complete calculation:

- first day of current week

Automatic feeding of the real

No

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

4.2. Global Parameters
Generation of alerts if real work is not entered

Specific settings for alerts based on a profile.

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

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

  Control input up to
  Select when you want to be controlled: current day, previous day or next days.
  Number of days to control
  Choose how many days will be controled
  Send alert to resource
  Choose how alerts will be sent, Internal alert, email, both or none
  Only incompletes imputation
  The goal is to be able to send alerts on charges only if the entry is incomplete, not if it is greater than the capacity of the resource.

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

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

### 4.2.11 Tab System

#### Authentication’s sections

- Files and directories service
- Localization data
- Miscellaneous
- PDF export
- SSL connection to database

#### Files and directories

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

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

#### Localization data

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

- Charset to save files on server
  - Keep empty for Linux servers, files names will be stored in UTF8.
  - For windows OS server, define charset as “windows-1252” (for western europe) or similar corresponding to your localization.
- Separator for CSV files
- Choose the field separator for csv exports
- Export CSV to UTF-8 format
  - Preserve UTF-8 for exported csv files. If set no, will encode in CP1252 (recommended for windows in English and western Europe Languages)

#### Miscellaneous

Settings for the update

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

Basic settings for PDF exports

Memory limit for PDF generation.
Size in MB. Too small can lead to PDF error but too big can crash the server
Font for PDF Export.
Freesans give great portability for non ANSI characters - Helvetica give smaller PDF files.

SSL connection to database

Allows to set up a secure SSL connection:

• SSL Key
• SSL Certification
• SSL Certificate Authority
• Enter patch to corresponding files to enable SSL connection to the database.

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

4.3 Special Fields

Special fields can be used in the title and body mail to be replaced by item values:

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

4.4 Administration Console

Fig. 13: Administration screen

Note: The screens described below are restricted to users with administrator profile. Users with other profiles can not access it, whether display or access rights are granted or not.

Administration console allows to execute administration tasks on application.

4.4.1 Background tasks

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

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

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

4.4.2 Internal alert

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

Internal alerts can be sent to users.
### Background tasks

**cron status**: running

- General cron sleep time = 10 seconds
- Alert generation cron delay = 30 seconds
- Automatic import cron delay = 60 seconds
- Automatic notification generation cron delay = 3600 seconds
- Administration cron check for leave rights earned
disabled
- Send grouped emails
- Email input
  
  ![Stop button](Image)

Fig. 14: Background tasks is running in Administration console

### Internal Alert

**addresses**: all users

**sent date**: 01/14/2021 09:40

**type**: Information

**title**:  

**message**:  

![Send button](Image)

Fig. 16: Internal Alert
You can define a date and time for sending, specific addressees or all users, the type of message that users will receive: information, an alert or a warning …

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

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

By the administrator

The administrator can send internal alert by administration console.

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

Monitoring indicators

Monitoring indicators send only warning and alert message.

The message contains information that explains the alert:

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

The indicators are defined in *Indicators screen*.

### 4.4.3 Manage connections

![Manage connections](image)

**Fig. 17: Manage connections**

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

**Disconnect all users**

- The button *Disconnect all users* allows to disconnect all connected users except your own connection.
- The application status is displayed below.
- Disconnection will be effective for each user when his browser will 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*.

**Open/Close application**

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

- **Consistency checks**

  run consistency checks [scan for issues]

  fix issues

Fig. 18: consistency check

**Consistency check**

- on the WBS sequence search for duplicates, sequence holes, incorrect order
- on the presence of one and only one line of “PlanningElement” for the planifiable elements
- on the consolidation of ticket work
- on consolidation of work on activities
- on assignments
- This feature available automatically corrects detected issues

4.4.5 Maintenance of Data

The administrator has the possibility to:

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

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

4.4.6 Log files maintenance

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

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

4.5 Access Rights

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

4.5.1 Module Management

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

This enables or disables a consistent group of features.

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

The menu at the top of the page allows you to display all the modules or to display the modules corresponding to a part of the scope of the project management
Fig. 19: Maintenance of data

- **Close emails** sent since more than **7** days
  
  close activate *this feature is not active currently*

- **Delete emails** sent since more than **30** days
  
  delete activate *this feature is not active currently*

- **Close alerts** sent since more than **7** days
  
  close activate *this feature is not active currently*

- **Delete alerts** sent since more than **30** days
  
  delete activate *this feature is not active currently*

- **Delete notifications** sent since more than **30** days
  
  delete activate *this feature is not active currently*

- **Delete connection logs** closed since more than **30** days
  
  delete activate *this feature is not active currently*

Fig. 20: Log files maintenance

- **Log level**
  
  log level **Debug**

- **Delete log files** older than **7** days
  
  delete

- **Log files maintenance**
  
  show log files list
  show last log file

4.5. Access Rights
Fig. 21: Log files list
When you have selected one of these menus, the modules are displayed below.

Click on a module to display its description, as well as the list of screens that will be activated or deactivated. Disabling certain modules will also hide the corresponding reports.

Click on the checkboxes to enable or disable the module.

Modules list
- the planning section
- the ticketing
- the time tracking
- the requirements
- the financial section with expenses - Incomes - financial situation and revenue management
- the risks
- the meetings
- the steering
- the products configuration (versions, components…)
- the asset management
- the humans resources
- the external documents management
- the organizations (level society) management
- the cloned environments
- the activity stream
- and the notifications.
4.5.2 Profiles

The profile is a group of rights. Each with specific access rights to the database.
Thus, each user is linked to a profile which defines the data that he can see and possibly manage.

See also: Concept

Value of Field “Name”

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

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

The restriction zone offers two types of restriction:
- By type based on ProjeQtOr elements (actions, activities, invoices, catalog . . .)
- By product versions

More details: Restriction types
Table 1: Required Field

<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.
4.5.3 Access to forms

This table is used to define the access to the selected screen for each profile. Users belonging to one profile can see the corresponding screen if authorized or not.

Click on checkbox to permit or revoke access to the screen for a profile.

4.5.4 Access modes

The access mode defines a combination of rights to Created, Read, Update or Delete items.

It’s the CRUD RIGHTS

Each access is defined as scope of visible and/or updatable, that can be, by kind of elements.

Project dependant

By default, ProjeQtOr offers 10 different access modes.

Each access defines the visibility that can be applied by type of elements dependent on a project (activity, ticket, action, ...).

You can choose from several levels of visibility for each CRUD entitlement.

- **No element**: No element is visible and updatable.
- **Own elements**: Only the elements created by the user.
- **Elements he is responsible for**: Only the elements the user is responsible for.
- **Elements of own project**: Only the elements of the projects the user/resource is allocated to.
- **All elements on all projects**: All elements, whatever the project.

Value of Field “Name”

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

**Tip:** Ideally, the value of the field should start with “accessProfile” to be easily identified in the translation table.
### Access to forms

<table>
<thead>
<tr>
<th></th>
<th>Administrator</th>
<th>Supervisor</th>
<th>Project Leader</th>
<th>Project Member</th>
<th>External Project Leader</th>
<th>External Project Member</th>
<th>Project Guest</th>
<th>[Traine]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
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### Work

<table>
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<th>[Traine]</th>
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<td>Actions</td>
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</tr>
<tr>
<td>Global view</td>
<td>✔</td>
<td>✔</td>
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<td>✔</td>
<td>✔</td>
<td>✔</td>
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<td></td>
</tr>
</tbody>
</table>

### Follow-up

<table>
<thead>
<tr>
<th></th>
<th>Administrator</th>
<th>Supervisor</th>
<th>Project Leader</th>
<th>Project Member</th>
<th>External Project Leader</th>
<th>External Project Member</th>
<th>Project Guest</th>
<th>[Traine]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timesheet</td>
<td>✔</td>
<td>✔</td>
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<td>Timesheet validation</td>
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<tr>
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<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global planning</td>
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<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Projects portfolio</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource planning</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diary</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View interventions</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Requirements & tests

### Expenses

### Incomes

Fig. 25: Access to forms screen
Table 2: Required Field

<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>

Not project dependant

The non-dependent elements of a project, such as organizations, parameters, lists of values, tools or even controls and automatisms can also be set with CRUD rights.

These elements must be visible. So the reading right is granted on a basic basis.

ProjeQtOr offers 5 different access modes where you can define creation, update and deletion rights.

- **yes:** allows the right to . . .
- **no:** does not allow the right to . . .
- **Own elements:** Only the elements created by the user.
- **Elements he is responsible for:** Only the elements the user is responsible for.

You can then define a mode corresponding to the visibility rights that you wish to grant on each profile in the access to data not dependent on the project.

4.5.5 Access to data

This screen allows to set element access mode for each profile.

Allows to define scope of visibility and/or updating of data in elements for users and resources.

Project dependant

This screen is only for the elements reliant on a project.

**For each element, selected the access mode granted to a profile.**

Not project dependant

This screen allows to set for each profile, elements access rights. Allows to grant access rights (read only or write) to users, to data on specific elements. This screen is only for the elements not reliant on a project.

**For each element, select the access rights granted to a profile.**

Some features do not have a manager or are not linked specifically to a user profile, like messages, tools or even environmental parameters.

Certain access modes are therefore not offered in the drop-down lists on certain elements of this screen.
4.5.6 Access to reports

This screen allows to define report access for each profile. Users belonging to a profile can see the corresponding report in the report list. Reports are grouped by report categories.

Click on checkbox to permit or revoke access to the report for a profile.

4.5.7 Document rights per directory

You can define the access rights to documents according to the profile at each level of the document directory tree.

By default, all values are initialized for each existing directory from the existing values in the “Project-dependent access to data” rights screen.

4.5.8 Specific access

This screen groups specific functionalities options. Users belonging to a profile can have access to the application specific functions. Depending on options of functionality, allows to grant access rights, to define data visibility or to enable or disable option.

For each option, select the access granted to a profile.

Access to resource data

This section allows to:

- Defines who will be able to see and update “real work” for other users.
- Defines who can validate weekly work for resource.
- Defines who have access on diary for resources.
- Defines who, as a resource, can subscribe to survey for users.
- Defines who have access on report for resources.

Note: Validate real work: in most cases, it is devoted to project leader.
Work and Cost visibility

• This section defines for each profile the scope of visibility of work and cost data.

Assignment management

• This section defines the visibility and the possibility to edit assignments (on activities or else).

Display specific buttons

• This section defines whether some button, checklist, job list will be displayed or not (if defined).
  
  **Display of combo detail button**
  
  – This option defines for each profile whether the button will be displayed or not, facing every combo list box.
  – Through this button, it is possible to select an item and create a new item.
  – This button may also be hidden depending on access rights (if the user has no read access to corresponding elements).

  **Multiple update**
  – Defines the possibility or not to change one or more criteria for one or more selected rows at a time

Planning access rights

• This section defines access for each profile to planning functionality.

Monthly consolidation of projects

• This section defines the right for each profile if it can validate and / or block the allocations of the resources of a project for a defined month.

Unlock items

• This section defines for each profile the ability to unlock any document or requirement.
  
  • Otherwise, each user can only unlock the documents and requirements locked by himself.

Reports

• This section defines for each profile the ability to change the resource parameter in reports.

Financial

• This section defines for each profile the possibility of modifying the financial situations or of being able to automatically generate a project expense.
Specific update rights

• Defines for each profile the ability to manage all notes.
• Defines for each profile the ability to delete attached files.
• Defines for each profile the ability to force delete items.
• Defines for each profile the ability to force delete items with real work.
• Defines for each profile the ability to force close items.
• Defines for each profile the ability to update creation information in the header of the details area.
• Defines for each profile the ability to mention or not the components on a ticket.
• Defines for each profile the ability to update the left work on assignment section and timesheet.
• Defines for each profile the ability to work on tickets

Limit visibility to resources

• By profil, allows to restrict or not the number of resources displayed, by organizations or own team, on resource lists.
• By profil, allows to restrict or not the number of resources displayed, by organizations or own team, on resource screen.

Limit visibility to organizations

• By profil, allows to restrict or not the number of organizations displayed, by organizations or own organization, on organization lists.
• By profil, allows to restrict or not the number of organizations displayed, by organizations or own organization, on organization screen.
4.5.9 Translatable name

For profiles and access modes, the value of field “Name” is translatable. The field “Name” in screens Profiles and Access modes is not the name displayed, but it is a code in the translation table.

The name displayed at right of the field is the translated name.

The translated name depends on user language selected in User parameters screen.

Note: If translated name is displayed between square brackets [ ], then the value of field “Name” is not found in the translation table.

Translation table files

- In ProjeQtOr, a translation table file is defined for each available language.
- The files are named “lang.js” and are localized in a directory named with ISO language code.
  - For instance: ../tool/i18n/nls/fr/lang.js.

How to modify the translation file?

- You can edit file “lang.js” to add translation of new value or to modify the existing value translation.
- Or, you can download Excel file named “lang.xls”, available on ProjeQtOr site. You can modify the translation tables of all languages and produce files “lang.js”.

4.6 List of Types
Each element of ProjeQtOr can be typed at your convenience according to your profession or your field of activity. Each type is presented the same. A very simple description section, with different fields depending on the element, and a behavior section that will condition your future actions according to the parameters entered.

### 4.6.1 Behavior section

This section is common to several element types. Allows to determine some GUI behavior, according to element types.

**Description or Comments**

- Box checked indicates the field *Description* is mandatory.

**Responsible**

- Box checked indicates the field *Responsible* is mandatory when the status to treatment of the item is “handled”.

**Result**

- Box checked indicates the field *Result* is mandatory when the status to treatment of the item is “done”.

**Flag status**

- You can lock the macro status: In progress - Done - Closed - Canceled
- Those fields allow to determine whether the checkbox fields concerned are locked or not.
- If the box is checked then you will only be able to modify the macro status thanks to the workflow statuses.

**Project**

**No left work on done**

- The plannable elements of the project cannot be passed to status *done* if there is still left work.

**Lead Project**

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

**Activity**

**activity on real time**

- Possibility of managing activities on real time.
- See: Global parameters | Assignement section

**No left work on done**

- The activity cannot be passed to status *done* if there is still left work.
Ticket

Resolution

- Box checked indicates the field Resolution is mandatory when the status to treatment of an item is done.

Lock solved

- Box checked indicates the field Solved is read only.
- The value of field must come from the field “Solved” defined in the selected resolution.

4.6.2 Types restrictions

Allows to limit values displayed in the list of values for each element type.
Restrictions can be defined for a project, a project type or a profile.

Note: Types restrictions section on Project screen

To display types restrictions section: Go to Global parameter > Tab Activity > Controls and Restrictions Section “allow type restriction on project” must be set to “Yes”. Possibility to define more restrictions to a project against restrictions defined at the project type level.

Type restriction management

Fig. 27: Restrict types section

- Click on Restrict types button to display the dialog box.
- For each element type, select values that will be in the list of values displayed.
- By default, if no type of element is selected, all the values of the line will be displayed on each screen that will be affected.

Displays element type names where a restriction is applied

Reminder: It means too, no restriction for remaining element types on each dedicated screen.
### 4.6. List of Types

<table>
<thead>
<tr>
<th>Category</th>
<th>Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actions type</td>
<td>Project, Customer, Internal</td>
</tr>
<tr>
<td>Activities type</td>
<td>Task, Development, Evolution, Management, Phase</td>
</tr>
<tr>
<td>Budget type</td>
<td>Initial, Additional</td>
</tr>
<tr>
<td>Catalogs type</td>
<td>Product, Service</td>
</tr>
<tr>
<td>Change requests types</td>
<td>Recurring problem, Functional improvement, Technical improvement, Regulatory constraint, Process and quality</td>
</tr>
<tr>
<td>Client contract type</td>
<td>Management assistance, Hosting, Technical improvement</td>
</tr>
<tr>
<td>Client invoices type</td>
<td>Partial bill, Final bill, Complete bill</td>
</tr>
<tr>
<td>Component Version Types</td>
<td>Major Version, Minor Version, Patch</td>
</tr>
<tr>
<td>Components type</td>
<td>Specific, On the shelf</td>
</tr>
<tr>
<td>Decisions type</td>
<td>Functional, Operational, Contractual, Strategic</td>
</tr>
<tr>
<td>Deliverable type</td>
<td>Document, Software, Hardware</td>
</tr>
<tr>
<td>Delivery type</td>
<td>Document, Software, Hardware</td>
</tr>
<tr>
<td>Documents type</td>
<td>Contract, Need expression, Test Plan, Meeting Review, Detailed Specification, Exploitation manual, Follow-up, General Conception, User manual, Financial, Detail Conception</td>
</tr>
<tr>
<td>Incoming type</td>
<td>Document, Software, Hardware</td>
</tr>
<tr>
<td>Issues type</td>
<td>Technical issue, Resource management issue, Process non conformity, Customer complaint, Quality non conformity, Delay non respect</td>
</tr>
<tr>
<td>Meetings type</td>
<td>Steering Committee, Progress Meeting, Team meeting</td>
</tr>
<tr>
<td>Milestones type</td>
<td>Deliverable, Incoming, Key date</td>
</tr>
<tr>
<td>Notifications type</td>
<td>ALERT, WARNING, INFO</td>
</tr>
<tr>
<td>Opportunities type</td>
<td>Contractual, Operational, Technical</td>
</tr>
<tr>
<td>Organizations types</td>
<td>Department, Unit, Location</td>
</tr>
<tr>
<td>Products type</td>
<td>Software, Service</td>
</tr>
</tbody>
</table>
4.6.3 Description section

Organization types

The type of organization allows you to define a common behavior on organizations.

Management of Organizations allows to edit the structure of the company in the frame of organizations.

<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>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>

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.

<table>
<thead>
<tr>
<th>code</th>
<th>description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPE</td>
<td>Manual billed</td>
</tr>
<tr>
<td>OPE</td>
<td>Fixed Price</td>
</tr>
<tr>
<td>OPE</td>
<td>Time &amp; Materials</td>
</tr>
<tr>
<td>OPE</td>
<td>Capped Time &amp; Materials</td>
</tr>
<tr>
<td>OPE</td>
<td>Internal</td>
</tr>
<tr>
<td>ADM</td>
<td>Administrative</td>
</tr>
<tr>
<td>TMP</td>
<td>Template</td>
</tr>
</tbody>
</table>

**OPE : Operational project**

Most common project to follow activity.

All new types are created with OPE code.

**ADM : Administrative project**

Type of project to follow non productive work : holidays, sickness, training, …

Every resource will be able to enter real work on these projects, without having to be allocated to the project, nor assigned to project activities.

Assignments to all project task will be automatically created for users to enter real work.
These projects are not visible on Gantt type screens. Some sections and fields are not visible or do not work on administrative projects like Paused, Fix planning or the minimum threshold.

**TMP : Template project**

These projects will not be used to follow some work. They are just designed to define templates, to be copied as operational projects. Any project leader can copy such projects, without having to be allocated to them.

### Section Description

#### Other sections

- **Behavior**
- **Types of restrictions**

### Table 4: Required fields

<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: Workflow).</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: Incomes).</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>
Tickets types

Ticket type is a way to define common behavior on a group of tickets.

Section Description

Other sections

- Behavior

Table 5: Required fields

<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: Workflow).</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>
Activities types

Activity type is a way to define common behavior on group of activities.

Section Description

Other sections

• Behavior

Table 6: Required fields

<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: Workflow).</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>
Milestones types

Milestone type is a way to define common behavior on group of milestones.

Section Description

Other sections

• Behavior

Table 7: Required fields

<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: Workflow).</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>
Budget types

Budget types are a way to define the best budget for each project/activity. Estimated budget, cash, investment, sale . . .

Section Description

Other sections

• Behavior

<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: Workflow).</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>
Call for tender types

The types of calls for tenders make it possible to define the best procedure for launching calls with respect to the organization of your company:

the open, restricted tender, with minimum capacity requirements or pre-selection;

### Other sections

- **Behavior**

<table>
<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: Workflow).</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>
Supplier contract types

Supplier contract types are a way of defining the type of contract with a supplier.

Types of contract are already pre-registered: management assistance, hosting, technical improvement or Maintenance and support

Table 10: Required fields

<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: Workflow).</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>
Client contract types

Client contract types are a way of defining the type of contract with a client.

Types of contract are already pre-registered: management assistance, hosting, technical improvement or maintenance and support

<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: Workflow).</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>
Provider tender types

Quote types allow you to organize and categorize the different offers received by your suppliers

Section Description

Other sections

• Behavior

Table 12: Required fields

<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>
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</tr>
<tr>
<td>Workflow</td>
<td>Defined the workflow ruling status change for items of this type (see: Workflow).</td>
</tr>
<tr>
<td>Sort order</td>
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</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>
Order to Provider types

Vendor order types categorize the subject of the request: service or product

Section Description

Other sections

- Behavior

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Description</td>
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</tbody>
</table>

Table 13: Required fields
Provider bill types

There is a wide variety of invoice types. Each one is used in specific circumstances and requires the respect of protocols concerning their constitution and their emission.

You can create as many invoice types as you need.

Section Description

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Behavior</td>
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Table 14: Required fields

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</tr>
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</tr>
</tbody>
</table>
Payments to provider types

Payment type is a way to define common behavior on group of payments.

**Section Description**

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>• Behavior</td>
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**Table 15: Required fields**

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<tr>
<td>Name</td>
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</tr>
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<td>Description</td>
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</tr>
</tbody>
</table>

Individual expenses types

Individual expense type is a way to define common behavior on group of individual expense.

**Section Description**

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>• Behavior</td>
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**Table 16: Required fields**

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</table>
Project expenses types

Project expense type is a way to define common behavior on group of project expense.

Section Description

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>• Behavior</td>
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Table 17: Required fields

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</table>
Expenses details types

Expense detail type is a way to define common behavior and calculation mode on group of expense details.

Section Description

Table 18: Required fields

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<th>Field</th>
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</thead>
<tbody>
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<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>
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</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>

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>
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<tbody>
<tr>
<td>Individual expense</td>
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</tr>
<tr>
<td>Project expense</td>
<td>Details type of project expense.</td>
</tr>
</tbody>
</table>
Client Quotations types

Other sections

• Behavior

Customer quote types allow you to define common behaviors on a quote group, such as the type of billing that will be applied

Section Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
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<tr>
<td>Name</td>
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<tr>
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<tr>
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</tr>
</tbody>
</table>
Client order types

Client order types allow you to define common order behaviors, such as billing

Section Description

Other sections

- Behavior

Table 20: Required fields

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<tr>
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Client Bills types

Bill type is a way to define common behavior on group of bills.

Section Description

Other sections

• Behavior

Table 21: Required fields

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<tr>
<td>Description</td>
<td>Description of the type.</td>
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</table>
Client payments types

customer payment type defines how the customer will pay the bill

Other sections

- Behavior

<table>
<thead>
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</thead>
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<tr>
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<tr>
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</tbody>
</table>
Catalog types

catalog types allow you to define what type of item you produce or sell to your customers: products, services . . .

Section Description

Other sections

• Behavior

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
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Risks types

Risk type is a way to define common behavior on group of risks.

Section Description

Other sections

• Behavior

Table 24: Required fields

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<tr>
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</table>
Opportunities types

Opportunity type is a way to define common behavior on group of opportunities.

Section Description

Table 25: Required fields

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<tbody>
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Actions types

Action type is a way to define common behavior on group of actions.

Section Description

Other sections

- Behavior

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<tr>
<td>Description</td>
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</table>
Issues types

Issue type is a way to define common behavior on group of issues.

Section Description

Other sections

- Behavior

Table 27: Required fields

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<th>Field</th>
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</table>
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.

## Section Description

### Other sections

- **Behavior**

<table>
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<td>Description</td>
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</table>
Change requests types

The change request type is a way to define common behavior on a group of particular requests.

Several types are pre recorded: recurring problems, technical and functional improvement, regulatory constraint and process and quality.

Section Description

Table 29: Required fields

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<th>Field</th>
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</thead>
<tbody>
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<td>Description</td>
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</table>
Decisions types

Decision type is a way to define common behavior on group of decisions.

Section Description

Other sections

- **Behavior**

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Asset types

Question type is a way to define common behavior on group of questions.

Table 31: Required fields

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</thead>
<tbody>
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</table>
Questions types

Question type is a way to define common behavior on group of questions.

Section Description

Other sections

- Behavior

Table 32: Required fields

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<th>Field</th>
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<tr>
<td>Code</td>
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</tr>
<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>
Messages types

Message type is a way to define common behavior on group of messages (appearing on today screen).

**Section Description**

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Behavior</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
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<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
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<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>
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Table 33: Required fields
Documents types

Document type is a way to define common behavior on group of documents.

**Section Description**

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<th>Description</th>
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<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>
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 35: Required fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
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<td>Name of the type.</td>
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<tr>
<td>Description</td>
<td>Description of the type.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
</tbody>
</table>
Requirements types

Requirement type is a way to define common behavior on group of requirements.

Section Description

Other sections

- Behavior

<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: Workflow).</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>
Test cases types

Test case type is a way to define common behavior on group of test cases.

Section Description

Other sections

• Behavior

Table 37: Required fields

<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: Workflow).</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>
Test sessions types

Test session type is a way to define common behavior on group of test sessions.

Section Description

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Behavior</td>
</tr>
</tbody>
</table>

Table 38: Required fields

<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: Workflow).</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>
Customers types

Customer type is a way to define different kinds of customers (prospects or clients).

Section Description

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Behavior</td>
</tr>
</tbody>
</table>

Table 39: Required fields

<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>

4.6. List of Types
Providers types

Provider type is a way to define different kinds of providers.

Section Description

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Behavior</td>
</tr>
</tbody>
</table>

Table 40: Required fields

<table>
<thead>
<tr>
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<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>


Products types

Product type is a way to define common behavior to group of product.

Section Description

Other sections

• Behavior

Table 41: Required fields

<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: Workflow).</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>
Components types

Component type is a way to define common behavior to group of component.

Section Description

Other sections

• Behavior

Table 42: Required fields

<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: Workflow).</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>
Product version types

Product version type is a way to define common behavior to group of Product version.

Section Description

Other sections

- **Behavior**

Table 43: Required fields

<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: Workflow).</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>
Component version types

Component version type is a way to define common behavior to group of Component version.

Section Description

Other sections

- **Behavior**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Id</strong></td>
<td>Unique Id for the type.</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>Name of the type.</td>
</tr>
<tr>
<td><strong>Code</strong></td>
<td>Code of the type.</td>
</tr>
<tr>
<td><strong>Workflow</strong></td>
<td>Defined the workflow ruling status change for items of this type (see: Workflow).</td>
</tr>
<tr>
<td><strong>Sort order</strong></td>
<td>Number to define order of display in lists.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Box checked indicates the type is archived.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Description of the type.</td>
</tr>
</tbody>
</table>
4.7 List of Values

Each screen in List of values allows to define your own values.
Then you will be able to select them in corresponding screens.

Note:

• By default, some lists are not visible on their corresponding screen like Languages in Product and Component screen.

• To use them you must enable their parameter in global parameters.
4.7.1 Status

The status is an important element of items lifecycle. It defines the progress of the treatment of the element. Some automations are implemented, depending on status definition, to set on items. See: Workflow.

**Handled status**
- This status specifies that the treatment of item is supported.
- A responsible can be determined or required.

**Paused status**
- This state indicates that item processing is in a paused state.
- Used for the processing of certain elements (activity, tickets . . . )
- Allows you to exclude and purge the calculation from the schedule
- Recording these break times allows you to get more accurate treatment information

**Done status**
- This status specifies that the treatment of item is done.
- A result can be specified or required.
- It is possible to require a result when the status change to “done”.

**Closed status**
- This status indicates that the item is closed.
- This article is archived and will no longer appear in the lists.
- You can display these items by checking the “closed” option at the top right of the screen

**Cancelled status**
- This status specifies that the item is cancelled.

### Section Description

<table>
<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><strong>Handled status</strong></td>
<td>Defines whether ‘handled’ flag is automatically set for this status.</td>
</tr>
<tr>
<td><strong>Done status</strong></td>
<td>Defines whether ‘done’ flag is automatically set for this status.</td>
</tr>
<tr>
<td><strong>Closed status</strong></td>
<td>Defines whether ‘closed’ flag is automatically set for this status.</td>
</tr>
<tr>
<td><strong>Cancelled status</strong></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><strong>Closed</strong></td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

**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.

4.7.2 Functions

The function defines the generic competency of a resource.
The function is used to track resource costs on planning element.

Section Description

Table 46: Required fields

<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>

4.7.3 Categories of project

Categories are defined to group sets of projects. Reporting exploits this value.

Section Description

Table 47: Required fields

<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>

4.7.4 Resolutions

Allows to define different kinds of resolution for tickets.

4.7. List of Values
Section Description

Table 48: Required fields

<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”</td>
</tr>
<tr>
<td></td>
<td>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>

4.7.5 Languages

Allows to define and create your own languages list.

Then in Product, product version or Component screen you can select your languages values.

This language are also used with the translation module.

Note: you have to active ‘display language in Product/Component’ in global parameters.

Section Description

Table 49: Required fields

<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>Code</td>
<td>Code / reference for the registered language.</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>

4.7.6 Language skill level

Le niveau de compétence langage est utilisé pour les traduction sur les produits et versions de produits.

Vous déterminez le niveau de compétence pour une langue.

Section Description

Table 50: Required fields

<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 for the registered language skill 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>
4.7.7 Intervention modes

Allows you to define and create your own list of interventions mode. These values are used in the *planned interventions* screens and *view interventions*.

**Section Description**

<table>
<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>Letter</td>
<td>Letter displayed on the intervention schedule and which refers to the corresponding intervention mode</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number which defines the display order of intervention modes on the planned interventions and view interventions screen</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

4.7.8 Steering

**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>

**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>
Efficiencies

The efficiency measures the result of an action.

Section Description

Table 54: Required fields

<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>
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</tr>
<tr>
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<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>

4.7.9 Financial

Payment deadlines

The payment deadline is stated on the bill.

Section Description

Table 55: Required fields

<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>
Payment methods

The mode of payment.

Section Description

Table 56: Required fields

<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>

Delivery modes

The mode of delivery.

Section Description

Table 57: Required fields

<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>

• Add dates on deliveries to follow dates: initial, planned, real, validation
Measure units

The measure units.

Section Description

Table 58: Required fields

<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>

Budget orientation

The orientation of the budget

Section Description

Table 59: Required fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
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<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>
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</table>

Budget Categories

The orientation of the budget

Section Description

Table 60: Required fields

<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>

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 61: Required fields

<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>

Renewal

Allows you to define and create your own renewal type list. These values are used in the customer and supplier contract management screens.

3 values are pre-registered by default: never, tacit and Express See: incomes

Section Description

Table 62: Required fields

<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>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

Predefined situation

Section Description

Table 63: Required fields

<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>Element</td>
<td>Type of element affected</td>
</tr>
<tr>
<td>Type</td>
<td>Name of the Brands</td>
</tr>
<tr>
<td>Sort order</td>
<td>Number which defines the display order of the financial elements</td>
</tr>
<tr>
<td>Financial situation</td>
<td>The financial situation which will be taken into account</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate this value is archived.</td>
</tr>
</tbody>
</table>

4.7.10 Deliveries

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 64: Required fields

<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>

**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 65: Required fields

<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>

**Incoming status**

Define your incoming status list and select it in Incoming screen.

**Section Description**

Table 66: Required fields

<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>
• Add dates on incomings to follow dates: initial, planned, real, validation

**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>

• Add dates on deliverables to follow dates: initial, planned, real, validation

**4.7.11 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>

**Field Icon**

• If no icon is defined, color is used.

• You can define your own icons list (see: administration guide).
4.7.12 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>

**Field Icon**

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

4.7.13 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>
4.7.14 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>

**Field Icon**

- If no icon is defined, color is used.
- You can define your own icons list (see: administration guide).

4.7.15 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>

**Field % value**

This field is used to calculate a reserve amount according to the likelihood of risk or opportunity.
4.7.16 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 73: Required fields

<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>

4.7.17 Severities

The severity designs the level of negative or positive impact the risk or opportunity may have for the product.

### Section Description

Table 74: Required fields

<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>
4.7.18 Urgencies

The ticket urgency is an element given by the requestor to indicate the quickness of treatment needed for the ticket.

**Section Description**

Table 75: Required fields

<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>

4.7.19 Priorities

The ticket priority defines the order to treat different tickets.

**Section Description**

Table 76: Required fields

<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>

4.7.20 Locations

Allows you to define and create your own list of locations, Sites, Cities, Countries . . . for the management of your IT infrastructure.

**Section Description**

Table 77: Required fields

<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>
4.7.21 Periods

Allows you to define and create your own list of periods. These are used to define the intervention periods in customer and supplier contracts.

Section Description

Table 78: Required fields

<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>

4.8 Control Automation

The menu “controls and automatisms” allows to manage and parameterize efficiently and finely the triggering events as well as all that ensues from it . . . automatically.

Sending mails, changes of status, status, loading of notes . . .

4.8.1 Workflow

Concepts

- Profiles definition

A workflow defines the possibility to go from one status to another one, and who (depending on profile) can do this operation for each status.

Once defined, a workflow can be linked to any type of any item.

It is possible to define some mandatory fields on some status change (in the definition of type of item or through the Screen Customization plugin).

If a field is required for the transition from one status to another then you will be automatically redirected to the required field.

Regardless of the layout and presentation of your screens.

Select status

Click on ☒ to display the status list.

Choose the statuses to keep or hide by clicking on the checkboxes

Section List of types using this workflow

List of all elements and objects related to this workflow
Section Workflow Diagram

The workflow diagram presents a visual representation of the workflow displaying all possible transitions (independently to profile rights).

Section Habilitation to change from a status to another

- The habilitation table helps defining who can move from one status to another one.
- Each line corresponds to the status from which you want to be able to move.
- Each column corresponds to the status to which you want to be able to go.
- It is not possible to go from one status to itself (these cells are blank).
- Just check the profile (or “all”) who is allowed to pass from one status to the other.

Make sure that it is still possible to transfer an item from one status to another. Because it is possible to get stuck on a status.

Check the links so that there is still an outlet.
Fig. 29: Select or hide status
Fig. 30: List of types using this workflow

Fig. 31: Workflow Diagram

Fig. 32: Habilitation table
4.8.2 Email Templates

The user is able to format mails that are sent automatically on events.

See Mails on event.

When using template, the standard email formatting is replaced with selected one.

Just define your templates, and select it on the “Mail on Events”

Field element updated and type

- If not set, the template is valid for every type of the element
- If element is set, only these elements will be able to select the template
- If element and type are defined, only elements of the corresponding type will be able to select the model of mail

Specifics Tags on email template

In the model, the user can use any property of the subject and display it in the mail using specific tags.

You just need to use the tag $ {projectName} for the name of the project to appear and $ {idproject} to display the identification number of this one.

Tip: For properties referencing an external element, such as idXxxxx, use $ {nameXxxxx}

Other tags are available as parameters for email titles

More details, see Global Parameters
Some specific tags can also be used

- `${item}`: class of the item
- `${dbName}`: display name of current instance
- `${responsible}`: synonym for `${nameResource}`
- `${sender}`: name of user sending the email
- `${project}`: synonym for `${nameProject}`
- `${url}`: url to get the direct link to the item
- `${goto}`: display Class and Id of item, clickable to have direct link to the item

Attached files.

- `${allAttachments}`: allow to add to your template all the attached files of the element
- `${lastAttachment}`: allow to add the last attached files to the element

**Warning:** When sending all the files, the software retrieves the files one by one and this, in the order of insertion, from the most recent to the oldest attached file.

If the maximum size allowed does not allow all files to be sent, then the software will stop until the maximum size is reached.

If the last attached file saved in the software alone exceeds the maximum authorized size, then no file is sent.

This tags are available except in the mail title because they display a table

- `${HISTORY}`: displays the last change of an object.
- `${HISTORYFULL}`: display all the modifications
- `${LINK}`: list linked elements to the item
- `${NOTE}`: lists the element’s notes in tabular form
- `${NOTESTD}`: list notes in default format

**the Tags selector**

- A tag selector is available under the text fields.
- Choose the tag you want to insert.
- Click on **insert**
- The tag appears in the body of the text

**4.8.3 Mails on event**

- The app is capable of automatically sending emails when updating an item.
- Events are defined on an element and / or an element type.
- The e-mail message is formatted to display information about the item.
- Selecting a template will use the template formatting instead of the standard default formatting.
Fig. 34: Insert specific tags
• The e-mail titles are defined in *Global parameters*.
• If the type field not set, the event is valid for every type of the element.

**Description section**

In the description section you will detail what will be the levers to trigger the sending of an email. Status is one of these levers. Positioning items in the chosen status will generate an email. Or choose any other event in the drop-down list.

```
new status: done
or other event
email template
   attachment add
   note add
   note change
   assignment add
   assignment change
   add allocation to project
   change allocation to project
   link add
   link delete
   responsible change
   description change
   result change or response
   any change
   any change of status
   priority change
   new user created
```

*Fig. 35: Events list*

**Mail receivers Section**

• List of addresses of the mails.
• The list is not nominative, but defined as roles on the element.
• Each addressee will receive mail only once, even if a person has several “checked” roles on the element.
• See: *Receivers list* for receivers detail.
4.8.4 Delays for tickets

It is possible to define a default delay for tickets, for each ticket type, each ticket urgency and for each status.

**Note:** On creation, the due date will automatically be calculated as creation date + delay.

**Section Description**

Table 79: Required field

<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>Project</td>
<td>The project on which the delays will be applied.</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>

**Field Value**

**Unit for the value can be**

- **Days:** simple calculation as days
- **Hours:** simple calculation as hours
- **Open days:** calculation excluding days off
weekends and days off defined on “calendar”

- **Open hours**: calculation only on the “standard open hours” defined in *Global parameters* screen.

**Ticket status**

You determine what the status of the ticket will be for the timeframe you create.

For the same ticket, you can have 2 days to take charge of it, 1 day to process it and 1 day to close it.
4.8.5 Indicators

It is possible to define indicators on most elements. You can set the indicators on:

- actions
- activities
- customer invoices
- customer invoice exchanges
- customer orders
- customer quotes
- individual expenses
- issues
- meetings
- milestones
- supplier orders
- projects
- project expenses
- supplier invoices
- supplier offers
- questions
- requirements
- risks
- payment deadlines to suppliers
- test sessions
- and finally the tickets

Depending on type of elements the type of indicators that can be selected in list differs.

Some indicators are based on delay (due date), some on work, others on cost.

For each indicator, a warning value and an alert value can be defined in days or hours (working or not).
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.
4.8.6 Predefined notes

The predefined note set the possibility to define some predefined texts for notes. When some predefined notes are defined for an element and/or type a list will appear on note creation. Selecting an item in the list will automatically fill in the note text field.

Section Description

Table 80: Required field

<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>

Field Element

If not set, predefined note is valid for every element type.

Field Type

If not set, predefined note is valid for every type of the element.
4.8.7 Checklists

It is possible to define checklist forms for each element or each type of element. When a checklist form exists for a given element, the checklist is available only for the element.

![Checklist screen](image)

Fig. 38: Checklist screen

**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 ![icon](icon) to create a new checklist line.
- Click on ![icon](icon) to update an existing checklist line.
- Click on ![icon](icon) to delete the corresponding checklist line.

**Tip:** Details of dialog box

- Each line has a name, an order and up to 5 check choices.
- A line with no check choice will be displayed as a section title.
- Name and Choices have 2 fields:
  1. Displayed caption.
  2. Help text that will be displayed as tooltip.
- Checks can be exclusive (select one will unselect others) or not (multi selection is then possible).
Fig. 39: Choices for the checklist lines
4.8.8 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.
4.8.9 KPI definitions

A performance indicator or key performance indicator (KPI) is a type of performance measurement. It is possible to define KPI on incomings and deliverables items.

Fig. 40: KPI Definition screen

Section Description

**Warning:** Description integrates the formula used to calculate the KPI.

Section Tresholds

It is possible to attributes tresholds lines to KPI.

- Click on + to create a new JobList line.
- Click on to update an existing JobList line.
- Click on to delete the corresponding JobList line.

<table>
<thead>
<tr>
<th>Thresholds</th>
</tr>
</thead>
<tbody>
<tr>
<td>name</td>
</tr>
<tr>
<td>not good</td>
</tr>
<tr>
<td>good</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
4.8.10 JobList

The JobList can be used for each item or item type. It is generally used to detail an activity or a ticket. It also acts as an indicator to monitor compliance with date values thanks to the lead time of tasks.

Section JobList lines

A JobList is built from JobList lines.

- Click on + to create a new JobList line.
- Click on to update an existing JobList line.
- Click on to delete the corresponding JobList line.

Task anticipation delay .

Fig. 41: List of KPI Reports

Fig. 42: Joblist colors anticipation delay
• This deadline is fixed for each step created in the joblist. It works with planned dates. It is not compulsory.
• A color code allows you to anticipate these dates
  – **White:** Without anticipation delay
  – **Green:** Check the box to indicate that this step has been completed. The dot turns green.
  – **Orange:** You enter the anticipation period
  – **Red:** you have exceeded this deadline

### 4.8.11 Notifications

You must activate the notifications module to display the corresponding screens

This system allows you to generate notifications or according to very “powerful” rules (defined as “where” clauses).

**Note:** ProjeQtOr offers 2 systems to generate alerts or reminders: definition of notifications and manual notifications from the tools menu

see: [Notifications](#).

Notification definition in control and automation menu allows you to create notifications about events

#### Notification System

If it is generated by the notification system, it is linked to an element of the system (Action, Invoice, ...).

![Notifications system screen](#)

**Fig. 43: Notifications system screen**

#### Creation

**The definition of notification generation is based on the following:**

• The title that can contain the field values of the notifiable element or its sub-elements
• The element of the system that determines the notification, called “Notifiable Element” (notifiable)
• The type of notification (Alert, Warning, Information)
• The notification rule notifying the elements related to the generation of a notification
• The content may also contain the field values of the notifiable element or its sub-elements.
• The date (referred to as the reference date) at which the notification must be generated. This is one of the dates of the notifiable item that is not the creation date.
• The generated notification receivers. Fields of the notifiable element or its sub-elements that refer to users.
• The choice to send, or not, to all the sending of emails at the same time as the notifications.

Section Description

This section briefly describes the type of notification
Its name, its type: alert, information or warning as well as the notifiable element.

Section Notification title

This section allows you to give a title to your notification.
This title will be the object of the programmed mail if you tick the box send an email in the receivers section
You can add dynamic fields with help to insert a dynamic field in the title
The title of the notification can therefore contain fields of the “notifiable” object and its linked elements via an idXXX.
where XXX is the name of the linked item.
Select an object and / or a field and click the Insert button so that the dynamic field with the correct syntax fits directly in the title, where the cursor is.
In this case, the syntax must be: #{the name of the field} ...

Tip:  #{billId} - Invoice not paid - Sent on #{sendDate} If the rule (see below) of the instruction on the invoice of 'billId' 2019-12-30-0001 whose sending date is 30-12-2019 then the title of the notification will be:
2019-12-30-0001 - Invoice not paid - Submitted on 12-30-2019

Section Rule to apply

This rule determines which instance of the item will generate a notification.
The syntax is the one we take for a WHERE clause in an SQL statement.

Tip:  Scheduling a notification for all invoices where the amount has been paid = total amount AND project name ‘ACME’

4.8. Control Automation
ProjeQtOr User guide, Release 9.2.0

#{paymentAmount} < #{fullAmount} AND #{idProject.name} = ‘ACME’ AND isnull (#[paymentDate])

---

**Note:** The rule to apply is not mandatory. If the rule is empty, then only the reference date is used to determine whether or not a notification is generated.

In addition to choosing a dynamic field, you can choose to use an operator or function with the following elements:

---

**Notification content**

This section is mandatory

You can also add dynamic fields with **help to insert a dynamic field in content** in the same way as in the description section

---

**Section Start as**

- **Start at**
  - reference date
  - initial due date/time
  - to notify: [days before or] [120 minutes before]

- **repeat notification**
  - every year
  - every month
  - every week
  - every open day
  - number of times before

Fig. 45: Start as section

This section allows you to program the frequency of the notification display

- **The reference date**
  - Date on which will be generate the notification (minus the number of days or minutes programmed before)
  - Notify before: This is a number of days before the notification date for which the notification is to be generated
  - This field is mandatory

Example “delivery expected date” is selected.

For all deliverables that do not follow the previous rule, a notification will be generated if the delivery date is not respected.

---

**Every year**

- If the year is checked, the generator is a notification every year to the month and the day of the reference date
• If the year is checked, the month and day filled, then it is a birthday. The reference date will not be used.

**Every month / Week / Open day**

• Is selected, responsive notifications will be generate monthly / weekly or each open day

**Receivers**

These are the types of people who are notified.
The syntax is as follows: One of the words in the “Help Authorized Recipients” section separated by a ‘;’
The following items allow you to choose the type of remitter.

If **Sent e-mail** checked, an e-mail will be generated even if the notification for each type of person has been defined.

**See also:**

**Global Parameters Management of automated service (CRON)**

Gives in seconds, the time interval between two generations of notification (and the Cron system is active) and between two the refresh of notifications on the HMI.

---

**Note: The authorizations**

The access rights for the ‘notification’ menu were given to the ‘standard’ projeqtor profiles (idProfile = 1 to 7) with the CRUD rights reader only

The access rights for the ‘notification definition’ menu have been given for the administrator profile (idProfile = 1) with the CRUD rights modifiers

---

**Notification and the IHM**

After logging in, a message generated after “Login accepted” that tells you that you have unread notifications:

**Display of unread notifications**

It is done at 2 levels on the main screen:

• Bottom right A notification icon appears as soon as a notification is not intended for the user.

  Clicking on the icon gives direct access to the notifications screen.

• In the secondary menu

A tree whose title indicates the number of unread notifications intended for the user.

**This tree has the following levels:**

• Level 1: The types of notifications

• Level 2: The trigger for notifications

• Level 3: The Notification Definition to Product Notifications

• Level 4: The id of the element that generated the notification. Allows direct access to the item.
Fig. 46: Notification on the login screen
Fig. 47: Notifications

Fig. 48: Notifications
The icon allows you to refresh notifications without waiting for the scheduled update.

The icon provides direct access to the notifications screen.
Numbers indicate the number of unread notifications

4.9 Tools
4.9.1 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.
4.9.2 Emails to send

You must enable the Activate email grouping option in the global parameters. The programmed emails will be grouped in this screen before their automatic sending based on the period entered in the global parameters.

4.9.3 Scheduled report

In reports, you can schedule sending emails for accurate reports. You can get the list and details of this programming on this screen. Click on Button to cancelled the programming.

Fig. 49: Scheduled report screen

See: Report Sending programmation

4.9.4 Alerts

Users can have a look at the alerts sent. By default, administrators can see all the alerts sent, and other users only see their own alerts.

Button Mark as read

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

**Concepts**

- **Profiles definition**

You can define some message that will be displayed on the login screen.

**Section Description**

**Table 81: Required 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>Start Date</td>
<td>Date when the message begins</td>
</tr>
<tr>
<td>End Date</td>
<td>Date when the message ended</td>
</tr>
<tr>
<td>Message</td>
<td>Complete text of the message</td>
</tr>
</tbody>
</table>

**Detail section**

You can apply visibility filters.

- by profile
- by project
• by organization
• by team
• per user

Check the “Show on login screen” box to see your message on the login screen.
4.9.6 Legal notice

The General Data Protection Regulation (GDPR) governs the processing of personal data in the territory of the European Union.

Above all, this involves informing people about what you do with their data and respecting their rights. As a data controller, or as a processor, you must take measures to ensure that this data is used that respects the privacy of the persons concerned.

You can define a “legal” message that will be displayed when you log in from the home screen.

For this message to disappear, it must be scrolled to the read confirmation button.

Fig. 52: Legal notice screen

This allows you to have a real-time follow-up of the users who have confirmed the reading of this message.

Fig. 53: Legal notice screen

Note: What is the GDPR?

The abbreviation GDPR stands for “General Data Protection Regulation” (GDPR). The GDPR governs the processing of personal data in the territory of the European Union.

The legal context adapts to follow developments in technologies and in our societies (increased use of digital technology, development of online commerce, etc.).

This new European regulation is a continuation of the French Data Protection Act of 1978 and strengthens the control by citizens of the use that may be made of data concerning them.

It harmonizes the rules in Europe by offering a unique legal framework to professionals. It helps to develop their digital activities in the EU based on the trust of users.

Visit the CNIL web site here
4.9.7 Import data

Imports data from CSV or XLSX files.

How to do

1. Select the element type from the list.
2. Select file format (CSV or XLSX).
3. Select the file.
4. Click on **Import data** button to start importing.

Report of the import

- Data that is not imported because not recognized as a field appear in grey text in the result table.
- Data that are voluntarily not imported (because must be calculated) appear in blue text in the result table.

Import users

- The password field must be cut and pasted from the database because it is encrypted.
- If you enter some readable password, the users will not be able to connect.

**Warning:**

- If you want to create new users **don’t put any id** because if id already exists, it will be overridden by the new (with possibility to erase admin user…).
- Always keep in mind that your import may have some impact on administrator user.
- So be sure to keep an operational admin access.

Importing document versions

- Two ways to import document versions:
  - by describing only the version, with its standard fields.
  - by describing the document and the version (the name of the fields of the version will be followed by ‘(DocumentVersion)’, or its translation into the current language).

**Note:** CSV import

- The **CSV import file may also include**:
  - ‘importFile’ field that will give the link to the version file (this file will have to be reachable by the PHP server).
  - ‘target’ field that can be set to ‘DELETE’ (the file to be imported is deleted after import) or a directory name (the file to be imported is moved to this directory after import) or nothing (the file to be imported is not modified).
File format

The content of the imported file must fit the element type description.

To know the data that may be imported, click on the button.

Names of columns

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

Tip:

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

Date format

- Dates are expected in format “YYYY-MM-DD”.

Data import process

Operations are performed, depending on whether the element type, the column or the column value.

Column Id

You may or may not add an “id” column in the file.

Column “id” exists and “id” is set in a line

- The import will try to update the corresponding element, and will fail if it does not exist.

Column “id” does not exist or if “id” is not set in a line

- The import will create a new element from the data.

Linked tables

For columns corresponding to linked tables (“idXxxx”), you can indicate as the column name either “idXxxx” or “Xxxx” (without “id”) or the caption of the column (as displayed on screens).

Numeric value

- If the value of the column is numeric, it is considered as the code of the item.

Non numeric value

- If the value of the column contains non numeric value, it is considered as the name of the item, and the code will be searched for the name.

Columns with no data

- In any case, columns with no data will not be updated.
- Then you can update only one field on an element.
Clear data

- To clear a data, enter the value “NULL” (not case sensitive).

Planning elements

- Insertion into “Planning” elements (activity, project), automatically inserts an element in the table “PlanningElement”.
- The data of this table can be inserted into the import file.

Tickets

- Do not import the value of “real work” on tickets, even if it is specified in the import file.

Automatic import

Imports can be automated.
Files placed on a defined directory will automatically be imported.

Note:

- Automatic import parameters must be set in Global parameters.
- Background task must be started by Administration Console.

The files must respect some basic rules.

File name format

- File name format is : “Class”_”Timestamp”.”ext”
- Example of import file name: Ticket_20131231_235959.csv
  
  Class
  - The type of item to be imported (Ticket, Activity, Question, . . . ).
  
  Timestamp
  - Timestamp defined to be able to store several files in the directory.
  - Format is free.
  - The recommended format is “YYYYMMDD_HHMMSS”.
  
  Ext
  - File extension, representing its format.
  - Valid extensions are CSV and XLSX.

File format

- The files must follow the ProjeQtOr File format.
- Files must be full and consistent.

Tip:
• The files should not be directly created in the import folder.
• They must be created in a temporary folder and moved afterwards.

**Import process**

• Correctly imported files are moved to a “done” sub folder of the import folder.
• If an error occurs during import of a file, the full file is moved to “error” sub-folder of the import folder, even if there is only one error over many other items correctly integrated.
• You can get the result as a log file and/or email summary.
4.9.8 Cloned Environment

You can duplicate the complete environment (data and code) to form a simulation environment.

**Important:** The CRON program must be started and running so that the simulation request can be taken into account and can be generated.

**Administration of simulation requests**

This parameters are also be accessible from simulated environments.

Click on on the Simulation Management screen

Management of rights and limitations per profiles

Definition of profiles that have the right to create a simulation.

You can limit the number of total simulations per profiles.

This limitation can have some advantages:

- Avoid saturating the server.
- Force users to clean up their files.
- Limit performance degradation caused by the creation of a simulated environment

The removal requests are decremented. If the limits are reached, the request screen to create a simulated environment is blocked.

**Sequencing of the creation of simulations**

The time required to create a simulation space may vary. Depending on your database, your servers or even if several requests are generated simultaneously. It is an operation which can take time. That is why you can set frequencies for creation requests.

- **Fixed frequency**
  
  Analyzes creation requests at regular intervals and starts the generation of simulation environment as soon as a request is encountered.
• **At a given time**

In order to avoid any slowing down of the database, you can program the generations of the spaces at a specific time of the day. This allows these to be programmed outside working hours.

**Copying datas**

It is necessary to copy the code and the data because the simulations created in a version could no longer be compatible with the code of the main instance that has migrated.

The creation of a simulation instance is a heavy process for the server: duplication of code, duplication of data...

That’s why when generating your simulation space, not all data is copied.

**Is not copied**

- Archived data (closed)
- Update history
- Attached documents and files

**Copy of the code**

- Disabling all automation and notifications.
- Update the simulations table to record the actual creation:
  - Date and time of actual creation,
  - Flag “available environment”
  - Instance access URL

**The cloned Environment managment**

![Cloned environments management](image)

This screen allows you to manage your queries for new simulation environments, to follow them or to request the deletion of a particular simulation.

You can also track requests from other users based on your profiles and your rights.

**Generating a simulation environment**

To request the creation of a new simulation area, click on ![+]

A pop up will appear allowing you to make your request.

Identify the profile making the request, name your space (required) and confirm your request by clicking on OK.

**The simulated databases will always have a name prefixed by simu_ followed by the name of the simulation.**

**Dates**

- Creation dates: Indicate precisely the date on which you made your request for simulation space.
• Availability dates: Indicates the date on which your space was actually generated. They are indicated to you when your request is taken into account.
• Delation dates: Indicates the date on which your space will be completely deleted. The simulation space must actually be generated for the deletion request status to appear. If the database is in the request phase and therefore not yet generated, then the deletion is immediate and the deletion request status does not appear.

Color code
• **Blue:** Request being created
• **Orange:** Warning (delete request)
• **Red:** Error creating the environment (path, rights . . . )
• **Green:** Environment creates

Go to the cloned Environment

When your simulation is ready, green status, you can open your cloned environment. Click on to launch the environment.

A new tab opens with a new ProjeQtOr session. Authenticate yourself, you can start working in your environment.
The instance area turns red when you are in a simulation space.
Not all screens or functions will be accessible in this space.
For example, you will not be able to request and create a new simulation space in your cloned environment.
Copy a cloned Environment
You did a successful simulation on one of your cloned environment.
You want the copy to run other tests but without touching the simulation.
Just copy this environment.
The origin of the copy will then be indicated in the list with a shortcut to access it.
Deleting a simulation environment
Deletion requests are stored in the simulation table.
They are processed in the same process as creations, but always with priority to free up space before allocating new resources to new instances.

Tip: To avoid overly broad rights management and server invasion problems, all simulations (code) will be placed in a "simulation" directory outside of the main ProjeQtOr directory.

Thus, if the main instance is accessible via the url “projeqtor.xxx.fr”, the simulations will be accessible via the url “projeqtor.xxx.fr/simulation/nom_de_simulation”.

4.9. Tools
4.9.9 Notifications

You can defined manually notifications in this screen.

You receive notifications as soon as you authenticate on the login screen.

When you are logged in, you have a reminder at the top of the screen.

You have the number of unread notifications.

Hover over it for the list of notifications to appear.

A slight color line in front of the name indicates the type of notification:

- Red = alert
- Blue = information
- Yellow = warning

Click on the name of the notification to display its detail screen.

You can also display the notification in the part below the menu.

See: Secondary menu - Notifications section

Click on an unread notification for discover the details.

- The first icon indicates the type of notification
- the second icon indicates how the notification was created
  - System Notification
  - Manual Notification
- The third icon indicates if the notification has a definition. see: Notification System
- Click on the fourth icon for display the detail of the notification

Note: Type of alert

- \(\text{type information}\)
**Alert Title**

Text of the alert

---

**Vaccination and Blood Test Reminder**

Vaccination and blood test reminder
On Friday February 26, the blood test session for staff will take place in room 2036 on the 2nd floor of the Technical Building B. Many thanks for coming.
The vaccination campaign will begin on the same day.

---

**Culture and Leisure**

Culture and leisure
Come in large numbers to the X. XXX photo exhibition next weekend at the John Doe room in X
• ☀ type Warning

• ⚠ type alert

• Σ sum - Records all the type
4.9.10 Audit connections

Audit connection proposes a view of “who is online”. you can know which platform the user has logged on to, his browser and dates of his first and last access, as well as the duration of the connection.

Note: The administrator has the possibility to force the disconnection of any user (except his own current connection, see: admin-console.)
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 similar structure and position.
5.1 Graphical User Interface 9.0

ProjeQtOr interface is divided into several areas.

Fig. 1: Overview graphical user interface screen

Interface areas:
- Top bar
- Infos bar
- Custom Menu
- Menu
- Secondary menu
- List Area
- Details area
- Activity Stream

Note: Area separation

5.1.1 Top bar

Interface areas:
- Navigation buttons
- New tab
- Project selector
Fig. 2: The splitters allow resizing areas in the interface. The position of splitters is saved and retrieved on each connection.

- **Navigation buttons**

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

- **Button New tab**

  The new tab button 📝 allows to open a new tab within the same session.

- **Project selector**

  Allows to select the project to work on. Limited visibility of all elements of the selected project, including sub-projects if applicable. Definition of the “default” project for new elements.

**Note:** _User parameter_

**default project** Defines the project that will be selected and display by default into the project selector

See: _User parameters - section automation_

Project selector parameters

Click on 🔧 to display the project selector parameters dialog box, you can select:
• View closed projects and handled projects.
• Change the project list display mode.
• Refresh the list.

Show / hide
Choose which types of projects to display from the project selector list.

- **show closed items**
  
  This option allows you to enter the archive mode of the project selector. Closed projects will then appear in the selector list.

  When archive mode is activated then icon 
  is displayed in the top bar. Click on it to stop the process.

- **Display the handled projects**
  
  This option allows to display only in the list of the project selector, the projects with the macro state **handled**.

Project list display mode
ProjeQtOr offers the possibility to display the list of projects in different ways.

- **Standard reflecting WBS structure**
  
  • List of project and sub-project are displayed according to WBS structure.
  • Only multi selection mode
  • You can choose to display multiple projects by checking the corresponding boxes.

- **Filtering select with autocomplete**
  
  • List of project and sub-project are displayed according to entered text.
  • Search criteria works in a “starts with” mode
  • Autocompletion is active
Fig. 4: Project list display mode standard

Fig. 5: Filtering select with autocomplete
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

![Filtering select with search](image)

Selector of the current item

- Click on the button [ ] to select current project in the project selector.
- Click once, from any element to display in the selector the project linked to the element.
- Double click to display all projects again

Project selector search

Click on [ ] to search projects and subprojects from any screen with the same search functions as on the projects screen

![Project selector search window](image)

> **Instance name**

you can rename the name of the ProjeQtOr instance via the global parameters in the View tab.

See: Tab Display

### 5.1.2 Infos bar
The CRON activation button allows you to quickly see if your CRON is launched or not. The button is only visible for Administrator profile.

- **the CRON is running**
- **In request for closure. The next refresh turns it red.**
- **the CRON is stopped**

Click on the button to start or stop CRON in the same way as on the Administration page.

See: *Background tasks*

### Version button

Displays the version of ProjeQtOr installed

Click on the button to access the site of ProjeQtOr.org

### About menu

This menu allows you to have access to real-time information with a notification system for news.

The button sends you to the forum of the ProjeQtOr site in order to post the possible anomaly.

**Links**

The links indicated allow you to display:
Fig. 8: About menu
• the software manual,
• the manual page concerning the keyboard shortcuts taken into account in ProjeQtOr,
• the version information on the external libraries used in ProjeQtOr.

News
Find all the information about ProjeQtOr in real time.
Hover over the desired information with the mouse to preview it.
Click to view full information.
A navigation system allows you to consult all the information.
Access
Access ProjeQtOr’s plugin store and forum summary with just one click.

Screen layout

The layout of the screens allows you to choose how you want to display the ProjeQtOr interface

The arrangement not chosen appears in gray

Many modes are available!

Switched mode

Allows to enable or disable switched mode that allows to switch between list and detail windows.
Window selected is displayed in “full screen” mode.
Hidden window are replaced by a gray bar. Click on the gray bar to switch between windows.

Horizontal layout - vertical layout

You have all the screens of the application in horizontal or vertical mode.
You can uniquely arrange your screens by using the display icon in the list box
Horizontal mode shows the list box at the top of the screen and the details box at the bottom.
Vertical mode shows the list box on the left of the screen and the details box on the right.

Mode List

Column mode corresponds to the historical presentation of ProjeQtOr, where the different parts making up the details area are displayed in one, two or three columns

Mode Tab

The sections present in the columns are dispatched under tabs with the tab mode.
Show/Hide Activity Stream

Show or hide globally (on all screens), the notes area for each element.

To display notes only on a specific screen, choose 💬 from the details area toolbar.

See: Activity stream
See: Tools details area

Full screen mode

With this mode, you make your browser invisible, the menus, navigation bar, buttons ... are hidden. You can enjoy your ProjeQtOr instance in full screen mode.

Session menu

The connection window offers some settings and information at user level.

Profile

The profile section tells you:
- The common name in the software
- The connection identifier
- The profile assigned in the software with this account
- The organization to which the user belongs

You can assign a profile picture in the user settings.
The configuration section allows you to choose and modify at your leisure:

- the language of your personal session
- the home page which will be displayed when you log in
- the colors of your personal interface
- Your password

You can access full user settings from this window.

And it is in this window that you end your session using the disconnect button.

These changes only impact your session and will apply over the global settings defined by your administrator.

### Interface colors

You choose two colors which will be declined thanks to subtle colorimetric games throughout the software.

The main color corresponds to the color that will be displayed in the background of the menus, title and separation elements.

The secondary color is applied for everything related to selection, navigation or position.

#### Color discs

These discs are shortcuts for applying a color scheme. Basic four color discs are available including one with the original colors of ProjeQtOr.

The other three discs are suggestions on our part. You can display your colors by saving them in the global settings on the Display tab. The next time you reconnect, the last color disc will have your colors.

### brightness

Adjust the background brightness of your interface.

The brighter the brightness, the more white the background will be, move the cursor to dark to obtain the gray interface background.

### Menu speed

You determine how the menu behaves as you navigate through it. When you set to fast then the animation between the menus will hardly be visible anymore.

### 5.1.3 Custom Menu

![Display area](image)

Fig. 11: Bookmarks Bar
1. **New element**

This button allows you to quickly create a new element from any screen.

![Create a new item](image)

You can create:

- a project
- a resource
- an activity
- a ticket
- a meeting
- a milestone

The switch button “create on pop-up” allows you to define how to initiate the creation.

If the button is activated, a pop-up opens over the current screen on the screen of the element you want to create.

![Create a new element](image2)
If the button is disabled, you go directly to the screen of the element you want to create.

### Bookmarks

You can mark certain screens and organize them in the favorites bars to create a personalized menu. You can create up to 5 favorite bars.

Click on the button to display in the display zone the list of screens of the elements that you have put in favorites.

Right clicking on the display area allows you to display and organize the 5 favorite bars and choose how to display them.

- **Text** Bookmarks text
  - You view bookmarks in text mode only

- **Icon** Bookmarks icon
  - You display bookmarks in icon mode only

- **Icon and text** Bookmarks icon and text
  - You display bookmarks with icon and text
  - The number displayed corresponds to the number of the favorites bar on which you are.
  - To change bookmarks bar, use your mouse wheel when you are positioned on the bar.
  - Or click on the up and down navigation arrows at the right end of the bar.

**Add, Organize and remove bookmarks**

- To add a bookmarks, click on the star to the right of each menu screen
To organize your favorites, right click on the bar or click on to display your 5 bars, then click and drag and drop the screens to the desired bars.

The star is filled with the secondary color of your interface once added to the favorites bar.
A green bar tells you that you can drop the favorites from your screen, a red bar tells you that it is impossible.

To remove a bookmark, right click on the bookmark and click on the button remove from the custom menu bar.

> Recents bar

The recent screens bar allows you to keep in memory the screens you have browsed since the connection. It acts like a kind of limited history.

Indeed, the number of recent screens depends on your screen resolution. For example: between 12 and 16 screens displayed for a 2K screen and between 6 and 10 for an HD screen.

5.1.4 Menu

Interface areas:

- Main menu
- Section indication
- Breadcrumb
- Show / Hide menu
- Search menu

Main menu

The menu takes up the overall scope of project management. Each section represents a part of this perimeter.
Fig. 16: Menu
The menu is designed to highlight the main screens in each section. These are often the screens most used by project management professionals.

The secondary screens appear under sub-menus and the navigation is deeper.

Section indication

When browsing, each time you select a section or subsection, the icon corresponding to the latter is displayed in this area.

Breadcrumb

Breadcrumb generally refers to the breadcrumb trail of website navigation. This item tells the user where they are in the menu hierarchy.

In ProjeQtOr, the Breadcrum shows you the previous section of the one where you are.

By clicking on the breadcrumb, you return to the mother section, until you reach the reception.

Show / Hide menu

Click on \(\leftarrow\) to hide the menu

Click on \(\Rightarrow\) to bring up the menu

Search menu

You have the possibility to do a search directly in the menu.

The search takes into account the name of the element screens, but also certain tags, which do not know how to be enriched.

The search also allows you to display the reports related to the keywords entered in a separate section.

When you click on a screen resulting from your search, the screen is displayed but you do not change the section in the menu, which allows you to return at any time to the screens of the section where you were.

To return to your section after a search, click the reset icon in the search field.

5.1.5 Secondary Menu

The secondary menu can be seen as the right hand side of the menu.

It allows you to display a lot of information about your project, your navigation or your organization.

<table>
<thead>
<tr>
<th>Interface areas:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parameters</td>
</tr>
<tr>
<td>Links</td>
</tr>
<tr>
<td>Repertory and Document</td>
</tr>
<tr>
<td>Console</td>
</tr>
<tr>
<td>Notifications</td>
</tr>
</tbody>
</table>
Fig. 17: Search performed with the tag GANTT
Parameters

The parameters displayed in the secondary menu are linked to the selected screen.

In the example above, the user selected the Activity screen. We then see that the parameters are in direct correlation with the activities.

If the user selects the project screen, then the parameters will be adapted for those.

Links

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

![Project directories](image)

### Repertory and Document

Document directories give direct access to documents contained in the directory. See also: Document directories screen.

![Document structure](image)

### Console

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

**Warning:** Messages displayed here are not stored and will be flushed when user logout.
Notifications

In the secondary menu

![Fig. 19: Notifications]

A tree whose title indicates the number of unread notifications intended for the user.

This tree has the following levels:

- Level 1: The types of notifications
- Level 2: The trigger for notifications
- Level 3: The Notification Definition to Product Notifications
- Level 4: The id of the element that generated the notification. Allows direct access to the item.
The icon 🔄 allows you to refresh notifications without waiting for the scheduled update.

The icon ⌚ provides direct access to the notifications screen.

Numbers indicate the number of unread notifications.

### 5.1.6 List Area

#### Interface areas:
- **Element identifier**
- **Tools**
- **Items list**

#### Element identifier

Displays the element name and the count of items in the list.

Each element is identified with a distinctive icon.

#### Tools

- Click on 🔄 to create a new element
- Click on ⌚ to refresh the list
- Click on ⏰ to apply many filters
- Click on ⚙️ to organize the columns
- Click on 🕔 to open the sub-menu
- Click on 📜 to print the list area as it appear on the window
- Click on 📄 to export the list area to PDF
• Click on [CSV] to export the list area to CSV
• Click on [ ] to open the multiple update
• Click on [ ] to display this screen vertically or horizontally only

Swith the button close to make appear all the handled elements

The filters

<table>
<thead>
<tr>
<th>FILTERS</th>
<th>Reset</th>
<th>always display</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td></td>
<td></td>
</tr>
<tr>
<td>name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>quick search</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Advanced filters

Advanced stored filters

no filter clause

Fig. 20: Filters windows

The first filters offered are basic filters.

The rapid filters

You can choose to always display them in the toolbar of the list box by activating the switch button.

Fig. 21: Filters always visible

You can choose to always display them in the toolbar of the list box by activating the switch button.
You can restrict the display:
- by ID
- by name
- by type

The Quick search

fill in the quick search field then click on the magnifying glass to launch the search in all the available fields of the list box AND details.

Click the reset button to clear your search and restore the original display.

**Note:** Accents are not taken into account

States filters

Switch the button **Display states to filter directly**

Only existing status are visible if their are used.

Choice one of them and the item list will be filter.

This is a quick filter list by status

The advanced filters

Click on the button to display the advanced filters window.

Several sections are available

Active filter

Define the clauses of filter or sort in “Add a filter or sort clause”.

Select the name of the field, the operator and the value to the clause.

- Click on **+** to add additional criteria.
- Name the filter to save and click on **□** for later reuse.
- Click on **□** to filter the filter list.
- Click on OK button to apply the filter.
- Click on Cancel button to revert to previous filter.
- Click on Clear button to reset the active filter.

Logical operator

Possibility to select the logical operator OR between the criteria of a filter instead of AND.

Applies logical operator with preceeding criteria (by default AND).

Be careful, operator AND is applies before OR.

Dynamic value
When the selected value is dynamic, then you do not select anything in the list.

The value will then be entered when the filter is called and will be fully activated when the filter is chosen.

Saved filters

This section allows to manage saved filters.

- Click on a saved filter to retrieve its definition.
- Click on \(\text{\textbf{a}}\) from a saved filter to delete it.
- Click on \(\text{\textbf{z}}\) to reorganize the filters.
- Click on \(\text{\textbf{g}}\) to shared a filter with your employees

When your collaborators share filters, they appear below the list of saved filters.

Click on the list to display all filters and their author.

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 \(\text{no filter clause}\) to reset the filter.

The columns
Fig. 24: Shared filters

Fig. 25: List of filters

5.1. Graphical User Interface 9.0
Fig. 26: Columns Organizer
This functionality allows to define columns displayed in the list for this element. The columns display is defined for the user. The definition will be automatically applied in the next connection.

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

**Column section**

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 Button icon drag to reorder fields with drag & drop feature.

You can also move the columns directly on the list with the drag and drop by placing you on the name of the latter.

**Column size**

Use the spinner buttons to change the width of the field.

Width is in % of the total list width.

The minimum width is 1% and the maximum width is 50%.

You can also position your mouse between two columns and drag to modify the width of the selected column.

**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.
- This may lead to strange display, over page width, on list, reports and PDF export, depending on the browser.

**Export to PDF format**

Allows to export data of list to PDF format.

Export contains all details and links between tasks.

Export can be done horizontally (landscape) or vertically (portrait) in A4 and / or A3 format with high quality of details

**Export to CSV format**

This functionality allows to export data of list in a CSV file.

The fields are regrouped and presented in the order as they appear in the item description.

- Click on **OK** button to export data.
• Click on **Cancel** button to close the dialog box.

The export definition is defined for each user.

The same definition can be applied in the next export.

• Use the checkbox to select or unselect all fields.

• Click on **Select list columns** button to restrict selected fields to the ones that are currently displayed in the list.

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

• Box checked indicating that HTML tags in a long text field will be kept during export.

---

**Note:** **Import Datas**

The active filter defined will be applied to export data.

The CSV exported files can directly be imported through the import functionality.

*See:* **Import data**

---

**Multiple update**

Allows to update several items in one operation.

• The fields that can be updated depends on the selected element.

• The editable fields are sorted in alphabetical order.

**Apply updates**

• Select the items to modify in the list box

  You can select one or more rows with the Shift or Control keys directly in the list box or use the check boxes. Clicking a second time on the line deselects it.

• Then select the field to modify from the proposed list.

• Click on save to update the fields.

• Click on delete to delete the selected elements.

• Items and a report will be displayed on the right after validation

• Click on exit to exit multiple update mode.

---

**Note:**

• Target milestones can be modified with “multiple update” tickets and activity screens

• You can bulk close items that do not have status (assigned, closed, recorded . . . ) as resources

• The passwords of all users can be reset at the same time:
  – On the users screen, In the update area, click on the **Reset** button.
  – An email will be send to the selected users.

---

**Items list**

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

Sorting is not always on the name displayed.
### Export

#### Choose columns to export

- **Check/uncheck all**
- **Select list columns**
- **Id or name for references**
- **Preserve HTML format for long texts**
- **Separator for CSV files**

<table>
<thead>
<tr>
<th>Description</th>
<th>Treatment</th>
<th>Progress</th>
<th>Product</th>
<th>Component</th>
<th>Target product version</th>
<th>Target comp. version</th>
</tr>
</thead>
<tbody>
<tr>
<td>hyperlink</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>id</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>reference</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>name</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>activity type</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>project</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>external reference</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>creation date</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>last update</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>issuer</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>requestor</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>origin type</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>origin id</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>description</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

- **Cancel**
- **OK**

**Fig. 27: Dialog box - Export**
If the sorted column is linked to a reference list with sort order value, the sorting is executed on this sort value. Sorting on the “Status” allows to sort values such as defined in the workflow. Click on a line (any column) will display the corresponding item in the detail window.

5.1.7 Details Area

**Interface areas:**
- Item identifier
- Creation information
- Buttons
- Text Editor
- Sections
- Special fields

---

Fig. 28: Multiple mode item selection

Fig. 29: Details Area
Item identifier

Identifies the item with the element type and the item id and name.
Each element is identified with a distinctive icon.

Creation information

You can see at a glance the status, update and creation information of the element.

- First calendar shows the date of update.
- Second calendar indicates the creation date of the element.

  Calendars appear in red when the modified or created date is today’s.
  They appear in yellow when this date is yesterday.
  and in gray when the date is older

The thumbnail corresponds to the creator of the element

See: Thumbnails

Note: Administrator can change this informations.

Buttons

Details windows buttons

- Create new item
- Save the changes
- Refresh the display
- Copy the current item
- Delete the item
- Cancel changes
- Print the details
- Export to PDF format
- Send details
- Subscribe detail
- Activity Stream
- Show history
Warning: Some buttons are not clickable when changes are ongoing. When changes are ongoing, you cannot select another item or another menu item. Save or cancel ongoing changes first.

Create a new item
Depending on the screen of the selected item, create a new item in that category

Save the changes
Save the changes of the current item.
Or use shortcut key ctrl-s to save the changes on the current item.

Refresh the display
Allows you to refresh the details windows of the selected element

Copy item
Allows you to copy an entire element or to select only some information such as project structure, meetings, links or attached files.
The new item has the status copied.
The information to copy is different depending on the item selected
The options displayed in dialog box depends on whether the element is simple or complex.

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

Complex element
Complex element (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) or meeting, periodics meetings as well as test sessions.

It is possible to select:
• New kind of element.
• Select new type (corresponding to the kind of element).
• Change the name.
• Change the project.
• 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).

Delete the item
To delete the selected element.
Fig. 30: Copy project
Basically, some items cannot be deleted. For example, if actual work has been saved on an activity. The latter, as well as the project on which it depends, cannot be deleted.

To be able to delete these elements, go to the Access Rights menu in the Specific access and choose YES in can force the deletion of the actual work in the “specific update rights” section.

Undo the change
The button is clickable only when changes are ongoing.

Allows you to undo changes made to the current element

Print the details
To obtain a printable version of the details of the current element.

Export to PDF format
To get a printable version of the details in PDF format.

Email detail
Allows to send an informative email to defined 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.
When sending an email, the address(es) entered in “other” remains in memory and will be proposed during the next mailing.

Use commas or semicolons to separate addresses.

**Message**

The message that will be included in the body of the email, in addition to a complete description of the item.

**Save as note**

Flag on to indicate the email message will be saved as a note.

**Email Template**

You can choose an email template even without having predefined it in the settings.

To create and view templates. See *Email Templates*.

**Files to attach to email**

Attachments for the item appear in the attachment table. If the item has no files attached then the table is not visible.

The maximum size of attached files must be entered in the global parameters in the Mailing tab. The size indicated is in bytes unless you indicate otherwise. See *Global parameters*.

When you check a file to send the size of the latter is displayed at the top right of the table.

- If several files are selected, then the total size of these files is calculated and displayed.
- If the total size

Subscribe detail

Allows to subscribe to tracking of an item.

This icon is checked when you subscribed.

![Follow this item](image)

![Stop following this item](image)

![Define others as followers](image)

![Show list of followed items](image)

Fig. 32: Subscribe detail

When a user “subscribes” to the project, he will receive notifications “to subscribers” for all elements of the project.

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

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

**Display of list of followed items**

You can view the list of followed items in two ways:

- click on the button “View the list of subscriptions” in the subscription menu
- In the user settings of the *Automation section*, click on the “show list of followed items” button.

---

**Note**: email
Fig. 33: Subscribe for other

Fig. 34: Display list of followed items
Possibility to send an email to users following the item
When unitary sending detail or on automatic sending or on indicator.

**contacts**

You can see the items followed by your contacts

see: *Contacts*

---

**Activity Stream**

This icon allows you to display the Stream activity in a unique way on the selected element.

Unlike the Activity Stream icon in the Display layout menu which activates it globally on all screens.

The last position of the activity stream is always saved.

*See: Activity Stream*

---

**History of changes**

All the changes items are tracked.

They are stored and displayed on each item.

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

<table>
<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.

**Show/Hide work**

- This button allows to show or hide work changes done in “Real Work Allocation”.

- For section “Change history” the display of work is defined in user parameter “Display history”.

**Show / hide the checklist**

This button is only displayed if the “display checklist” parameter in the user settings is set to “on request” status

**More details:** *Checklists*

**Drop file area**

This area allows to add an attachment file to the item.
• Drop the file in the area.
• Or click on the area to select a file.

Text editor

Text editors are available for editing of long text fields like description, results, notes, . . .
Selection of text editor can be done in User and Global parameters screens.

CK Editor

The most advanced web editor.

Spell checker available with this text editor.

Fig. 36: CK Editor - 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.

Plain text editor
- Conventional text input.
- Text zone is extendable.

**Sections**

- The fields are regrouped under a section.
- All sections can be folded or unfolded, clicking on the section title.

**Columns**
The sections are organized in columns.
Number of displayed columns can be defined in user parameters.

**Common sections**
Some sections are displayed on almost all screens. (See: Common sections)

**Item count in the list**
When the section contains a list, the item count is displayed at right of the header.

**Attachments**

Fig. 37: Header section

**Thumbnails on items in the list**
Thumbnails are displayed on item row to present field values in graphical format.
See: Thumbnails.

**Go to selected item**
In a list, possibility to go directly to an item by clicking on its fields.
Cursor change to 🔎 on clickable fields.

**Special fields**

**Accelerator buttons**
ProjeQtOr provides you with shortcut buttons allowing you to more easily and quickly manage the information in the fields.

Move to the next status
This button allows to skip to the next status without having to open the list. The next status is defined by the workflow linked to the type of element.
The mouse tracking over this colored button allows to show the workflow.
It is possible to define events when a state passes.
If a field is required for the transition from one state to another then you will be automatically redirected to the required field.
Regardless of the layout and presentation of your screens
Assign to me button
This button allows to set the current user in the related field.

**Combo list field**

Combo list field allows to search, view or create item associated with the field.
The access to view or create item depends on your access rights. Some buttons can be not available.

- Click on ![arrow] will directly go to the selected item.
- Click on ![viewer] to display the details of the selected item.
- Click on ![add] to directly add a new element corresponding to the selected field.
- Click on ![search] to search for an element among those existing corresponding to the selected field.
- Click on ![select] to re-select an item.
- Click on ![close] to close the dialog box.
- Click on ![filter] to filter the items list

Some elements is possible to select several items, use **Control** or **Shift**.

**Origin field**

The origin of an element has no impact on it.
This is a memo, pure information.
It can be filled in automatically during a copy or manually.
### 7 Projects types

<table>
<thead>
<tr>
<th>id</th>
<th>name</th>
<th>code</th>
<th>order</th>
<th>workflow</th>
<th>closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>75</td>
<td>Manual billed</td>
<td>OPE</td>
<td>0</td>
<td>Default</td>
<td></td>
</tr>
<tr>
<td>48</td>
<td>Fixed Price</td>
<td>OPE</td>
<td>10</td>
<td>Default</td>
<td></td>
</tr>
<tr>
<td>49</td>
<td>Time &amp; Materials</td>
<td>OPE</td>
<td>20</td>
<td>Default</td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>Capped Time &amp; Materials</td>
<td>OPE</td>
<td>30</td>
<td>Default</td>
<td></td>
</tr>
<tr>
<td>51</td>
<td>Internal</td>
<td>OPE</td>
<td>40</td>
<td>Default</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>Administrative</td>
<td>ADM</td>
<td>50</td>
<td>Default</td>
<td></td>
</tr>
<tr>
<td>53</td>
<td>Template</td>
<td>TMP</td>
<td>90</td>
<td>Default</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 40: Dialog box - Item search

Fig. 41: 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 \( - \) to delete the link.

Set color field

• This field allows to set the color of an item.
• Used to differentiate items in list or report.
• Click on list of colors to select.
• Click on “Reset” button to erase.

Fig. 42: Add an origin element

– Choose the type of element from the drop-down list.
– Select the item from the corresponding list

Fig. 43: Set color field

• Displays a colored circle for field colorable.
• Some list of values has a field to define a color.
• A color is defined for each value.
**Thumbnails**

Thumbnails are a graphical representation of the field value.

**Date**
- Displays the date of creation or update of the item.
- Move cursor over thumbnail to display the date.
  - The item has been created or updated today.
  - The item has been created or updated recently.
  - Default view.

**User**
- Portrait of the user. Displays if it has created or updated an item.
- If no photo is saved, an icon will automatically be generated.
- The letter is chosen according to the real name. This is his initial.
- Move the cursor over the thumbnail to display the user’s name and photo in its original size.
- The user who does not have a photo automatically obtains a thumbnail with the first letter that makes up the real name.

<table>
<thead>
<tr>
<th>id</th>
<th>user name</th>
<th>photo</th>
<th>profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>member3</td>
<td>A</td>
<td>Project Member</td>
</tr>
<tr>
<td>8</td>
<td>member2</td>
<td>A</td>
<td>Project Member</td>
</tr>
<tr>
<td>6</td>
<td>external2</td>
<td>E</td>
<td>External Project Leader</td>
</tr>
<tr>
<td>5</td>
<td>external1</td>
<td>E</td>
<td>External Project Leader</td>
</tr>
<tr>
<td>4</td>
<td>member1</td>
<td>A</td>
<td>Project Member</td>
</tr>
<tr>
<td>3</td>
<td>manager</td>
<td>P</td>
<td>Project Leader</td>
</tr>
<tr>
<td>2</td>
<td>guest</td>
<td>G</td>
<td>Project Guest</td>
</tr>
</tbody>
</table>

Fig. 44: list of users without personal photo

**Comment**
- Indicates a comment or description is defined.
- to add a new note or comment
- Move cursor over thumbnail to display text.

**Privacy**
- Indicates the visibility level defined in a note or attachment.
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

![Warning - Ticket #3](image)

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. 45: Alert on detail window

Alert on Today screen

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

Fig. 46: Alert on Today screen

5.2 Common sections

Some sections are displayed on almost all screens in the detail area.

Those sections allows to set information or add information to an item of the element.

Interface areas:

- Description section
- Allocations section [Project]
- Assignment section [Activity]
- Treatment section
- Configuration
- Sub-Project and Sub-Activity
- Predecessor and Successor
- Progress section
Fig. 47: A view of ProjeQtOr’s global interface
5.2.1 Description section

This section allows to identify items of the element.

Each element has its own description section. The description fields are not the same depending on the element or even its type.

Most of the fields available for each element offer the possibility of having a search view and an accelerator to access other elements.

See: Combo list fields

5.2.2 Allocations section

![Allocation section](image)

This section allows to manage resource allocation to projects.

**Concepts**

- Profiles definition
- Allocation to project
### Field 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>Profile</td>
<td>Selected profile. Determine the profile on this project. A resource can have a different profile on each of the projects to which it is assigned.</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date of allocation. The software will take these dates into account for the work calculation.</td>
</tr>
<tr>
<td>End date</td>
<td>End date of allocation. The software will take these dates into account for the work calculation.</td>
</tr>
<tr>
<td>Rate</td>
<td>Allocation rate for the project (%).</td>
</tr>
</tbody>
</table>

- 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.

Closed assignments are indicated with a gray background.
The contact and users sections only display those who only have this role.

Click on the resource name to go directly to the selected resource.

**Replace resource**

- Replace resource on an allocation: all tasks assigned will be transferred to the new resource with assigned and left work.
- Work done on tasks still belongs the old resource.

![Replacement of the allocated resource](image)

Fig. 49: Replace allocation dialog window
Table 2: Replace allocation dialog box - Required field

<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>

5.2.3 Assignment section

This section allows to manage assignment of resources to tasks.

Assigning a resource to a task makes it possible to define its function on the latter and its daily cost, if defined during the creation of the resource.

Important:

- Only project resources can be assigned to project tasks.
- If actual work exists for an assignment, it cannot be deleted.

Fig. 50: Activity page with assignment

Fig. 51: Assignment section
Concepts

- Resource function and cost
- Period & Rate selection

Table 3: 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>

- Click on + to assign a new resource.
- Click on person to assign an entire team to the activity
- Click on organization to assign an entire organization to the activity
- Click on pencil to modify the assignment.
- Click on trash can to delete the assignment.
- Click on division to divide the assignment (two equal parts between two resources)
- Click on allocation to go directly to the allocation sheet for this resource.
- You may have this button at the top of the assignment area if you are assigned to the item yourself.
- Click on the name of the resource to access the details on the resource screen.
- The closed assignments are displayed on a gray background.

Note:

- If the person assigned to the projet as contact is also a resource, then it will appear in resource.
- The contact and user lines will only display people who are only contact or user.

Multiple assignment to a task

- A resource can be assigned more than once to a task.
- Allows to assign the resource to the same task with a different function (different daily cost).
- Allows to add extra work without modifying initial assignment.
Fig. 52: Assignment dialog box
Add a new assignment

Table 4: 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. The main function defined for the resource will be displayed first.</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 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.

Recurrent mode assignment

The recurring planning mode is the only mode that, by default, covers the entire duration of the project.

If the project is lengthened, then the task in recurring mode will lengthen accordingly.

During the assignment, you distribute the workload of your resource on a weekly basis.

You can enter a different value for each day of the week.

The copy is an accelerator to copy the entered value on Monday every other day.

The total load will be calculated after validation according to the duration of your project and the assigned times.

Warning:

- It is a priority planning method.
- Using this mode can add a significant workload!
Fig. 53: Recurring assignment
Planned Interventions assignment

The assigned workload is no longer determined but will be entered on a calendar which can be clicked, per half-day.

See: Planned interventions assignment

Display Manual planning calendar

- Click on to add a new assignment.
- To see the workload distribution table, select the resource and confirm. Then click on the edit button.
  - If the assignment already exists, click directly on the .
  - The calendar will then be displayed in the assignment window.
- The display starts in the current month and spans the next six months.
- Each box is divided into two half days. The assigned work is then automatically the sum of the selected half-days.

![Assignment](image)

The workload saved in this window will be displayed on the planned interventions screen.

Distribution of the workload for a new assignment

- click on a box to enter a workload.

Depending on the global parameter, this workload will be either planned work or real work.

![Fig. 54: Assignment with the Manual planning mode](image)
• Each day is represented by two half-days (am and pm)
• You can plan for the 6 months following the date of the assignment
• The half-days filled in will be visible on the screen of planned interventions
• Save this data with the save button

Activity on real time

When you check the activity option at the time spent on an activity then several fields will no longer be accessible and a recalculation of the load will be carried out:
• Recalculation of the rated load = revised load when modifying the remainder to be done
• Recalculation of the remainder to be done = rated load - actual load when changing the assigned load. This is the existing operation in all cases
• Prohibition to modify the assigned load to a value lower than the actual load. You will then have a blocking message

5.2.4 Treatment section

This section contains information on the treatment of articles, ie on the life and progress of the element. It usually contains status information, macro reports, situations or those responsible for the work of this element.

![Treatment section for project](image)

Fig. 55: Treatment section for project

Depending on the item, this section may display different fields.
All the lists in this section are customizable.

Project tracking settings

This part of the section allows you to follow your project in a more visual way.
On the Today screen, you can see this informations in the scope of the numbers counted in the Project Section.
The macros states work thanks to levers. Several states are populated directly based on the information you record.

- **in progress**
  - The field is filled in when you fill in the first charge on your timesheet.
  - Please note, the date recorded in the in progress field is the date on which the charge is entered and not the day on which it is entered.

- **Done**
  - The field is filled in when you fill in the last charge on your timesheet.
  - The remaining time MUST therefore be at 0 for this field to be completed.

- **Closed**
  - The field is filled in when you close an element

- **Cancelled**
  - The field is filled in when you cancel the element via the status of your workflow

### Other options

ProJeQtOr offers you several options to build your projects, protect them, or even pause them depending on the hazards you may encounter.

- **Fix planning**
  - The project is never re-calculated.
  - It means the planning will always be the same whatever you do on other projects.

**Important:** This may lead to dependencies unconsistency.

- **Paused**
  - Available on projects and activities.
• The planning is never recalculated.
• Unlike “fix planning”, the current planning for the project is erased.
• This is used to postpone the project to an undetermined date.

Non extendable project
• You can’t add new elements to this project,
• You can’t delete elements from this project.
• You can’t move elements from/to this project.

Under construction
• The resource don’t see it on timesheet.
• The alerts are not generated
• Emails are not sent.

Exclude from global plan
• Do not show the not plannable items for this project on the global planning view.
• This means that only “standard” planning items will be displayed. Excluding actions, decisions, deliveries…

Validated work treatment
• Activates treatment of the validated work based on the sum of the work of the project orders.
• Otherwise it will be calculated on the sum of the validated work of the activities

5.2.5 Working hours

![Working hours section](image)

Fig. 58: Working hours section for the project

Section visible if you have enabled the global setting to apply working hours to projects.
You can enter different times for each project.
These times will then be used for the automatisms using the delays.
See: Global parameters
See: Delay for tickets

5.2.6 Configuration section

You can view the products and product versions related to this project.
Click on the product name or product version to go to their respective screens.
5.2.7 Progress section

This section allows all at once, define planning and follow-up the progress.

All planning elements have a progress section.

Description of the different sections is grouped by the planning elements that have common fields and behavior.

Progress data are displayed in the same format, but according to the planning element, fields can have another meaning or behavior.

Below is the definition of the different columns that make up the Progress section.

**Dates and duration**

The dates and durations section allow you to record and display different time information on your element.

**Validated**

Validated dates are used for:

- Define the input parameters according to the selected planning mode - See: Planning mode
- Define the initial due dates as a reference in order to check any drifts in your project.
- Set a deadline by which the work must be completed.
- Directly on the project, without any other constraint, determines the start of planning for it.

**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**
### Progress

#### Dates and durations

<table>
<thead>
<tr>
<th></th>
<th>Validated</th>
<th>Planned</th>
<th>Real</th>
<th>Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start date</td>
<td>01/18/2021</td>
<td>01/01/2021</td>
<td>01/18/2021</td>
<td>09/05/2011</td>
</tr>
<tr>
<td>End date</td>
<td>04/07/2021</td>
<td></td>
<td></td>
<td>08/19/2015</td>
</tr>
<tr>
<td>Duration</td>
<td>56 d</td>
<td>69 d</td>
<td></td>
<td>1 027 d</td>
</tr>
</tbody>
</table>

#### Costs and works

<table>
<thead>
<tr>
<th></th>
<th>Validated</th>
<th>Assigned</th>
<th>Real</th>
<th>Left</th>
<th>Reassessed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work</td>
<td>110 d</td>
<td>117.7 d</td>
<td>3 d</td>
<td>127.4 d</td>
<td>130.4 d</td>
</tr>
<tr>
<td>Cost</td>
<td>€30,254</td>
<td>€600</td>
<td>€32,864</td>
<td>€33,464</td>
<td></td>
</tr>
<tr>
<td>Expense</td>
<td>€6,500</td>
<td>€6,297,68</td>
<td></td>
<td>€6,297,68</td>
<td></td>
</tr>
<tr>
<td>Reserve</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Cost</td>
<td>€36,754</td>
<td>€6,897,68</td>
<td>€32,864</td>
<td>€39,761,68</td>
<td></td>
</tr>
</tbody>
</table>

#### Technical progress

| Progress       | 44.29 % | Calculated | 140 | Consolidated |  |

#### Steering

- Progress: 2 % expected, 3 % WBS -1 %
- Margin: -20.4 % expected, -19 % actual
- Priority: 500

**Need replan**

#### Revenue

| Revenue | 0 € | Command's | 0 € | Invoices | 2,400 € |

---

Fig. 60: Progress section
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.

**Warning: Planned dates of parent element**
At parent element level, dates are adjusted with the first planned start date and the last planned end date from all sub-elements.
The planned start date is adjusted to the real start date when work began.

**Real**
These are the dates of work actually carried out. The work actually charged
The real start date is set when work began (handled).
The real end date is set when no more remaining work (done).

**Note: Real dates of parent element**
The real start date will be propagated to parent elements up to project.
The real end date for parent element will be initialized, when all sub-element have been completed.

**Requested**
Allows you to define forecast dates. These are generally the dates agreed with your client or the beneficiary of your activity.

**Duration**
The durations correspond to the number of days between the start and end dates.
They are calculated automatically.
But you can also enter a start date and a number of days, the end date will be automatically calculated.

**Delay display**
If the dates entered in the validated dates are lower than the dates calculated by the software - the planned dates, then the planned end date box is red as well as the bar of the Gantt chart corresponding to the element.
This then reflects a possible delay.

**Costs and works**
The cost of resources is calculated thanks to the workload allocated to each resource on the tasks.
You must fill in a function associated with a daily cost for your resources.
See: *Function and cost* on the resources screen
Progress

Fig. 61: The planned dates are greater than validated dates

Validated

Allows to define scheduled work and budgeted cost of resources.

Work
This value is used for calculation of the expected progress and project margin (work).

Cost
This value is used for calculation of project margin (cost).

Note: Project
The values of work and cost can be initialized with the sum of total work and amount of all project orders.
See: Incomes

Assigned

Sum of planned work assigned to resources and estimated cost.

Real
Sum of work done by resources and cost incurred.

Left
Sum of estimated remaining work to complete tasks and ensuing costs.
Left work should be re-evaluated by resource while entering the real work on real work allocation screen.
Left work can also be changed on assignment, at project management level.

Reassessed
Sum of resource total work that will be needed from start to end and the ensuing costs.

\[ \text{[Reassessed]} = \text{[Real]} + \text{[Left]} \]
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 tracking

This section is used by Project.

See: Project reserve

Validated (Expense)

Allows to set the budgeted cost of project expenses.

This value is used for calculation of project margin (cost).

Assigned (Expense)

Project expenses planned.

Sum of “planned amount” for all expenses on project.

Real (Expense)

Project expenses committed.

Sum of “real amount” for all expenses on project.

Left (Expense)

Project expenses not committed yet.

Sum of “planned amount” for expenses for which “real amount” is not defined yet.

Reassessed (Expense)

Spending projections.

Sum of Real + Left

Left (Reserve)

Project reserve.

Note: Total columns

Total is the sum of resources cost, expenses and reserve of their corresponding column.
Technical Progress

The Technical Progress section allows you to display an advancement in units of work.

**Warning:** To display the technical progression section, which corresponds to an advancement in Unit of Work, you must position the option in the global parameters.

See: *Global Parameters*

The section technical progress is displayed on **Project** and **Activity** screen.

You determine the number of units of work to be performed on the activity.

The progress and the rest will be consolidated towards the father project and/or the mother activity.

**Number of units**

As for the dates and durations, you can enter several values for the realization of your units of works.

- **To delivered**
  - Number of units to be delivered.

- **To realise**
  - Number of units to be produced.

- **Realised**
  - Number of units actually produced.

**Progress**

For advancement in unit of work, you can choose the way so it will be evaluated.

- **Calculated**
  - Progress as a percentage is calculated by software.

- **Manual**
  - You define yourself the progress of the realization of your units of works.

**Weight**

The weight defines a certain importance on the realization of these units.

It determines how the calculation of the progress of the work units will be calculated and consolidated.

- **Manual**
  - You enter a value manually according to the unit of work to be done.

- **Unity of work**
  - It is the number of units to deliver or to realize.
Steering

Progress

Percentage of actual progress.
Calculated by the sum of the work done divided by sum of work reassessed.

\[
\text{[Progress \%]} = \frac{\text{[real work]}}{\text{[reassessed work]}} = \frac{\text{[real work]}}{\left(\text{[real work]} + \text{[left work]}\right)}
\]

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 to a project or activity.
A project or an activity with a priority
By default, the value is set to “500” (medium priority).
1 being the highest priority and 999 the lowest priority.
See: Scheduling priority.
See: Steering section for activity

Color

You can set a color on an element.
This color will be displayed on the bars of the Gantt chart.

Steering section Activity

Advancement

You can monitor the effectiveness of the progress of your project based on the data entered upstream on the validated dates.

Planning mode

Used by Activity & Test session.
Depending on the planning mode selected, the calculation of your planning will not be executed in the same way.

- See Concepts
- See Planning modes
Minimum threshold

When this value is set, the activity will only be scheduled on the day that the daily availability will be greater than or equal to this threshold.

You also have the option to add a new property to a “not splitted work” task.

This will require defining the minimum work to be allocated each day and thus filling in the minimum threshold field.

Planning will require finding consecutive days with at least the given value possible.

See: Minimum threshold

Fix planning

Fix planning will avoid the recalculation of planning for an activity.

To fix the project see: Treatment section

Paused

When an activity is paused, it is never recalculated.

Unlike fix the planning, the current schedule for the project is purged.

This amounts to postponing the activity to an undetermined date.

When this option is checked, the option fix the planning is automatically checked.
Activity on real time

When you check the option **activity at time spent** then the validated load becomes read-only and the calculation of the validated load equals the revised load.

The option can be disabled manually even if it has been set to the activity type.

The option is incompatible with activities managed by “Work Units” (turnover module). The field will then not be visible and the “Unit of work”, “complexity” and “quantity” fields will be hidden if the “activity over time” option is activated.

It will therefore be necessary to deactivate the option to make these fields reappear.

See: Planning Activity

Ticket

![Ticket interface](image)

Fig. 64: Attached tickets

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

Field Estimated and Left

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

The Left field will be highlighted when the sum of remaining work on the tickets is higher than the remaining planned work on the activity.

Show tickets attached

- Click on ![ticket list](image) to show ticket list attached to the activity.
- Click on a ticket name to directly move to it.

![List of tickets](image)

Fig. 65: List of tickets

Planning activity

Planning activity field allows to link the ticket with a planning activity

See: Planning Activity

Steering section Project
Margin

The margin is only displayed in the control section of the project screen.

Margin (work)

Used by Project.

Calculated by the scheduled work minus the sum of work reassessed.

\[
\text{Margin} = \text{Validated work} - \text{Reassessed work}
\]

\[
\text{Margin(\%)} = \frac{\text{Validated work} - \text{Reassessed work}}{\text{Validated work}}
\]

Margin (cost)

Calculated by the budgeted cost (resource & expense) minus the total of reassessed cost.

\[
\text{Margin} = \text{Validated cost} - \text{Reassessed cost}
\]

\[
\text{Margin(\%)} = \frac{\text{Validated cost} - \text{Reassessed cost}}{\text{Validated cost}}
\]

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”.

Planning mode

Fixed milestone
Floating milestone

---

**Note:** A milestone has no duration, so there are no start and end dates for a milestone, just a single date.

WBS

Hierarchical position of the milestone in the global planning.

Color

You can set a color on a milestone.
This color will be displayed on the bars of the Gantt chart.
Progress section Meeting

Fig. 68: Steering section on meeting screen

This section allows to define priority and follow progress on a meeting.

Validated
Allows to define scheduled work and budgeted cost.
Used to consolidate validated work and cost to the project.

Assigned
Sum of planned work assigned to attendees and the planned cost.

Real
Sum of work done by attendees and the cost.

Left
Sum of planned work remaining and the remaining amount.

Color
You can set a color on a meeting.
This color will be displayed on the bars of the Gantt chart.
5.2.8 Sub-Project and Sub-Activity

On the projects screen, this section allows you to display the sub-projects linked to the selected one. Click on the name of the sub-project to access its dedicated screen.

Fig. 69: Display of sub projects

In the same way, you can display on the activities screen, the sub-activities linked to the selected activity. Click on the name of the sub-activity to access its dedicated screen.

Fig. 70: Display of sub activities

5.2.9 Todo list

You can create subtasks or steps for the selected items.

Fig. 71: Todo list

- For each completed line, a new line appears after. You can register up to 4000 characters
- You can specify the urgency, the person in charge and the state of the point to be treated.
- You can close a point to be addressed. It disappears from the lists. Display it again using the “closed” switch button.
• You can reorganize the list using the handles in front of the name of the point to be processed.
• To delete a line, completely delete the text and validate after the deletion popup.

Todo list screen

• A screen dedicated to the point to be treated is available in the steering menu.

![Fig. 72: Todo list screen](image)

• You then have access to all your lists, all elements included.
• Filters are available to restrict the display of these, including the direct display of the version in the form of a listbox, with the possibility of changing the value of the element
• You display the color of the item’s state
• If the element has a manager defined, then it is automatically filled in as manager for each line created
5.2.10 Predecessor and Successor

This section allows to manage dependency link between planning elements.

A dependency can be created from the predecessor and/or successor planning element.

The dependency link can be created in the Gantt chart.

Click on the name of a predecessor or successor to go directly to the element.

See also:

- Dependencies
- Milestones

![Fig. 73: Predecessor and Successor section](image)

- Click on add to the corresponding section to add a dependency link.
- Click on Edit to edit the dependency link.
- Click on Delete to delete the corresponding dependency link.

In the NAME field, icons are displayed to indicate the type of dependencies

- ![End End dependency](image)
- ![End start dependency](image)
- ![Start start dependency](image)

**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 or Shift key while clicking.

**Delay (late)**

Days between predecessor end and successor start.

![Fig. 74: highlighting the date](image)
Highlighting the date that will most constrain the next activity
5.2.11 Linked Elements section

This section allows to manage link between ProjeQtOr elements.

You associate items on different elements in the same project.
A project can be linked with other.
Click on an item name to directly move to it.

- Click on \(\text{+}\) to create a new link.
- Click on \(\text{-}\) to delete the corresponding link.
- Click on \(\text{\(\rightarrow\)}\) to download the document
- Click on \(\text{\(\rightarrow\)}\) to edit the comment linked to the element

Reciprocally interrelated
If Item A is linked to Item B, Item B is automatically linked to Item A.
A link between items has no impact on them treatment.

Linked element list of values
By default, the list of values shows items of the same project.
But, it is possible to link items from different projects.
Click on \(\text{\(\rightarrow\)}\) 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.
Linked documents are available directly in linked elements list.

**Specified version**

A link with a document element offer the possibility to select a specific version.

A direct link to version of the document is created.

**Not specified version**

If the version is not specified, the last version will be selected.

The download will transfer always the last version of the document.
### 5.2.12 Attachments section

This section allows you to attach files or hyperlinks to the selected item.

![Attachment section](image)

You can attach all types of files

**Add a new file**

There are several ways to add a file.

- In the section table of attached files
  - Click on + to add an attachment file to an item.
  - Click on document icon to add a hyperlink to an item.
- In the attached files area in the toolbar of the details area
- Directly on the detail area of the element by dragging and dropping

![Add an attachment file window](image)

- Filled in the description to give a name to the document will be attached.

- Hover over the icon to see the exact name of the document. Otherwise, the exact name of the document will be displayed.
  - Click on to remove an attachment.
  - Click on to download the attached file.
  - Click on to access the hyperlink.
– Click on 🖋️ to edit the comment attached to the element

You can select one or more files of different types with the shortcuts CTRL when the files are not consecutive or SHIFT for those that follow.

Download a file
Attachments are stored on the server side.

The attachment directory is defined in: ref:Global Settings<file-directory-section>.

5.2.13 Notes section

This section allows to add notes on items of elements.

Notes are comments, that can be shared to track some information or progress.

• Click on ✍️ to add a note to an item.
• Click on 📝 to edit the note.
• Click on 🗑️ to delete the note.

Predefined note
The list of values appears whether a predefined note exists for an element or an element type.
Selecting a predefined note will automatically fill in the note text field.
Predefined notes are defined in Predefined notes.

Note visibility

– **Public**: Visible by all members assigned to the project.
– **Team**: Visible to every member of the creator’s team.
– **Private**: Visible only to the creator.
PLANNING AND FOLLOW-UP

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

The main activity of Project Leader is to measure progress, analyse situation and take decisions. In order to ease his work, ProjeQtOr provides several reporting tools, from the well know Gantt chart, to many reports.
6.1 Planning elements

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

### 6.1.1 Project

The project is the primary entity of ProjeQtOr.

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

#### Sub-projects

- You can define sub-projects on any project and this unlimited.
- On the parent project screen, you can view the children in the subproject section.
- Then, the projects may not be real projects, but just organizational breakdown corresponding to an organization.

#### Project type

There are 3 types of projects which are not managed in the same way.

- Operational projects for work planning,
- Administrative projects for recording unavailability
- Template projects which will serve as models to be recovered.

See: *project type*

#### Fix planning

- When the “correct planning” box is checked, the project planning will not be recalculated.
- This avoids modifying the expected values.
- Planning will always be the same no matter what you do on other projects.

**Warning:** This may lead to dependencies unconsistancies

#### Non extendable project

When project perimeter is fixed you can’t:

- add new elements to this project
- delete elements from this project
- move elements to or from this project

#### Under construction

- When a project is under construction, no *automatic emails* will be sent, no *notifications* or *alerts* will be generated for the project elements.
- A project can be under construction as long as it isn’t stated. Set to *handled* status.
- The resources don’t see it on *timesheet*.
Exclude from global plan

- Do not show the not plannable items for this project on the global planning view.
- This means that only standard planning items will be displayed excluding:
  - Actions
  - Decisions
  - Deliveries

Validated work treatment

Activates treatment of the validated work based on the sum of the work of the project orders otherwise it will be calculated on the sum of the validated work of the activities.

Manual indicators

- Fields: Health status, Quality level, Trend and Overall progress are manual indicators.
- They allow define visual way the general health, conformity, trend and progress of the project.
- Some manual indicators are displayed on the Today screen.

Special fields

- The value of the fields the Project name, Sponsor, Project code and Contract code can be used as the substitute value of special fields.
- See: Special Fields

Monitoring indicator

- The indicators can be defined on the progress data.

Do not start project before Validated Start Date

- The schedule should only start from this date, as if there was a fixed milestone preceding the project.
- Resources cannot be charged to the project before the specified date (as with a project under construction).
• This option must be enabled in the *global parameters*.

**Project reserve**

• Project reserve is an amount reserved based on identifying *Risks* and *Opportunity*.
• Calculated from contingency reserve of risks minus potential gain of opportunities.
• ProjeQtOr uses a technique as “Expected monetary value (EMV)” to convert risks and opportunities into an amount.
• The amount of project reserve will be added to remaining amount.

**Section Description**

**Other sections**

• *Progress*
• *Allocations*
• *Versions linked to this project*
• *Types restrictions*
• *Predecessor and Successor*
• *Linked element*
• *Attachments*
• *Notes*

<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>Description</td>
<td>Complete description of the project.</td>
</tr>
<tr>
<td>Objectives</td>
<td>Objectives of the project.</td>
</tr>
</tbody>
</table>

**Field Customer**

The value of the field is used in the *Quotations, Orders and Invoices* concerned with the project.
Field Bill contact

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

Section treatment

Table 2: Required fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>Non extendable project</td>
<td>When project perimeter is fixed you can’t add or delete elements to this project, move elements to or from this project.</td>
</tr>
<tr>
<td>Under construction</td>
<td>Box checked indicates the project is under construction.</td>
</tr>
<tr>
<td>Exclude from global plan</td>
<td>Do not show the not plannable items for this project on the global planning view. This means that only standard planning items will be displayed excluding actions, decisions, deliveries.</td>
</tr>
<tr>
<td>Validated work treatment</td>
<td>Activates treatment of the validated work based on the sum of the work of the project orders otherwise it will be calculated on the sum of the validated work of the activities.</td>
</tr>
<tr>
<td>handled</td>
<td>Box checked indicates the project is begun.</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>Cancelled</td>
<td>Box checked indicates the project is cancelled.</td>
</tr>
</tbody>
</table>
6.1.2 Activity

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.

Activity planning: work on tickets
- Tickets can be linked to an activity (task).
- Work on tickets will be included in the activity.

Assignment of resources to task
- Resources who will work on the ticket doesn’t need to be assigned to linked activity before.
- The assignment will be automatically created once that resource has entered the working time (real work) in the ticket.
• The assigned task and the sum of working time entries by resource in tickets will be available in its timesheet.

Fix planning

• When box “fix planning” is checked, the activity scheduling won’t be remade.
• This will avoid change on planned values.
• The planning will always be the same whatever you do on other projects.

| Warning: This may lead to dependencies unconsistancies |

Filter on list

Ability to filter activities by data or type, for instance by assigned resources

Monitoring indicator

• The indicators can be defined in the List of Values.
• See: Health status and Overall progress

Section Description

Table 3: Required fields

<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>

Section Treatment

Table 4: Required fields

<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>
Field Target version

- Contains the list of *product versions* linked to the project.
6.1.3 Milestone

A milestone is a flag in the planning, to point out key dates. Milestones are commonly used to check delivery dates. They can also be used to highlight the transition from one phase to the next.

ProjeQtOr offers two types of milestone:

**Floating milestone**
- This milestone will automatically move to take into account dependencies.

**Fixed milestone**
- This milestone is fixed in the planning, not taking into account predecessor dependencies.
- This kind of milestone is interesting, for instance to set-up start date for some tasks.
- Fixed date is set by validated date.

**Monitoring indicator**
- The indicators can be defined in the List of Values.
- See: Health status and Overall progress

### Section Description

<table>
<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>
**Section Treatment**

### Table 6: Required fields

<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 milestone.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Resource who is responsible for the milestone.</td>
</tr>
<tr>
<td>Handled</td>
<td>Box checked indicates the milestone is taken over.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates the milestone has been treated.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the milestone is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates the milestone is cancelled.</td>
</tr>
<tr>
<td>Target version</td>
<td>The target version of the product allocated in delivery of the milestone.</td>
</tr>
<tr>
<td>Result</td>
<td>Complete description of the treatment done on the milestone.</td>
</tr>
</tbody>
</table>

**Field “Target version”**

- Contains the list of *product versions* linked to the project.

### 6.2 Planning

The Gantt chart is a tool used in scheduling and project management and allowing to visualize in time the various tasks composing a project.

It is a representation of a connected graph, evaluated and oriented, which makes it possible to graphically represent the progress of the project.

#### 6.2.1 Gantt chart

This screen allows to define projects planning and follow progress.

**The Gantt Chart is composed of five areas:**

- **Interface areas:**
  - Toolbar
  - Task List
  - Progress data view
  - Gantt chart view
  - Details area
When you make a modification on an element of your project, the project must then be recalculated to take it into account.

You have the option of using the automatic calculation function, which, if you make a modification on the planning screen, and only on this screen, will immediately take this modification into account.
If the modification is made on another screen, even if you have selected automatic calculation then, you will have to restart the calculation on the planning screen.

- Click on \[\text{cell icon}\] to start the activity planning calculation.
- A popup window appears with the list of projects.
- The check boxes allow you to select one or more projects to recalculate.

If you have selected one or more projects with Project Selector then the selected projects will be automatically checked.

Choose the date on which you want to recalculate the project.

By checking the “Hide unselected projects” box, you will only have the projects selected in the project selector and they will be automatically checked.

**Overuse**

The overuse option allows you to allocate to all the resources and this, on the projects of your choice, maximum overbooking.

This allows you to see the amount of work that is overused for the resources assigned to the task for each period of time.

**Warning:** This function is dangerous, it does not reflect reality.

For this reason, by default, it is not activated, even for the administrator.

See: Specific access in the Planning section access rights

**Automatic run plan**

Switch the button to activate automatic calculation on each change.
Fig. 4: Project selection popUp for project calculation

Only works on the Gantt Planning view.

If the modification of an element is carried out on the dedicated screen of the element, then it is necessary to click again on BUTTON to restart the computation.

All modifications about assignement (rate, name or numbers of resources, dates...) done are not displayed on the new planning screen until having, for this purpose, activated the planning calculation, either in an automatic run plan or not.

On the contrary, the screen planning will not change even if modifications have been loaded yet.

Automatic calculation

**Differential calculation** = calculation of projects that require a recalculation.

**Complete calculation** = calculation of all projects

The calculations are programmed according to a frequency of CRON type (every minute, every hour, at a given hour every day, at a given time on a given week day, ...)

See: Global Parameters into the chapter *Automatic planning Calculation*

**Add a new planning element**

- Allows you to create a new planning element.
- The element is then added under the previously selected element and with the same level of incrementation
- The element is added to the Gantt chart and the detail area adapts to the content created.
- The details area allows you to complete the entry.

You can create several elements on the planning view and more on to the *Global planning*.
Advanced Filter

The advanced filter allows to define clause to filter and sort.
More details: filters

Displayed columns

This functionality allows to define columns displayed in the progress data view.
More details: Display and organize the columns.

Display other options

Clicking the icon will bring up the additional options window.

Display from... to...

Change the start and / or end date to limit or extend the display of a Gantt Chart.
If the display is truncated because the project is too long, think to change the display scale.
   All the projet
   Check All the project for the Gantt chart to show all project tasks when possible.
   Saving dates
   Save your dates of display to retrieve them on every connection.

Planning validation

Allows you to replace the validated dates with the planned dates.
With this approach, you validate in a way any possible delay on the activities of your project.
Two actions are available: Always or If empty.
   Always
   Will overwrite existing values.
   If values are entered in the “validated” fields then, they will all be replaced by the planned dates (calculated by the software)
   If empty
Will not overwrite existing values.
If the “validated” fields are not completed, then these dates will be replaced by the planned dates.
If the “validated” fields are completed then they will be kept.

**Save and show baseline**

The baseline is a record of the planning state at a time T.

You can create as many baselines as you want per day, but you can only save one baseline per day. Each new baseline must replace the previous one.

Save baseline

Saved a baseline with the button ![Save baseline button](image).

Enter the project on which to create the baseline. The list of existing baselines, already registered, is available via this window. You can modify your baseline or delete it to save another one.

Show baseline

You can display two baselines at the same time. The one above the current activity bars of your project. The other below.

Each of them has a different color, pale blue for the top line and pale purple for the bottom line.

This option will be very useful for you to compare possible drifts and explain them.
Fig. 8: Record baseline

Fig. 9: Display two baselines
Print and Export the Gantt chart

You can print directly on your printer or export in PDF format or in MS Project format.

Print planning

Click on the button to print the Gantt chart in A4 and / or A3 format.

The print quality, despite printing or exporting on a reduced scale, remains very qualitative and offers very little loss of detail in the diagram.

Export planning to PDF

Allows to export planning to PDF format. Export can be done horizontally (landscape) or vertically (portrait) in A4 and / or A3 format with great detail even with a zoom.

Export contains all details and links between tasks and also include a pagination.

And the option Repeat Headers allow you to print or export your planning in multiple pages.

![Export planning to PDF](image)

This feature will execute export on client side, in your browser. Thus the server will not be heavy loaded like standard PDF export does.

It is highly faster than standard PDF export.

**Warning:** This technically complex feature is highly dependent on the browser and is not compatible with all of them. It is compatible with the latest versions of IE (v11), Firefox, Edge and Chrome. Otherwise, the old export function will be used.

**Tip:** Forced feature activation/deactivation

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

Export planning to MS Project

You have the option of exporting XML in MS Project.
Click on the button $\rightarrow$ to start the export.

A user parameter allows you to enter if you want to add the assignments when exporting the project to MS-Project format.

If not, the name of the resources will not be available in the MS-Project application.

See: User Parameters into the chapter Tab Export

## 11 Other options: checkbox for display

At the end of the first zone, you have the choice to display or not, certain information on the Gantt chart.

**Show WBS**

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

![Fig. 11: Task list without and with WBS Display](image)

Closed item

Flag on “Show closed items” allows to list closed items.

Resource

The Resource checkbox allows you to directly display the resources assigned to each activity on the Gantt chart.

A user parameter allows you to choose between displaying names or initials.

Choose if you want names, initials or nothing to appear on the Gantt chart.

See: Tab Display

Show Critical path

**The critical path** allows you to determine the total duration of your project. This is the longest sequence of tasks that must be completed for the project to be completed on time.

**The Critical Chain**, meanwhile, is a technique for planning and monitoring deadlines but has the same principle: take into account the constraints to determine the duration of the project and the
critical tasks that may impact this duration. One of these constraints is the taking into account of resource or skill limitations in addition to the dependencies between the tasks and the implementation of buffers, i.e. time reserves, in the critical chain and the secondary chains.

ProjeQtOr offers you a critical chain rather than a critical path, but for better understanding, the term Critical path has been retained.

- click on the critical path check box to calculate and display the red path in the Gantt schedule.

Note: The tasks of the project which are not crossed by the critical path are elements which will not affect the duration of the project and, even modified, will not automatically involve a modification of this duration for the entire project.
You can display or hide the template type projects in the area list.

**Task List**

The task list displays the planning elements in hierarchical form by dividing the WBS. Tasks are regrouped by projects and activities. The projects displayed depend on the selection made with **the project selector**. See: *Project selector*

![Task list & progress data view](image)

*Fig. 15: Task list & progress data view*
### Interface areas:

- **Show or Hide activities**
- **Icon of element**
- **Reorder Planning elements**
- **Names of the items**
- **Increase and decrease indent level**

### Show/Hide activities

- Click on the plus or minus of the header area to close and open the groups in the list area.
- Click on the icons at the top of the list to expand or collapse all project groups at the same time.
- Click on the group row to expand or collapse the group only.

### Icon of element

A specific icon appears to the left of each item type for faster identification.

- ![Gear](image) **Project**
- ![Sun](image) **Project to recalculate (the Gant diagram to display with the latest settings)**
- ![Bell](image) **Project under construction**
- ![Lock](image) **Projet fixed in the planning**
- ![Activity](image) **Activity**
- ![Milestone](image) **Milestone**
- ![Meeting](image) **Meeting**
- ![Test session](image)

Other items can be displayed in the *Planning global* (action, decision, delivery…)

### Reorder planning elements

The selector ![Selector](image) allows to reorder the planning elements.

---

**Note:** Ability to move multiple tasks at one time from one location to another using the key control to select the lines and then dragging and dropping them.

**Warning:** If you move an activity to a new project, the assigned resource must be allocated to the new project to allow this move.
• **Item name**

Click on a line to display the detail of the item in the detail area.

• **Increase and decrease indent level**

Increase and decrease indent level

![Indentation buttons](image)

Fig. 16: Indentation buttons

**Increase indent**

The element will become the child of the previous element.

**Decrease indent**

The element will be moved at the same level than the previous element.
Progress data view

The progress data view allows to show progress on project elements.

To display the progress columns, pull the splitter to the right.

For each planning element, the progress data are displayed at them right.

![Fig. 17: Progress data view](image)

- The projects used to display consolidated progress data by the tasks.
- The task row used to display task progress data.
- Click on \[ \] to define the columns displayed.

More details: Display and organize the columns.

More option on the Project Portfolio screen

Gantt chart view

The Gantt chart view is a graphical representation of the progress data of a project.

For each planning element, a bar is associated with it

![Fig. 18: Gantt chart view](image)

---

Interface areas

- Scale
- The Gantt chart’s Bars
Scale available: daily, weekly, monthly and quarter

The Gantt chart view will be adjusted according to scale selected.

Gantt chart's bars

The bars displayed in the gantt chart can appear with different colors. Each color has a meaning.

**Current date Bar**

- Yellow column indicates the current day, week, month or quarter, according to scale selected.
- The red line in yellow column display the current day and time.
- PALE GREEN OR RED BAR

![Fig. 19: Current date bar](image)

Condition: Activities without assigned work - pale red or pale green as appropriate

**GREEN BAR**

![Fig. 20: no charge](image)

Condition: Assigned resources are available and meet workload, validated or scheduled dates do not conflict with other items

**RED BAR**

![Fig. 21: all is well](image)

Condition: Planned end date > Validated end date - Real end date if completed task > Valited end date

**PURPLE BAR**

![Fig. 22: Overdue tasks](image)

Condition: If a resource is not or is no longer available on an activity.
The calculator is trying to plan the workload. The resource assigned to the activity is unable to be planned for this task (absence, calendar, assignment or assignment periods, etc.); then the bar turns purple.

**SURBOOKING and OVERUSE BAR**

![Fig. 23: Impossible to calculate the remaining work](image1)

Condition: Add extra work time on the standard capabilities of your resources to plan more projects that you will not process.

![Fig. 24: Resource capacity overbooking](image2)

See: Management of surbooking periods

See: overuse

**SURCAPACITY BAR**

![Fig. 26: Overcapacity of resources](image3)

Condition: The capacity of the resource has been changed. It can be under capacity or over capacity. That is to say, it does less or more than its FTE.

![Fig. 27: Surcapacity view on Gantt chart](image4)

For more information see: Variations in resource capacity

**REAL WORK IN PROGRESS**

![Fig. 25: Surbooking or overuse view on Gantt chart](image5)
Condition: the length represents the percentage of completion based on the actual progress versus the length of the Gantt bar.

CONSOLIDATION BAR

![Work in progress](image1)

**Fig. 28: Work in progress**

Condition: graphical display of the dates consolidated by the group of planning elements for a project

CUSTOM COLORS

you can apply the color of your choice on the bars of the Gantt chart representing activities, milestones and meetings.

If the Planned end date > Validated end date then the bar should be colored red. In case you have set a custom color, this state will still be indicated

![Consolidation Bar](image2)

**Fig. 29: Consolidation Bar**

On the one hand, directly on the bar and on the other hand in the task list, where the indicators remain the original color.

Click on the reset button to come back to original colors.

Item name display

![Item name and scheduled dates on the selected bar](image3)

**Fig. 31: Item name and scheduled dates on the selected bar**

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

Dependency links

Dependencies allow to define the execution order of tasks (sequential or concurrent).
All planning elements can be linked to others.
Dependencies can be managed in the Gantt chart and in screen of planning element.
Dependencies between planning elements are displayed with an arrow.

Create a dependency

To create a dependency, left click on a bar of the gantt (the predecessor) and slide towards the successor.

You can also create dependencies with the predecessor and successor tables at the bottom of the details area.

Remember than the first task always drives the second.
Fig. 32: Predecessor and Successor section - In the NAME field, icons are displayed to indicate the type of dependencies

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

Fig. 33: Dialog box - Predecessor or Successor element

Modify a dependency
Click on the arrow which turns orange, a pop up is displayed allowing you to modify the type and one to add a possible delay.

The delay can be positive or negative. Negative delay allows overlapping of certain tasks

See the strict mode of dependencies

Dependency types

End-Start

The second activity can not start before the end of the first activity.
The successor can not begin before the beginning of the predecessor. Anyway, the successor can begin after the beginning of the predecessor.

End-End

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

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

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

Strict mode for dependencies

The strict dependency mode forces the successor planning element not to start on the same day as the same predecessor but the next day. Even if the task is finished before the end of the day.

To have the successor start on the same day or before the end of the predecessor task, select NO for strict mode or you can also put a negative delay.

The strict dependency mode is a global parameter.

By default, the strict dependency mode is set to YES.

**Milestone**

Milestones appear as small diamonds. Filled if completed, empty otherwise.

Color of diamond depends on milestone progress.

**Ongoing milestone and in times**

**Completed milestone and in times**

**Ongoing milestone and delayed**

Planned end date > Validate end date
Completed milestone and delayed
Real end date > Validated end date

Detail of the work
Right click on a bar to displays the detail of the work for this bar.

Fig. 35: Display details of the work

Meaning of colors
- Planned workload
- Real work - charged to the timesheet
- Excess workload over dates
- Absence of the resource

Warning: You have to selected week or day scale to display detail or a message will ask you to switch to smaller scale.

Details area
The details area is the same as on all the ProjeQtOr element screens and adapts according to the selected element. For more details on this area:
- see: Details window
- see: Common section

Planning Modes
Projeqtor offers several ways to plan the workload for your resource with 11 different planning modes.
- As soon as possible
- Work together
- Must start before...
- Should end before...
- Regular between dates
- Regular between dates in full day
- Regular between dates in half day
- Regular between dates in quarter day
- Recurring
- Fixed duration
- Manual planning
- Minimum threshold & not splitted work

**As soon as possible**

The task is planned to finish as soon as possible.

*Note:* For tasks “as soon as possible”, if no assignment is created but the validated work is defined, take the validated work as the default duration (instead of 1 days)

|MODES|

**Work together**

When two or more resources are assigned to the same task, planning tries to find periods where all resources are available to work together.

Periods are searched “as soon as possible”.

If only one resource is assigned, this planning mode is exactly the same as “As soon as possible”.

If one resource is assigned more work than the other, the extra work is planned after working together periods.

|MODES|

**Must not start before validated date**

The validated start date field must be set.

The task must not begin before a specific date.

*Note:* You have the possibility to define dates directly on the project. If no other constraint is applied to the elements of the latter, the planning will start only from the dates entered on the project.

|MODES|

**Should end before validated end date**

The validated end date field must be set.

The task is planned backward from end to start.

“Floating” backward planning is not possible, validated end date must be defined.

|MODES|
Regular between dates

- Allows to evenly distribute work between two dates.
- Used for management recurrent activities.
- The validated dates fields must be set.
- Possibility to readjust the task with handles directly on the bar of the Gantt view.

Examples of the planning modes upcoming are based on 2 work days to plan on 10 days.
Work will be evenly divided between on working days. For instance, 0.2 days during 10 days.
See also: Regular modes with excess workload

Regular in full days

Work will be distributed on full day between on working days.
Possibility to readjust the task with handles directly on the bar of the Gantt view.

<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>

See also: Regular modes with excess workload

Regular in half days

The work will be distributed over half of the day between working days.
Possibility to readjust the task with handles directly on the bar of the Gantt view.

<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</td>
<td>0.5</td>
<td>0.5</td>
</tr>
</tbody>
</table>

See also: Regular modes with excess workload

Regular in quarter days

Work will be distributed on one quarter of the day between on working days.
Possibility to readjust the task with handles directly on the bar of the Gantt view.

<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>

6.2. Planning
Regular modes with excess workload

If the dates are too short compared to the assigned load, the excess load will be divided and added in the same way as the chosen mode.

So you can get full days even in regular mode in quarter day or half days.

- Example with 8 days of workload to plan over 10 days with the Regular mode in half days between dates

The load is distributed regularly so as to respect the dates.

If the load is too high to meet the dates, the excess load will be distributed over the whole day after the validated end date and will therefore be late (red color)

Recurring (on a weekly basis)

This new mode allows reserving availability on recurring tasks on a weekly basis, for example 1/2 day every Monday, 1h every day, . . .

Activities in this mode dynamically assign the work based on the start and end bounds:

- Start defined with a dependence End-Start or Start-Start
- End defined with an end-end dependency
- Planning mode for which the assigned work is not fixed
- Workload distributed weekly
- Adapts to the duration of the project

See: Recurrent mode assignment
**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.
- Possibility to readjust the task with handles directly on the bar of the Gantt view.

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

**Manual planning**

- This is the most priority planning mode and constraint.
- You have the option to save the work as scheduled or actual work.
- Two screens are dedicated to it: *planned interventions* to plan monthly and the *View interventions* for read-only.

**Note:** The choice of planned or actual work is made in the global parameters in the planning section work tab. See: *global parameters*.

**Minimum threshold & not splitted work**

When this value is set, the activity will only be scheduled on the day when the daily availability is greater than or equal to this threshold.

You also have the option to add a new property to a “cannot be split” task.

This will require defining the minimum work to be allocated each day and therefore filling in the minimum threshold field.

Be careful with this mode, planning will require finding consecutive days with at least the given value possible, which may never happen.

**6.2.2 Planning global**

The global planning allows to create and visualize any type of element (project, activity, milestones, risk, meeting, action . . . )

- Add and Show any new planning element on Gantt chart
- The created item is added in the Gantt and detail window is opened.
- The detail window allows to complete entry
- Project planning and activity planning calculation can be done in the Gantt.
6.2.3 Projects portfolio

This screen displays only the projects on the diagram. The activities and other elements that make up the schedule are hidden.

It displays summary and project dependencies only.

**Note:** This section describes specific behavior for this screen. All others behaviors are similar to *Planning global* screen.

**Show milestones**

- You have the option to show or hide milestones.
- It is possible to define the type of milestone to display. All milestones are available: deliverable, incoming, key date, etc.
- The milestones are displayed directly on the bar of your project.
- Colored columns are displayed in addition to those in the simple planning view.
- It is about the life and general health of your project. With the health status, quality level, trend and progress columns.
### 6.2. Planning

<table>
<thead>
<tr>
<th>Create a new item</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td></td>
</tr>
<tr>
<td>Activity</td>
<td></td>
</tr>
<tr>
<td>Decision</td>
<td></td>
</tr>
<tr>
<td>Deliverable</td>
<td></td>
</tr>
<tr>
<td>Delivery</td>
<td></td>
</tr>
<tr>
<td>Incoming</td>
<td></td>
</tr>
<tr>
<td>Issues</td>
<td></td>
</tr>
<tr>
<td>Meeting</td>
<td></td>
</tr>
<tr>
<td>Milestone</td>
<td></td>
</tr>
<tr>
<td>Opportunity</td>
<td></td>
</tr>
<tr>
<td>Project</td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td></td>
</tr>
<tr>
<td>Requirement</td>
<td></td>
</tr>
<tr>
<td>Risk</td>
<td></td>
</tr>
<tr>
<td>Test case</td>
<td></td>
</tr>
<tr>
<td>Test session</td>
<td></td>
</tr>
<tr>
<td>Ticket</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 38: Create a new item

Fig. 39: Gantt (Projects portfolio)
### 6.2.4 Resource planning

#### Others section

- **Resources**

This screen displays the Gantt chart from a resource perspective.

The assigned tasks are grouped under the resource level.

Regarding resource planning, periodic group meetings are under his responsibility.

Ability to view assigned activities without charge.

#### Interface areas

- Show project level
- Gantt charts for resources
- Limit display
- Tools
- Print and exportation
- Display dates
- Checkbox
Show project level

Tasks can be grouped by project in the list area.

Click on Show project level to view the projects on which resource activities depend.

Gantt charts for resources

The bars used in the Gantt chart for resources differ slightly from the standard planning bars.

Most of the bars used in the Gantt chart are the same as for standard planning.

See: Gantt chart’s bars.

Conditions:

- Assigned resources are available and meet workload, validated or scheduled dates do not conflict with other items.
- The gray bar in the middle graphically represents the actual percentage progress relative to the total duration of the activity.
- This makes appear some planning gap between started work and reassessed work.

Dependencies behavior
• Links between activities are displayed only in the resource group.
• Links existing between tasks on different resources are not displayed.

**Note:** This section describes specific behavior for this screen. All others behaviors are similar to *Planning global screen.*

### Limit display to selected resource or team

• Click and select one resource to display only his data.
• Click and select one team to display only data of resources of this team.
• Click and select one organization to display only data of resources of this organization.

### Tools

• Click on ![icon](image) to start the activity planning calculation. See: .
• Click on ![icon](image) to create a new element.
• Click on ![icon](image) to apply many filters. See: *Advanced filters.*
• Click on ![icon](image) to organize the columns of the progress data view.
• Click on ![icon](image) to display the sub-menu.
• Click on ![icon](image) to display this screen in horizontal or vertical mode.

### Print and export

You can print directly on your printer or export in PDF format.

**Print planning**

Click on the button ![icon](image) to print the Gantt chart in A4 and / or A3 format.

The print quality, despite printing or exporting on a reduced scale, remains very qualitative and offers very little loss of detail in the diagram.

**Export planning to PDF**

Allows to export planning to PDF format.

Export can be done horizontally (landscape) or vertically (portrait) in A4 and / or A3 format with great detail even with a zoom.

Export contains all details and links between tasks and also include a pagination.

And the option **Repeat Headers** allow you to print or export your planning in multiple pages.

This feature will execute export on client side, in your browser. Thus the server will not be heavy loaded like standard PDF export does.

It is highly faster than standard PDF export.
**Warning:** This technically complex feature is highly dependent on the browser and is not compatible with all of them. It is compatible with the latest versions of IE (v11), Firefox, Edge and Chrome. Otherwise, the old export function will be used.

**Tip:** Forced feature activation/deactivation

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

### Display dates

This functionality allows to define columns displayed in the progress data view.

More details: *Display and organize the columns*.

### Checkbox for display

You have the choice to display or not, certain information on the Gantt chart.

- **Show WBS**
  Click on “Show WBS” to display the *WBS* number before the names.
- **Closed item**
  Flag on “Show closed items” allows to list closed items.
- **Show left work**
  The option **Show left work** displays at the end of each bar the left work directly on the gantt chart.
- **Show activities without work**
  Basically, activities with no workload do not appear on the Gantt chart by resource.
  Check this box to make them appear.
- **Show project level**
- **Show projects in the list area**
6.2.5 Planned Interventions

The goal is to make the specifications more flexible to cover broader and more generic needs.

Assignment

The assigned workload is no longer determined but will be entered on a calendar which can be clicked, per half-day.

See: Planned interventions assignment

![Assignment with the Manual planning mode](image)

The workload saved in this window will be displayed to the planned interventions screen.

The planned Interventions

The planned interventions screen allow you to manage the manual planning.

This screen is available if at least one activity has a planning mode set to manual planning.

Interface areas

- **Display zone**
- **List of Projects and activity**
ProjeQtOr User guide, Release 9.2.0

Fig. 45: Planned interventions screen

- **FTE**
- **Interventions mode**
- **Interventions Calendar**

### Display zone

The display area allows you to filter the resources you want to display.

The screen is blank until you select the resource, the team or the organization.

The calendar is displayed for the resource or for all members of the selected team or organization.

These parameters are not exclusive, you can select team and organization.

- Resource
  - Filter by resource on calendar display.
- Team
  - Filter by team on calendar display.
- Organization
  - Filter by organization on calendar display.
- Project
  - Filter by project on calendar display.
- Year
  - Select the year to display.
- Month
  - Select the month to display.
- Hide done items
  - You can hide the activities recorded in the “done” state in the displayed list.

**Note:** The selected parameters, except the month, always set by default to the current month, are saved as a user parameter.
When the user returns to the screen, he therefore finds the last parameters entered.

> **List of Projects and activity**

The list of activities displayed are in the planning mode “manual planning”. If no filter is selected (project, resource, organization …) then the screen does not display any data.

You cannot create new activities in manual planning mode from the intervention screen. You need to access the activities or schedule screen to create the new activity in manual planning mode. The new activity will then appear in the list.

Click on ➤ to access the activity screen and view its detail.

> **FTE**

In this calendar, we display graphically if we respect the quantity of people requested on the activity and on the half day.

Fill in an integer value for each activity to check.

If you enter 1, you expect at least one person to perform half a day on this activity.

A check is then carried out and takes into account all the resources assigned to each activity, and not only those selected and visible on the calendar.

If the field is left empty or at 0 then no control is carried out and the calendar will not display any green or red box.

**Blue box**

When you start to put in the workload but do not yet reach all of the expected FTEs.

**Green Box**

If the entry respects the workload constraint expected in FTE the box is green.
Example with a value of 2 in the FTE field for the selected activity. This FTE value is defined for each half-day. You must therefore have 2 effective persons planned for each half day whatever the resource or resources that will be provided.

Red Box

If the total entry is greater than the expected workload in FTE the box is red.

The box then turns red: the workload is higher than expected since we expected a person on this half day and on this activity

Non-colored box

There is no expected workload.

**Interventions mode**

The list of possible intervention methods is customizable. This list can be modified via a setting screen in the *list of values.* The saved modes will remain fixed for all projects and all teams. You can select an activity or a modality or both.
Fig. 46: Intervention mode

- If the intervention mode is not selected, the box is colored according to the activity but no letter appears, and vice versa.
- If only the intervention mode is selected, it will be saved without modifying the planned or actual work.

You can however add one or the other after having planned the intervention or the intervention mode.

A second click with the same parameters will delete the assignment.

Ctrl Click allows you to complete the two half days

Interventions Calendar

- Click on an activity and / or an intervention modes to plan workload on it
- Click on half a day to plan the workload
- The targeted half day is filled with the color of the selected activity and the letter of the chosen intervention mode.

Light Gray color

The light gray box indicates that the day is inactive on the resource calendar.

It can correspond to a weekend, a public holiday or a non-working day recorded on the resource’s calendar.

Dark Gray color

The dark gray boxes indicate reality. It’s work actually performed and informed on the timesheet.

When real work is completed for half a day, the box is half gray.

If the full day is completed then the box is completely grayed out.
Blue color

The blue boxes indicate absences.

Striped box

The striped boxes indicate that the working time recorded by the resource has been validated.

---

**Note:** Planned or Real

The workload can be recorded as a planned load or as a real load.

This option can be set in the *global settings*.  

---

**View interventions**

This screen allows you to see your planned interventions.

You cannot modify these interventions or plan another half day on this screen.
It is a bit the equivalent of planning by resource but in manual planning mode

Fig. 47: View interventions screen
6.3 Today (Dashboard)

Fig. 48: Today screen’s Global view

This screen allows the user to have an overview of the projects and tasks he is working on.

His projects, the tasks to which the user is assigned, those for which he is responsible as well as the various tasks created by himself or for which he is a requestor are listed in different sections.

Each list can therefore contain different types of tasks. The user can therefore view activities, questions, decisions, tickets, risks, meetings, milestones, ... as well as financial elements, such as quotes, invoices or contracts.

It’s the User parameter “First page” by default

This parameter defines the screen that will be displayed first on each connection.

The definition of visibility is based on the access rights of each user

**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 to access screen parameters.
**Today parameters**

Period for tasks selection

- due date [ ] next days
- or not set [ ]

Refresh parameters

- refresh delay [5] mn
- scroll delay [10] s

Items to be displayed

- Projects
- report "Gantt planning"
- Tasks assigned to me
- Tasks I am responsible for
- Tasks I am issuer or requestor of
- Documents to approve
- Tasks I am accountable for

[Cancel] [OK]
Activity Stream

- You have access to the activity stream of the elements that you see displayed in accordance with the rights of your profile.
- Click on 🔄 to display current information related to your rights.

Period for task selection

Allows to define the period for tasks will be displayed.

Due date
  - Select only items with due date less than today plus this selected period.

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 🔄.

The number of items to display for the user can be customized in the user parameters, in the display tab.

Enter the number of projects or tasks to appear on the screen.

See: User parameters

If you have added any reports to the Today page, they will appear in the list.

You can hide the added reports by clicking on the box.

See: Favorite Report

See: Today Screen Report

See: Extending

6.3. Today (Dashboard)
6.3.1 Projects

A quick overview of projects status.

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

The number of displayed projects can be defined in the global parameters.

![Project section interface areas](image)

**Scope of the numbers counted**

- Trend
- Health status
- Calculated and overall progress
- Other measure of progress
- Elements concerned to project

The list of projects is limited to the extent of visibility of the logged in user.

All the projects to which you are assigned will therefore be displayed in this list.

**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.

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

**2. Trend**

Manual indicator can be set on project.

Trend and health status indicators are displayed.

This icon allows to display the trend of the project.

**3. Health status**

This icon allows to display the health status of the project.
● Calculated and overall progress

Actual progress of the work of project and additional progress manually selected for the project

- On mouse over the bar

![Progress chart](image)

Fig. 50: Calculated progress

On each project shows part of “to do” (red) compared to “done and closed” (green).

- Other measure of progress

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

- Elements concerned to project

Numbers of elements concerned to a project are displayed.
6.3.2 Tasks

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

Click on an item will directly move to it.

**Note:** Max items to display Parameter

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. Id column displayed unique Id and specific icon 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>
6.3.3 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.

See: *Favorite report on Today*

- Click on ⬇️ to set the location of the report(s) on the Today screen.
  
- Click on the handles to move the item in the list
  
- You can reorder like any other parts.

- Click on ❌ to completely remove them from the list.

![Items to be displayed](image)

Fig. 51: Display parameters on today

6.4 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.
6.4.1 Calendar selector

**Day colors**

- **Yellow day**: Current day
- **Grey days**: Days off

**Period**

Displays the current day, month, and year according to the selected view.

**1st day**

Displays a specific date or date.

The first day of the week or month is displayed according to the selected view.

**Resource**

Allows to select the resource calendar.

**Select item to display on the liste**

Allows you to display only certain items on the calendar.
Show done items & Show closed items
Allows to display or not the done and closed items.

and Top buttons and Left side buttons
Allows to change current month, week, or day.
Click on  to go to week display mode.
Click on  to return to the last display mode.

Day number button
Click on the day number button to go day display mode.

Task / Activity / Tickets/ Leaves
Each item the resource is assigned to is displayed in its log.
All types of holidays and deliveries are also displayed.
The color that appears on the objects are those of the project to which they are attached
6.5 Reports

A list of reports is available in different categories. They themselves contain several sub-categories. You will find the reports home page in the menu but also all the categories. These, directly accessible, allow you to find the report of your choice from the main menu.

6.5.1 Reports View

1. Select a category and the subcategories will appear in replacement
2. The selected report will appear under the splitter
3. The specific parameters for this report appears
4. Update the parameters to get the information you need
5. Click on \( \text{\textbullet} \) to produce the report

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

   **Buttons**

   • Click on \( \text{\textbullet} \) to View the report.

   • Click on \( \text{\textbullet} \) to get a printable version of the report.

   • Click on \( \text{\textbullet} \) to export the report as PDF format.

   • Click on \( \text{\textbullet} \) to View this report on the Today screen.

   • Click on \( \text{\textbullet} \) to define this report as favorite.

   • Click on \( \text{\textbullet} \) to schedule sending the selected report

   • Click on \( \text{\textbullet} \) to go to scheduled report screen

### 6.5.2 Today Screen Report

You can add reports to your home screen today.

• Select the report you want to see quickly on this screen.

  • Click on the button \( \text{\textbullet} \)

  • On the Today screen, the report is Viewed at the bottom of the page

  • Click on the setting icon on the screen today to change the location of the report

---

**Note: Update**

The Viewed report is updated automatically. Any modification made to the content of the latter is reflected on the screen today.

Click the parameter button to define the location of the report (s) on the Today screen.

Click on the handles to move the item in the list.
Fig. 53: View a report on the today screen

6.5. Reports
6.5.3 Favorite reports

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

You can add a “blank” report type to the favorites or to a specific project and resources. In this case, next to the report name, linked items will be Viewed.

Popup menu management

- Allows to reorder reports Viewed with drag & drop feature. Using the selector area button icon drag .
- Click on to remove the report from the list.
6.5.4 Filter Reports

For tickets and only tickets, you can apply an existing or create a filter.

As with the advanced list box filters, you can choose from many criteria to create your filter.

See: advanced filters
6.5.5 Report Sending programmation

Ability to schedule the sending of reports as emails
For example, you can send a report every day, every Monday or every first day of the month

![Report sending programmation](image)

Fig. 54: Sending a report to email

To view all scheduled reports for sending, go to Scheduled Report in the Tools menu
6.5.6 Report List

Real Work

Allows you to view the actual expenses consumed by your resources on one or all projects over a given period. Most reports allow you to refine the display by organization, by team and by resource or even by type of activity.

1. Work - Weekly
2. Work - Monthly
3. Work - Yearly
4. Work - Between two dates
5. Detailed work - Weekly
6. Detailed work - Monthly
7. Detailed work - Yearly
8. Detailed work - Between two dates
9. Detailed work per resource - Weekly
10. Detailed work per resource - Monthly
11. Detailed work per resource - Yearly
12. Work for a resource - Weekly
13. Work for a resource - Monthly
14. Work for a resource - Yearly
15. Work for a resource per type of activity - monthly
16. Work for a resource per type of activity - Yearly
17. Left work

Planning

The reports in the planning category allow you to track the use of your resources through your project schedules. Diagram, synthesis, colored report, loads plan between planned and real work...

1. Gantt planning
2. Portfolio Gantt planning
3. Work synthesis per activity
4. Work synthesis per ticket
5. Synthesis of technical progress
6. Monthly planning resource/project
7. Monthly planning project/resource
8. Yearly planning project/resource
9. Monthly planning project/activity/resource
10. Monthly planning resource/project/activity
11. Monthly planning for a resource
12. Monthly planning for a resource (per project)
13. Work plan per week
14. Work plan per month  
15. Work plan per resource and per week  
16. Work plan per resource and per month  
17. Monthly availability of resources  
18. Availability synthesis  
19. Colored monthly resource planning  
20. Global planning project/resource per month  
21. Planned interventions  

**Steering charts**

The management diagrams are very precise reports to follow, compare and inform on the costs, deadlines and progress of your projects.

1. Burndown chart  
2. S curve chart  
3. 45° chart  
4. Performance indicator

**KPIs**

Track your KPI indicators with precision.

1. KPI Duration for project  
2. KPI Duration consolidated  
3. KPI Workload for project  
4. KPI Workload consolidated  
5. KPI Deliverable for project  
6. KPI Deliverable consolidated  
7. KPI Incoming for project  
8. KPI Incoming consolidated  
9. KPI Terms

**Tickets**

Find here all the reports concerning the follow-up of your tickets on one or more projects and this, over a given period.

You can restrict and filter your display by resource, by customer, by requestor, issuer or manager. But also by priority or qualification.

1. Yearly report for tickets  
2. Yearly report for tickets by type  
3. Yearly report for tickets by product  
4. Report for tickets by qualifying - weekly  
5. Report for tickets by qualifying - monthly
6. Report for tickets by qualifying - yearly
7. Report for tickets by qualifying - global
8. Report for opened tickets - weekly
9. Report for opened tickets - monthly
10. Report for opened tickets - yearly
11. Report for opened tickets - global
12. Report for tickets cumulated - number of days
13. Handled ticket synthesis - monthly
14. Done ticket synthesis - monthly
15. Curve of tickets BurnDown
16. Clients impacted by tickets

**Current status**

The current status category allows you to follow the status of elements relating to the project: Activities, activity tasks, risks, Document approval . . .

1. Status of ongoing work
2. Status of all work
3. Risk management plan
4. Version detail
5. Jobs summary for activities
6. Approval of documents

**Costs**

You will be able to follow all your costs related to the project, the activity or your resources.

1. Cost synthesis per activity
2. Resources costs per month
3. Project expense per month
4. Individual expense per month
5. Total expense per month
6. Total expense and cost per month

**Financial**

In the same way, you will be able to follow the receipts related to the project and their consolidation.

1. Invoices
2. Monthly terms
3. Weekly terms
4. Financial expenses board
5. Financial expenses synthesis
6. Monthly consolidation
7. Summary of orders / client invoicing

Requirements & Tests

You will be able to trace the status of cases played out for requirements and / or products, monitor requirements coverage, review annotations, comments and obtain various summaries.

1. requirements test coverage
2. products test coverage
3. test cases detail
4. test session summary
5. Requirements flow annual
6. Requirements cumulated on number of days
7. Requirement yearly by type
8. Curve of requirement Burn-Down
9. Requirements with open questions
10. Requirement weekly opened
11. Requirement monthly opened
12. Requirement yearly opened
13. Requirement global opened

Miscellaneous

A set of additional but very comprehensive reports on your projects and some of its elements.

1. Detail of history for one item
2. Connections audit
3. Deleted items
4. Project dashboard
5. Flash report
6. Followed items
7. List of attachments per user

Human Resources

A set of additional but very comprehensive reports on your projects and some of its elements.

1. Resources inputs - outputs
2. Resources workforce
3. Resources seniority
6.6 Real work allocation

6.6.1 Timesheet

This screen is dedicated to entering actual work.
The resource completes their work every day, for each assigned task.
Data entry for a resource is done on a weekly basis.
The corresponding cost to the real work is automatically updated to the assignment, activity and project.

![Timesheet zone screen](image)

Fig. 55: Timesheet zone screen

### Interface areas

- **Selection and filters**
- **Tools**
- **Data entry validation**
- **Task Zone**
- **Entry field**

### Selection and filters

This filters allows to select a timesheet for a resource and for a period.

**Resource selection**

- By default, users can only select themselves as a resource.
- Access to other resources timesheet depending on Specific access.

**Selection period**

By default, the period is determined according to the current day.
Targeted periods are displayed in different places on the screen.

- You can select the number of the week and its year directly with the corresponding filters.
- The “first day” filter allows you to choose a specific date, day, month and year. The full week containing this date will be displayed.
- The button today targets the current week
• The D-day is highlighted.

**Tools**

• Click on ![folder] to save timesheet datas.

• Click on ![refresh] to refresh datas.

• Click on ![options] to display options.

• Click on ![print] to print timesheet.

• Click on ![PDF] to export timesheet in PDF format.

• Click on ![CSV] to export timesheet in CSV format.

---

Filters allow to define the list of tasks displayed.

**Show only current week meeting**

• Recurring meetings display all meetings with one meeting per line. Depending on the period and frequency of your recurring meetings, many lines may be displayed.

• With this option, you only display meetings for the week displayed on the screen.

**Hide done items**

• Check this box to hide completed tasks. With left work to 0.

**Hide not started items**

• Select this check box to show or hide unsupported tasks. The macro state **in progress** must be activated and saved for the tasks to appear.

**Limit list of resource for selected project**

• You can limit the display of the resource selection drop-down list. If you have selected a project in your project selector then you will only see the resources assigned to that project.

**Show closed items**

• Check this box to show closed tasks. Archived tasks.
Show planned work

- Planned work is indicated on each input cell, in the upper left corner, in light blue.
- Allows you to display the planned working time per day for the resource assigned to the task.

![Fig. 57: Planned work](image)

Show ID

- Show ID to identify all single task.

Data entry validation

Enter real as planned

- Planned work on an activity for a resource is carried forward for each day.
- If there is no figure displayed then it means that the resource is not supposed to be informed of the actual work on this activity during this period.
- Even if planned work is scheduled for a resource, there is nothing forcing it to complete its work as expected.
- The option Show planned work must be activated.

Submit work

ProjeQtOr offers a system of validation of charges which makes it possible to follow the information of the real work of resources by a hierarchical manager.

The validation system is optional and can therefore be hidden.

After sending the actual work, you can no longer change the actual working time for the week.

You must cancel the validation request to make a change.

Validate work

- Project managers can validate the work or any other personalized profile authorized to do so.
- Only people with the necessary permissions can see this button
- When the work is validated, then the resource can no longer modify its work on this week. Likewise, the cancellation of validation will no longer be available.

Task Zone

The list displays the tasks assigned to the resource selected in the list.

Click on the activity name to access the activity details screen.

Tasks assigned with actual work are always displayed, even when closed.
The function of the resource on this task is displayed at the end of the line.

**Note:**

- A resource can have multiple *functions*.
- It is possible to *assign* the same resource several times but with different functions to monitor project costs.

- The icon allows you to add a comment.
- The icon indicates that there is a comment on the assigned task.
- Simply move the mouse over the icon to see the latest comment.
- Click to view all comments
- A global comment can be added on the weekly follow-up.

The Start and End columns display the planned dates for each activity.

**Entry field**

In order to see and know the assignments on a task, several columns indicate the periods assigned to a resource

- **Assigned**
  - It is the work assigned to the resource that is calculated by the software.
- **Real work**
  - This is the work actually performed and reported by the resource.
- **Left work**
  - This is the work that the resource still has to provide for this task
  - Left work is automatically decreased on input of real work.
  - Resources can adjust this value to estimate the work needed to complete the task.
- **Reassessed**
  - This is the work required to complete the task. It's the actual work + the rest to do. See: "progress-section-date-duration"
  - You cannot edit Assigned Work, Actual Work, and Reassessed directly in columns.
  - This information is calculated directly by the software based on what you have entered
- **Real work entry**
  - Area to enter real work. It possible put real work in off days.
  - Columns of days off is displayed in grey.
  - Days off is determine in resource *calendar definition*.

**Total of days**

On the last row is the sum for all days of the week.

It is a synthesis displayed for each project and globally for the whole week.

The resource capacity is defined by the number of hours per day and the resource capacity (fte).

![Fig. 58: Total of the day Zone](368)
• 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.
• The total of the day is no colored whether entries is less than the resource capacity of days.

See also:

Timesheet parameters

• Unit for work
  Allows to set the unit time for real work and workload and the number of days worked per week. The number of hours per day is defined here.

• Timesheet
  You can set many levers, alerts or display options

• Generation of alerts if real work is not entered
  You can trigger alerts on the entry of actual work for different collaborators. These messages can be sent at a frequency defined by email or displayed as an alert directly in the application.

• Automatic feeding of the real
  You can automatically fill in the actual work from the work scheduled up to a given date and then trigger the automatic calculation of the projects from the day after that date.
The status of tasks

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

- Set to first **in progress** status: if the parameter value is set to “Yes”, when real work is entered on a task, its status will be changed automatically to the first status “handled”.

- Set to first **done** status: if the parameter value is set to “Yes”, when left work is set to zero on a task, its status will be changed automatically to the first status “done”.

Change status validation

An icon will be displayed on the task if a status change is applicable.

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

**Warning:** Common issue

- If a **responsible** or a **result** are set as mandatory in element type definition for the task. It’s impossible to set those values by real work allocation screen.
- The change status must be done in treatment section on the task definition screen.
6.6.2 Timesheet Validation

The timesheet validation screen allows the project manager to receive, verify and validate the time allocated weekly by the resources to an activity for all the projects.

Selection and filters

You can filter the display of this screen by resource, by team and by period.

The visibility of resources in the list is defined according to your rights defined by your profile.

You can increase the display restriction with the possibility to show only some of the validation request.

Color code

According to the work completed by the resource, and according to the expected workload for this resource.

The project leader receives the timesheet with a precise color code.

- **Green**: The completed job is the same as the expected one.
- **Red**: The filled workload is shorter or longer. It does not match the expected work.
- **Orange**: the job is not the same as the expected job but the load is the same.
In the “Timesheet submitted” column you see the date and time when the resource to send the submission.

In the “Timesheet validation” column you have the possibility to validate the work or to cancel the submission so that the resource can correct his work.
6.6.3 Monthly consolidation

Monthly consolidation allows you to view, control and validate resource allocations to a particular project for an entire month. This screen will list all the projects on which the user has visibility.

Fig. 61: Monthly consolidation screen

Filters will limit the list:

- Project to restrict the listed projects to this project and its sub-projects
- Project Type to restrict the listed projects to projects of this type
- Organization to restrict the listed projects to the projects of this organization
- Month and year to restrict to this date

**Note:** By default, this will be the last month for which projects are still blocked, or failing this it will be the current month.

This screen will display for each project not validated:

- The currently known CA
- The currently known validated load
- The total actual load currently known to the project
- The actual load consumed on the project for the selected month
- The remainder to be done currently known
- The currently known reassessed load
- The currently known margin (load) = load validated - load reassessed

For validated projects, the data displayed is that stored during validation.

**Block a project over a month**

The and buttons allow you to block or unblock charges beyond the month-end date. When the project is blocked for a given month, you cannot enter a charge for the following month, even if it has started. The block will be propagated recursively to sub-projects.

**Validate a project over a month**

The and buttons allow you to block or unblock charges beyond the month-end date. When the project is blocked for a given month, you cannot enter a charge for the following month, even if it has started. The block will be propagated recursively to sub-projects.
Absences

The absenteeism screen allows you to enter non-productive days, i.e. days not worked.

Absences must be informed as soon as possible so that the calculation of the planning of your projects takes into account the unavailability of resources.

Fig. 62: absences screen

Absences are linked to an administrative project. Only one project is necessary for all the resources, without them being assigned to this project.

Resource Selector

Depending on your rights and profile, you can have access to the resources that you manage or only to yourself.

Select the resource whose non-productive days you want to add as well as the year on which these days will be retained.

Types of absences

Each type of absence is an activity related to the administrative project.

You can create as many activities as types of absences.

Accelerator

Select the type of leave and click on the accelerators to enter the selected value directly in the date boxes in the calendar.

- 1: full day
- 0.5: half day on the type of leave selected
- 0: delete the days already entered

Calendar

Select the type of leave from the existing list.
Click on the boxes of the dates concerned by non-productive work.
The boxes are filled with the color of the leave type
The dark gray boxes indicate the real work. It’s work actually performed and informed on the timesheet.
The striped boxes indicates that the working time recorded by the resource has been validated.

6.7 Asset Management

This module is dedicated to the management of your IT infrastructure.
You can manage:

- All types of equipment
- Equipment categories
- Brands
- Models
- Equipment localisations

6.7.1 Equipment

This screen allows you to manage lists of licenses, versions, products or even components linked to equipment.

- Define the list of devices contained in another device.
- Display the global tree of the equipment constituting an equipment, by being able to close or expand a given level.
- When copying a device you can select the complete composition of this device.
- Each piece of equipment contained is duplicated, recursively, by initializing the unique data (serial number, references, etc.).

Fig. 63: Asset management screen
Access rights

You can limit the visibility of equipment.

some fields will be updated automatically to allow the user to see the items they have just created.

If a profile has creation rights and read rights only on “the items for which it is responsible”, the creation must automatically position the manager on the current user.

If a profile has creation rights and read rights only on “its own elements”, the creation must automatically position the user on the current user.

This rights management is automatically extended to all elements not dependent on the project.

Feeding the responsible field when creating an element if the user has visibility rights such as “the elements for which he is responsible”.

Warning: Hide buttons “Lock” and “send mail” when access right is readonly

Note: Each asset related to a resource or an user, is displayed on their respective screen.

See: Resource and User

Description

This section allows you to enter the details of the composition of an item of equipment.

Table 7: Fields of add an origin element dialog box

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>name</td>
<td>Name of the asset.</td>
</tr>
<tr>
<td>Asset type</td>
<td>Type of the asset defined in the asset type screen.</td>
</tr>
<tr>
<td>Brand</td>
<td>Brand of the asset defined in the brand screen</td>
</tr>
<tr>
<td>Model</td>
<td>Model of the brand of the asset.</td>
</tr>
<tr>
<td>Provider</td>
<td>Equipment provider</td>
</tr>
<tr>
<td>Asset category</td>
<td>Category of the asset. Individual or collective by defaut.</td>
</tr>
<tr>
<td>Parent asset</td>
<td>Link to parent equipment. This contains the other equipment. A computer has multiple devices.</td>
</tr>
<tr>
<td>Serial number</td>
<td>Serial number of the material or the serial numer of a licence.</td>
</tr>
<tr>
<td>Inventory number</td>
<td>Add your own identification number to your equipment inventory.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the asset</td>
</tr>
</tbody>
</table>

Attribution section

This section allow to define:

- A status for each device according to the selected workflow.
- An installation date and a possible decommissioning date.
- The location of the equipment, with the possibility of defining a list (see: Asset types) and / or a manual entry field for more precision.
- The user who will benefit from this equipment.
- The closed check box. Which allows to put the equipment in archive mode.
Costs section

This section allows you to define costs for the selected asset.

You can set a cost for:

- Purchase value
- The warranty period
- End of warranty date
- The amortization period
- The need for insurance

Asset composition section

When you define an element parent, the components of the element appear in this section giving you the complete structure of an element.
ProjeQtOr User guide, Release 9.2.0

6.7.2 Asset types

The button display the structure opens a pop up which summarizes the complete composition of your equipment in table form.

You can print this box.

Fig. 66: Asset composition

Fig. 67: Asset composition section

The types of asset in equipment make it possible to list the different materials of an equipment.

For example, a workstation contains a computer, peripherals such as a screen, a mouse, a keyboard, or even a webcam, software, licenses, a printer . . .

But you can also create even more detailed lists with types of information storage, processing, or network equipment.
Table 8: Required fields

<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: Workflow).</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>

You can define an icon for each type of asset.

ProjeQtOr puts some icons at your disposal but you can create and import yours in the application.

Save your icons in the `www/projeqtor/view/icons` folder and relaunch the application.

### 6.7.3 Asset category

The screen of the equipment categories will allow you to make a more detailed inventory of certain equipment.

You can determine for example whether a piece of equipment can be personal, for a service or collective.

But you can also determine if a device is part of a hardware, network or workstation architecture.

Table 9: Required fields

<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>
</tbody>
</table>

### 6.7.4 Brands

The brand screen allows to create a list of brands making up your IT infrastructure.

Table 10: Required fields

<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>Closed</td>
<td>Box checked indicates the type is archived.</td>
</tr>
</tbody>
</table>

### 6.7.5 Models

The model screen allows you to create a list of models linked to a brand and type of equipment.
### Table 11: Required fields

<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>brand</td>
<td>Name of the brand.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the model</td>
</tr>
<tr>
<td>Asset type</td>
<td>Name of the asset type</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the model.</td>
</tr>
</tbody>
</table>

### 6.7.6 Location

Location screen allow to create a list of places so that you can locate your equipment.

Fig. 68: Location screen

### Description section

<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 location.</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 location</td>
</tr>
</tbody>
</table>

The “location” fields in the assets screen offers the possibility of selecting from the recorded list of locations and a manual entry field allowing you to add details with alphanumeric characters.

### Adress section

You can complete the exacte address by filling in numerous fields:

- Street
- Complement
- Zip code
- City
- State
• Country

Fig. 43: all is well
CHAPTER

SEVEN

DOCUMENT MANAGEMENT SYSTEM
7.1 Documents

Concepts

- Product

A document is a reference element that gives a description of a project or product.

The document element describes the general information.

The file will be stored in the tool as versions.

![Fig. 1: Documents screen](image)

Description section

Other sections

- Linked element
- Notes

<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>Type</td>
<td>Type of the document</td>
</tr>
<tr>
<td>Project</td>
<td>Name of the project to which the document is attached</td>
</tr>
<tr>
<td>Product</td>
<td>Name of the product to which the document is attached</td>
</tr>
<tr>
<td>Directory</td>
<td>Choose the directory in which the document should be saved</td>
</tr>
<tr>
<td>Document reference</td>
<td>Automatic reference created from the parameters saved in the global parameters</td>
</tr>
<tr>
<td>External reference</td>
<td>Manual reference corresponding to your activity</td>
</tr>
<tr>
<td>Author</td>
<td>The author, the creator of 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>
Project and Product

Must be concerned either with a project, a product or both.
If the project is specified, the list of values for field “Product” contains only products linked the selected project.

Field Author

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

Section Lock

This section allows to manage document locking.
When a document is locked the following fields are displayed.

Fig. 2: Lock document section

- Locked: box checked indicates the document is locked.
- Locked by: user who locked the document.
- Locked since: date and time when document was locked.

lock/unlock this document

- Button to lock or unlock the document to preserve it from being editing, or new version added.
- When document is locked it cannot be modified
- When the document is locked, it can not be downloaded except for the user who locked it or a user with privilege
- Only the user who locked the document, or a user with privilege can unlock it
- You can forbid Global Parameters
7.1.1 Document versioning

This section allows to manage version list of document.

Document versioning allows to keep different version at each evolution of the document.

Document can evolve and a new file is generated at each evolution.

Type of versioning must be defined for a document.

```
<table>
<thead>
<tr>
<th>version</th>
<th>date</th>
<th>status</th>
<th>file</th>
</tr>
</thead>
<tbody>
<tr>
<td>V2.0</td>
<td>01/04/2021</td>
<td>recorded</td>
<td>TECHSp.2356-22-2021.pdf</td>
</tr>
</tbody>
</table>
```

Fig. 3: Versioning section

- Click on + to add a new version.
- Click on ▼ to download file at this version.
- Click on < to modify a version.
- Click on DELETE to delete a version.
- Click on ▶️ to display the history for approvals for 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.

**Document viewer**

• Document viewer available for image, text and PDF files.

• Click on + to display the pop up.

![Document version dialog box](image)

Fig. 4: Document version dialog box

**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**

**Field “Update”**

A version can have a draft status, that may be removed afterwards.

7.1. Documents
Field “Is a reference”

Should be checked when version is validated.
Only one version can be the reference for a document.
Reference version is displayed in bold format in the versions list.

Field “Description”

May be used to describe updates brought by the version.

This icon appears when the description field is filled.
Moving the mouse over the icon will display description text.

7.1.2 Approval process

You can define approvers for a document.
Only users assigned to the project linked to the document can be added.

- Click on to add an approver
- Click on to delete an approver

The approvers

When an approver is created in the list, the approver is also automatically added to the latest version of the document.
When adding a version to the document, approvers are automatically added to the version.
Each approver can see the list of documents to approve on their Today screen.
On the Documents screen, the approver can approve or reject the document.
All approvers of the document can view the response of other approvers.
Once the document is approved, the line is then checked and the date and time of the approval recorded.
If the document is rejected, the line is then marked with a cross.

Approval status

This status allows you to globally track the status of the approval.
It can be used in a filter, like all the other fields of the document object.
calculated according to the approval status of the latest version of the document and may take the following values:

- **Without approval**: if no approver has been added to the list of approvers
- **Rejected**: if at least one approver rejected the version of the document
- **Pending approval**: if there is at least one approver who has not approved the document and no one has yet rejected the version of the document
- **Approved**: if all approvers approved the document.
Fig. 5: Documents to be approved on the today screen

Fig. 6: Documents to be approved on the today screen
**Note:** The quick search only display documents that are in directories to which the user has rights.

Send a reminder email to approvers.
Send an email to approvers who have not yet validated the document.
Those who have already validated it will not receive this email.
The sending will be effective if an email address has been registered for the user.
7.1.3 Document directories

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

Location

- The files of document will be stored in the folder defined by the parameters Document root and Location.
- Document root is defined in Global parameters screen.
- Location is automatically defined as «Parent directory» / «Name».
- Product will be the default to new stored documents in this directory.
  - If the project is specified, the list of values contains the products linked the selected project.
  - If the project is not specified, the list of values contains all products defined.
- The Default type will be the default to new stored documents in this directory.

Directory access rights

- The list of documents only displays Documents that are in directories for which the user has read rights.
- You can define the access rights to documents according to the profile at each level of the document directory tree.
- There is no notion of inheriting rights to subdirectories.
- You define for each profile the CRUD right (create / read / update / delete) on each directory.
- The rights defined in the “Project dependent data access” rights screen will only be used as a definition of default values when creating a directory.

See: Documents rights per directory

Note:

- Note that if a directory is dedicated to a project, the profile used for assigning rights is the user’s profile on this project, otherwise it is his default profile.
- The assignment of modification or deletion rights without assigning read rights is inconsistent and will not be taken into account.

7.1.4 Nomenclature

product designation in the document nomenclature

Possibility to take into account the designation of the product in the nomenclature of documents with the new codes

- {PROD} product designation
- {PROJ / PROD} the project code if specified, otherwise the product designation
- {PROD / PROJ} designation of the product if specified, otherwise the project code
8.1 Expenses

The expenses incurred for the project are monitored.

8.1.1 Hierarchical budget

The hierarchical view of budgets allows you to display an overview of budgets in a very graphic way with an interpretation system for better reading.

You can filter the list of budgets using the parent budget filter.

You can display a particular budget family.

You can move budgets by “drag and drop”.

8.1.2 Budget

A budget is a list of all products and different expenses to plan. It is a plan that allows to define in advance the expenses, the incomes and the possible savings to be realized during a definite period.

It allows to anticipate the resources that the company will have at a specific moment.

- You can create as much budget and sub budget as you want.
- An expense is related to a base budget, ie a budget item
- A budget item is linked to a parent budget
- Only the current budget items will be displayed in the lists.
- Current, under construction and closed budgets will not appear in the lists. To view the closed items, check the “closed” box.

Budget parent filter

With the filter, you can display in the list area, only a budget and its family (sub-budget).

An indentation of these to the right shows that they are sub-budgets.
To see the closed items in this list, check the “closed” box.

If you change the name of a budget, remember to refresh the page so that the lists take into account the changes.

- The parent budget exists only to consolidate the data of the underlying budget items.
- You cannot modify the expenses in the Progress field of a parent budget.
- Only the target amount can be changed if the budget treatment is still under construction.

The budget item

- The budget item is the finer element of the budget analysis.
- These posts or budget destinations will allow you to detail your budget, categorizing it at your convenience.
- When you create a project expenses or an individual expenses, you can link them to a specific budget item.

Description

This section allows to identify items of the element.
Fig. 3: Filters on budget
### Table 1: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the budget</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the budget</td>
</tr>
<tr>
<td>Budget type</td>
<td>Type of budget: initial or additional</td>
</tr>
<tr>
<td>Budget orientation</td>
<td>The orientation of the budget: operation or transformation</td>
</tr>
<tr>
<td>Budget category</td>
<td>subdivision of budget orientation into category</td>
</tr>
<tr>
<td>Article number</td>
<td>The number of the article</td>
</tr>
<tr>
<td>Organisation</td>
<td>Name of the organisation</td>
</tr>
<tr>
<td>Customer Code</td>
<td>the code you attribute to your client</td>
</tr>
<tr>
<td>is sub-budget of</td>
<td>if your budget is part of another budget</td>
</tr>
<tr>
<td>Sponsor</td>
<td>from the budget. If your budget comes from grant for example</td>
</tr>
</tbody>
</table>

### Treatment

This area allow you to change the macro state of the budget.

- A budget may be under construction
- A budget under construction does not allow to see the fields “target amount” and prevents the modification of the estimated amount
- The “approved” macro-state changes and automatically cancels the “under construction” macro state. The date is then displayed in the fields of the macro-state concerned.
- Each sub-budget is then impacted and the “approved” state will then be propagated on all of his family.
- Each macro state “under construction”, “approved”, “closed” and “canceled” modified from the parent budget screen propagates in cascade over the entire budget hierarchy.

### Table 2: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Change of states according to the Workflow selected for the type of your budget</td>
</tr>
<tr>
<td>Is a budget item</td>
<td>Self-checked box when the budget becomes a sub-budget</td>
</tr>
<tr>
<td>Under construction</td>
<td>When the budget is validated. The box is unchecked</td>
</tr>
<tr>
<td>Approved</td>
<td>When the box is checked, the target amount is blocked</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that profile is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Flag to indicate that profile is cancelled.</td>
</tr>
</tbody>
</table>

### Progress

This section allows to follow the consolidation of all the expenses.

The target amount is the only amount that you can change on a parent budget if it is still under construction.

The other amounts are recovered from the sub-budgets and consolidated on the parent budget.

Transferred Amount allows to release a sum of an amount planned for a budget item in order to redistribute it to another item.

This amount is visible on all budget items.

Transferred Amount

- Enter a negative amount on a budget line to transfer an amount
- Enter a positive amount on a budget line to recover this amount
### Progress

<table>
<thead>
<tr>
<th></th>
<th>start date</th>
<th>end date</th>
</tr>
</thead>
<tbody>
<tr>
<td>budget dates</td>
<td>01/01/2020</td>
<td>12/31/2020</td>
</tr>
<tr>
<td>n° BBS</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

#### untaxed amount full amount

<table>
<thead>
<tr>
<th></th>
<th>€</th>
<th>€</th>
</tr>
</thead>
<tbody>
<tr>
<td>estimate amount</td>
<td>40 000,00</td>
<td></td>
</tr>
<tr>
<td>initial amount</td>
<td>40 000,00</td>
<td></td>
</tr>
<tr>
<td>update n°1 amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>update n°2 amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>exceptional update</td>
<td></td>
<td></td>
</tr>
<tr>
<td>transferred amount</td>
<td>1 000,00</td>
<td>1 500,00</td>
</tr>
<tr>
<td>updated amount</td>
<td>41 000,00</td>
<td>1 500,00</td>
</tr>
<tr>
<td>engaged amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>available amount</td>
<td>41 000,00</td>
<td>1 500,00</td>
</tr>
<tr>
<td>invoiced amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>real left amount</td>
<td>41 000,00</td>
<td>1 500,00</td>
</tr>
<tr>
<td>available transferred</td>
<td>-1 000,00</td>
<td>-1 500,00</td>
</tr>
</tbody>
</table>

Fig. 4: Progress Section
• Only the parent budget and its sub budget will see this amount.
• Another parent budget can not recover this amount.

Budget expense detail

This section displays lines in detail. This section, available at the first level of the parent budget, displays in detail the expense lines of the project that have been linked to the defined budget items.

<table>
<thead>
<tr>
<th>name</th>
<th>date</th>
<th>untaxed amount</th>
<th>tax amount</th>
<th>full amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>#3 - Servers</td>
<td>planned</td>
<td>03/01/2021</td>
<td>4 500,00 €</td>
<td>900,00 €</td>
</tr>
<tr>
<td>real</td>
<td>01/29/2021</td>
<td>5 400,00 €</td>
<td>1 080,00 €</td>
<td>6 480,00 €</td>
</tr>
</tbody>
</table>

Fig. 5: Details lines
8.1.3 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.
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: machine or office 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>Origin</td>
<td>Element which is the origin of the quotation</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>

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>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>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>
<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>Result</td>
<td>Complete description of the treatment of the expense.</td>
</tr>
</tbody>
</table>

Fields Planned & Real

- **Ex VAT**: Amount without taxes.
  - Real amount is automatically updated with the sum of the amounts of detail lines.
- **Tax**: Applicable tax.
- **Full**: Amount with taxes.
- **Payment date**:
  - For field “Planned” is the planned date.
  - For field “Real” can be the payment date or else.
Expenses 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.

- Click on **+** to add a detail line.
- Click on **-** to modify an existing detail line.
- Click on **trash** to delete the detail line.

**Field Date**

This allows to input several items, during several days, for the same expense, to have for instance one expense per travel or per month.

**Field Type**

Depending on type, new fields will appear to help calculate of amount.

Available types depending on whether individual or project expense.

See: Expenses details types.

**Field Amount**

Automatically calculated from fields depending on type.

May also be input for type “justified expense”.

**Financial expenses synthesis**

When your financial elements have been linked and attached to a project expense (detailed or not), you will find the summary of these elements.
8.1.4 Individual expenses

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.

Description

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Expenses detail lines</td>
</tr>
<tr>
<td>• Linked element</td>
</tr>
<tr>
<td>• Attachments</td>
</tr>
<tr>
<td>• Notes</td>
</tr>
</tbody>
</table>

Table 5: Required field

<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>
## Treatment

Table 6: Required field

<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 amount</td>
<td>Planned amount of the expense (Date is mandatory)</td>
</tr>
<tr>
<td>Real amount</td>
<td>Real amount of the expense (Date is mandatory)</td>
</tr>
<tr>
<td>Budget item</td>
<td>Budget item related to expense</td>
</tr>
<tr>
<td>Payment done</td>
<td>Box checked indicates the payment is done.</td>
</tr>
<tr>
<td>Closed</td>
<td>The box is checked automatically when the invoice linked to this expense is paid</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates that the expense is cancelled</td>
</tr>
</tbody>
</table>
8.1.5 Call for tenders

This screen allows you to record information on your needs for any request for tenders from your providers.

This can be used to detail all requests and find the best proposal.

To help you do this, you have the option of creating different evaluation criteria. You can then assign a value to them in the offer.

The call for tenders, once saved, automatically creates a provider offer for each of the selected providers.

Description

Table 7: Required field

<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. See: <code>List of type</code></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>
<tr>
<td>Description</td>
<td>Description of the tender</td>
</tr>
<tr>
<td>Business requirements</td>
<td>Description of the requirements</td>
</tr>
<tr>
<td>Technical requirements</td>
<td>Description of the technical requirements</td>
</tr>
<tr>
<td>Other requirements</td>
<td>Description of the others requirements (organization, financial...)</td>
</tr>
</tbody>
</table>
## Treatment

### Table 8: Required field

<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 item according to the workflow you have selected.</td>
</tr>
<tr>
<td><strong>Responsible</strong></td>
<td>Person responsible for the processing of this call for tender.</td>
</tr>
<tr>
<td><strong>Sent date</strong></td>
<td>Sent date of the call for tender.</td>
</tr>
<tr>
<td><strong>Expected answer date</strong></td>
<td>Expected answer date, meaning expected tender date.</td>
</tr>
<tr>
<td><strong>Handled</strong></td>
<td>Box checked indicates that the tender is handled with date when checked.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Box checked indicates that the tender is done with date when checked.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Box checked indicates that the tender is archived with date when checked.</td>
</tr>
<tr>
<td><strong>Cancelled</strong></td>
<td>Box checked indicates that the tender is cancelled.</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td>Description or analysis of the desired result.</td>
</tr>
</tbody>
</table>

### Submissions of tenders

This section contains the list of providers to whom the invitation to tender is sent.

- Click on ![Plus icon] to add a provider to the list.
- Click on ![Edit icon] to edit informations.
- Click on ![Delete icon] to delete a provider to the list.

A pop up is displayed. Fill in the different fields necessary for your needs.

![Fig. 9: Submission to call for tender pop-up](image)

### List of values

- You can choose a specific supplier contact.
- The contacts available in the list are linked to the selected supplier.
- These contacts must be registered in advance on the provider’s screen.
- Change supplier, the contact list will adapt.
- The dates of the request and the expected response.
- The status of the submission to tender. Several statuses are available.
- They are fully configurable and customizable. Each status has a color code.
- See: *List of values*
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>Name of the provider to which the offer was sent as well as the color code corresponding to the provider’s status in relation to the offer.</td>
</tr>
<tr>
<td>Requested</td>
<td>Request date when tender sent with the hour.</td>
</tr>
<tr>
<td>Expected</td>
<td>Answer date expected with the hour.</td>
</tr>
<tr>
<td>Received</td>
<td>Date of receipt of the provider’s offer</td>
</tr>
<tr>
<td>Evaluation amount</td>
<td>Evaluation note given to the provider upon receipt of the offer according to the selected criteria and the total amount.</td>
</tr>
</tbody>
</table>

You can access to each offer by clicking on the name of the provider or by visiting the provider offers screen.

**Evaluation Criteria**

This section allows you to add evaluation criteria to rate your providers based on your requests.

- Click on + to add a criteria
- Click on to modify a criteria
- Click on to delete a criteria

![Tender evaluation criteria](image)

Fig. 10: Add an evaluation criteria

- Name your evaluation criteria.
- Assign a maximum rating value.
- Assign a coefficient according to the importance of the criteria.
- The score is calculated based on the values assigned and reported in the “submission of tenders” table.

**Tip:** Click on to logically switch from one financial item to another:

Call for tenders -> Provider tenders -> Order to provider -> Terms/Bills -> Payments to providers

Each time you copy a financial item, the most logical financial item for the rest of the order process will be displayed automatically.

The amount of expense of these elements will be recovered, passed on and linked to each of the others and will allow you more precise monitoring.

You can prevent the carry forward of amounts or the generation of expenses in the *global parameters*.
8.1.6 Provider Tenders

Provider tenders store information about responses to tenders you have submitted. This can be used to detail all the offers, compare them, evaluate them to choose the most suitable for your needs.

An offer can be created manually or generated automatically following a call for tenders. Each provider added to the invitation to tender will generate an offer.

Description

<table>
<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. See: List of type</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>
Table 10: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></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>Initial amount not taxed - Amount of tax applicable by the provider and the type of product - Total amount with discount taken into account.</td>
</tr>
<tr>
<td>Discount</td>
<td>Negotiated price - Enter a numerical value and the percentage is calculated automatically. And conversely, enter a percentage, the numerical value is generated automatically.</td>
</tr>
<tr>
<td>Total</td>
<td>Total amount with discount taken into account.</td>
</tr>
<tr>
<td>Project expense</td>
<td>Connect your provider’s offer to an existing project expense.</td>
</tr>
<tr>
<td>Generate expense</td>
<td>Automatically create expenses from the current item. The name of the project expenditure generated will be the same as that of the offer.</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><strong>Handled</strong></td>
<td>Box checked indicates that the tender is handled with date when checked.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Box checked indicates that the tender is done with date when checked.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>Box checked indicates that the tender is archived with date when checked.</td>
</tr>
<tr>
<td><strong>Cancelled</strong></td>
<td>Box checked indicates that the tender is cancelled.</td>
</tr>
<tr>
<td><strong>Result</strong></td>
<td>Description or analysis of the expected result from this provider.</td>
</tr>
</tbody>
</table>

**Project expenses and generate expense**

![Project expenses and generate expense diagram](image)

Fig. 12: Generate expense

You can attach a specific expense to your order.
Select a manually created expense from the project expense list.
If you have not created an expense upstream, check the generate expense box, a line will then be created in the project expenses.
Evaluation

The Evaluation section is only available when the offer is linked to a call for tenders. If the offer is created manually, the evaluation section does not offer criteria.

When the link is made then:

- You can assign evaluation criteria
- You can assign a rating with a coefficient system.
- The evaluation will display a summary of your criteria with their scores.
- The overall score will then be displayed on the invitation to tender for all the offers concerned.
- See: the criteria evaluations in the Call for tenders chapter

<table>
<thead>
<tr>
<th>name</th>
<th>max evaluation value</th>
<th>coefficient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>Quality</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>Deadlines</td>
<td>10</td>
<td>1</td>
</tr>
<tr>
<td>total:</td>
<td>50</td>
<td></td>
</tr>
</tbody>
</table>
8.1.7 Orders to provider

This screen allows to manage the orders to provider.

![Order to provider screen]

Fig. 14: Order to provider screen

**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>Order to provider type.</td>
<td>Type of order product and/or Service. See: <em>Order to Provider types</em></td>
</tr>
<tr>
<td>Project</td>
<td>The project concerned by the order</td>
</tr>
<tr>
<td>Sent date</td>
<td>Date of sending to the provider</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the quotation</td>
</tr>
<tr>
<td>Provider</td>
<td>Name of the provider</td>
</tr>
<tr>
<td>External Reference</td>
<td>Provider reference</td>
</tr>
</tbody>
</table>
### Treatment

<table>
<thead>
<tr>
<th>status</th>
<th>recorded</th>
<th>qualified</th>
</tr>
</thead>
<tbody>
<tr>
<td>responsible</td>
<td></td>
<td></td>
</tr>
<tr>
<td>contact</td>
<td></td>
<td></td>
</tr>
<tr>
<td>payment conditions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>delivery delay</td>
<td></td>
<td></td>
</tr>
<tr>
<td>planned date</td>
<td>real date</td>
<td>validation date</td>
</tr>
<tr>
<td>delivery date</td>
<td>03/01/2021</td>
<td></td>
</tr>
<tr>
<td>in progress</td>
<td></td>
<td></td>
</tr>
<tr>
<td>done</td>
<td></td>
<td></td>
</tr>
<tr>
<td>closed</td>
<td>false</td>
<td>cancelled</td>
</tr>
<tr>
<td>untaxed amount</td>
<td>tax rate</td>
<td>tax amount</td>
</tr>
<tr>
<td>initial</td>
<td>4 500,00</td>
<td>20%</td>
</tr>
<tr>
<td>discount</td>
<td>250,00</td>
<td>5.56%</td>
</tr>
<tr>
<td>total</td>
<td>4 250,00</td>
<td>850,00</td>
</tr>
<tr>
<td>project expense</td>
<td>Servers</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 15: Order to provider - Treatment section
### Treatment

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Defines the progress of the processing of the element according to the workflow used</td>
</tr>
<tr>
<td>Responsible</td>
<td>Name of the person in charge of the order</td>
</tr>
<tr>
<td>Contact</td>
<td>Name of the contact related to the order at the provider</td>
</tr>
<tr>
<td>payment conditions</td>
<td>Description of payment terms</td>
</tr>
<tr>
<td>Delivery delay</td>
<td>From the validation of the order, processing time and preparation of the order</td>
</tr>
<tr>
<td>Delivery date:</td>
<td></td>
</tr>
<tr>
<td>Planned date</td>
<td>Delivery date planned by the provider</td>
</tr>
<tr>
<td>Delivery date:</td>
<td></td>
</tr>
<tr>
<td>Real date</td>
<td>Date of receipt of delivery</td>
</tr>
<tr>
<td>Delivery date:</td>
<td></td>
</tr>
<tr>
<td>Validated date</td>
<td>Date of validation of delivery to the service provider</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>Untaxed amount</td>
<td>Amount of the order without taxes</td>
</tr>
<tr>
<td>Tax rate</td>
<td>Applicable tax rates in your country/region</td>
</tr>
<tr>
<td>Tax Amount</td>
<td>Total amount of taxes calculated based on Taxe rate</td>
</tr>
<tr>
<td>Full amount</td>
<td>Total amount of the order including taxes</td>
</tr>
<tr>
<td>Project expense</td>
<td>Connect your provider’s offer to an existing project expense</td>
</tr>
<tr>
<td>Generate expense</td>
<td>Automatically create expenses from the current item. The name of the project expenditure generated</td>
</tr>
<tr>
<td>Comment</td>
<td>Leave your comments here</td>
</tr>
</tbody>
</table>

### List of terms orders

This section allows you to create one or more terms for your invoices.

- Click on ![add](image) to add a term. A pop-up opens.
- Click on ![existing](image) to add an existing term.

![list of terms](image)

- The name and the date are mandatory.
- Enter the number of installments you want to pay your invoice.
- If 1 then it is a cash payment.
- When you enter several terms, the calculation on the total amount is done automatically.
- When you copy your order as an invoice, the terms are automatically added to it.
Fig. 17: Terms creation pop-up
• You can add due dates from the provider invoices screen if you have not done so on this screen.

<table>
<thead>
<tr>
<th>number of terms</th>
<th>untaxed amount</th>
<th>rate (%)</th>
<th>tax amount</th>
<th>full amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>900,00 €</td>
<td>20 %</td>
<td>180,00 €</td>
<td>1 080,00 €</td>
</tr>
</tbody>
</table>

Fig. 18: Calculation after number of deadlines entered

When you transform your order into an invoice, the terms recorded in the offer are automatically transferred to the invoices.

See: List of terms

In the order, these will be filled in as invoiceed with a link to the latter.

<table>
<thead>
<tr>
<th></th>
<th>id</th>
<th>date</th>
<th>amount</th>
<th>provider invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>invoiced</td>
<td>#10</td>
<td>04/25/2021</td>
<td>1 080,00 €</td>
<td>#2 bc558/889-66</td>
</tr>
<tr>
<td>invoiced</td>
<td>#11</td>
<td>05/25/2021</td>
<td>1 080,00 €</td>
<td>#2 bc558/889-66</td>
</tr>
<tr>
<td></td>
<td>#7</td>
<td>01/25/2021</td>
<td>1 080,00 €</td>
<td>#2 bc558/889-66</td>
</tr>
<tr>
<td>invoiced</td>
<td>#8</td>
<td>02/25/2021</td>
<td>1 080,00 €</td>
<td>#2 bc558/889-66</td>
</tr>
<tr>
<td>invoiced</td>
<td>#9</td>
<td>03/25/2021</td>
<td>1 080,00 €</td>
<td>#2 bc558/889-66</td>
</tr>
</tbody>
</table>

Fig. 19: List of terms invoiceed
8.1.8 Terms of payments to providers

In France, inter-company payment periods are regulated and set at maximum 60 calendar days or 45 days end of month from the date of issue of the invoice.

Failing to mention the payment period in the contract or the invoice, it is legally fixed to 30 days after receipt of the goods or performance of the service.

- Depending on the sector, deadlines are modifiable
- You can save, organize, track and edit your payment dates to your provider
- You can record one or more payment delays on each invoice to the service provider.
- An invoice can therefore be paid either in cash or in several installments.
- Each recorded due date, whether on the supplier orders screen or on the supplier invoices screen, generates a line on the terms screen.

Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the term of payment</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the term</td>
</tr>
<tr>
<td>Project</td>
<td>Project attached to the term of payment</td>
</tr>
<tr>
<td>Order provider</td>
<td>Name of the order attached to the term of payment</td>
</tr>
<tr>
<td>Provider Bill</td>
<td>The provider's invoice</td>
</tr>
<tr>
<td>Responsible</td>
<td>Name of the person in charge of the payment</td>
</tr>
</tbody>
</table>

Fixed price for term

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial ex VAT</td>
<td>Amount before taxes</td>
</tr>
<tr>
<td>Tax</td>
<td>Applicable tax</td>
</tr>
<tr>
<td>Full</td>
<td>Amount with taxes</td>
</tr>
<tr>
<td>Date</td>
<td>Date of expiry</td>
</tr>
<tr>
<td>Billed status</td>
<td>If payment has been invoiced</td>
</tr>
<tr>
<td>Paid status</td>
<td>If payment has been paid</td>
</tr>
<tr>
<td>Closed status</td>
<td>Defines whether ‘closed’ flag is automatically set for this status.</td>
</tr>
</tbody>
</table>

Note:

- **Ex VAT**: The column value is automatically updated with the sum of invoice line amounts.
- **Tax**: If the tax is not defined, nothing is applied in this field and the amount will remain without tax.
- **Full**: If the total amount exclusive of tax and the tax rate have been entered, the total amount will be calculated automatically.
- On the project, the sum of the expenses must be carried out in including taxes if the entry of expenses is in including taxes.
8.1.9 Provider invoices

This screen is used to manage invoices generated manually or linked to provider offers.

![Provider invoice screen]

**Fig. 20: Provider invoice screen**

### Description

Table 15: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the term of payment</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the term</td>
</tr>
<tr>
<td>Provider</td>
<td>The way to define common behavior on group of invoices</td>
</tr>
<tr>
<td>Project</td>
<td>project attached to the invoice</td>
</tr>
<tr>
<td>Date</td>
<td>Date of the invoice</td>
</tr>
<tr>
<td>Origin</td>
<td>Element which is the origin of the quotation</td>
</tr>
<tr>
<td>Provider</td>
<td>Provider name.</td>
</tr>
<tr>
<td>External reference</td>
<td><em>External reference</em> of the provider’s invoice</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the expense.</td>
</tr>
</tbody>
</table>
**Treatment**

Table 16: Required field

<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 placing the order</td>
</tr>
<tr>
<td>Contact</td>
<td>name of the person at the provider related to this invoice</td>
</tr>
<tr>
<td>Payment conditions</td>
<td>the payment terms of the provider</td>
</tr>
<tr>
<td>Payment due date</td>
<td>expected payment date</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>

**List of terms**

![Fig. 21: List of terms invoiced](image)

This section allows you to create one or more terms for your invoices.

If your invoice was created from an order, then the terms recorded on the offer will be automatically recovered on the invoice.

- Click on to add a term. A pop-up opens.
- Click on to add an existing term.
- Click on to remove a term.
- The name and the date are mandatory.
- Enter the number of installments you want to pay your invoice.
- If 1 then it is a cash payment.

When you transform your order into an invoice, the deadlines recorded in the order are automatically transferred to the invoices.

In the orders, in the deadlines section, these will be indicated as invoiced

Each line provides a link to the item screen.
Fig. 22: Terms creation pop-up

Fig. 23: List of terms invoiceed
8.1.10 Payments to provider

Follow the payment of your provider invoices to better organize your general cash flow or your working capital.

Description

Table 17: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the term of payment</td>
</tr>
<tr>
<td>Name</td>
<td>Short description of the payment</td>
</tr>
<tr>
<td>Payment to Providers types</td>
<td>The way to define common behavior on payments to provider</td>
</tr>
</tbody>
</table>

Treatment

Table 18: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment mode</td>
<td>Groups different payment methods.</td>
</tr>
<tr>
<td>Payment date</td>
<td>The date on which the payment method chosen above will be made.</td>
</tr>
<tr>
<td>Payment amount</td>
<td>Amount of the invoice.</td>
</tr>
<tr>
<td>Payment fee</td>
<td>Fee generated by payment or otherwise.</td>
</tr>
<tr>
<td>payment credit</td>
<td>Amount of credit if there is.</td>
</tr>
<tr>
<td>Provider payment term</td>
<td>Selection of the payment term to the provider. If the exchanges were created on the offers or on the invoice, they will be available in the list.</td>
</tr>
<tr>
<td>Provider invoice</td>
<td>Selection of the provider invoice. The invoice is automatically choose if the provider payment term is existing.</td>
</tr>
<tr>
<td>Provider invoice reference</td>
<td>The reference is automatically fill in when selecting the provider invoice.</td>
</tr>
<tr>
<td>Provider</td>
<td>The name of the provider is automatically fill when selecting the provider invoice.</td>
</tr>
<tr>
<td>Provider invoice amount</td>
<td>The amount of the invoice is automatically fill when selecting the provider invoice.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates that the tender is archived with date when checked.</td>
</tr>
</tbody>
</table>

When the payment to the supplier has been completed and recorded, on the screen of provider invoice in the treatment section, you will find a record of these payments.

In the list of terms section, you can see in the table, the terms for which the settlement has been made.

When all the due dates have been paid:

- on the invoice screen the “full” box is automatically checked
- The date of the last installment is recorded
- A summary is displayed with the name of each payment made
- Each line is clickable.
8.1.11 Provider Contract

ProjeQtOr gives you the possibility to manage and precisely follow your supplier contracts. The supplier contract is necessarily linked to a project and a supplier.

**Section Description**

Complete the description of the contract.
Table 19: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the contract</td>
</tr>
<tr>
<td>Number</td>
<td>Reference number of the contract</td>
</tr>
<tr>
<td>Client contract type</td>
<td>List of types of the contracts</td>
</tr>
<tr>
<td>Project</td>
<td>Project to which this contract will be attached</td>
</tr>
<tr>
<td>Supplier</td>
<td>Supplier concerned by the contract</td>
</tr>
<tr>
<td>Contact</td>
<td>List of provider contact only. Contacts must be registered in advance on the supplier’s screen. Change supplier, the contacts list is suitable.</td>
</tr>
<tr>
<td>Supplier reference</td>
<td>Reference of the provider</td>
</tr>
<tr>
<td>Phone number</td>
<td>The field is of alphanumeric type. You can enter a telephone number with precision. Example with a number phone and his ext.</td>
</tr>
<tr>
<td>Origin</td>
<td>Used to enter the origin of the agreement Example the name of the seller or the advertisement which brought the customer</td>
</tr>
<tr>
<td>Description</td>
<td>Descriptive text of the contract</td>
</tr>
</tbody>
</table>

Section Treatment

Follow the state, the progress of your contract in this section.

Responsible

- Choose a responsible
- Its initials are displayed on the Gantt chart of contracts

Workflow

- The workflow is based on the default workflow.
- You can change or modify the current workflow.
- See: Workflow

Renewal

Defines the behavior of the renewal of a contract at the end of the initially planned duration

- **Never**: the contract will never be renewed
- **Tacit**: the contract will be renewed if there is no termination
- **Express**: the contract is renewed and is the subject of a written or verbal act

States

- **Handled**: Date on which the contract is taken over. Effective. This date can be entered manually or by going to the Assigned state of the workflow
- **Done**: Date the contract ends.
- **Closed**: Date on which the contract was closed.
- **Cancelled**: Cancellation Date

Section contact

This section allows you to fill in the information relating to your contact with the provider
Table 20: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Name of the provider contact</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Phone number of the provider contact. The field is not numeric and lets you add textual information such as the extension number.</td>
</tr>
<tr>
<td>Levels of service</td>
<td>Determines if you have levels of service agreements (SLA) for this contract. This check box is an indication.</td>
</tr>
<tr>
<td>service agreements</td>
<td></td>
</tr>
<tr>
<td>Intervention time</td>
<td>Periods during which services, contacts and interventions with the provider will be possible. You can choose a time slot for weeks, Saturdays, as well as Sundays and holidays.</td>
</tr>
</tbody>
</table>

Section Progress

In the Progress section, determine the different dates and deadlines for the contract, notice, deadlines, payments ...

Table 21: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract dates</td>
<td>Start and end date of the contract</td>
</tr>
<tr>
<td>Initial contract term</td>
<td>Contract duration displayed according to the chosen unit: day, month, year</td>
</tr>
<tr>
<td>Notice period</td>
<td>Duration displayed according to the chosen unit: day, month, year</td>
</tr>
<tr>
<td>Notice date</td>
<td>Free reminder of a scheduled deadline</td>
</tr>
<tr>
<td>Due date</td>
<td>End of contract validity</td>
</tr>
<tr>
<td>Periodicity of the contract (Month)</td>
<td>Duration of the renewal of the contract is possible. Example 24-month subscription renewable after 12 months</td>
</tr>
<tr>
<td>Billing frequency (Month)</td>
<td>Billing frequency during the term of the contract</td>
</tr>
</tbody>
</table>

Provider contract Gantt chart

In addition to the contract management screen (list and details area), you can view your contracts in a time view on a Gantt chart. This is the “contract schedule”

Each bar representing the different contracts, going from the start date to the end date of the contract.

Notice dates and due dates are displayed as milestones.

Gantt bars for customer contracts turn red when the due date is higher than the end of contract date.

No calculation is made. This is an indication to show an inconsistency.

8.2 Incomes

Follow with the “Incomes” menu, incoming financial movements and your customers and all the elements revolving around them, such as contracts, quotations, bills, catalogs ...

8.2.1 Client contract

ProjeQtOr gives you the possibility to precisely manage and monitor your customer contracts.

The customer contract is necessarily linked to a customer.
8.2. Incomes
Section Description

Complete the description of the contract.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the contract</td>
</tr>
<tr>
<td>Number</td>
<td>Reference number of the contract</td>
</tr>
<tr>
<td>Client contract type</td>
<td>List of types of the contracts</td>
</tr>
<tr>
<td>Project</td>
<td>Project to which this contract will be attached</td>
</tr>
<tr>
<td>Customer</td>
<td>Customer concerned by the quotation</td>
</tr>
<tr>
<td>Contact</td>
<td>Customer contacts only. Contacts must be registered in advance on the customer’s screen. Change customer, the contacts list is suitable.</td>
</tr>
<tr>
<td>Client reference</td>
<td>Reference of the client</td>
</tr>
<tr>
<td>Phone number</td>
<td>The field is of alphanumeric type. You can enter a telephone number with precision. Example: XXXXXXXXXXXX ext XX</td>
</tr>
<tr>
<td>Description</td>
<td>Allows to link the document defining the SLA</td>
</tr>
</tbody>
</table>

Section Treatment

Follow the state, the progress of your contract in this section.

Responsible

- Choose a responsible
- Its initials are displayed on the Gantt chart of contracts

Workflow

- The workflow is based on the default workflow.
- You can change or modify the current workflow.
- See: Workflow

Renewal

Defines the behavior of the renewal of a contract at the end of the initially planned duration

- **Never**: the contract will never be renewed
- **Tacit**: the contract will be renewed if there is no termination
- **Express**: the contract is renewed and is the subject of a written or verbal act

States

- **Handled**: Date on which the contract is taken over. Effective. This date can be entered manually or by going to the Assigned state of the workflow
- **Done**: Date the contract ends.
- **Closed**: Date on which the contract was closed.
- **Cancelled**: Cancellation Date
Section contact

This section allows you to fill in the information relating to your contact with the client.

Table 23: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Name of the client contact</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Phone number of the client contact. The field is not numeric and lets you add textual information such as the extension number.</td>
</tr>
<tr>
<td>Levels of service agreements</td>
<td>Determines if you have levels of service agreements (SLA) with the client for this contract. This check box is an indication.</td>
</tr>
<tr>
<td>Intervention time</td>
<td>Periods during which services, contacts and interventions with the client will be possible. You can choose a time slot for weeks, Saturdays, as well as Sundays and holidays.</td>
</tr>
</tbody>
</table>

Section Progress

In the Progress section, determine the different dates and deadlines for the contract, notice, deadlines, payments ...

Table 24: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract dates</td>
<td>Start and end date of the contract</td>
</tr>
<tr>
<td>Initial contract term</td>
<td>Contract duration displayed according to the chosen unit: day, month, year</td>
</tr>
<tr>
<td>Notice period</td>
<td>Duration displayed according to the chosen unit: day, month, year</td>
</tr>
<tr>
<td>Notice date</td>
<td>Exact date of notice</td>
</tr>
<tr>
<td>Due date</td>
<td>End of contract validity</td>
</tr>
<tr>
<td>Periodicity of the contract (Month)</td>
<td>Duration of the renewal of the contract is possible. Example 24-month subscription renewable after 12 months</td>
</tr>
<tr>
<td>Billing frequency (Month)</td>
<td>Billing frequency during the term of the contract</td>
</tr>
</tbody>
</table>

Client contract Gantt chart

In addition to the contract management screen (list and details area), you can view your contracts in a time view on a Gantt chart. This is the “customer contract calendar”

Each bar representing the different contracts, going from the start date to the end date of the contract.

Notice dates and due dates are displayed as milestones.

Gantt bars for customer contracts turn red when the due date is higher than the end of contract date.

No calculation is made. This is an indication to show an inconsistency.

8.2.2 Client Quotation

A quotation is a proposal estimate sent to customer to get approval of what’s to be done, and how must the customer will pay for it.

On the quotation form, you can record all the information about the sent proposal, including attaching some file completely describing the proposal with details terms and conditions.

Transform quotation to order

A quotation can be copied into an order when corresponding document is received as customer agreement.
Fig. 27: Client contract Gantt chart screen

**Bill lines section**

This section allows to detail the quotation modality.

**Section Description**

**Other sections**

- Bill lines
- Linked element
- Attachments
- Notes

### Table 25: required field

<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>Client quotation type</td>
<td>Type of the quotation to define the way the concerned activity should be billed</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>Recipient</td>
<td>Name of entity receiving 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>

**Note:** Field “Customer”

Automatically updated from project field.
## Section Treatment

### Table 26: required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status of the quotation.</td>
</tr>
<tr>
<td>Responsible</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>Handled</td>
<td>Box checked indicates that the quotation is taken in charge.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates that the quotation is processed.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates that the quotation is archived.</td>
</tr>
<tr>
<td>Cancelled</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>
8.2.3 Client Orders

An order (also called command) is the trigger to start work.

On the order form, you can record all the information of the received order.

Scheduled work and budgeted cost of project

- The scheduled work (field: “validated work”) of the project will be initialized with the sum of total work from all orders.
- The budgeted cost (field: “validated cost”) of the project will be initialized with the sum of the total amount before taxes for all orders.
- See: Progress section

Bill lines section

This section allows to detail the order modality.

Section Description

<table>
<thead>
<tr>
<th>Other sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Bill lines</td>
</tr>
<tr>
<td>• Linked element</td>
</tr>
<tr>
<td>• Attachments</td>
</tr>
<tr>
<td>• Notes</td>
</tr>
</tbody>
</table>

<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>

Note: Field Customer

Automatically updated from project field.
Section Treatment

Table 28: required field

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

**Note: Fields behavior**

- **Fields Initial, Amendment and Total**
  - **Ex VAT**: Amount before taxes.
    - The column value is automatically updated with the sum of bill line amounts.
  - **Tax**: Applicable tax.
    - If the applicable tax isn’t set, the tax defined for the selected customer is used.
  - **Full**: Amount with taxes.
  - **Work**: Work days corresponding to the order.
    - The column value is automatically updated with the sum of bill lines quantities.
    - When the measure unit is “day”.

- **Field Amendment**
  - The columns values “Ex VAT” and “Work” are automatically updated with the sum of billing lines with selected amendment checkboxes.

- **Fields Start and end date**
  - **Initial**: Initial dates
  - **Validated**: Validated dates

**Warning**: Activity type

- The activity should be created only after approval.
### 8.2.4 Client invoicing terms

A term is a planned trigger for billing.
You can define as many terms as you wish, to define the billing calendar.

**Note:** Terms are mandatory to bill “Fixed price” project.
A term can be used just one time. The bill name will be displayed.

**A term has triggers**

- You can link the activities that should be billed at this term.
- A summary of activities is displayed for validated and planned amount and end date.
- Validated and planned values play the role of reminder.
- You can use these values to set real amount and date.

**Description**

<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>

**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 <em>(Read only)</em>.</td>
</tr>
<tr>
<td>Validated date</td>
<td>Max of validated end dates of activities defined as triggers <em>(Read only)</em>.</td>
</tr>
<tr>
<td>Planned amount</td>
<td>Sum of planned amounts of activities defined as triggers <em>(Read only)</em>.</td>
</tr>
<tr>
<td>Planned date</td>
<td>Max of validated end dates of activities defined as triggers <em>(Read only)</em>.</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.

**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>

8.2.5 Client invoices

A bill is a request for payment for delivered work.

Billing will depend on billing type defined for the project through project type.

![Fig. 28: Clients Bills](image_url)

**Invoice Type**

- 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.

8.2. Incomes
– Used for instance for **Fixed price projects**.

**On produced work**
– No term is needed.
– The billing will be calculated based on produced work by resources on selected *activities* and on a selected period.
– Used for instance for **Time & Materials projects**.

**On capped produced work**
– No term is needed.
– The billing will be calculated based on produced work by resources on selected *activities* and on a selected period.
– Taking into account that total billing cannot be more than project validated work.
– Used for instance for **Capped Time & Materials projects**.

**Manual**
– Billing is defined manually, with no link to the project activity.
– Used, for instance for **Any kind of project where no link to activity is needed**.

**Not billed**
– No billing is possible for these kinds of projects.
– Used, for instance for **Internal projects & Administrative projects**.

**Warning: Billing report**

Only bill with at least status “done” will be available for reporting.
Before this status, they are considered as a draft.

**Description section**

**Other sections**
- *Linked element*
- *Attachments*
- *Notes*
Table 29: required field

<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). The value is calculated with date of bill + payment deadline</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. Automatically updated from project fields</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>

Treatment Zone

Table 30: required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status of the bill.</td>
</tr>
<tr>
<td>Responsible</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>Done</td>
<td>Flag to indicate that the bill has been treated.</td>
</tr>
<tr>
<td>Closed</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>

**Fields Amount**

- **Ex VAT**: Amount without taxes.
  - The value is automatically updated with the sum of bill line amounts.

- **Tax**: Applicable tax.
  - Automatically updated from customer field.

- **Full**: Amount with taxes.

**Fields Payment**

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

8.2. Incomes
Invoice 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 add a formatted line depending on billing mode
- Click on pencil to modify an existing bill line.
- Click on delete to delete the bill line.

Bill line “At terms”

Table 31: required field

<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 Can be set on update.</td>
</tr>
<tr>
<td>Price</td>
<td>Real amount of term.</td>
</tr>
</tbody>
</table>

Field Description

- Automatically set with the term name.
- Can be modified on update.
Bill line On produced work & On capped produced work

Table 32: required field

<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 Can be set on update.</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>

Field “Description”

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

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.
8.2.6 Client Payments

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

### Description

Table 33: required field

<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>

### Treatment

Table 34: required field

<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>
8.2.7 Activities prices

Activity price defines daily price for activities of a given activity type and a given project. This is used to calculate a billing amount for billing type On produced work and On capped produced work.

Description

<table>
<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>
8.2.8 Financial Gallery

The financial gallery allows you to display in list form and by elements, the different client quotation, invoices and orders recorded in ProjeQtOr, per date, client or per type, partial, final and complete bill.

Attachments are displayed grouped by element.

Click on the icons to display attachment list.

<table>
<thead>
<tr>
<th>element</th>
<th>start date</th>
<th>end date</th>
<th>client</th>
<th>type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Invoice</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>Partial bill</td>
</tr>
</tbody>
</table>

![Fig. 31: Financial gallery](image)

**Filters**

Filters can be applied to the list.

**Element**

- Displays attachments for this element.

**Start and end date**

- Displays attachments for this period.
- Attachments will be displayed according a date defined in the element.

**Quotation**

- Done date

**Order**

- Validated start date

**Bill**

- Bill date

**Customer**

- Displays attachments for this customer name.

**Type**

- Displays attachments for this element type.
8.2.9 Financial catalog

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

Section Description

<table>
<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>

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>
8.2.10 Revenue Management

You can manage the turnover of the project at completion, and its consistency with the orders and invoices on the project.

A “Revenue management” section is visible on the projects screen in the Progress section after activation of the “Revenue management” module under the financial section.

The following information is then accessible:

- The turnover at completion corresponds to the total amount that will be invoiced for this project.
- Display of the sum of the project’s customer orders
- Display of the sum of customer invoices for the project
- Method of valuation of turnover

Method of valuation of turnover fixed

The turnover is fixed and is entered manually

Method of valuation of turnover variable

Variable over time depending on the activities

The turnover will then be calculated from the turnover of all the activities (not canceled) of the project and possibly of the sub-projects. In this case the activities will also have a turnover field to feed.

Projects with sub-projects will systematically have a “Variable” valuation mode, this mode will automatically consolidate the turnover of the sub-projects on the parent project.

Consistency with project orders and invoices

For projects with sub-projects, the sum of orders and invoices will consolidate the data of the sub-projects, that is to say, it will integrate the orders and invoices of the sub-projects in addition to the orders and invoices possibly on the project itself.

The sum of the orders is in red if it is lower than the turnover. The sum of the invoices is in red if it is greater than the turnover.

Raise alerts

You can create definable alerts for projects in the “unit indicators” section:

- Revenue upper than command’s sums
- Revenue less than invoices sums

In order to integrate this evolution into the community version, without disturbing the users who do not need this functionality, we will condition the behavior:

In order to transcribe the current use of the validated cost, a global parameter will determine whether the turnover is automatically reported as validated cost on activities and projects.

Note: This functionality is only visible if the Revenue Management module is activated via the access rights menu in Modules management.

The Revenue Management is a sub-module of the financial module.

This new module will activate / desactivate the management of OUs and everything related to the management of OUs (see below).

This module will be disabled by default.
Work units catalog

The objective is to define catalogs of work units, made up of work units, themselves broken down into several complexities.

This functionality will only be accessible if the Revenue management module is activated.

Fig. 32: Work units Catalog screen

Each project can only have one catalog.

If the activity project has a catalog, we present the OUs of this catalog.

Otherwise, we search for the catalog of the parent project, recursively going up the parent until we find a catalog.

We stop at the first catalog found.

You can select an or several OU on an activity, if the project has a “Variable” turnover valuation mode.

  • Click on \[
  \]
  to add a new OU

  • Click on \[
  \]
  to edit the OU

Section Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Treatment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the catalog.</td>
</tr>
<tr>
<td>Nomenclature</td>
<td>Code usually a reference shared with the customer.</td>
</tr>
<tr>
<td>Project</td>
<td>Unique - only one catalog per project.</td>
</tr>
<tr>
<td>Number of complexities</td>
<td>Maximum number of complexities, within the limit of the global parameter.</td>
</tr>
<tr>
<td>Complexities</td>
<td>Text fields to fill in the complexities of the catalog</td>
</tr>
</tbody>
</table>

Warning: If the number of complexity isn’t filled then the default number set in the *global parameters* is applied.
Then fill in the fields with the name of the complexities managed by this catalog.

Click on + to open the pop-up windows and complete the complexity details.

You can fill in the following fields for each OU:

- Reference
- Description
- Incomes
- Deliverable
- Validity date

The description, incoming and deliverable fields are text editors in inline mode. Edit buttons appear when the cursor is in the field.

For each complexity of the OU, we can define:

- Validated load of complexity - 0 is allowed
- Price (CA) of complexity
- Duration in working days - optional

It is not mandatory to fill in all the complexities for an OU.

The description, incoming and deliverable fields are text editors in “inline” mode. The edit buttons appear when the cursor is in the field.

**Use of a catalog of work units**

You can select an OU on an activity, only if the project has a Variable CA valuation mode.

We will inform the OU, its complexity and the number of units:

- Entering the OU in the list of OUs in the catalog linked to the project. This will dynamically populate the list of OU complexities by displaying only those that have a charge and a price that is not zero but may be equal to zero.
- Entering complexity
- Entering the quantity number of work units
Fig. 34: Pop-up of the complexities details
An activity will only be associated with a single OU / Complexity pair. If OU is selected, complexity and quantity are mandatory, otherwise they are prohibited, i.e. not enterable.

The UO / Complexity / Quantity data will make it possible to value:
  - The validated load = load of the OU / Complexity x Quantity
  - The turnover of the activity = price of the OU / Complexity x Quantity
  - The validated duration = duration of the OU / Complexity x Quantity

Entering the validated duration will automatically calculate the validated end date if the validated start date is entered.

**Note:** This will only determine the planned duration of the activity if it is in “fixed duration” planning mode. Otherwise, the schedule will determine the planned duration from the assigned load and the availability of assigned resources.

These 3 data (validated load, validated duration, CA) will then go into read-only since they are calculated.

If the OU’s expiry date has passed, an alert will be displayed on the activity, without this blocking the recording of the activity.

If the global parameter “Report of turnover on the validated cost of activities” is activated, the turnover entered or entered through the OU is recopied in the validated cost of the activity.

**Modification of data**

You can modify the catalog on the data of an OU, a Complexity or a Quantity however it is not possible to modify a unit of work from the catalog, if it is already used on an activity.

  - Re-calculation of validated data: validated load, validated duration and turnover
  - If resources are assigned, application of the variation in the assigned load, in proportion to the load assigned to each resource and updating of the “still to do” accordingly (without ever being able to become negative).

**Tip:** For example:

In the case of an OU whose complexity generates 5 days of load with a quantity of 1, if A is assigned for 2 days and B assigned for 3 days, if we double the quantity (and therefore the validated load) A is then assigned 4 days and B is assigned 6 days.

**Deletion of data**

You can delete the catalog on the data of an OU, a Complexity or a Quantity however it is not possible to delete a unit of work from the catalog, if it is already used on an activity.

  - The validated load data, validated duration and CA become manually modifiable again
  - The calculated data is kept

The project turnover will be updated from the sum of the turnover of the project activities, whether this data is entered from an OU or entered manually.

The turnover of the activities and the UO, Complexity and Quantity data will only be accessible for “basic” activities (which do not have sub-activities). For “parent” activities, the turnover will be consolidated from the turnover of the sub-activities.

You can close an unit of work directly in the OU’s window.

If closed, the OU is no longer selectable.
Management of ordered work

The services ordered use the work unit catalog functionality.

You must “activate ordered services” in the global parameters.

On the activities

In the Turnover section in Progress of the details area, the drop-down menu of the services ordered offers you the list of orders, only if the project is an activity project, where the unit of work ordered is the same unit of work on the activity and where the complexity is consistent with that of the order.

Select the order corresponding to the setting up of your activity in order to follow the realization and the invoicing of these units of works.

Be careful though, some rules apply:

- the quantity must not be less than the quantity already invoiced,
- the quantity must not be less than the quantity already carried out
- if there is a quantity performed or invoiced, the unit of work and the complexity cannot be changed

On the commands

On the order that you have linked from your activity, you have a summary table indicating the type of units ordered, those that have been carried out, since the monitoring of your activity, as well as the number of units and their corresponding amount, already charged.

In the case of invoicing, a table for the invoiced work order will be available.

When copying your order to an invoice, the table of services ordered is also done taking into account the quantity already invoiced.

Please note, some rules apply:

- The sum for the entire invoiced quantity (including current and already invoiced) must not exceed the ordered quantity.
• Selecting a work order displays the work unit, complexity, unit quantity and quantities (stored on the work order line)
• The amount is calculated = quantity invoiced x unit amount
• During the update, the reference of the work order cannot be changed
• When data is inserted / updated, the sum of the data on the work order is updated
8.3 Financial situation

Project financial situation

The financial situation screens allow you to precisely follow up all the financial elements of a project.

![Project financial situation screen](image)

Fig. 37: Project financial situation screen

Find the financial situation in its entirety on the respective screens of the elements.

Financial status screens will only display the most recent transaction.

Expenses financial situation

The following operations will then be displayed for the expenses.

- Call for tender.
- Provider tenders
- Orders to provider
- Provider bills

Incomes financial situation

The following operations will then displayed for the incomes.

- Client quotations
- Client orders
- Clients bills
- Client paiements
9.1 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.

Each meeting is displayed in the agenda

**Project task**

- Meeting is a task. They appear in the imputation sheets with the date fixed.
- You can assign project resources (named attendees).
- You have a progress section that allows for followed resources work and cost.

**Section Description**
Other sections

- Attendees
- Progress
- Predecessor and Successor
- Linked element
- Attachments
- Notes
- Live meeting

Table 1: Required field

<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. If not set, will automatically be set to meeting type completed with meeting date.</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>The initial date of the meeting, including the start and end time.</td>
</tr>
<tr>
<td>Location</td>
<td>Place (room or else) when meeting will stand.</td>
</tr>
<tr>
<td>Email invitation</td>
<td>Send an email to the expected participant in the Attendees section</td>
</tr>
<tr>
<td>Start Meeting button</td>
<td>Allow to go on the live meeting screen.</td>
</tr>
<tr>
<td>Agenda of the meeting</td>
<td>Description of the meeting and agenda.</td>
</tr>
</tbody>
</table>

Description can be used to store agenda.

Email invitation

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

Treatment

Table 2: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent activity</td>
<td>Parent activity of the meeting. In the WBS structure, under which the meeting will be displayed in the Gantt plan.</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>Closed</td>
<td>Flag to indicate that meeting is archived.</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>

Note: Minutes

You can enter here only a short summary of the minutes and attach the full minutes as a file.
Steering
Retrieving the agenda of a meeting from the description of its type

Diary
Viewing meetings in agenda, even if they are not planned
9.1.1 Live Meeting

LiveMeeting you can manage meetings in an *Agile* way.

- Manage minutes of meetings quickly
- Automatically share the time between all participants
- Dynamically measure the speaking time of each participant
- Easily write minutes while assistants speak
- Easily manage actions / decisions / questions while writing minutes
- Manage tickets, activities, actions and requirements with Kanban while writing minutes.

Click on **Start meeting** button to access the Live Meeting Management screen.

![The Live Meeting screen](image)

**Fig. 2: The Live Meeting screen**

- Click on **Hide time counters** to show or hide participants’ tabs with their speaking time
- Click on **Start** to start the meeting and to start decrementing the speaking time
- Click on **Stop** to stop the meeting and close the LiveMeeting window
- Click on **Exit** to exit the LiveMeeting screen
- Click on **Save** to save the live meeting report

*See: Live Meeting*

**Kanban Management**

Click on **Kanban** to manage the kanbans

You can manage your Kanban tiles directly in the Live Meeting interface.

*See: KanBan*
9.1.2 Periodic meetings

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

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 recording a recurring meeting, unit meetings are automatically created in a parent folder.
When the parent folder is closed, the meeting lines are not visible, but they appear on the same line as the folder.
Changes can be made on each group meeting.
In most cases, these changes will not be affected or 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.
- Allocation of the entire project team to a periodic meeting (as existing for a simple meeting) is possible.
- 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.

**Section Description**

**Other sections**

- **Attendees**
- **Progress**
- **Predecessor and Successor**
- **Notes**

<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>
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 4: Required field

<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>

Field Periodicity

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

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

- 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.
- Ability to assign to a meeting a resource or a contact or a user not member of the project team

<table>
<thead>
<tr>
<th>resource</th>
<th>rate</th>
<th>assigned (d)</th>
<th>real (d)</th>
<th>left (d)</th>
</tr>
</thead>
<tbody>
<tr>
<td>multi developer</td>
<td>100%</td>
<td>0.25</td>
<td>0.00</td>
<td>0.25</td>
</tr>
<tr>
<td>web developer</td>
<td>100%</td>
<td>0.25</td>
<td>0.00</td>
<td>0.25</td>
</tr>
<tr>
<td>project manager</td>
<td>100%</td>
<td>0.25</td>
<td>0.00</td>
<td>0.25</td>
</tr>
<tr>
<td>other attendees</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Attendee list**

- Click on [+] to add a new attendee
- Click on [edit] to modify the assignment of the resource
- Click on [-] to delete the assignment of the resource
- Click on [divide] to divide the assignment with another resource

**Note:** Mandatory participant

The icon ⭐ indicates that the presence of the participant is mandatory

More detail about how assigned project resources, see: Assignment section section.

**Other attendees**

Extra list of persons attending (or expecting to attend) the meeting, in completion to resource in the attendee list.

- You can enter attendees by email address, resource or contact name, user name or initial without caring about.
- Just separate attendees with commas or semicolons.

**Note:** Duplicate email addresses in the attendee list will automatically be removed.
9.2 Change Request

The change request feature provides effective tracking of your customer’s change requests. Its purpose is to describe a process that makes clear how the change is communicated, how decisions will be made and by whom and how the project will adapt accordingly.

A change request is very close to a requirement, it can also generate several requirements. The change request is necessarily linked to a project and can be linked to a product.

Section Description

Table 5: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Request ID number</td>
</tr>
<tr>
<td>Name</td>
<td>Fill in the title of the change. It must be understandable at first reading</td>
</tr>
<tr>
<td>Change Request Type</td>
<td>define the type of the request</td>
</tr>
<tr>
<td>Project</td>
<td>Link the change request to a project</td>
</tr>
<tr>
<td>Product</td>
<td>Link the change request to a product</td>
</tr>
<tr>
<td>External reference</td>
<td>Name of the external reference</td>
</tr>
<tr>
<td>Contact</td>
<td>Name of the contact</td>
</tr>
<tr>
<td>Origin</td>
<td>Link to the item causing the change request</td>
</tr>
<tr>
<td>Business Features</td>
<td>Functionality trades whose modification request will need</td>
</tr>
<tr>
<td>Urgency</td>
<td>Determine the urgency of the request</td>
</tr>
<tr>
<td>Initial due date</td>
<td>Date you committed to the client</td>
</tr>
<tr>
<td>Planned due date</td>
<td>Deadline actually planned</td>
</tr>
<tr>
<td>Description</td>
<td>Describe the change request you want to initiate</td>
</tr>
<tr>
<td>Justification</td>
<td>Justify this change request.</td>
</tr>
<tr>
<td>Expected benefit</td>
<td>List the potential benefits that this change request will bring</td>
</tr>
</tbody>
</table>

Section Treatment

Table 6: Required field

<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>Responsible</td>
<td>Resource who is responsible for the follow-up of the question</td>
</tr>
<tr>
<td>Criticality</td>
<td>how critical is the demand</td>
</tr>
<tr>
<td>Feasibility</td>
<td>how feasibility is the demand</td>
</tr>
<tr>
<td>Technical risk</td>
<td>what are the technical risks</td>
</tr>
<tr>
<td>Priority</td>
<td>What is the priority of the request</td>
</tr>
<tr>
<td>Estimate work</td>
<td>Estimate work for the request</td>
</tr>
<tr>
<td>Estimate cost</td>
<td>Estimate cost for the request</td>
</tr>
<tr>
<td>Target Version</td>
<td>The target version affected by the request</td>
</tr>
<tr>
<td>Handled</td>
<td>Flag to indicate that question has been taken into account</td>
</tr>
<tr>
<td>Approved by</td>
<td>Indicates the date the application was approved and by whom</td>
</tr>
<tr>
<td>Done</td>
<td>Flag to indicate that question has been answered</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>
<tr>
<td>Result</td>
<td>Enter the result of the implementation of the change request</td>
</tr>
<tr>
<td>Efficiency Analyse</td>
<td>Complete the analysis of the effectiveness of the implementation of the change request</td>
</tr>
</tbody>
</table>

9.2. Change Request
9.3 Decisions

Decisions are stored to keep track of important decisions, when, where and why the decision was taken. You can link a decision to a meeting to rapidly find the minutes where the decision is described.

**Section Description**

| Linked element | Attachments | Notes |

**Other sections**

<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>

**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>

**Field Origin**

It can be either the reference to a meeting where the decision was taken (so also add the reference to the meetings list), or a short description of why the decision was taken.

**Field Accountable**

The person who took the decision.
9.4 Questions

Questions are stored to keep track of important questions and answers. In fact, you should keep trace of every question and answer that have an impact to the project. The questions can also afford an easy way to track questions sent and follow-up non-answered ones. This will provide an easy way to find back when, who and precise description of the answer to a question. Also keep in mind that some people will (consciously or not) be able to change their mind and uphold it has always been their opinion...

You can link a question to a meeting to rapidly find the minutes where the question was raised or answered.

Monitoring indicator

Possibility to define indicators to follow the respect of dates values.

- Respect of initial due date
- Respect of planned due date

Section Description

Other sections

- Linked element
- Attachments
- Notes

<table>
<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>
## Section Answer

Table 10: Required field

<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 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>
9.5 Deliverables

This section allows to define the list of deliverables items. This will provide an easy way to organize your due to customers. In fact, you can keep track of every deliverables.

Deliverables links with Milestones.

**Note:** If you change the responsible of milestones, the responsible of deliverable will automatically changed, and vice versa.

### Section Description

<table>
<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*
## Section Validation

<table>
<thead>
<tr>
<th>Field</th>
<th>Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery status</td>
<td>Actual <em>status</em> of the delivery.</td>
</tr>
<tr>
<td>Deliverable</td>
<td>Weight of the quality of the deliverable.</td>
</tr>
<tr>
<td>Responsible</td>
<td>to name</td>
</tr>
<tr>
<td>due date</td>
<td>as planned</td>
</tr>
<tr>
<td>Closed</td>
<td>Box to indicate that delivery is archived.</td>
</tr>
</tbody>
</table>

To follow life cycle management on deliverables (status managed as a workflow)
9.6 Incomings

This section allows to define the list of incomings items from customers. It can be an indicator to follow if you can begin an action. For example, if you need an item from customer. Incomings links with Milestones.

**Note:** If you change the responsible of milestones, the responsible of Incomings will automatically changed, and vice versa.

You can estimated quality value for incoming and this will produce a KPI. See: *KPI definitions*
9.7 Deliveries

Deliveries items are stored to keep track of deliveries.
Added list of deliverables integrated in delivery.

Note: Automatic dispatch of delivery status to deliverables.

Section Description

Table 12: Required field

<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>

Section Validation

Other sections

- Deliverables
- Linked element
- Attachments
- Notes

<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>

To follow life cycle management on deliveries (status managed by a workflow)

9.8 Configuration Management

Configuration management consists of managing the technical description of a system, as well as managing all changes made during the evolution of the system.

It is the set of processes to ensure the conformity of a product to the requirements, throughout its life cycle.

In computing, for example, configuration management can be used for many purposes.
• To store and trace the different versions or revisions of any information intended to be used by a system (hardware, software, document, unit data, etc.).
• To deploy configurations through a computer park in the form of files and data.
• Manage source codes . . .

9.8.1 Products

Allows to define product and sub-product.

Allows to link components to product.

Fig. 7: Product configuration screen

Description

Other sections

• Attachments

• Notes
Table 13: Required fields

<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>sub-product</td>
<td>Name of the top product if this product is a sub-product.</td>
</tr>
<tr>
<td>Status</td>
<td>State to be registered.</td>
</tr>
<tr>
<td>Closed</td>
<td>item is closed if checked</td>
</tr>
<tr>
<td>Description :</td>
<td>Box checked indicates the product is archived.</td>
</tr>
<tr>
<td>Context</td>
<td>Add context for the product</td>
</tr>
</tbody>
</table>

Treatment

You can create many links between products, product versions and component products:

- Project linked to this product
- Possibility of attaching the products of the list to projects.
- When you link a project to a product, all versions of this product are going to be linked.
- The start and end date corresponds to the duration of this link.
- Composition
- List of sub-products and list of components used by this product
- See: Relationships.
- Structure
- You can display 2 ways to display the structure. Normal and flat.

Fig. 8: Normal display the product structure

Box checked “Show versions for all structure” allows to display versions of sub-products and components.

Box checked “Show projects linked to versions” allows to display projects linked.

List of business features concerning to this product

Link business functionalities to the product

See:
Language

You can display 2 ways to display the structure. Normal and flat.

9.8.2 Product Versions

Allows to define versions of a product.
Allows to link a component version to product version.
Allows to link the product version to a project.
Ability to define the compatibility between product versions (feature activated through a global parameter)

Automatic formatting of version name

Possibility to define if the version name is automatically produced from the product name and version number.
Set Global Parameters to activate this feature.
Else, the version name will entered manually.
By profile, possibility to have a different list of the version of the original product according to the status.

Description

Other sections
- Projects linked to this version
- Composition...
<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
</tr>
<tr>
<td>product</td>
</tr>
<tr>
<td>version number</td>
</tr>
<tr>
<td>product version type</td>
</tr>
<tr>
<td>name</td>
</tr>
<tr>
<td>prime contractor</td>
</tr>
<tr>
<td>responsible</td>
</tr>
<tr>
<td>initial</td>
</tr>
<tr>
<td>start date</td>
</tr>
<tr>
<td>delivery date</td>
</tr>
<tr>
<td>entry into service</td>
</tr>
<tr>
<td>end date</td>
</tr>
<tr>
<td>status</td>
</tr>
</tbody>
</table>

Fig. 10: Product version description
Table 14: Required field

<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>Product v° type</td>
<td>Type of the product version: major, minor, patch</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>Start date</td>
<td>Initial, planned and real start dates of the version</td>
</tr>
<tr>
<td>Delivery date</td>
<td>Initial, planned and real delivery dates 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>Status</td>
<td>State to be registered</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the version</td>
</tr>
</tbody>
</table>

**Version number & Name**

The field “Version number” appears only if the global parameter “Automatic format of version name” is set to Yes. The field “Name” will be read only.

**Prime contractor**

The field “Prime contractor can be different from product prime contractor.

**Entry into service (Real)**

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

**End date (Real)**

The field “End date” specify the date end-of-service. The box “Done” is checked when the real date field is set.
9.8.3 Components

Allows to define product components.

Allows to define products using the component.

Possibility to define component types and component versions that will only be used for definition of structure (not for Version Planning or Tickets)

![Component details](image)

Fig. 11: Component details

Description

Other sections

- **Structure**...
- **Composition**...
- **Attachments**
- **Notes**

<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>Statut</td>
<td>State to be registered</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>

Table 15: Required field
Component versions

List of versions defined for the component.

Component versions are defined in Component Versions screen.
9.8.4 Component Versions

Allows to define versions of a component.

Allows to link a product version to component version.

![Component Version #5 - ETI V2.0](image)

Fig. 12: Component version details

**Automatic formatting of version name**

Possibility to define if the version name is automatically produced from the component name and version number.

Set global parameters to activate this feature.

Else, the version name will entered manually.

**Description**

Other sections

- **Structure**
- **Composition**
- **Attachments**
- **Notes**
Table 16: Required field

<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>V° number of the component</td>
</tr>
<tr>
<td>Component V° type</td>
<td>Type of the component version: major, minor or patch</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the version</td>
</tr>
<tr>
<td>Responsible</td>
<td>Name of the responsible</td>
</tr>
<tr>
<td>Start date</td>
<td>Initial, planned and real start dates of the version</td>
</tr>
<tr>
<td>Delivery date</td>
<td>Initial, planned and real delivery dates 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>Statut</td>
<td>State to be registered</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the version</td>
</tr>
</tbody>
</table>

**Note: Initial Date**

when the planned date has been set, the initial date (if it is empty only) will be defined

**Version number & Name**

The field “Version number” appears only if the global parameter “Automatic format of version name” is set to Yes. The field “Name” will be read only.

**Entry into service (Real)**

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

**End date (Real)**

The field “End date” specify the date end-of-service. The box “Done” is checked when the real date field is set.
9.8.5 Relationships

**product and component elements**

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

See possible relationships: *Product structure*

**Relationships management**

- Click on + to create a new relationship. The dialog box “Structure” appear.
- Click on - to delete the corresponding relationship.

![Fig. 13: Structure](image)

**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 \(\text{Trash Can}\) to delete the corresponding link.

Fig. 14: Version structure
version to projects

This section allows to manage links between projects and versions of products.

Link version to projects management

• Click on + to create a new link.
• Click on to update an existing link.
• Click on to delete the corresponding link.

Fig. 15: Project / Version Link

Table 17: Project-Version link dialog box

<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>Version start date (Planned start date).</td>
</tr>
<tr>
<td>End date</td>
<td>Version end date (release date on the version).</td>
</tr>
<tr>
<td>Status</td>
<td>State to be registered</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.

9.8.6 Versions planning

Select one or more product versions and the planning version is displayed.

This planning displays each version of selected product versions and their components from define start date to deliverable date.

To use it define your start and delivery date in Product Version and Component Version.
**Note:** To insert values you have to activate display the start and delivery milestones’ in global parameters otherwise these fields are hidden.

This screen allows to see if the delivery date of Component versions is more later than their Product versions. Graphically, you can see any delay or incompatibility.

![Fig. 16: Planning version](image)

**Display options**

Click on to add an activity. Click on to filter the version display.

Click on **Show activities from product version** or **Show activities from component version** To display the related activities.

New check boxes will appear: one to show resources and the other to show or hide versions with no activity displayed.

You must select an existing activity to insert the new activity into the WBS structure.

If no activity is selected then the “add new element” icon will be grayed out.

The new activity is automatically inserted after the selected activity.

The new activity is generated on the same project, with the same component, the same component version, and with the same product and the same product version if these elements are filled in on the original activity.

The insertion from the selection of a product and component version will not be possible because we do not know where to insert it in the WBS of the projects.
Fig. 17: Version planning options
10.1 Requirements dashboard

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

Direct access to the list of requirements

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

Parameters

- Click on \(\text{\textcircled{\textbullet}}\) to access parameters.

**Important:** For **Synthesis by status**, filter clauses are not applicable.

- Allows to define reports displayed on the screen.
- Allows to reorder reports displayed with drag & drop feature.
- Using the selector area button \(\text{\textcircled{\textbullet}}\) Scope filters
Filters allow you to restrict the display of saved requirements.

- By status, period, duration, closed element, linked to the user or no related

No resolution scheduled

- Unscheduled: Requirements whose resolution is not scheduled in a next product version (target product version not set).

## 10.2 Requirements

### Concepts

- **Product**

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
• Linked element
• Attachments
• Notes

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>

Fields Project and Product

• Must be concerned either with a project, a product or both.
• If the project is specified, the list of values for field “Product” contains only products linked the selected project.
Treatment

Table 2: Required fields

<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>

Field Target version

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

Lock

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

**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 3: Fields when the requirement is locked

<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>
10.3 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.

**Rights management**

- Linking test case to a project will limit the visibility, respecting rights management at project level.

**Other sections**

- *Predecessor and Successor element*
- *Linked element*
- *Attachments*
- *Notes*

**Predecessor and successor elements**

- Test case can have predecessors and successors.
- This defines some dependencies on the test case.
- Dependencies don’t have specific effects. It is just an information.

**Description**

This section allow you to describe the test to run.

**Fields Project and Product**

- Must be concerned either with a project, a product or both.
- If the project is specified, the list of values for field “Product” contains only products linked the selected project.

**Field Version**

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

**Field Environment (Context)**

- Contexts are initialized for IT Projects as “Environment”, “OS” and “Browser”.
- This can be easily changed values in *Contexts* screen.

**Field Description**

- The description of test case should describe the steps to run the test.
Treatment

<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>

Field Prerequisite

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

Test case run

- ![Planned](image) **Planned**: Test to be executed.
- ![OK](image) **Passed**: Test passed with success (result is conform to expected result).
- ![Blocked](image) **Blocked**: Impossible to run the test because of a prior incident (blocking incident or incident on preceding test) or missing prerequisite.
- ![Failed](image) **Failed**: Test has returned wrong result.

This section allows to display a complete list of test case runs.
- These are links of the test to test sessions.
- This list also displays the current status of the test in the sessions.

Field Summary

- An icon whose presents the run status of the test case.
- For detail, see: *Summary of test case run status*.

**Note**: To go, click on the corresponding test session.

<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>
10.4 Test sessions

Fig. 1: Test session screen

**Concepts**

*Product*

A test session defines all the tests to be executed to reach a given target.

Define in the test case runs all test cases will be running to this test session.

For each test case run sets the status of test results. (See: Test case run status)

The test session is defined for a project, a product or one these components.

**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 in the *List of Values*.
- See: *Health status* and *Overall progress*

Other sections

- *Assignment*
- *Progress*
- *Summary of test cases*
- *Predecessor and successor element*
- *Linked element*
- *Attachments*
- *Notes*

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>

Fields Project and Product

- Must be concerned either with a project, a product or both.
- If the project is specified, the list of values for field “Product” contains only products linked the selected project.

Field Version

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

<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>
Test case runs

This section allows to manage test case runs.

Table 5: Fields - Test case runs list

<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 [trash] to remove a test case run.

- Click on [OK] to mark test case run as passed.

- Click on [KO] to mark test case run as failed. The **Test case run detail dialog box** will be appear.

- Click on [block] to mark test case run as blocked.

![Fig. 2: Test case run section](image)

**Note:**

- When status is set to failed, the reference to a ticket must be defined (reference to the incident).
- The referenced ticket is automatically added in linked element.
- Field ticket appear only whether status of test case run is **failed**.
10.5 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.
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

- **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.
11.1 Risks

A risk is any threat of an event that may have a negative impact to the project, and which may be neutralized, or at least minimized, through pre-defined actions.

The risk management plan is a key point to project management:

- Identify risks and estimate their severity and likelihood.
- Identify mitigating actions.
- Identify opportunities.
- Follow-up actions.
- Identify risks that finally occur (becoming an issue).

Contingency reserve

- Contingency reserve is defined according to monetary impact and likelihood of occurrence.
- Contingency reserve for risks and potential gain for opportunities allow to define the project reserve. (See: Project reserve)

Monitoring indicator

- Possibility to define indicators to follow the respect of dates values.

  Respect of initial due date
  Respect of planned due date

Other sections

- Linked element
- Attachments
- Notes
Section Description

Table 1: Required fields

<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>

Field Criticality

Automatically calculated from Severity and Likelihood values. See: Criticality value calculation. Value can be changed.

Field Project reserved cost

Automatically calculated from the percentage defined for the selected likelihood. (See: Likelihoods)

Section Treatment

Table 2: Required fields

<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>
11.2 Opportunities

Other sections

- Linked element
- Attachments
- Notes

An opportunity can be seen as a positive risk. It is not a threat but the opportunity to have a positive impact to the project.

Potential gain

- The potential gain is defined according to the expected amount and likelihood of occurrence.
- Contingency reserve for risks and potential gain for opportunities allow to define the project reserve.
- See: Project reserve

Section Description

Table 3: Required fields

<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>

Field Criticality

Automatically calculated from Significance and Likelihood values. See: Criticality value calculation - Value can be changed.

Field Project reserved gain

Automatically calculated from the percentage defined for the selected likelihood. (See: Likelihoods)
Section Treatment

Table 4: Required fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status 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>Handled</td>
<td>Flag to indicate that opportunity is taken into account.</td>
</tr>
<tr>
<td>Done</td>
<td>Flag to indicate that opportunity has been treated.</td>
</tr>
<tr>
<td>Closed</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>Result</td>
<td>Complete description of the treatment of the opportunity.</td>
</tr>
</tbody>
</table>
11.3 Criticality value calculation

Criticality value is automatically calculated from **Severity (Significance)** and **Likelihood** values.

Criticality, Severity (Significance) and Likelihood values are defined in lists of values screens. 

*See: Criticalities, Severities and Likelihoods screens.*

In the previous screens, a name of value is set with numeric value.

Criticality numeric value is determined by a simple equation as follows:

**Equation**

- \[ \text{Criticality value} = \text{Severity value} \times \text{Likelihood value} / 2 \]

  For example:

  - Critical (8) = High (4) \times \text{High (4)} / 2

**Default values**

- Default values are determined.
- You can change its values while respecting the equation defined above.
11.4 Issues

An issue is a problem that occurs during the project. If the risk Management plan has been correctly managed, issues should always be occurring identified risks. Actions must be defined to solve the issue.

Monitoring indicator

- Possibility to define indicators to follow the respect of dates values.
  - Respect of initial due date
  - Respect of planned due date

Other sections

- Linked element
- Attachments
- Notes

Section Description

Table 5: Required fields

<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>
### Table 6: Required fields

<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>
11.5 Actions

An action is a task or activity that is set-up in order to:

- Reduce the likelihood of a risk
- or reduce the impact of a risk
- or solve an issue
- or build a post-meeting action plan
- or just define a “to do list”.

The actions are the main activities of the risk management plan. They must be regularly followed-up.

**Private action**

- Private actions allow to manage a personal to-do list.

**Monitoring indicator**

- Possibility to define indicators to follow the respect of dates values.

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

**Other sections**

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

**Section Description**

<table>
<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>
Section Treatment

Table 8: Required fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Actual status 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>Handled</td>
<td>Box checked indicates that the action is taken over.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates that the action has been treated.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates that the action is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates that the action is cancelled.</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>Result</td>
<td>Complete description of the treatment of the action.</td>
</tr>
</tbody>
</table>

11.6 Tickets

A ticket is a kind of task that cannot be scheduled in a unitary manner.

This is usually a short-lived activity for a single ticket that gives feedback to the issuer or to keep track of the result.

It can be globally planned as a general activity, but not unitarily.

For instance, bugs should be managed through tickets:

- You can not plan bugs before they are registered.
- You must be able to give a feedback on each bug.
- You can (or at least should) globally plan bug fixing activity.
Tickets (simple)

- This screen is a limited version of screen “Tickets”.
- It’s dedicated to users who want to create and follow their own tickets without being involved in their treatment.
- When fields and features are available, the description is similar.

Restrict the entry of real work in the ticket

- Possibility to define that only the responsible of ticket can enter real work.
- This behavior can be set in Global parameters screen.

Due dates

- Initial and planned due date allows to define a target date for solving the ticket.
  
  Initial due date
  
  - If a definition of ticket delay exists for giving ticket type and urgency the date is automatically calculated with this delay.
  
  Delays for tickets screen allows to define ticket delay.

  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

Note: Initial due date of the ticket set as read only if it is calculated from the setting of “delays for tickets”

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.

Other sections

- Linked element
- Attachments
- Notes

Versions identified

- A ticket can identify all versions allocated.
- Possibility to define a main version and the other versions allocated.
Responsible of product

A responsible can be defined for a product or component.
If a product or component is selected, the responsible defined can be automatically assigned to the ticket.

Note: Ticket responsible from product responsible
This parameter, in Global parameters, allows to define, if the defined responsible is automatically assigned to the ticket.
See: Global Parameters

Section Description

Table 9: Required fields

<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>

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”.

11.6. Tickets
Section Treatment

Table 10: Required fields

<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>Handled</td>
<td>Box checked indicates the ticket is taken over.</td>
</tr>
<tr>
<td>Done</td>
<td>Box checked indicates the ticket has been treated.</td>
</tr>
<tr>
<td>Solved</td>
<td>Box checked indicates the ticket has been solved.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the ticket is archived.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Box checked indicates the ticket is cancelled.</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>Result</td>
<td>Complete description of the resolution of the ticket.</td>
</tr>
</tbody>
</table>

**Priority**

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

Notion of regression can be added.

**Left work**

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

**Target product version & Target comp. version**

- The list of values will be filtered depends on the selected value in fields “Product and component”.

**Field Solved**

- The box is automatically checked or unchecked, according to the resolution selected.
**Button Start/End work**

- The start Work / Stop Work button is a clock on / off timer.
- If the logged in user is a resource, he or she has the option to start working on the ticket.
- Click the “Start work” button to start timing the processing time on the ticket.
- The start time is then displayed under the button and the button changes name.

- Once the work is done, press the “stop work” button.
- The spend time will automatically be converted as real work.
- It’ll be transferred on planning activity if it is set.
- A decrease in “left work” on activity will be carried out.

**Important:** Closing the application or starting work on another ticket will automatically stop the current ongoing work.

**Button Dispatch**

This button allows to dispatch ticket.

- Click on + to add a line.

**Button Show periods**

You can calculate the time spent between the start of processing, which corresponds to the receipt of the ticket and the end of processing of a ticket, that is to say when it goes to the done state, with the possibility of subtracting waiting periods thanks to the “paused” state macro.

The passages from an active macro-state to a non-active macro-state (paused or done), are recorded thanks to the start and end dates of each period. This table is updated automatically with calculation of the duration in working hours and the duration in calendar hours when the end date of the period is entered.
Fig. 2: Status period
11.6.1 Planning activity

Planning activity field allows to link the ticket with a planning activity. If the global parameter *limit Planning Activity to those with flag* is set to yes then:

- You must check the “Planning activity” box on the activity to be linked.
- It will then be visible in the planning activities list of your ticket.
- Work on the ticket will be included in this activity.
- After saving the option, new fields are displayed.
- You can see the number of tickets linked to this activity and time information corresponding to all of these tickets.

![Fig. 3: New fields displayed after saving the Planning activity option](image)

- Click on ![to open a popup which will display the details of these tickets.](image)

![Fig. 4: List of tickets linked to the activity](image)

Real work

Put the real work from tickets to the resource timesheet.

- When a resource has entered the real work on the ticket and the ticket is linked to a planning activity.
- The resource is automatically assigned to this activity.
- Real work set on tickets is automatically set in resource timesheet.

![Fig. 5: Imputations real work on related tickets.](image)
• The tickets are very dependent on the planning activity.
• The time indicated by the resources will be decremented to that planned for the activity.
11.6.2 Multi-version selection

In the version fields, it’s possible to set several versions.

**Main and other version**

- The version with smaller id will appear in the select list and is considered as the main version.
- Other versions are listed above.
- It is possible to set an ‘other’ version as the main version using the button.

- Click on to add a other version.
- Click on to delete a version.

11.6.3 Priority value calculation

Priority value is automatically calculated from **Urgency** and **Criticality** values.

Priority, Urgency and Criticality values are defined in lists of values screens. See: **Priorities**, **Urgencies** and **Criticalities** screens.

In the previous screens, a name of value is set with numeric value.

Priority numeric value is determined by a simple equation as follows:

**Equation**

- \([\text{Priority value}] = [\text{Urgency value}] \times [\text{Criticality value}] / 2\)
- For example:
  - Blocking (4) \(\times\) Critical (8) / 2 = Critical priority (16) for \(\text{Priority value}\)

**Default values**

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

11.6.4 Receive tickets from emails

ProjeQtOr offers to save tickets from e-mail directly in the application.

**Description section**

This section allows you to enter the parameters of your mailbox.
ProjeQtOr User guide, Release 9.2.0

Fig. 6: Receive email from ticket screen

Table 11: Required field

<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>Project</td>
<td>name of the project to which the ticket is attached.</td>
</tr>
<tr>
<td>IMAP host</td>
<td>Name of your IMAP host.</td>
</tr>
<tr>
<td>IMAP User</td>
<td>Mail of the IMAP user.</td>
</tr>
<tr>
<td>IMAP Password</td>
<td>IMAP user account password entered.</td>
</tr>
</tbody>
</table>

You can create a new mailbox for tickets on each project and for each type of ticket configured in ProjeQtOr.

**IMAP Host**

The address must be an IMAP connection string.

Example to connect to the GMAIL input area, the host must be

{imap.gmail.com:143}INBOX

No protocol is required

security constraints

- **Mails from any source (may lead to spam** Allow you to receive emails from anyone and therefore can cause spam
- **Only mails from known users** Can only receive emails saved in your ProjeQtOr application
- **Only mails from known users allocated to the project** Only allows you to receive emails saved in your ProjeQtOr application and which are assigned to the project selected in the settings of your mailbox
- Include attachments Indicates whether or not you allow your users to attach attachments.
- allow up to maximum weight allowed for receiving emails.

**Warning:** maximum weight

There is no weight limit in ProjeQtOr but probably your mail server.

Most of the time emails are blocked beyond 5 to 10 MB
Description treatment

Table 12: Required fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket type</td>
<td>Type of ticket for which emails will be sent.</td>
</tr>
<tr>
<td>Responsible</td>
<td>Name of the person who will work on the default ticket.</td>
</tr>
<tr>
<td>Planning activity</td>
<td>Name of the planning activity on which the tickets will be decremented. The parent activity must belong to the same project.</td>
</tr>
<tr>
<td>Limit of tickets / hour</td>
<td>Maximum number of emails per hour allowed.</td>
</tr>
<tr>
<td>Last input date</td>
<td>Date of last ticket received</td>
</tr>
<tr>
<td>Last input ticket</td>
<td>Display the name of the last ticket received</td>
</tr>
<tr>
<td>Total input tickets</td>
<td>Total number of the tickets since the mailbox creation</td>
</tr>
</tbody>
</table>

**Warning:** Cron must be launched for tickets to be processed in ProjeQtOr. If you do not receive a ticket, try to stop the cron so that it can restart with a refresh of the code.

Some fields can be decisive for the reception of your emails.

**limit of tickets / hour**

- This limit allows you to restrict the reception of emails by hour.
  
  If the number of tickets received is much higher than your limitation then the probability of spam is to be considered or you have incorrectly evaluated the number of tickets to be processed.

- When the maximum number of tickets is reached then the mailbox freezes
  
  Only manual intervention by the administrator can unlock it
  
  Its role will consist in reassessing the number of tickets to allow their receipt

- If the maximum number of tickets per hour has been reached then you have a rejection message on the history line: **rejected ticket: ticket limit per hour**

**History of ticket created**

You can choose the number of tickets to display in the history by filling in the “history to display” field

Table 13: Required fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email address</td>
<td>address of the ticket sender</td>
</tr>
<tr>
<td>Date</td>
<td>date of receipt of the ticket</td>
</tr>
<tr>
<td>Result</td>
<td>Indicates whether the ticket has been processed or rejected</td>
</tr>
</tbody>
</table>
11.7 Tickets dashboard

Allows user to have a tickets global view of his projects. Displays several small syntheses that group the tickets by category: type, priority or by product, component or by state. The number of tickets is listed. The result is displayed with numbers and as a percentage. Filters are available to limit scope.

Direct access to the list of tickets

- In the various summaries, click on an element to obtain the list of tickets corresponding to this element.
- You return to the tickets screen

Parameters

- Click on \( \text{\(\rightarrow\}} \) to access parameters.
- Allows to define reports displayed on the screen.
- Using \( \text{\(\rightarrow\}} \) to reorder reports displayed.
- For Synthesis by status, filter clauses are not applicable.

Filters

Filters allow you to restrict the display of saved requirements

Scope filters

- By status, period, duration, closed element, linked to the user or no related . . .
- No resolution scheduled
• Unscheduled: Requirements whose resolution is not scheduled in a next product version (target product version not set).
CHAPTER TWELVE

ENVIRONMENTAL PARAMETERS
12.1 Users

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

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

---

**ProjeQtOr and LDAP users**

ProjeQtOr offers three modes of authentication.

**ProjeQtOr users**

- Users’ information is kept in the application database.
- Password policy and login behavior are managed by the application.
- See: *User and password*

**Note:** The users “admin” and “guest” are created during installation.

**LDAP users**

- Allows users defined in an external directory to login at ProjeQtOr by the LDAP protocol.
- Users’ information and password policy are managed in the external directory.
- for each user from an LDAP, the word “comes from Ldap” will be displayed next to the user’s name with possibility of modification according to the rights of the connected user
- See: *LDAP Management Parameters*

**SSO users**

- Allows users to connect to ProjeQtOr using the SSO protocol.
- Set entity ID, IDP certificate, unique login and logout, etc.
- Information message on creating a new user from SAML
- User information and password policy are handled by your SSO solution.
• See Single Sign On SAML2

Default user profile

• A default user profile is set during creation of the user.
• A different default profile can be set according to mode of authentication.

Web Service

• ProjeQtOr provides an API to interact with its elements. It is provided as REST Web Service.
• An API key is defined for the user.
• This API key is used to encrypt the data for methods: PUT, PUSH and DELETE.

Section Description

Table 1: Users description section fields - Required Field

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

Warning: User name

The user name must be unique.
Is a contact

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

Is a resource

- Check this if you want to create a Resources to this user.
- The user will then also appear in the “Resources” list.

Allocated asset

This section allows you to view all the equipment connected to the user in the form of a simple table.

![Allocated asset](image)

Each line of equipment is clickable and directs to the element screen.

See: Asset Management

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 2: Users miscellaneous section fields

<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.
12.2 Resources

Concepts

- ProjeQtOr roles
- Profiles definition
- Stakeholder definition
- Resource function and cost
- Resource calendar
- Tab Profile

The resources of a project can be human or material. Resource availability is defined by assigning it to a project.

- Resources are needed for project planning
  See: Assignment section
- A resource can be a group of people
  or a fictitious resource with a FTE > 1
  See: Pool of Resources

![Fig. 3: Details area of the resources screen](image)

Description zone

Other section

- Allocations
- Assignment
Fig. 4: Description field for creating a resource
## Resource planning

### Table 3: Required fields

<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>Users 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>Capacity (FTE)</td>
<td>Capacity of the resource in Full Time Equivalent.</td>
</tr>
<tr>
<td>Calendars</td>
<td>Calendar defines the availability of the resource.</td>
</tr>
<tr>
<td>Profile</td>
<td>Default profile of the user.</td>
</tr>
<tr>
<td>Organization</td>
<td>The organization to which the resource is attached.</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>Entry date</td>
<td>Date to which the resource arrived. The start and end dates are taking into account in planning and reports.</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>Is an employee</td>
<td>Used for the humans resources module.</td>
</tr>
<tr>
<td>is a student</td>
<td>The resource is a student.</td>
</tr>
<tr>
<td>is outsourced</td>
<td>The resource is an outsourced.</td>
</tr>
<tr>
<td>is manager of leaves</td>
<td>Allow absence management. Used for the humans resources.</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>

### Full Time Equivalent

- 1 FTE (full time equivalent)
- < 1 for part time working resource or variations of capacity
- > 1 for virtual resources or teams, pool of resource or variations of capacity

**Note:** If you want a resource pool of three people, the FTE capacity must be set to 3

### Field is a contact

- Check this if the resource must also be a Contacts.
- The resource will then also appear in the “Contacts” list.

### Field is a user

- Check this if the resource must connect to the application.
- You must then define the User name and Profile fields.
- The resource will then also appear in the Users list.
Field is an employee

- Check this box if the resource needs to be linked to the human resources module.
- The resource will then also appear in the *Employees and Manager* list.

### Concepts

- **Allocations**
- **Assignment**

### Allocations to projects

This Zone allows to allocated the resources to the project.

- Click on ![+] to allocate a new resource to the project.
- Click on ![edit] to update an existing resource cost.
- Click on ![delete] to delete the resource cost.

### Allocations to projects

<table>
<thead>
<tr>
<th>id</th>
<th>project</th>
<th>profile</th>
<th>start date</th>
<th>end date</th>
<th>rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Project</td>
<td>Project Member</td>
<td></td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>6</td>
<td>holidays</td>
<td>Project Member</td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>project one - maintenance</td>
<td>Project Member</td>
<td></td>
<td></td>
<td>100</td>
</tr>
</tbody>
</table>

![Fig. 5: Resource assigned to the project](image)

### 12.2.1 Variations in resource capacity

You can record dates (start and end) to indicate that the capacity (FTE) of your resource will vary during this period.

This allows you to reserve and enter additional working time (overtime) or to withdraw hours at standard capacity (recovery).

The resource will then enter its imputations, the exact value of its variable capacity for the given period. $1 + XX$ hours for the status of the day to go green.

The surcapacity of a resource is directly visible on the Gantt chart.

A thin red stripe overcomes the resource work allocation bars and you will find the exact capacity added at the end of the resource detail.

### 12.2.2 Management of surbooking periods

Surbooking in planning allows you to add extra work time on the standard capabilities of your resources to plan more projects that you will not process.
You can also subtract this work time to not plan the full availability of resources. The resource will continue to report their charges normally, with no extra or reduced work time, to change the status of their day to green.

**Warning:** variable capacity and overbooking do not behave in the same way. Variable capacity will be more used to control and record periods of actual overtime and the behavior of imputations will be adapted to this ability. Overbooking is a way of planning in the future without interacting with the behavior of the working time of the resources.

### 12.2.3 Function and cost zone

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

#### Main function

- The main function allows you to enter the default functions that will be used in the assignments of the activities.
- A resource can have several functions and different costs depending on the function.

#### Resource cost definition

- Allows to define the daily cost according to the functions of the resource.
- The daily cost can be defined for a specific period.
Table 4: **Function and cost section fields**

<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 trash can to delete the resource cost.

Fig. 9: Resource cost dialog box

Table 5: Resource cost dialog box fields

<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.

Table 6: Miscellaneous section fields

<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>

12.2.4 Incompatible resources

Two resources A and B are incompatible.

If A is scheduled at a given time, B can not be scheduled on the same day as for a load less than or equal to the remaining availability of To date, that is, the minimum of [capacity of the resource-load already planned] for each incompatible resource and reciprocally with the relation is bijective.
Exemple

Example with two FTE resources = 1
Day x, A is scheduled 0.6 d so B can be scheduled only 0.4 d on all the activities on which A is scheduled

12.2.5 Support resources

Exemple

Example with B support resource of A with a 50% employment rate

- Day x, A is available 1.0 d and B 1.0 d: A is planned 1.0 d, B is planned 0.5 d.
- Day y, A is available 0.5 d and B 1.0 d: A is planned 0.5 d, B is planned 0.25 d
- Day z, A is available 1.0 d and B 0.2 d: A is planned 0.4 d, B is planned 0.2 d

12.2.6 Others

Allocated asset

This section allows you to view all the equipment connected to the resource in the form of a simple table. Each line of equipment is clickable and directs to the element screen.
See: Asset Management
12.3 Pool of Resources

A pool is a group of resources that can work as any of the assigned resources. You assign resources to the pool at a given rate for a given period. A resource cannot be assigned on pools for more than 100% on a given period.

### Other sections

- **Allocations**

A pool can be allocated to projects like any resource.

- A pool can be assigned to activities like resources. The difference is that when you assign a pool, you don’t specify the rate but the FTE (Full Time Equivalent) assigned to the activity. It means the number of resources that can work at the same time on the activity.

- A pool does not have a specific capacity. It’s capacity is calculated from capacity and rate of assigned resources.

### Table 7: Required Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the pool.</td>
</tr>
<tr>
<td>Real name</td>
<td>Name of the pool.</td>
</tr>
<tr>
<td>Initials</td>
<td>Initials of the pool of resource.</td>
</tr>
<tr>
<td>Calendar</td>
<td><em>Calendar</em> defines the availability of the resource.</td>
</tr>
<tr>
<td>Organization</td>
<td>Name of the organization to which the pool is attached</td>
</tr>
<tr>
<td>Team</td>
<td>Name of the team to which the pool is attached</td>
</tr>
<tr>
<td>Start date</td>
<td>Start date of activity for this pool</td>
</tr>
<tr>
<td>is a student</td>
<td>Indicates if the pool is made up of students.</td>
</tr>
<tr>
<td>is a outsourced</td>
<td>Indicates if the pool is made up of outsourced.</td>
</tr>
<tr>
<td>Closed</td>
<td>Flag to indicate that the resource is archived.</td>
</tr>
<tr>
<td>End date</td>
<td>End date of activity for this pool</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the resource.</td>
</tr>
</tbody>
</table>

**Warning: Limits**

- A pool can not be a user and does not have a profile as it may not connect to the application.
- A pool can not be a contact
- A pool cannot be the responsible of an item. A pool can not be a user and does not have a profile as it may not connect to the application.

### 12.3.1 Behaviour

Find here some information on the type of behavior of certain elements

**Automatic decrement for assigned work**

- When you assign a pool to an activity, and then assign a resource of the pool to the same activity, then assigned work on the resource is automatically subtracted from assignment of the pool.
• The same way, when you assign a pool to an activity, and then assign a resource of the pool to a sub-activity of this activity, then assigned work on the resource is automatically subtracted from assignment of the pool.

• When you assign a pool to an activity, and then assign the same pool to a sub-activity of this activity, then assigned work on the pool on the sub-activity is automatically subtracted from assignment of the pool on the parent activity.

Planning
• When planning a pool, availability of unitary resources already booked on other tasks is taken into account.

• When planning an unitary resource, availability already booked through the pool on other tasks is also taken into account (globally for all the resources of the pool).

Possible use cases for pool
• When you have a group of resources that may work on same tasks, but you don’t know in advance who will work. For instance a maintenance team that may work on maintenance tasks and other project tasks.

• For macro planning.

• Define a pool for each group of resources (depending for instance on competencies).

• On first step, assign fake resources to the pools, and plan your project with the pools: you get a first draft of your project, even before knowing who will work on the project, and without needing to go to a very detailed level of tasks (it’s macro planning, you just have macro tasks).

• Then when you know who will work on the project: just replace the fake resource with real resources: you immediately get a realistic planning taking into account availability of real resources already booked on other projects. It’s still a macro planning, but realistic.

• Then you can draw you detailed planning, just adding sub-activities to your macro tasks, and assigning real resources to the lowest level activities: when you add assigned work, it is automatically subtracted from assigned work on the pool on the macro task, and global assigned work on the project is constant.

Delete an assignment
• When deleting an assignment, the remaining job is reassigned within the pool.

12.3.2 Aggregated resource

The aggregated resource allows you to choose a single resource from a resource pool.

When you assign a resource pool to an activity, a check box appears: single resource.

If you select single resource then you will have no FTE capacity to fill in but a busy rate on the activity.

Check the box and confirm to close the pop up.

When the pool is allocate, the pool icon appears on the board.

If you chose the unique resource then the 1 number will be displayed on the icon.

Similarly, the function of the resource chosen from the pool is indicated in brackets.

Click on to edit the allocation.

The pop up opens again and this time you have the summary table showing you the resources of your pool and the dates each resource can or should finish the activity.

You must fill in the activity load to see the end dates of the pool resources.

Otherwise the message ‘not planned work’ appears instead of the dates.
### Assignment

- **resource**: Pool 1
- **cost**: € / d
- **capacity (FTE)**: 1
- **assigned work**: 83 d
- **real work**: 0 d
- **left work**: 83 d
- **reassessed work**: 83 d

#### Table:

<table>
<thead>
<tr>
<th>resource</th>
<th>rate</th>
<th>assigned (d)</th>
<th>real (d)</th>
<th>left (d)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pool 1 (Developer)</td>
<td>100 %</td>
<td>83</td>
<td>0.00</td>
<td>83</td>
</tr>
<tr>
<td>admin (Manager)</td>
<td>%</td>
<td>2</td>
<td>0.00</td>
<td>3.2</td>
</tr>
<tr>
<td>web developer (Developer)</td>
<td>100 %</td>
<td>5</td>
<td>0.00</td>
<td>5</td>
</tr>
<tr>
<td>project manager (Manager)</td>
<td>100 %</td>
<td>10</td>
<td>0.00</td>
<td>10</td>
</tr>
</tbody>
</table>

---

Chapter 12. Environmental parameters
12.3. Pool of Resources

ProjeQtOr User guide, Release 9.2.0

Assignment

<table>
<thead>
<tr>
<th>resource</th>
<th>assigned work</th>
<th>real work</th>
<th>reassessed work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pool 1</td>
<td>15</td>
<td>0</td>
<td>15</td>
</tr>
<tr>
<td>function</td>
<td>Developer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>cost</td>
<td>€ / d</td>
<td></td>
<td></td>
</tr>
<tr>
<td>rate (%)</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>closed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>comments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>resource</th>
<th>planned end date</th>
<th>selected by calculation</th>
<th>update selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>analyst A</td>
<td>03/19/2021</td>
<td></td>
<td>definitively</td>
</tr>
<tr>
<td>analyst B</td>
<td>03/26/2021</td>
<td></td>
<td>definitively</td>
</tr>
<tr>
<td>analyst C</td>
<td>02/16/2021</td>
<td></td>
<td>definitively</td>
</tr>
</tbody>
</table>
Choose the appropriate resource by selecting the corresponding line and confirm.
Basic, ProjeQtOr will automatically select the fastest resource to complete the task.
The selected resource will then be the only one to be planned on this activity from the pool.
12.4 Teams

The team is a group of resources gathered on any criteria. A resource can belong to only one team.

**Use for**

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

**Team members**

List of the resources members of the team.

<table>
<thead>
<tr>
<th>id</th>
<th>name</th>
<th>closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>#10</td>
<td>web developer</td>
<td></td>
</tr>
<tr>
<td>#8</td>
<td>analyst B</td>
<td></td>
</tr>
<tr>
<td>#4</td>
<td>analyst A</td>
<td></td>
</tr>
<tr>
<td>#3</td>
<td>project manager</td>
<td></td>
</tr>
</tbody>
</table>

![Allocate all team members to a project](image)

Fig. 13: Team members section

- Click on + to add a new member to the team
- Click on - to delete the member to the team

**Button Allocate all team members of a project**

- This button allows to allocate all team members of a project.
- The *allocation dialog window* will be displayed.
12.5 Calendars

Concepts

- Resource calendar

This tool allows to define calendars.

- It allows to define exceptions to the default definition.
- In default definition, week days are days work and weekend days are days off.
- You can change the standard calendar or create other calendars by allowing any day of the week to be a holiday

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

Default calendar

- A calendar named “default” is already defined.
- 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 particular 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.
- You can also import the public holiday
- Existing exceptions of current calendar are not changed.

Note:

- The calendars are not linked.
- You have to re import the definition to apply changes.

Bank Of OFF Days

Holiday bank definition that can be easily added each year

Click on \( + \) to create a public Holiday

A Pop Up open and you can defined the Off day
Week days off

- By default, Saturday and Sunday are non-working days
- Check the boxes corresponding to non-working days if the default settings do not suit the structure of your company

Year

- Select the calendar year to create.

Year field

- Create the calendar from the specified year with all the features of the calendar called.

Button Import this year from calendar

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

Calendar days

A calendar of selected year is displayed to give a global overview of the exceptions existing.

- In white: days work.
- In gray: days off.
- In red: exception days work.
- In blue: exception days off.
- In bold: current day.

Just click on one day in the calendar to switch between off and work day.
12.6 Clients

The client is the entity for which the project is set.
It is generally the owner of the project, and in many cases it is the payer.
It can be an internal entity, into the same enterprise, or a different enterprise, or the entity of an enterprise.
The client defined here is not a person. Real persons into a client entity are called “Contacts”.

Fig. 15: Clients screen

Section Description

Other sections

• Attachments
• Notes

Table 8: Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Unique Id for the client.</td>
</tr>
<tr>
<td>client name</td>
<td>Short name of the client.</td>
</tr>
<tr>
<td>Type of client</td>
<td>Type of client.</td>
</tr>
<tr>
<td>Client code</td>
<td>Code of the client.</td>
</tr>
<tr>
<td>Payment deadline</td>
<td>The payment deadline is stated on the bill for this client.</td>
</tr>
<tr>
<td>Tax</td>
<td>Tax rates that are applied to bill amounts for this client.</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 client is archived.</td>
</tr>
<tr>
<td>Description</td>
<td>Complete description of the client.</td>
</tr>
</tbody>
</table>

Address section

Full address of the client.
Projects section

List of projects related to the client.

Contacts section

Displays the names of client-related contacts.

<table>
<thead>
<tr>
<th>Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Contacts Icon]</td>
</tr>
<tr>
<td>![Contacts Icon]</td>
</tr>
<tr>
<td>![Contacts Icon]</td>
</tr>
</tbody>
</table>

Fig. 16: Contacts section

You can create the contacts directly on the contact screen.

But you can create the contacts directly into the contact section

- Click on ![Contact Icon] to create the contact
- Click on ![Contact Icon] to delete the contact

When you want to add a contact, the window with the existing list of clients is displayed.

You can select or create a contact from this window, the information will be reflected directly in the contact screen.

Client quotation, client commands list and client bill list

These sections allow you to have a summary of the various financial documents concerning the client selected.

You find the list of quotes, orders and invoices of this client in tables for easy reading.

List of tickets

This section allows you to see all open tickets for the selected client.

Note: To display these sections, you must set the options “list quotes, commands and bills on client form” on yes in the global parameters but also in the user parameters.

See: Global Parameters See: Users Parameters
### Client quotation

<table>
<thead>
<tr>
<th>name</th>
<th>date</th>
<th>untaxed amount</th>
<th>full amount</th>
<th>status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qt_0014BF-554</td>
<td>01/22/2021</td>
<td>14 500,00 €</td>
<td>17 400,00 €</td>
<td>done</td>
</tr>
<tr>
<td>Sum</td>
<td></td>
<td>14 500,00 €</td>
<td>17 400,00 €</td>
<td></td>
</tr>
</tbody>
</table>

### Client commands list

<table>
<thead>
<tr>
<th>name</th>
<th>date</th>
<th>untaxed amount</th>
<th>full amount</th>
<th>status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evol0023</td>
<td>01/22/2021</td>
<td>500,00 €</td>
<td>600,00 €</td>
<td>recorded</td>
</tr>
<tr>
<td>Sum</td>
<td></td>
<td>500,00 €</td>
<td>600,00 €</td>
<td></td>
</tr>
</tbody>
</table>

### Client Invoices list

<table>
<thead>
<tr>
<th>name</th>
<th>date</th>
<th>untaxed amount</th>
<th>full amount</th>
<th>status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill_0001-0002-ABC</td>
<td>01/22/2021</td>
<td>0,00 €</td>
<td>0,00 €</td>
<td>recorded</td>
</tr>
<tr>
<td>test</td>
<td>03/15/2012</td>
<td>0,00 €</td>
<td>0,00 €</td>
<td>in progress</td>
</tr>
<tr>
<td>Bill March 2012</td>
<td>03/31/2012</td>
<td>2 400,00 €</td>
<td>2 870,40 €</td>
<td>done</td>
</tr>
<tr>
<td>Bill for tests</td>
<td></td>
<td>13 500,00 €</td>
<td>13 500,00 €</td>
<td>recorded</td>
</tr>
<tr>
<td>Sum</td>
<td></td>
<td>15 900,00 €</td>
<td>16 370,40 €</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 17: Financial monitoring sections

### List of tickets for this client

<table>
<thead>
<tr>
<th>Ticket</th>
<th>name</th>
<th>status</th>
</tr>
</thead>
<tbody>
<tr>
<td>#2</td>
<td>Enter some quotes on filed names : error Message</td>
<td>assigned</td>
</tr>
</tbody>
</table>

Fig. 18: List of tickets for this client
12.7 Contacts

A contact is a person in a business relationship with the company. The company keeps all information data to be able to contact him when needed. A contact can be a person in the client organization. A contact can be the contact person for contracts, sales and billing.

Field Is a resource

• Check this if the contact must also be a resource.
• The contact will then also appear in the “Resources” list.

Field Is a user

• Check this if the contact must connect to the application.
• You must then define the User name and Profile fields.
• The contact will then also appear in the “Users” list.

See: Ressource Contact User
Section Allocations to project

Allows to allocate your contact to a project

see: Allocations

Section List of subscription for this contact

You can see the items followed by your contact in this section

<table>
<thead>
<tr>
<th>type</th>
<th>id</th>
<th>name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Version</td>
<td>7</td>
<td>WebApps V3.0</td>
</tr>
<tr>
<td>Project</td>
<td>1</td>
<td>project one</td>
</tr>
<tr>
<td>Ticket</td>
<td>2</td>
<td>Enter some quotes on filed names : error Message</td>
</tr>
<tr>
<td>Ticket</td>
<td>4</td>
<td>Performance down</td>
</tr>
</tbody>
</table>

Fig. 20: list of elements followed by your contact

Section Miscellaneous

if the box is checked, the contact will not receive the mails sent to the team
12.8 Providers

Allows to manage provider list.

Section Description

**Other sections**

- Attachments
- Notes

<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>

**Section Address**

Full address of the provider.

**Section Contact**

Displays the names of provider-related contacts.

You can create the contacts directly on the contact screen.

But you can create the contacts directly into the contact section

- Click on + to create the contact
- Click on to delete the contact
12.9 Recipients

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

Section Description

Table 10: Required fields

<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>

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.

12.10 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.

Section Description

Other sections

- Current project
Fig. 21: Organization global view

- Linked element
- Attachments
- Notes
- Organization

Table 11: Required fields

<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>Display the structure</td>
<td>Displays the structure of the selected organization in a popup.</td>
</tr>
<tr>
<td>Show idle organization</td>
<td>Show closed organizations in the structure display.</td>
</tr>
<tr>
<td>Closed</td>
<td>Box checked indicates the organization is archived.</td>
</tr>
<tr>
<td>Closed dates</td>
<td>Displays the closing date and time of the organization.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the organization</td>
</tr>
</tbody>
</table>

Display the structure

Click on the button to open a pop-up which will display in a more graphic way the structure of the organization you have selected.

Project Synthesis

This section displays a summary of the costs recorded on the projects related to the selected organization.
Fig. 22: Structure display

Fig. 23: Project financial synthesis
Projects of organization and its sub-organizations

In this section you will find the list of projects and sub-projects linked to the selected organization.

Linked resources

This section allows you to see the resources attached to the selected organization.

- Click on \( + \) to add a new resource in the organization
- Click on \( - \) to delete a resource of the organization
- Click the allocate all organization members to a project button to assign all of an organization’s resources to a project.
  - The project assignment pop-up opens and allows you to choose your resources.

See: Allocations section

Linked elements

This section allow you to linked any element of ProjeQtOr to the selected organization.

See: Linked Elements section

Attachments

This section allows you to attach elements external to the selected organization. Whether documents or url addresses.

See: Attachments section

Notes

This section allows you to add notes on elements linked to the selected organization

See: Notes section
12.11 Humans Resources

**Important: Documentation**

The human resources module was developed by an external contributor SALTO CONSULTING. The explanations below have been taken from the instructions, provided in French only, with the module. *French documentation on the implementation of regulated absences is available on the download page*

The HR module was created in order to be easily adapted to French law, but it can be fully parameterized according to the rights of any country.

This section allows to manage the society’s Humans Resources.

This system comes in addition to the standards of the management of absences.

Used to manage absences that must be validated, controlled and have values to be regulated according to French law.

For the module to be functional, you must define the employees, new status for resources or users.

The absence manager in charge of leave, the types of leave you offer to your employees and the different types of employment contracts.

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

**Absence Administrator**

In order to be able to manage and configure the human resources module after its installation, you must access the global parameters.

A special additional HR section allows you to define the administrator of absences and regulated rights.

It is thus possible to manage the paid holidays, the RTT, the Stopped diseases by treating:

- Quantities acquired over a period of time
- The period of validity of a quantity of absence
- The possibility or not to take early holidays over the period being acquired
- The number of days before and after which the absence request can be made
- Specific acquisition rules
- Validation or rejection of an application

**Note:** A project dedicated to these regulated absences is created and makes it possible to store the requested days of absence as planned time and the days of absence validated as working time thus making it possible to integrate these absences in the planning.

**Leaves States**

With the activation of the HR module, an absence workflow is added with 3 states, which are accessible and customizable in the automation systems.
Recorded
Creation status. In this state all the data of the absence can be modified.
Submitted
This status means that the employee has sent his leave request to his hierarchy for validation.
Validated
State that only the manager and the administrator of the module can be enabled.
When the leave request is validated or refused, the status of the request cannot be changed
Cancelled
State that only the manager and the administrator of the module can be enabled.
The number of days the absence represents are not taken.
When the leave request is validated or refused, the status of the request cannot be changed

Note: The calculation of the number of days represented by absence is done on the basis of working days.
The working days are defined in Global Parameters and calendar associated with employee: holidays, non-working days.
12.11.1 Employees and Manager

The properties below is visible only when the HR module is enabled

Employee

An employee is a Resources whose property “is an employee” is checked in the screen resources. Once the resources are saved as employees, you can manage them from the employee screen. You find the same fields of description as the resources.

In this section, the employee can see the person who manage its leaves periods.

Employment Contract

This section is visible and linked to the Employment contract type screen.

To an employee are associated a Employment contract and Leave Rights earned.

The contract is associated with a Employment contract type.

This allow the employee to associate the rules of acquisition, the special rules of regulated absences and the acquired rights by type of absence and by acquisition period.

Manager

A manager is a resource whose properties “is an employee” and “is absence manager” are checked

A manager must be an employee.

An employee manager can make absence requests in lieu of employees.

He can validate or reject employee absentee requests that he manages.

**Important:** The management of an employee is dated, which allows to change manager or temporarily delegate management to another manager (absences).

**Bulk add for employees managed**

It is possible here to associate the employees with their manager, ie:

- **IN MASS** according to criteria of massification
- **UNITAIREMENT** with the list of employees attached to this manager

For example, if the company closes in August . . .

The manager can register a request for his organization and under organization, for all the organizations, his entire team, himself included
Fig. 25: Box “is an employee” and “is manager of leaves” is checked
Administrator

If an employee does not have a manager, the administrator of the Regulated absence module acts as manager. The administrator is obligatorily a leave manager.

**Warning:** When a resource is no longer "used", all the elements of the Regulated absence module are deleted by the module:

- Assignments to activities associated with type of absence
- Time spent generated following validated absence requests
- Planned times generated due to absence requests not yet validated
- Absence requests
- Acquired rights
- Contracts
- Links with his managers

Leaves Dashboard

A dashboard is available to absence managers. The filter bar allows you to filter the information presented in the dashboard. Leaves Calendar displays informations based on filters applied by managed employee.

The 🕒 tells you that the request was made late.

You can export the calendar into Excel format.
Synthesis

The synthesis is also displayed according to the filters selected beforehand, and gives the number of days remaining to be taken by type of leave and managed employees.

Leave period to process

In this section, appears the list of absences to be processed, that is to say under the “recorded” status.

12.11.2 Absence recording

Leaves Calendar

Regulated absences are done either by the employees or by their manager.

Absences can be recorded from the leaves calendar.

To record or change your absences, double clicking on an existing date or absence.
A pop up opens to display the properties of an absence (date and type of absence . . .)
The type of absences visible in the drop-down list depend on those recorded in the employee’s contract.
After validation, the holiday appears in the calendar.
The manager (and/or administrator) can validate or not, the leave of the employees. When the leave period is rejected, it is impossible to add a new leave on these same dates. The color of the holidays will change according to the validation.

Fig. 30: Leaves attributes
Leaves Periods

Regulated absences are done either by the employees or by the manager of leaves. Absences can be recorded from the leaves Periods screen.

On this screen, you can save, edit, delete a holiday request, as in the holiday calendar. The employee can record and submit his leaves.

Only the Manager of leaves and Leaves system administrator can change the status of a request for the absence of subject to accepted or rejected.
12.11.3 Leave Rights earned

On this screen, you can see your leaves rights earned since your contract’s beginning.

The start and end dates correspond to the period on which the days of leave are calculated.

The numbers of the acquired and left days to each type.

If your holidays over the reference period and according to the type of leave, then the checkbox “closed” is validated.

You no longer have this type of holiday available and can not ask any more.
12.11.4 Employment contract

You can see the details of the contracts and which employee is attached to them.

Fig. 33: Leaves rights earned

Regulated leaves parameters

The regulation of absences is based on the rights to take absences acquired over a given period.

It is therefore based on values to be given to attributes of regulation according to the type of absence (ex: Paid leave, RTT, sick leave, legal leave, etc.), and the type of contract associated with the employee (Ex: Full time, Part time).

General acquisition of rights

When you create a Employment contract type, you have several contractual values to fill in.

Warning: Check box “On default” and “on everything”

- If you check on “default” the entered values will be reflected on the default contract type only.
- If you check on “all” the entered values will be on all contract types.
- These values can not be changed after they are saved.

For any change, the creation of a new type of absence is necessary.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>start month period</td>
<td>month starting the reference period of paid holidays in your country.</td>
</tr>
<tr>
<td>start day period</td>
<td>day starting the reference period of paid holidays in your country.</td>
</tr>
<tr>
<td>period duration</td>
<td>The length of the period gives the number of months over which your reference period</td>
</tr>
<tr>
<td>quantity</td>
<td>the number of days of leave that will be paid during the period reference.</td>
</tr>
<tr>
<td>period of leave rights earned</td>
<td>the number of months before you can use your acquired days.</td>
</tr>
<tr>
<td>integer quotient</td>
<td>Possibility of rounding up earned leave.</td>
</tr>
<tr>
<td>validity duration</td>
<td>period during which the days of leave acquired will be retained. Beyond this period the leave will expire</td>
</tr>
<tr>
<td>is justiable</td>
<td>defines if the absence must be the subject of a request for proof</td>
</tr>
<tr>
<td>can be anticipated</td>
<td>If leave can be taken before the vesting period</td>
</tr>
<tr>
<td>max delay for retroactive absence (days)</td>
<td>allows, or not, to record absences on paid leave after being actually absent.</td>
</tr>
<tr>
<td>max delay for anticipated absence (days)</td>
<td>Number of days before which an application can be made</td>
</tr>
</tbody>
</table>
Fig. 34: Contractual values for the leaves type
Note: In France, an employee is entitled to 2 and a half days of leave per month of actual work at the same employer, whether 5 weeks per full year of work (from June 1st to May 31st)

Specific acquisition of rights

To integrate specific rights of absence, the concept of special rights has been put in place.

Usable entities are:

- Absences
- Employees
- Contracts
- Acquired rights

![Fig. 35: Contractual values for the leaves type](image)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name to give to the special right</td>
</tr>
<tr>
<td>custom earned rule</td>
<td>The rule allowing the calculation of a number of times to apply the quantity of right to absence</td>
</tr>
<tr>
<td>where clause</td>
<td>Condition of application of the special right</td>
</tr>
<tr>
<td>Quantity</td>
<td>The elementary quantity of the special right</td>
</tr>
<tr>
<td>Leave type</td>
<td>The type of absence to which the special duty applies</td>
</tr>
</tbody>
</table>

12.11.5 Leaves types

This part allows you to create the types of absences regulated.

A corresponding activity (= name of absence type) is created on the project dedicated to absences management.

All employees (resource registered as employee) are assigned to this activity

- You can choose the workflow that will be attached to human resources
- You can define who received an internal alert or an email on the creation, the update, the delete and/or the treatment of the leaves

See also:

More detail about Contractual values, see Earned rights
12.11.6 Employment contract type

This section allows you to create the different contracts that are in effect in your company.

The types of contracts allow to have rules of acquisition of different regulated absences according to the contract of employment of an employee.

You can only have one type of default contract.

**Note:** example in France

- Executive contract = No acquisition rule
- Full-time frame contract = RTT
- Part time frame contract = No RTT
- etc.

---

**See also:**

More detail about **contractual values**, see *Earned rights*
Parameters for earned leave rights

- In this section you can define which types of regulated absences will be attached to this type of contract.
- If you have created several types of regulated absences and attached them to all your contracts (check box on default or on everything), these types will be visible in this section.

If you are missing types of absences, you can create them from this screen:

- Click on the button
- A pop up opens and proposes to fill in the same fields as on the screen of the types of regulated absences

![Input of acquisition rights parameters](image)

Fig. 38: Special leaves rights

See also:
More detail about Specific values, see Earned rights

Configuration of special leave rights

Special acquisition rules are rules that cannot be expressed with the values of the standard acquisition rules

custom earned rules:

Define the special acquisition rule based on the attribute values of a ProjeQtOr entity.
This rule follows the vocabulary of the SQL language

**where clause**

Condition of application of the special right

this clause follows the vocabulary of the SQL language

---

**Important:** for help with the SQL functions you can use, click on the section bar *help on clause input*

A new part appears and proposes drop-down menus with prerecorded SQL queries

---

**Quantity**

Number of additional acquired days calculated following the application of the special acquisition rule

This rule follows the vocabulary of the SQL language

**Leave type**

The type of regulated absence to which will be attached, the rule of special absence.

**Employment contract end reason**

Allows you to record the different types of end of contract.

---

**Note:** **Why end a contract?**

- Resignation
- Change of the status (non management -> management)
- Change of the quotify (100% -> 80%)
- Going to retire...

These different reasons may lead to changes in the rules governing the acquisition of the rights of absence.
12.11.7 Leaves System habilitation

Allows you to restrict or restrict the view of Human Resources module screens to employee profile types. They can view - read - create - update and/or delete access

12.11.8 Workflows and values

- When you install the regulated absences module, a workflow for absences is created.
- You can edit and delete it like any other workflow.
- A new section is available in the list of values for the reports.
- The regulated leaves section allows you to determine the behavior of the absence workflow states.
- It can also trigger an alert and/or send mail
13.1 Plug-ins management

Plug-ins add non-generic features to ProjeQtOr.

You will find the complete list of plugins in the ProjeQtOr online store.

- The section **Installed plugins** lists the installed plug-ins.
- The section **Available plugins** allows to manage local plug-ins

**Available plug-ins list**

<table>
<thead>
<tr>
<th>file</th>
<th>date</th>
<th>size</th>
</tr>
</thead>
<tbody>
<tr>
<td>importProject_V1.0.zip</td>
<td>01/25/2021</td>
<td>231 KB</td>
</tr>
</tbody>
</table>

Fig. 2: Add a plugin

- The **Browse** button allows to select plugin file .zip.
- The file will be uploaded and it will be added in plugin-ins list.

**Plug-in installation**

- Click on + to install plug-in.
• Click on 🌐 to display the description of plug-in.

• Click on 🗑️ to remove the plugin from the installation table.

• Plug-in will be deployed during installation.

• The result of deployment will be available in the log file (See: Administration Console).

• Plug-in is removed from the list after installation.

Fig. 3: Description plug-in
14.1 Glossary

**Action**  Stocks are used in anticipation of risk. They serve to reduce the risks.

The analysis of these risks consists in defining actions. There are two types of actions:

- Preventive action aimed at removing the risk or
- Corrective action that has been earned on the occurrence of a risk

**Activity**  An Activity can be likened to the key stages of the project: it is the skeleton of your project that organizes the main phases of a project

- They have a start and end date
- They designed for the planning phases of a project
- They serve to organize the milestones and tasks of a project
- They can allocated to a or many resources
- They can be prioritized and have sub-activities

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

**Agile methods**  Agile methods are groups of practices of piloting and realization of projects. They originate from the Agile manifesto, written in 2001, which uses the term ‘agile’ to refer to multiple existing methods

**Closed**  Closed is a micro state in ProjeQtOr

- Flag to indicate that item is archived.
- Item will not appear in lists any more
- You can display them again by checking the box “Show closed items”
- You can setting their default display in the user’s Parameters

**Contact**  A contact is a person in a business relationship. A contact can be a person in the customer organization. Used as contact person for contracts, sales and billing. Contacts management is performed on Contacts screen.

**CRON**  cron is a program that allows users of Unix systems to automatically execute scripts, commands or software at a date and time specified in advance, or according to a cycle defined in advance.

**CRUD**  It is an English computer acronym for Create, Read, Update, Delete. It designates the four basic operations for data persistence, in particular the storage of information in a database.

**Decision**  A good decision helps move towards the end goal. It is in the general interest, the interest of the greatest number as well as in the interest of the project

- a good decision is a suitable solution, put in place with the tools and resources available at a given moment.

**Description**

- This field allows to define a description on an item.
• Depending on the element type, name of field can be different.

**See also:**

**GUI behavior**

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

**Done** Done is a micro state in ProjeQtOr

• Flag to indicate that item has been done.
• Date of done is saved.
• A result can be specify.
• It is possible to require a result when the status change to “done”.

**External reference**

• This field allows fill free input.
• It uses to refer information from an external source.
• External reference value can be put in email message with *externalReference* special field.
• More detail, see: *Administration*

**FTE** Full Time Equivalent The full-time equivalent (FTE) is a unit of measurement: a workload or more often, a capacity for work or production.

**Gantt chart** Description The Gantt chart is a tool used in scheduling and project management and allowing to visualize in time the various tasks composing a project.

It is a representation of a connected graph, evaluated and oriented, which makes it possible to graphically represent the progress of the project.

**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).

**Incident** Any event that is not part of the standard operation of a service and that causes, or may cause, an interruption or decrease in the quality of that service.

**Issuer** An issuer is a user who created the item.

**See also:**

**Creation information**

The issuer name and creation date of an item are displayed in the *Creation information zone.*

**Key Performance Indicator (KPI)** Indispensable to the project manager, an indicator makes it possible to evaluate a situation and to make an adapted decision. Key performance indicators measure the performance of your projects. You choose them together with your team. They must be simple, reliable, easily understandable by all and relevant.
If the indicator is green, all is well, you will need to continue the actions in progress to maintain this good result. If the indicator is red, then you must take the necessary corrective action. If the indicator is orange, it should be monitored.

- Each indicator is associated with a specific goal.
- An indicator necessarily implies a decision.
- An indicator is never silent.
- A relevant indicator must be simple

**Objective** An objective is a goal to achieve by carrying out different tasks. For example, building a new plant in order to produce more and meet the growing demand. It is essential to precisely define the goal(s) to reach so that you and your team know where you are going. A good goal must be SMART.

**Origin**
- Determines the element of origin.
- The origin is used to keep track of events (ex.: order from quote, action from meeting).
- More detail, see: **Origin field**.

**Owner builder** The client is the person on whose behalf the work is carried out. It is the sponsor and the one who bears the financial cost. The client is a natural or legal person, public law or private law

**PERT chart (Program Evaluation and Review Technique)** provides a practical method and means to describe, represent, analyze and logically follow the tasks and the network of tasks to be carried out as part of an action to be undertaken or to be followed. The PERT diagram represents the work schedule by a dependency graph. His network formalism focuses on the interconnection of the tasks to be performed and the calculation of critical paths.

An important difference with the Gantt chart is the conventional time scale of the PERT chart which represents a sequence of tasks and not durations or a calendar

**Project** A project is defined as a finite set of activities and actions undertaken in order to meet a defined need within a set timeframe and within the limits of an allocated budget envelope

**Project Leader** A project leader is a resource allocated to a project with a “Project Leader” profile. person responsible for leading a project and managing its smooth running. In general, he leads a team during the duration of the various projects for which he is responsible

**Project manager** A project manager is a resource defined as the manager on a project.

See also:

**Accelerator button**
This button allows to set current user is the project manager. More detail, see: **Assign to me button**.

**Project team** All resources allocated to a project.

**Quotity** A quota is the amount of a quota. This term of right refers to the fraction of a whole, a proportional sum in a share. A quota can be to pay or to collect.

**Reference**
- Reference is displayed after id, automatically generated on creation.
- Reference depends on defined format, see under “Format for reference numbering” section in **Global Parameters** screen.
- Default format defines a specific numbering format that can provide unique numbering sequence for each project and/or each type of items.

**Requestor** A requestor is a contact. Used to specify the requestor for ticket, activity and requirement. Only contacts allocated to the selected project can be a requestor.

**Responsible** A responsible is a resource in charge of item treatment. Usually, the responsible is set when the status of the item is handled. Only resources allocated to the selected project can be a responsible.
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.

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

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

**Access rights**
It is possible to define a combination of rights to permit access for elements the user is responsible for.
More detail, see: Access modes screen.

**Resource**
- Human or material resource involved in the projects.
- It is possible to define the resource availability to the projects.
- Resources management is performed on the Resources screen.

**Result**
- A result is a description of the treatment of an item.
- Usually, the result is set when the status of the item is done.

See also:

**GUI behavior**
It is possible to define that result field is mandatory on done status.
The element type screens allow to set this parameter to several elements.

**Risks**
The risk is a hazard, an undesirable event whose appearance is not certain, resulting in the possibility that the project does not achieve the objectives of:
- Completion date
- Costs
- Specifications (techniques, quality, performance, reliability . . .)
- Others: Image of the company, environment, legal, social . . .

The risk can put in danger the project, deviations from forecasts the making it unacceptable or totally unacceptable. We distinguished the risks exogenous (external at now; suppliers, evolution regulation, political, social, meteorology . . .)

**Quality**
The Quality approach consists in finding the match between the answer to the needs of the project, the correct expression of these needs by adequate specifications which go through a careful listening of the customer, and a realization answering the expression of the needs.

**User**
- User 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.

SLA  A service level agreement (SLA) is a contract between a service provider and its customers that documents the services that the provider will provide and defines the service standards that the provider is required to meet.

SMART it is an acronym or mnemonic device that stands for ‘Specific, Measurable, Acceptable, Realistic and Temporally Defined’. These terms apply mainly to the determination of the most suitable objectives in order to complete a given project. Setting appropriate targets will help accelerate project completion and improve its chances of success.

Status
• The status determines the life cycle of items.
• It defines the progress of the treatment of the item.
• Item is linked to a element type, element type is linked to a workflow.
• A workflow defines the possibility to go from one status to another one, more detail, see: Workflow.

Ticketing Ticketing is an anomaly tracking system : bugs, incidents, problems, requests…

WBS
• Work Breakdown Structure.
• Hierarchical position of the element in the global planning.
• WBS also defines the index of an item in the WBS structure. This index is calculated like paragraphs in a word document.

Work
• **Assigned:** The work initially planned for this resource to the task.
• **Left:** Assigned Work – Real Work
• **Planned:** Date defined by ProjeQtOr
• **Real:** Sum of work done by this resource to the task.
• **reassessed:** Real Work + Left Work
• **Requested:** Initially requested by the customer
• **Validated:** Initial planning, on which we committed each other. Baseline.

**Warning:** Except for some planning modes, the planning does not take into account the validated load but that affected.

Workflow A workflow is the representation of a series of tasks or operations carried out by a person, a group of people, an organization, etc.

The term flow refers to the passage of an element, from one stage to another.