



Project'Or RIA is a **Project Organizer Rich Internet Application**.
Project'Or RIA focuses on IT Projects, but is also compatible with all kinds of Projects.

Its purpose is to propose a unique tool to gather all the information about the projects.

The fact is that many Project Management softwares just focus on planning. But it is a much too restrictive point of view. Of course planning is an important activity of Project Management and is one of the keys to Project success, but it is not the only one.

Project Managers need to foresee all what can happen, measure risks, build action plan and mitigation plan.

It is also important to track and keep traces of all what is happening to the Project : incidents, bugs , change requests, support requests, ...

In this objective, Project'Or RIA gives visibility at all levels of Project Management.
At lower level, the Project follow-up consists in gathering all information, and maintain it up to date. This involves all the operational team.
At upper level, Project Steering uses the follow-up data to take the decisions and build the action plan. This allows to bring the adjustments needed to target on the objectives of the project.

The goal of Project'Or RIA is to be Project Management Method independent. Whatever your choice on the method, you can use Project'Or RIA.



Work

- Tickets follow-up, for short activity follow-up such as support or bug fixing.
- Activities follow-up, for work needing to be planned such as development or evolution.
- Milestones follow-up, to define key dates of the planning.
- Action follow-up, with complete description, status and accountable assignment.
- Hierarchic level management via links of Activities, Tickets or Milestones to parent Activity.
- Dependencies management between Activities, Milestones and Projects for accurate planning.
- Assignment of resources to activities.
- Workload management.
- Cost management.
- Workflow definition for status change.

Follow-up

- Planning functionality, in a simple and understandable way, taking into account resource capacity, resource affectation rate to project and resource assignment rate to activity.
- Planning presentation for projects, activities, milestones and dependencies in a Gantt view.
- Workload follow-up for resources.
- Printable reports, with graphics and possibility to export to PDF format.



Financial

- Individual expense.
- Project expense.
- Terms for bill planning.
- Bill management, with several billing modes, depending on project type.
- Definition of activities price, for "time & material" billing.

Risk Management Plan

- Risk follow-up, with complete description of risks and criticality enlightening.
- Issue follow-up, to track Project issues when risks occur.
- Links management, between Actions, Issues and Risks.

Review logs

- Meetings follow-up, with summary of status and minutes.
- Decisions follow-up, with full description and origin reminder.
- Questions management, to track exchanges and responses.
- Links management, between Meetings and Decisions and Questions.

Tools

- Message management, to communicate to users through Today screen.
- Import elements (tickets or else) from CSV files.
- Display of emails sent and alerts sent ("see other").



Environment

- Projects definition.
- Customers and contacts definition.
- Resources definition, for people working on Project, gathered in Teams.
- Users definition, for people connecting to the tool.
- Recipient definition, for billing information.
- Products and Product Versions definition.
- Calendar definition to enter "off days".

Controls and automations

- Workflow definition, controlling status change.
- Automatic email generation on status change.
- Definition of delays for tickets.
- Calculation of indicators, based on target values (dates, work, ...).
- Automatic alerts based on indicators value.

Security

- Login management for restricted access.
- Access Right Management, based on profiles completely customizable.
- Full profiles definition and rights management for reading, creating, updating and deleting.
- Management of visibility of Cost and Work depending on profile.



Document management

- Definition of directories to store documents.
- Documents management, with version follow-up, upload and download functionalities.

Parameters and lists of values

- Every parameter, every list of values may be changed through a devoted screen.
- Every element is linked to a type, defining some mandatory data or other GUI behavior.

Others

- Today screen with summary data for project, list of work (to do list) and list of tasks to follow-up
- Advanced filter functionality, including sort capacity.
- Administration functionalities.
- Global parameters management screen.
- User parameters management screen.
- Traceability of each update on items, displayed on change history section of each item.
- Different selectable color themes.
- CSV Export of every lists.
- PDF export of every printable report.
- Export planning to MS-Project xml format.
- Multi-Language.



Easy to use

- Project'Or RIA proposes a user friendly interface.
- Rich Internet Application running as a light client, in a simple browser.
- Multi-browser compatible (validated on IE 7 to 9, Firefox 3 to 7 and Chrome 5 to 14).
- User friendly interface.
Using AJAX, page refresh is always limited to the target area, avoiding blank pages and flickering.
General user interface is designed to conform to many usually used tools (such as webmail) :
 - menu on left hand,
 - data on right hand, divided on top as list of items and at bottom as detail for selected item.Selecting an item in the list directly displays its detail.
- Possibility to access to history of changes is offered on every item.
- Notes management enables to attach comments to any item.
- File attachment is proposed for most important items.
- Multi-Language.



Easy to install

- Project'Or RIA uses very well known technologies : PHP / MySQL / AJAX.
- Set up only requires the usual trilogy : Apache, MySQL, PHP.
Just use your favorite package : XAMPP, LAMP, WAMP, EasyPHP, ZEND Server ...
- Required versions:
 - Apache : any version, V2 or above is recommended,
 - MySQL : any version, V5 or above is recommended,
 - PHP : 5.2 or above needed.

For information, Project'Or RIA has first been developed with :

- *Easy PHP 2.0.0.0 [Apache V2.2.11, MySQL 5.1.30, PHP V5.2.8]*
- *Easy PHP 5.3.8.1 [Apache V2.2.21, MySQL 5.5.16, PHP V5.3.8]*
- *ZEND Server 4.0.5 Community Edition [Apache V2.2.12, MySQL 5.1.35, PHP V5.2.10]*
- *XAMPP 1.7.7 [Apache V2.2.21, MySQL 5.5.16, PHP V5.3.8]*
- Automatic version management triggers Database structure updates at first run for any new version.
- Set-up screen at first run to define internal parameters (database access, default parameters,...).



Easy to parameter

- Every user parameter, every list of values may be changed through a devoted screen.
- Default parameters are proposed, corresponding to most common needs.
- Language selection, proposed on locale value, editable by user
(*English, French and German for current version*).

Easy to customize

- As Project'Or RIA is proposed under open source GPL Licensing, you may adapt it to your needs.
- Project'Or RIA has been developed as a Framework, so it is very easy to add an element or add a data or change display for an element.



Pre-requisites :

- http server
- PHP server (5.2 or over)
- MySQL database (5 or over)

For instance, you may try to set-up an EasyPHP server, including all required elements. This set-up is not recommended for production purpose, but only for testing and evaluation purpose.

You may also set-up a ZEND Server, including all required elements. This set-up can be used for production purpose.

Set-up :

- Unzip projectorriaVx.y.z.zip to the web server directory
- Run application in your favorite browser, using <http://yourserver/projectorria>
- Enjoy !

Notice :

- At first run, configuration screen will be displayed.
- To run again configuration screen, just delete "/tool/parametersLocation.php" file.
- On first connection, database will be automatically updated, it may take several minutes.

Support :

- you may request support in the Forum of Project'Or RIA web site :

<http://projectorria.toolware.fr>



When you first log, normal process should be :

- configuration screen is displayed
- you fulfill data corresponding to your environment
- you then click on "OK" button
- a spinner is displayed
- the spinner disappears : at that moment, you should see a message and a new "Continue" button below the "OK" button
- you click on the "Continue" button
- screen changes to Logon screen
- you enter default login : admin/admin and click "OK" button
- spinner is displayed : this step may take a certain time (about 1 minute) because all the database structure is created
- spinner disappears and a short message indicates result of database creation (detail of this step is written in log file)
- click again on "OK" and you're in !

If all of this do not work, try this solution :

- get "/tool/parameters.php" file
- manually update this file with your own parameters
- create a new file : "/tool/parametersLocation.php" containing:

```
<?php $parametersLocation = "parameters.php";
```

You can move /tool/parametrers.php, then you just have to indicate its full way in "/tool/parametersLocation.php".



Make sure to store your parameters.php file out of web access to avoid having your security information stolen (for instance connection login to your database)



Parameters (1/5)

Fields filled in Configuration screen are stored in parameters.php file. Here is the mapping.

Caption	Description	Variable name
Database type	The database type. Leave 'mysql' (only possible value).	\$paramDbType
Database host	MySQL Server name (default is 'localhost'). If your MySQL Database is not listening to default 3306 port, just indicate it here as 'myServer:myPort'	\$paramDbHost
Database user to connect	MySQL valid user (default is 'root').	\$paramDbUser
Database password for user	MySQL password for user (default is 'mysql', should be changed).	\$paramDbPassword
Database schema name	MySQL database instance name (default is 'projectorria'). Database will be automatically created if it does not exist.	\$paramDbName
Name to be displayed	A name that will be displayed on the bottom of the main screen. Any value is possible to identify connected database.	\$paramDbDisplayName
Database prefix for table names	Prefix on table names. It is used to store several instances under same schema. It may be left blank.	\$paramDbPrefix



Parameters (2/5)

Caption	Description	Variable name
eMail address of sender	The email address used as sender for mailing function. Must be a valid email address.	\$paramMailSender
eMail address to reply to	The email address used to define the 'reply to' for mailing function. Must be a valid email address.	\$paramMailReplyTo
eMail of administrator	The email address of the administrator. It will appear on error messages. Should be a valid email address.	\$paramAdminMail
SMTP Server	Address of SMTP (mail) server. May be left blank (default is 'localhost').	\$paramMailSmtpServer [New in V1.2.0]
SMTP Port	Port to talk to SMTP (mail) server (default is '25')	\$paramMailSmtpPort [New in V1.2.0]
Sendmail program path	Path to program used to send mails. To set only on issue to send mails, or if not using default sendmail program.	\$paramMailSendmailPath [New in V1.2.0]
Automatic mail title	Title of automatic mails. May content \${item}, \${id}, \${status}, \${name} (*). Default value is proposed on configuration screen.	\$paramMailTitle [New in V1.2.0]
Automatic mail message	Main body message of automatic mails. May content \${item}, \${id}, \${status}, \${name} (*). Default value is proposed on configuration screen.	\$paramMailMessage [New in V1.2.0]
Automatic mail show detail	Tag to specify whether the detail of the element should be included in the message body. Possible values are 'true' or 'false' (default is 'true').	\$paramMailShowDetail [New in V1.2.0]

(*) \${id} : the id of the element
\${item} : the class of the element
\${status} : the new status of the element
\${name} : the name of the element



Parameters (3/5)

Caption	Description	Variable name
Default password for initialization	Default value used to reset users password. Any string is possible as default password (default is 'projector').	\$paramDefaultPassword
Min length for password	Minimum length of accepted new password. Any integer is possible, to force a long password (default is '5'). Keep is reasonable !	\$paramPasswordMinLength
Disable password change functionality	Tag to disable password change functionality for users (if set to 'true'). Then, only the administrator can reset passwords. Possible values are 'true' or 'false' (default is 'false').	\$lockPassword
Default locale to be used on i18n	Default language used by Internationalization functionality. Will be overridden by user's choice on user parameters screen. Possible values are 'en' for English or 'fr' for French (default is 'en'). More locales should come with next versions.	\$paramDefaultLocale
Default time zone	Default time zone (default is 'Europe/Paris'). List of possible values can be found at : http://us3.php.net/manual/en/timezones.php .	\$paramDefaultTimezone
Use fading mode for frames refresh	Tag to indicate that screens will appear in a fading motion, to avoid flickering screens. Possible values are 'true' or 'false' (default is 'true').	\$paramFadeLoadingMode
Number of row per page on main Grid view	Number of rows that will be rendered at a time. Any integer value is possible (default is '50'). See Dojo for more details on this topic.	\$paramRowPerPage
Icon size on menu tree	Size of icons displayed on menu bar (left side). Possible values are '16' for small icons, '22' for medium icons, '32' for big icons (default is '22').	\$paramIconSize
Default color theme, proposed while login	Default color theme, proposed while login. Possible values are 'blue', 'red', 'green', 'orange', 'grey', 'white' or 'random' for randomly selected (default is 'blue').	\$defaultTheme <i>[New in V1.3.0]</i>



Parameters (4/5)

Caption	Description	Variable name
Path separator	The path separator depending on the operating system. Possible values are '\' for Windows, '/' for Unix". Remark : '/' will also work on most Windows, so it is default value.	\$paramPathSeparator
Directory to store Attachments	Directory where attached files will be stored. Can be any valid directory. PHP server must have write rights to this directory. If set to empty string, attachment facility will be disabled. Default value is '../files/attach/' : as it is within web structure, it should be changed for security reasons.	\$paramAttachementDirectory
Max file size for attachment	Max file size for attached files. Size is in bytes (1024 * 1024 * MB). Default value is '2097152' = 1024 * 1024 * 2 = 2 MB.	\$paramAttachementMaxSize
Temp directory for reports	Directory to store temporary images for reports . It may be any valid directory into the web structure (must be web-reachable). Default is '../files/report/' and may be kept as is.	\$paramReportTempDirectory [New in V1.4.0]
Memory limit For PDF	Set maximum memory size (in MB) for PDF generation. Default in 512.	\$paramMemoryLimitForPDF [New in V1.6.1]
Log file name	Name of log files, including path. Can be any valid file name. PHP server must have write rights to this file (or at least to the directory). May contain '\${date}' to get 1 file a day. Default value is '../files/logs/projector_\${date}.log': as it is within web structure, it should be changed for security reasons.	\$logFile
Log level	Logging level, used for debugging purpose. Possible values are '4' for script tracing, '3' for debug, '2' for general trace, '1' for error trace, '0' for none (default value is '2').	\$logLevel
Setup Dojo debugging mode	Tag to enable Dojo debugging facility. Possible values are 'true' or 'false' (default is 'false').	\$paramDebugMode



Parameters (5/5)

Caption	Description	Variable name
Currency	The currency symbol to be used for costs display. Any symbol or letters is possible : '\$', '€', '£', 'USD', 'EURO', 'GBP', ... Hint : you may use a currency such as 'K€', so 1 euro would be 0.001 K€.	\$currency
Currency position	The position of the currency symbol Possible values are 'before', 'after' or 'none'.	\$currencyPosition
Parameter file name	Name of the file where all previous parameters will be stored. Default value is '../files/config/parameters.php' : as it is within web structure, it must be changed for security reasons.	Stored as \$parametersLocation in parametersLocation.php file
Allow login from Ldap	Definition whether connections can be validated through Ldap directory. Possible values are 'true' or 'false'. If set to true, Project'Or RIA can log user from Ldap.	\$paramLdap_allow_login [New in V1.8.0]
Ldap Base DN	Ldap Base DN. For instance 'dc=mydomain,dc=com '	\$paramLdap_base_dn [New in V1.8.0]
Ldap Host address	Ldap Host server address. D Default is 'Locahost '.	\$paramLdap_host [New in V1.8.0]
Ldap Port	Ldap Port . Default is '389'.	\$paramLdap_port [New in V1.8.0]
Ldap version	Ldap version . Possible values are '2' or '3'.	\$paramLdap_version [New in V1.8.0]
Ldap Search User	DN of Ldap user used for search functionality. For instance 'cn=Manager,dc=mydomain,dc=com"	\$paramLdap_search_user [New in V1.8.0]
LDAP Search User Password	Password of Ldap user used for search functionality.	\$paramLdap_search_pass [New in V1.8.0]
Ldap filter	Ldap filter to find used name . Must include %USERNAME% that will be replaced be the login user name. For instance 'uid=%USERNAME%'	\$paramLdap_user_filter [New in V1.8.0]



Installing new version

Project'Or RIA will constantly evolve to fit users needs.

To deploy a new version just unzip the new projectoriaVx.y.z.zip to the web server directory and connect to the application.

Database updates will automatically be triggered.

When done, a message will display the synthesis of the updates (number of errors if any).

You will find details of the updates in the log file.

Some new versions may also add new parameters.

These will of course be integrated in configuration screen.

If you deploy one of these versions from a previously installed one, new parameters will automatically be inserted at the end of your "parameter.php" file, with a default value.

You will then be able to update this value to your context, by modifying the file.

In these cases, a message will inform you that new parameters have been added, on login screen, just before the "Updated Database" message.



Pay attention that if you are upgrading from version lower than 1.1.0, you must remove last script closure (?>) in "parameters.php" file before upgrading.



It is highly recommended to back-up your Database before upgrading to new version, to be able to get back to previous version.



You can upgrade twice (if needed) : update "parameter" table, reset the value of line where parameterCode='dbVersion' to the previous version number and connect again. If you then notice that some menu items have disappeared, just check for double entries in "habilitation" table (last lines) and delete them (this should not happen since V1.5.0).



Login to the application uses a standard login screen : users must enter "user name" and "password".

Just notice that on this screen users have the possibility to change their password, and it is the only place where they can do this.

This functionality can be disabled (see parameters).

The administrator is then the only one able to reset the passwords to the default value (see parameters).

When a password has been reset to default value, the user must change it on first connection.

For the first connection to a newly installed version of Project'Or RIA, just use the default account : "admin" / "admin"

You must then go to "user " screen to create new users.



Don't forget to change the default password for "admin" user, or delete the "admin" user.



Remember to always have a user with " admin " rights to be able to create new users and change profiles.



Graphical User Interface is set into several **areas**.
Some **splitters** are provided to enable resizing of the parts.

Logo area

Menu
area

Splitter

Message
area

Splitter

Quick access buttons bar

List
area

Splitter

Detail
area

Info bar

The screenshot displays the Project'Or RIA graphical user interface. It features a menu on the left, a central list of projects, and a detailed view of a selected project. The interface is divided into several areas by splitters, allowing for resizing of the components.

Menu area: Contains a tree view with categories like Today, Projects, Documents, Work, Follow-up, Financial, Risk & Issue Management, Review logs, Tools, and Environmental parameters. Sub-items include Affections, Users, Resources, Contacts, Customers, Recipients, and Teams.

Projects List area: A table listing projects with columns for id, wbs, project name, type, color, project code, customer name, status, progress, validated end, planned end, done, and closed.

# id	wbs	project name	type	color	project code	customer name	status	progress	validated end	planned end	done	closed
1	1	project one	Fixed Price		001-001	client one	recorded	14 %		22/05/2012	<input type="checkbox"/>	<input type="checkbox"/>
2	1.1	project one - maintenance			001-001-1	client one	recorded	10 %		22/05/2012	<input type="checkbox"/>	<input type="checkbox"/>
3	1.2	project one - development			001-001-2	client one	recorded	30 %		30/03/2012	<input type="checkbox"/>	<input type="checkbox"/>
4	2	project two	Time & Materials		002-002	client two	recorded	100 %			<input type="checkbox"/>	<input type="checkbox"/>
5	3	internal project				internal	recorded	0 %			<input type="checkbox"/>	<input type="checkbox"/>
6	3.1	holidays				internal	recorded	0 %			<input type="checkbox"/>	<input type="checkbox"/>

Project Detail area: Shows the details for the selected project (id: 1). It includes fields for name, type, customer, bill contact, project code, contract code, manager, color, status, done, closed, and description. It also displays sub-projects, affectations, and versions linked to the project.

Progress area: A table showing the progress of the project across different stages.

	requested	validated	assigned	planned	real	left
start date:				05/03/2012	05/09/2011	
end date:				22/05/2012		

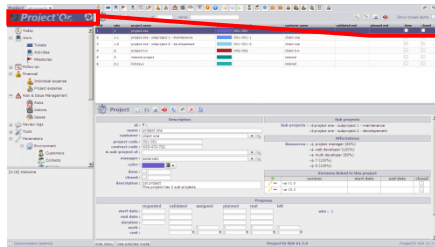
Info bar: Displays the current user (Disconnection [admin]), the application name (Project'Or RIA Manual), and the version (Project'Or RIA V2.1.0).



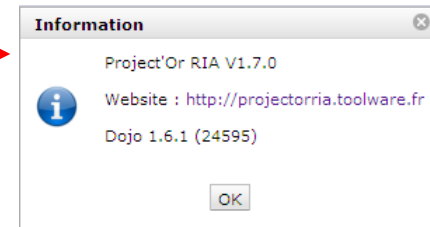
Graphical User Interface (2/9)

Project'Or
RIA

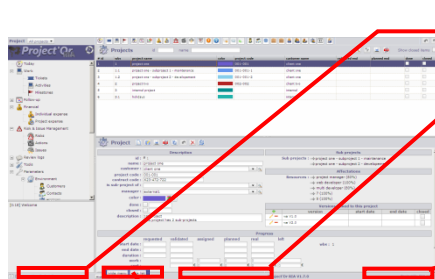
Toolbars and else



Clicking on the **Logo Area** will display the "About" pop-up.



Click on the Help icon will open the online user manual, to the page corresponding to the actual screen, if existing in the manual.



Disconnection [admin]

Click on left side of Info bar **disconnects** user.

Project'Or RIA V1.7.0 Manual

Database **Name** is displayed in the middle of Info bar.

Project'Or RIA V1.7.0

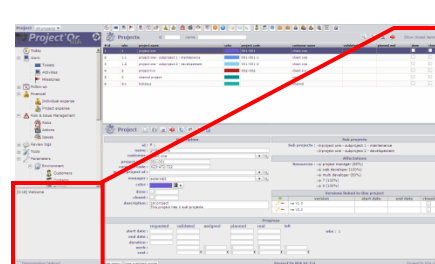
Version of Project'Or RIA is displayed on the right of Info bar. Click here to go web site.

Hide menu Use switched mode

Two buttons provide **Show/Hide** functionality for menu (left part) and **switched mode** for list and detail, so that selected element is displayed in "full screen" mode.

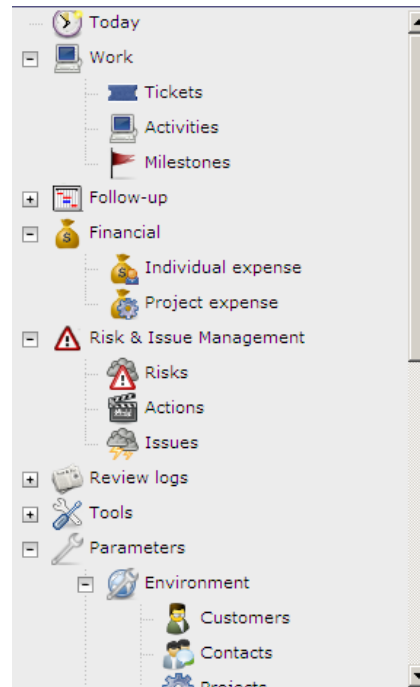
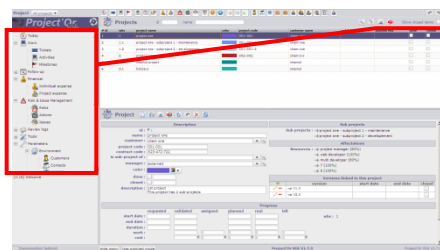
When hidden, these areas are replaced by small grey bars.

Moving the mouse over the bar displays the initial area.



[0:55] Welcome

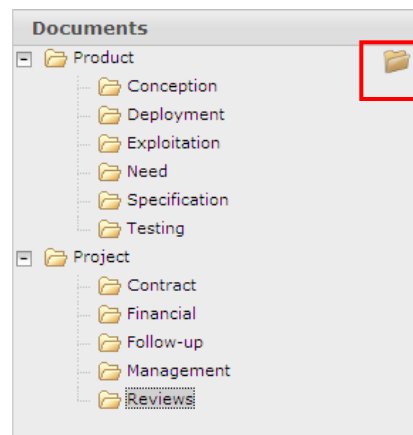
Message area displays information about main actions : insert, update, delete. Timestamp indicates when action was done. This is only a temporary logging area. Messages displayed here are not stored and will not live more than user connection.



Menu area is proposed as a tree view of reachable items.

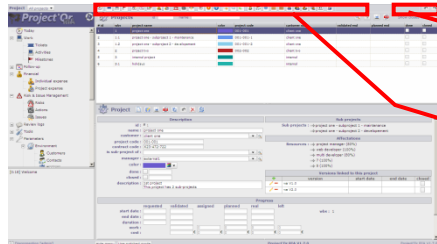
The presented items will depend on user habilitation to the screens.

Click on a grouping line will expand-shrink the group. Click on a item will display the corresponding screen in the main area (right side of the screen).



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

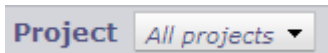
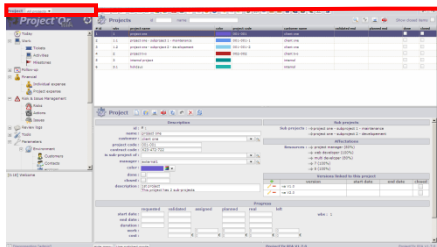
This icon gives direct access to the directories management screen



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



The quick access buttons give rapid access to main elements.



The **Project combo box** allows to restrict the visibility of all objects to the dedicated project, including sub-projects if any.

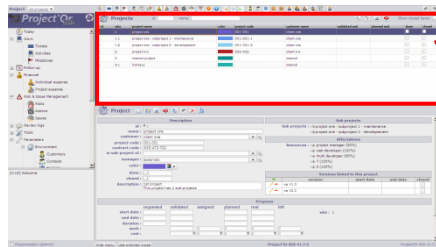
The selection will also define the "default" project for new items.


Example :

- Consider 3 projects P1, P2 and P3, P3 is sub-project of P1.
- Consider 3 tickets T1 on project P1, T2 on project P2, T3 on project P3
- Select "All projects" ⇒ you see the 3 tickets
- Select project P1 ⇒ you see tickets T1 and T3
- Select project P2 ⇒ you see ticket T2
- Create new ticket ⇒ default project is P2



If you create new projects, or change rights so that Projects list appearing in the combo should change, changes will appear only after disconnection/reconnection.







Projects


id


name


type











Show closed items

☐

# id	wbs	project name	type	color	project code	customer name	status	progress	validated end	planned end	done	closed
1	1	project one			001-001	client one	recorded	5 %		25/01/2012	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	1.1	project one - maintenance			001-001-1	client one	recorded	0 %		25/01/2012	<input type="checkbox"/>	<input type="checkbox"/>
3	1.2	project one - development			001-001-2	client one	recorded	30 %		28/10/2011	<input type="checkbox"/>	<input type="checkbox"/>
4	2	project two			002-002	client two	recorded	0 %			<input type="checkbox"/>	<input type="checkbox"/>
5	3	internal project				internal	recorded	0 %			<input type="checkbox"/>	<input type="checkbox"/>
6	3.1	holidays				internal	recorded	0 %			<input type="checkbox"/>	<input type="checkbox"/>

The main area (right side of the screen) is generally divided in two parts : **List area** and Detail area.

The upper part lists all the object (for instance, here are tickets).

On top left part, the number of listed items is displayed (here = 66).

Rapid filtering fields are proposed : "id", "name" and "type" (if significant for the object).

Any change on "id" and "name" will instantly filter data. Search is considered as "contains", so typing "1" in "id" will select "1", "10", "11", "21", "31" and so on.

Selecting a "type" in the combo box will restrict the list to the corresponding type (will request server).

Check the "show closed items" to list also closed items.

For more complex filtering, click on the "filter button"  (see next page for details).

Click on the "print button"  to get a printable version of the list, or  to export it to PDF format.

Click on the "csv export"  to export all the data of the selected items into CSV format file.

Click on the "search button"  to display the textual search area.

Quick search

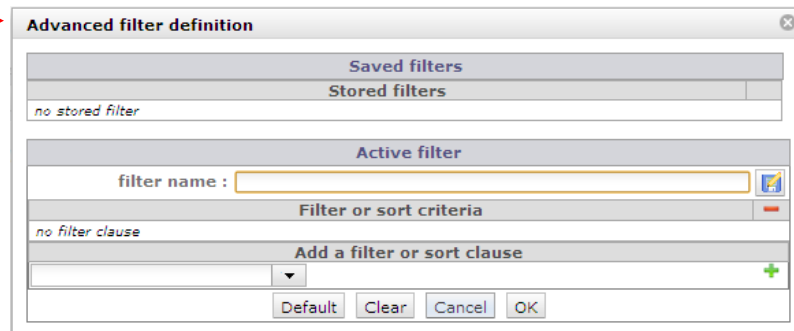
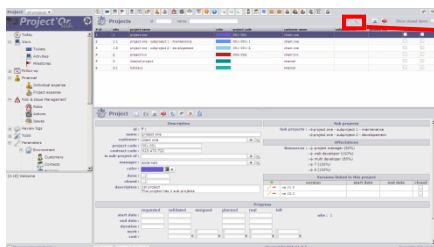
This search will find text in any textual field of items.

Any other current filter (if any) is skipped.

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


The sorting is not always on the displayed name : if the sorted column is linked to a reference list with sort order value, the sorting is executed on this sort value (for instance, here the sorting on the status is executed corresponding to Status sort order value, defined as a logic workflow for status change).

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





For **complex filtering**, click on the “filter button” .

The filter pop-up presents two areas : “Active filter” and “Saved filter”.

Enter new clause in Active filter : in “Add a filter or sort clause”, select the name of the field, the operator and the value for the clause. Then click on  to add the clause to the filter criteria.


The operator can be “sort” to define a sort criteria, then possible values are “ascending” or “descending”.

Click on  on a clause line to remove it.

Click on  on the header of Filter criteria to remove all clauses. This can also be done by clicking the “Clear” button.

When Filter criteria is correct, click on “OK” button to apply the filter to the list.


You can also click “Cancel” button to revert to previous filter.

At any step you can enter a filter name and click on  to save the filter definition.

Click on a Saved filter to retrieve its definition (filter criteria).

Click on  on a saved filter to delete it.

Click on “Default” button to set actual stored filter as default, kept even after disconnection.

When filter is applied, filter button in the list area is checked .



When filter is a list of values (with “amongst” operator), multi-value selection is possible using [CTRL] key.



Filters are defined and stored for a user and a type of item (a screen).

When a filter is applied to a type of item, coming back after moving to another type (another selection in the menu) will apply the previously defined filter.

After disconnection, currently applied filter is lost, but stored filters are saved. Default filter (if selected) is also stored and will be automatically applied on next connection.



Project

Description

id : # 1

name : project one

type : Fixed Price

customer : client one

bill contact :

project code : 001-001

contract code : X23-472-722

is sub-project of :

manager : external1

color :

status : recorded

done : ☐

closed : ☐

description : 1st project
This project has 2 sub-projects

Sub projects

Sub projects : project one - maintenance
 project one - development

Affections

id	resource	rate (%)
1	project manager	80
10	web developer	100
12	multi developer	80

id	contact	rate (%)
14	external business leader one	100
15	external project leader one	100

Versions linked to this project

version	start date	end date	closed
va V1.0			<input type="checkbox"/>
va V2.0			<input type="checkbox"/>

Progress

start date	requested	validated	assigned	planned	real	left
				05/09/2011	05/09/2011	
end date :				25/01/2012		
duration :				1.0		

wbs : 1
progress : 5 %

The **Detail area** present the detail of the selected in the list.

Click on to create new item, to save the changes, or to get a printable version of the detail, to copy the current item, to cancel ongoing changes, to delete the item and to refresh the display.

Some buttons are not clickable when change are ongoing : , , , , , .

button is clickable only when changes are ongoing.

On dependent items (for instance "Notes"), click on (in header) to add new, to edit and to delete.




When changes are ongoing, you can not select another item or another menu item.
Save or cancel ongoing changes first.




Every section is "colapsable" : click on the arrow icon to "collapse"/"expand" the section.





On Combo List fields, users may have access Detail button  .

customer : client one 

If element is selected in the combo, detail of element is displayed :

There, click on the search button  will go to the list of items.


Detail of list element




Description	Projects
id : #1 customer name : client one customer code : 001 closed : <input type="checkbox"/> description :	Projects : project one project one - subproject 1 - maintenance project one - subproject 2 - developement


Contacts
Contacts : external project leader one external business leader one

If no element is selected, list of elements is displayed, allowing to select an item :

There, click on the new button  allows to create a new element

Detail of list element

 **Customers** id name Show closed items ☐

# id	customer name	customer code	closed
3	internal		<input type="checkbox"/>
2	client two	002	<input type="checkbox"/>
1	client one	001	<input type="checkbox"/>



Display of Detail combo is managed by the administrator, through "specific access mode". Anyhow, user can only display, list and create items corresponding to his rights, defined in "access mode to data".



You may receive some information displayed as pop-up on the bottom right corner of the screen.
Three kinds of information may be displayed :

INFORMATION

Information from Admin

Access will be shut down tomorrow from 22:00 to 23:00

remind me in mn

Information comes from :

- Administrator message
- Check for new version of product

WARNING

WARNING - Ticket #1

bug: it does not work

indicator : respect of actual due date/time

target value : 09/09/2011 18:30

warning value : 09/09/2011 17:30

remind me in mn

Warnings come from :

- Indicator calculation
- Administrator message

ALERT

ALERT - Ticket #1

bug: it does not work

indicator : respect of actual due date/time

target value : 09/09/2011 18:30

alert value : 09/09/2011 18:30

remind me in mn

Alerts come from :

- Indicator calculation
- Administrator message

Each message has a title (bold) and a message text.

When coming from indicator calculation, title contains :

- alert type (ALERT or WARNING)
- item type and item id

and message contains :

- indicator description
- target value for indicator (due date, validated work, ...)
- alert or warning value (depending on type of alert) that has been defined as trigger for alert

On alert pop-up, you can select to remind you in a given number of minute (message will close and appear again in the given number of minutes), or just mark it as read to definitively hide it.



Users can select colors Theme to display the interface.

Just go to Menu "Parameters" ⇒ "Users parameters", and select the new theme in the "theme" select list.

New theme is automatically applied when selected.

Just save parameters to retrieve this theme on each new connection.

Administrator defines on parameters file a default Themes that will be applied on Login screen and up until the users selects a specific theme.

The "random" Theme is not really a Theme, it is a functionality to randomly select a Theme on each new connection.



Themes (2/2)

Project'Or_{RIA}

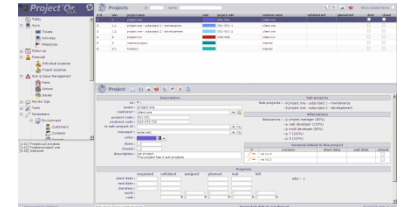
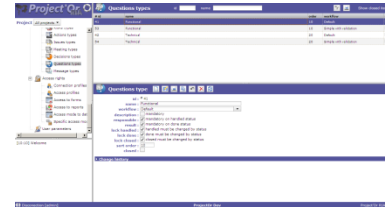
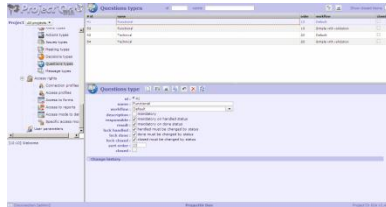
Light

Dark

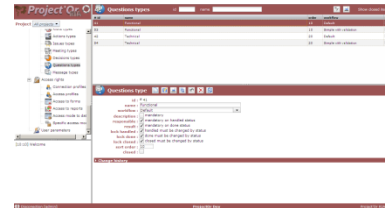
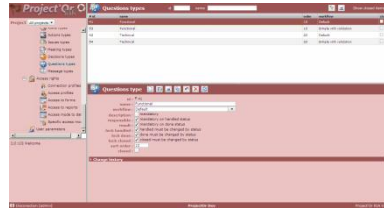
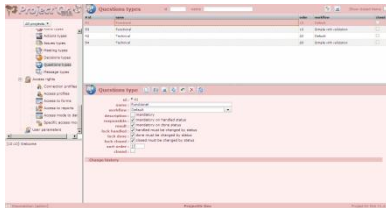
Contrasted

Project'Or RIA

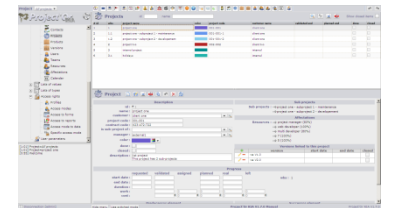
Blue



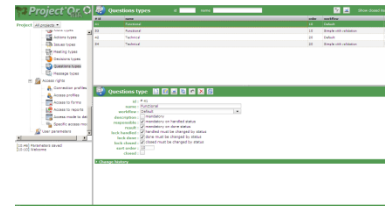
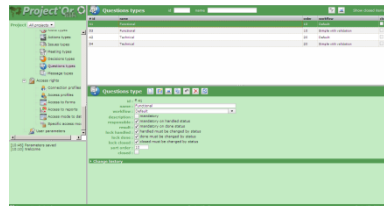
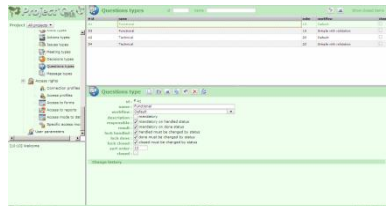
Red



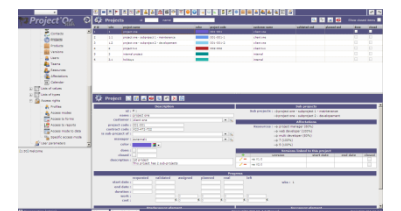
Project'Or RIA Light



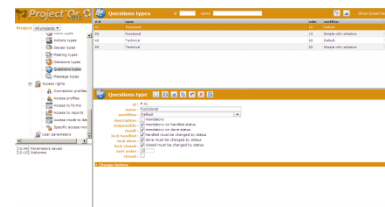
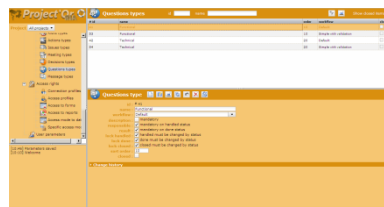
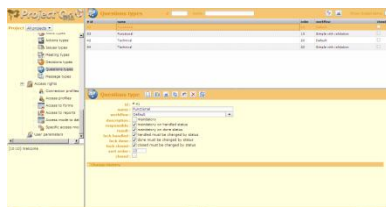
Green



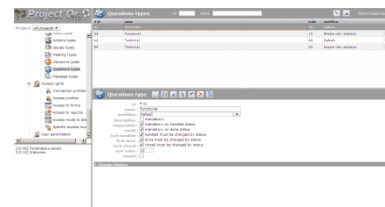
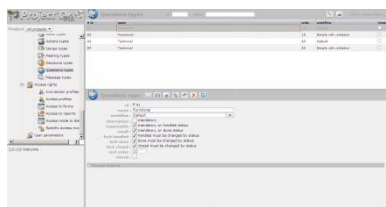
Project'Or RIA Contrasted



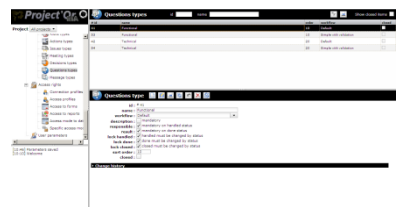
Orange



Grey



Black & White





Project'Or RIA is multilingual.

Each user can choose the language to display all the captions.

Of course, data is displayed as input, no translation is operated.

On the login screen, the locale of the browser is used to display captions.

When connected, the language selected (and saved) by the user is used.

When selecting new language, only refreshed data will use new selected language. For instance, all menu items will be kept in the old language. To actualize, save parameters, disconnect and reconnect.

Administrator can define the default language. This one is used on login screen.

It is also used as long as the connected user has not selected his favorite display language.



All the captions and messages are stored in an Excel file : /tool/i18n/nls/lang.xls.

To change (or correct) any data, on a windows set-up, open the file to its default place, enabling macros.

"Save-as", with the same name (to insure the default repository is the default one).

Click on generate button.

All the corresponding language files are automatically generated, in /tool.i18n/nsl subfolders.

To translate to a new language, update one of the existing columns, test using the corresponding locale, and when completed submit the file to support@toolware.fr, to have the new language integrated in the tool.



Current version manages English, French, German, Spanish and Portuguese.



It may sometimes seem that you are not able to attach a file to your new ticket. In fact, since a user can update a ticket, he is able to insert an attached file. So this is not a question of habilitation.

The reason is that this functionality do not appear during creation. You just have to save first to be able to attach a file.

This rule is valid for all depending items : Attachments, Notes, Assignments, Predecessor elements, Successor elements and links between Risk, Actions and Issues. Just one word : "save" first.



Since V1.3.0, you can rapidly save with [CTRL]+S, like in many office tools.

Every item has a unique Id, automatically generated on creation.

Id is chronologically affected, for all kind of items (Activity, Ticket).

Id is shared for all projects and all types (i.e. incident) of the same kind items (i.e. Ticket).

Reference is displayed after id, automatically generated on creation.

Reference depends on defined format in Global parameters screen.

Default format defines an numbering specific for each project and each type of items.

- | | | |
|---|---------|---------------------------|
| • Create ticket type "incident" on Project 1 | ⇒ Id #1 | ⇒ Reference PRO1-INC-0001 |
| • Create ticket type "incident" on Project 2 | ⇒ Id #2 | ⇒ Reference PRO2-INC-0001 |
| • Create ticket type "anomaly" on Project 1 | ⇒ Id #3 | ⇒ Reference PRO1-ANO-0001 |
| • Create ticket type "incident" on Project 1 | ⇒ Id #4 | ⇒ Reference PRO1-INC-0002 |
| • Create activity type "evolution" on Project 1 | ⇒ Id #1 | ⇒ Reference PRO1-EVO-0001 |
| • Create activity type "evolution" on Project 2 | ⇒ Id #2 | ⇒ Reference PRO2-EVO-0001 |
| • ... | | |



Update specificity

Project'Or
RIA



Since V1.3.0, you can rapidly save with [CTRL]+S, like in many office tools.



When updating an item, only updated fields are stored in the database. This means that if two users are updating different fields of the same item, they don't crush values updates by each other.



Delete specificity



After deleting an item, you will not be able to see it any more.
Data is physically deleted from the database.
Only the update history can then be access through dedicated reports.

Always consider setting an item to “close” status rather than deleting it. You will then not see it on main screens, but will be able to fetch it, using the “show closed item” checkbox in lists, and possibly re-activate it.

Deleting functionality should be reserve to remove invalid newly created items.

Items with existing dependencies can not be deleted.


Examples :

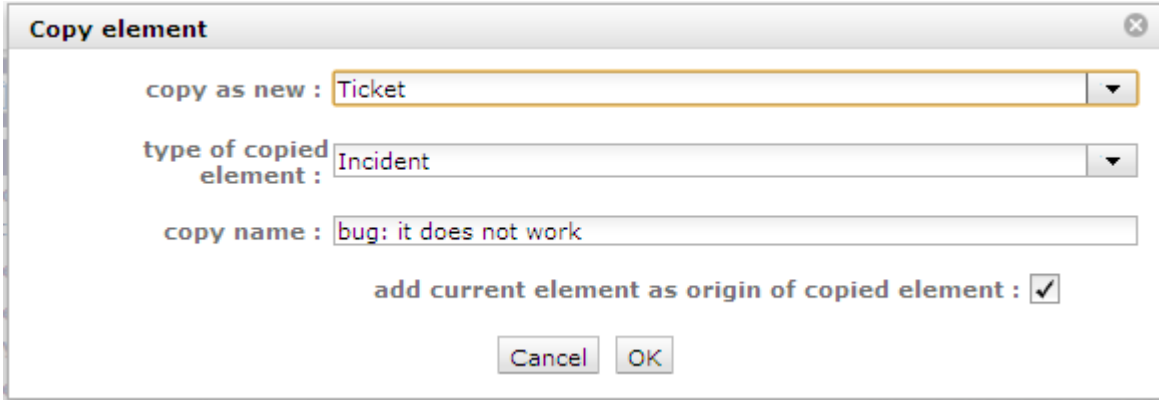
- You can not delete an activity if a resource is assigned to it.
- You can not delete an assignment is real work has been entered (imputation).
- You can not delete a project with existing items.
- ...



Copy specificity

Most simple items (environment parameters, lists, ...) can only be copied “as is” using the copy button .

But for most complex items (Tickets, Activities, ...) it is possible to copy them into new kind of elements. For instance, it is possible to copy a Ticket (the request) into an Activity (the task to manage the request). The way to do it is always through the copy button . But then new form is proposed :



The dialog box titled "Copy element" contains the following fields and controls:

- copy as new :** A dropdown menu with "Ticket" selected.
- type of copied element :** A dropdown menu with "Incident" selected.
- copy name :** A text input field containing "bug: it does not work".
- add current element as origin of copied element :** A checkbox that is checked.
- Buttons:** "Cancel" and "OK" buttons at the bottom.

There, it is possible to select new kind of element, select new type (corresponding to the kind of element), change the name, and select whether the initial element will be indicated as origin of the copied one.

If copy succeeds, the new element is automatically accessed, whatever the kind of element. This means that the list may change to represent the new kind of elements.



The "Today" screen is the first to be displayed on each connection.
It is divided in several parts. Each part can be folded/unfolded with a click on the header.

Messages :

Here are displayed the messages defined in the "message" section.

▼ Messages

Welcome

Welcome to ProjectOr web application

Projects :

A quick overview of the projects status. The projects list is limited to project visibility scope of the connected user.
Progress display is based on work. Counted items can be the "to do" (not done), "not closed" (to do and done) or "all" (to do, done and closed). "to do", "done" and "closed" status are based on corresponding checkboxes.
A progress bar on each item shows part of "to do" (red) compared to "done and closed" (green).
On mouse over the bar, detail of figures is displayed.

▼ Projects

scope of the numbers counted :

Projects	Progress	End date	Late	to do <input checked="" type="radio"/>	not closed <input type="radio"/>	all <input type="radio"/>	Tickets	Activities	Milestones	Actions	Risks	Issues	Questions
project one	14 %	22/05/2012		1			1			1	1	1	1
project one - maintenance	10 %	22/05/2012			1			1					
project one - developement	30 %	30/03/2012			5	1							
project two	100 %				1								

Tasks assigned to / responsible of / issuer or requestor of :

Here are listed, as a "Todo list" all the items for which the connected user is either "assigned to" or "responsible of" or "issuer or requestor of". Click on the name of an item will directly move to it.

► Tasks assigned to

► Tasks responsible of

▼ Tasks issuer or requestor of

Id	Project	Type	Name	Due date	Status	Issuer	Resp.
#1	project one	Incident	bug: it does not work	09/09/2011	in progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>
#1	project one - maintenance	Task	bug fixing	22/05/2012	in progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>
#2	project one - developement	Evolution	Evolution X	26/03/2012	in progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Project is the main entity of Project'Or RIA.

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

You can define some profiles, some will have visibility to all projects, others only to projects they are affected to.

You can also define sub-projects of a project.

This splitting can be functional :

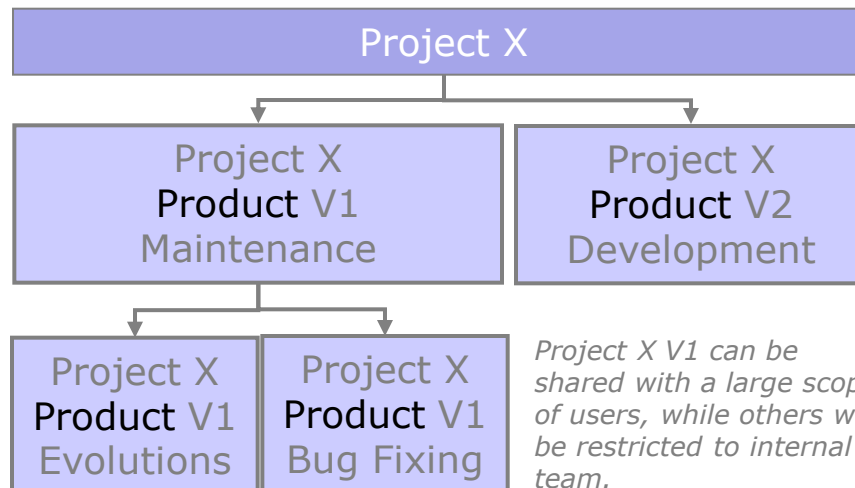
(for instance to split several versions)



- ⇒ Project X
- ⇒ Project X Product V1
- ⇒ Project X Product V2
- ⇒ Project X Product V3

or organizational :

(for instance to manage access rights)



- ⇒ Project X
- ⇒ Project X Product V1 Maint.
- ⇒ Project X Product V1 Evo.
- ⇒ Project X Product V1

Bug.

- ⇒ Project X Product V2 Dev.

Project X V1 can be shared with a large scope of users, while others will be restricted to internal team.



Description

id : # 1

name :

type :

customer :

bill contact :

project code :

contract code :

is sub-project of :

manager :

color :

status :

done : ☐

closed : ☐

description :

Sub projects

Sub projects :

Field	Description
Sub projects	List of the sub-projects of the current project.

Field	Description
Id	Unique Id for the project. Automatically generated on creation.
Name	Short name of the project. Mandatory.
Type	Type of project. Will define billing type for project.
Customer	The customer of the project (see related topic)
Bill contact	Billing contact.
Project code	Code of the project. Informative data.
Contract code	Code of the contract of the project. Several projects may share the save contract code. Informative data.
Is sub-project of	Name of the top project if this project is a sub-project.
Manager	Name of the resource who manages the project (Project Leader).
Color	Color of the project, to be displayed in some repots.
Status	Status of the project.
Done	Flag to indicate that project is been finished. Date of end is saved.
Closed	Flag to indicate that project is archived. Project will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the project. The description can have many lines. The field will auto-extend.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



Affectations			
	id	resource	rate (%)
	1	project manager	80
	10	web developer	100
	12	multi developer	80
	id	contact	rate (%)
	14	external business leader one	100
	15	external project leader one	100

Affectation

project :

project one

resource :

rate (%) :

100

closed :

☐

Cancel

OK

Affectations of user can be directly created from project definition.

Click on to create a new affectation.
A "add affectation" pop up will be displayed.

Click on to update an existing affectation.

Click on to delete the corresponding affectation.

Field	Description
Id	Id of the affectation
Project	Project the resource or contact is affected to. Readonly.
Resource	Name of the resource or contact.
Rate	Rate (in %) of the affectation to the project.
Closed	Flag to indicate that affectation in not active any more, without deleteing it.

Versions linked to this project				
	version	start date	end date	closed
	wa V1.0			<input type="checkbox"/>
	wa V2.0			<input type="checkbox"/>

Versions of products can be directly linked to project.

Click on to create a new link to version.
A "Project - Version link" pop up will be displayed.

Click on to update an existing link to version.

Click on to delete the corresponding link to version.

Project - Version link

project :

project one

version :

start date :

end date :

closed :

☐

Cancel

OK

Field	Description
Project	Current project. Readonly.
Version	Version of product linked to the project.
Start date	Start date for validity of the link
End date	End date for validity of the link
Closed	Flag to indicate that link is not active any more, without deleteing it.



▼ Progress

	requested	validated	assigned	planned	real	left	
start date :	<input type="text"/>	<input type="text"/>		05/03/2012	05/09/2011		wbs : 1
end date :	<input type="text"/>	<input type="text"/>		22/05/2012	<input type="text"/>		progress : 14 %
duration :	<input type="text"/> d	<input type="text"/> d		57	<input type="text"/> d	<input type="text"/> d	
work :		0	103,2	103,9	14,2	89,7	
cost :		€ 26 144	€ 26 354	€ 3 580	€ 22 774		


The progress information will impact Planning calculation, and is also calculated during Planning calculation.
(see related topic)


Field	Description
Requested start date	Wished start date.
Requested end date	Wished end date.
Requested duration	Wished duration (in working days).
Validated start date	Committed start date : project should not start later.
Validated end date	Committed end date : project should not end later.
Validated duration	Committed duration : project should not last longer.
Validated work / cost	Committed work / cost : total work / cost of the project should not be more.
Assigned work / cost	Sum of all the assigned work / cost for the assignments on the project. Read only.
Planned start date	Calculated start date, taking into account all the constraints (see related topic). Read only.
Planned end date	Calculated end date, taking into account all the constraints (see related topic). Read only.
Planned duration	Calculated duration, taking into account all the constraints (see related topic). Read only. "planned duration" = "planned end date" - "planned start date" (in working days, whatever the workload unit)
Planned work / cost	Calculated total work / cost needed to complete the task. Read only. "planned work" = "real work" + "left work" / "planned cost" = "real cost" + "left cost"
Real start date	Date of the first real work input entered by an resource on the "real work allocation" screen. Read only.
Real end date	If project is "done", date of the last real work input entered by an resource on the "real work allocation" screen. Read only.
Real duration	Calculated duration : "real duration" = "real end date" - "real start date" (in working days). Read only.
Real work / cost	Sum of all the work / cost really spent on the project , entered by resources on the "real work allocation" screen. Read only.
Left work / cost	Left work / cost to complete the project . Sum of the left work / cost on the activities of the project. Read only. Read only.
Wbs	Work Breakdown Structure. Hierarchical position of the project in the global planning.
Progress	Actual progress of the work on project, in percent. Progress = "real work" / "planned work" * 100.



Predecessor element				Successor element					
+	type	id	name	status	+	type	id	name	status
						Project	#4	project two	recorded

Projects can have predecessors and successors, to generate dependencies. Predecessors and successors can be Activities, Milestones or Projects.

Click  on the corresponding section to add a predecessor or successor. A "add predecessor" or "add successor" pop-up will be displayed. Select the type of element to add as predecessor or successor. The list of items below will then be automatically updated. Select the item in the list and validate (OK). Recursive loops are controlled on saving.

Click on  to delete the corresponding dependency.

If Project A is predecessor of Project B, Project B is automatically successor of Project A.

Pay attention to the heavy constraints that adding a predecessor will bring to the project. You should for instance restrict this use to link sub-projects of a main project.

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

Add a Successor to element Project #000001

linked element type :

linked element :

Field	Description
Type	"Activity", "Milestone" or "Project"
Id	The id of the predecessor or successor.
Name	Name of the predecessor or successor.
Status	Actual status of the predecessor or successor.



A document is a referential element that give description to a product or a project.

A global definition of a document refers to any kind of information.

This means that a document can be a file (text document, image, ...) or any non digital item (paper mail, fax, ...), or non file digital item (email, ...).

In Project'Or RIA, documents will reference files item, that will be stored in the tool as versions.

So a document will always refer to a directory where the file is stored.

The Document item describes general information about the document.

The file is not stored at this level.

A document can evolve and a new file is generated at each evolution.

So files are stored at document version level.

A document can evolve following 4 ways defined as versioning type :

Evolutionary :

Version is a standard Vx.y format.

It is the most commonly used versionning type.

Major updates increase x and reset y to zero.

Minor updates increase y.

Chronological :

Version is a date.

This versionning type is commonly used for periodical documents

For instance : weekly boards.

Sequential :

Version is a sequential number.

This versionning type is commonly used for recurring documents

For instance : Meeting reviews.

Custom :

Version is manually set.

This versionning type is commonly used for external documents, when version is not managed by the tool, or when the format cannot fit any other versionning type.



Description

id : # 1 001-001-GENCON-1

project :

product :

directory :

type :

name :

author :

closed : ☐

Field	Description
Id	Unique Id for the document. Reference is displayed after id.
Project	The project concerned by the document. A document must be linked either to a project (for project documentation) or to a product.
Product	The product concerned by the document. A document must be linked either to a project or to a product (for product document).
Directory	Place where the document is stored to organise document structure. The directory also defines the place where files will be physically stored.
Type	Type of document.
Name	Short description of the document. Mandatory.
Author	User or Resource or Contact who created the document. Positionned by default as the connected user. Can be changed (for instance if the author is not the current user).
Closed	Flag to indicate that document is archived. Document will not appear in lists any more, unless "show closed" is checked.

Lock

locked : ☐

locked by :

locked since :

Field	Description
Lock / Unlock this document	Button to lock or unlock the document to reserve it for editing. When document is locked it cannot be modified. Only the user who locked the document, or a user with privilege to unlock any document, can unlock it.
Locked	Flack to indicated that the document is locked. Readonly.
Locked by	User who locked the document (if locked). Readonly.
Locked since	Date and time when document was locked (if locked). Readonly.

Field	Description
Change History	(see related topic)



Versions

versioning type :

last version :

status :

	version	date	status	file
	V1.0	16/03/2012	validated	ARD-Architecture dossier-V1.0.docx
	V1.1_draft1	16/03/2012	in progress	ARD-Architecture dossier-V1.1.docx

Field	Description
Versionning type	Type of versionning for the document. This will impact the version number format for versions.
Last version	Caption of the last version of the document
Status	Status of the last version of the document

Versions can be linked to document.

Click on to add a new version. A "Document version" pop up will be displayed.

Click on to modify the document version.

Click on to delete the version.

Document version

file :

last version :

update : ☒ major ☐ minor ☐ no ☐ draft

new version :

date :

status :

is a reference : ☐

description :

Field	Description
File	Locale file that will be uploaded as new version. Mandatory on creation of version.
Last version	Caption of the last existing version.
Update	Importance of the update concerned by the new version. A version can have a draft status, that may be removed afterwards.
New version	New caption for the created version.
Date	Date of the version
Status	Current status of the version.
Is a reference	Flag to set that this version is the new reference of the document. 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.
Description	Description of the version. May be used to describe updates brought by the version.



A ticket is a kind of task that can not be unitarily planned.

It is generally a short time activity for a single ticket, that is interesting to follow unitarily to give a feedback to the issuer or to keep trace of result.

It can be globally planned as a general activity, but not unitarily.

For instance, bugs should be managed through tickets :

- you 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.



Description

id : # 1 001-001-INC-1

project :

ticket type :

name :

external reference :

urgency :

creation date/time :

issuer :

requestor :

origin :

duplicate ticket :

context :

original version :

description :

Field	Description
Id	Unique Id for the ticket. Reference is displayed after id.
Project	The project concerned by the ticket. Mandatory.
Ticket type	Type of ticket.
Name	Short description of the ticket. Mandatory.
External reference	External reference of the ticket. Free input. Can be reference of the ticket in an extern bug tracker.
Urgency	Urgency for treatment of the ticket, as requested by the issuer.
Creation date/time	Creation timestamp. Automatically generated on creation. Can be changed.
Issuer	User who created the ticket. Can be changed (for instance if creator is not the issuer).
Requestor	Contact at the origin of the ticket.
Origin	Origin element (may be automatically inserted on copy).
Duplicate ticket	Link to another ticket, to link duplicate tickets.
Context	List of 3 items describing the context of the ticket. Contexts are initialized for IT Projects as "Environment", "OS" and "Browser". This can be easily changed in the "Contexts" definition screen
Original version	Version of product where ticket has been identified.
Description	Complete description of the ticket. The description can have many lines. The field will auto-extend.



Fields

Ticket (3/3)

Project'Or
RIA

Treatment

planning activity :

status :

responsible :

criticality :

priority :

initial due date/time :

actual due date/time :

estimated work :

real work :

left work :

handled : ☒

done : ☐

closed : ☐

target version :

result :

Field	Description
Planning Activity	Activity where global wok for this kind of ticket is planned. Work on the ticket will be included on this activity.
Status	Actual status of the ticket. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none">• automatically sending emails,• automatically update "Handled", "Done" or "Closed",• some fields may become mandatory (see related topic) .
Responsible	Resource who is responsible for the treatment of the ticket.
Criticality	Importance of impact on the system, as determined after analysis.
Priority	Priority of treatment. Automatically calculated from Urgency and Criticality. Can be changed manually.
Initial due date	Initial target date for solving the ticket. Initial due date may be automatically calculated depending on definition of ticket delay, for given ticket type and urgency.
Actual due date	Actual target date for solving the ticket. Automatically initialized to Initial due date.
Estimated work	Estimated workload needed to treat the ticket.
Real work	Real workload spent to treat the ticket
Left work	Left workload needed to finish the ticket. Autoimatically calculated as Estimated - Real, and set to zero when Ticket is done.
Handled	Flag to indicate that ticket has been taken into account. Timestamp of handling is saved. This generally means that Responsible has been named.
Done	Flag to indicate that ticket has been treated. Timestamp of completion is saved.
Closed	Flag to indicate that ticket is archived. Ticket will not appear in lists any more, unless "show closed" is checked.
Target version	The target version of the product that will deliver the object of the ticket.
Result	Complete description of the resolution of the ticket. The result can have many lines. The field will auto-extend.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



An activity is a kind of task that must be planned, or that regroups other activities.

It is generally a long time activity, that will be assigned to one or more resources.
Activities will appear on Gantt planning view.

For instance, you can manage as activities :

- planned tasks,
- change requests,
- phases,
- versions or releases,
- ...

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.

Resources are can be assigned to activities. This means that some wok is planned on this activity for the resources. Only resources affected to the project of the activity can be assigned to the activity.

Activities can have predecessors and successors, to generate dependencies. Predecessors and successors can be Activities, Milestones or Projects.

If activity A is predecessor of activity B, activity B is automatically successor of activity A.

Predecessors and successors must belong to the same project or be a project.



It is generally advised to split activities so that each unitary one is 1 to 10 days long.

Shorter tasks will lead to unnecessary heavy and complex planning.

Longer tasks will be difficult to follow and estimate in progress : the resources will have difficulties to estimate left work.



Description

id : # 1 001-001-1-TAS-1

project :

activity type :

name :

external reference :

creation date :

issuer :

requestor :

origin :

description :

Treatment

parent activity :

status :

responsible :

handled : ☒

done : ☐

closed : ☐

target version :

result :

Field	Description
Id	Unique Id for the activity. Reference is displayed after id.
Project	The project concerned by the activity. Mandatory.
Activity type	Type of activity.
Name	Short description of the activity. Mandatory.
External reference	External reference of the activity. Free input. Can be reference of the activity in an extern tool.
Creation date	Creation date. Automatically generated on creation. Can be changed.
Issuer	User who created the activity. Can be changed (for instance if creator is not the issuer).
Requestor	Contact at the origin of the activity.
Origin	Origin element (may be automatically inserted on copy).
Description	Complete description of the activity. The description can have many lines. The field will auto-extend.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)

Field	Description
Parent Activity	Parent activity for grouping purpose.
Status	Actual status of the activity. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none"> • automatically sending emails, • automatically update "Handled", "Done" or "Closed", • some fields may become mandatory (see related topic) .
Responsible	Resource who is responsible for the treatment of the activity. Responsible must be a resource affected to the project.
Handled	Flag to indicate that activity has been taken into account. Date of handling is saved. This generally means that Responsible has been named.
Done	Flag to indicate that activity has been treated. Date of completion is saved.
Closed	Flag to indicate that activity is archived. Activity will not appear in lists any more, unless "show closed" is checked.
Target version	The target version of the product that will deliver the object of the activity.
Result	Complete description of the treatment done on the activity. The result can have many lines. The field will auto-extend.



Assignment					
+	resource	rate (%)	assigned (d)	real (d)	left (d)
	web developer (Developer)	50	75,00	8,50	66,50
	project manager (Manager)	20	10,00	0,00	10,00

Resources can be assigned to activities.
Click on to assign a new resource. An assignment pop up will be displayed.

Click on to modify the assignment.

Click on to delete the assignment. If real work exists for an assignment, it can not be deleted.

It is possible to assign several times the same resource to an activity. It can for instance be used to add extra work without modifying initial assignment.

Click on the resource name will directly move to the resource.

Assignment

resource :

function :

cost :

rate (%) :

assigned work :

real work :

left work :

planned work :

comments :

€ / d

100

0

0

0

0

Cancel

OK

Field	Description
Resource	Name of the resource assigned to the activity.
Function	The function of the resource on this assignment. This will determine the daily cost of the assignment.
Cost	The daily cost of the assignment. Automatically updated from the function of the resource.
Rate	The max rate (in %) to plan the resource on the activity. For instance, if rate is 50%, the resource will not be planned more than half days on the activity.
Assigned work	Work initially planned to complete the task.
Real work	Real work entered by the resource on his weekly report, on the "real work allocation" screen.
Left work	Work left to complete the task. Calculated as "Assigned Work" - "Real Work". Must be updated by the resource on the "real work allocation" screen to reflect the really estimated work needed to complete the task.
Planned work	The new total work planned to complete the task. "planned work" = "real work" + "left work"
Comments	Any comment on the affectation. When a comment exists, the icon will appear on the Assignment section, and on the description of the activity on the "real work allocation" screen. Moving the mouse over the description will display the comment.



▼ Progress

	requested	validated	assigned	planned	real	left	
start date :	<input type="text"/>	<input type="text" value="01/09/2011"/>		<input type="text" value="10/10/2011"/>	<input type="text" value="05/03/2012"/>		priority : <input type="text" value="500"/>
end date :	<input type="text"/>	<input type="text" value="31/12/2011"/>		<input type="text" value="25/01/2012"/>	<input type="text"/>		planning : <input type="text" value="regular in half days"/> ▼
duration :	<input type="text" value="88"/> d	<input type="text" value="88"/> d		<input type="text" value="79"/> d	<input type="text" value="8,5"/> d	<input type="text" value="76,7"/> d	wbs : 1.1.1
work :	<input type="text" value="0"/> d	<input type="text" value="85,2"/> d	<input type="text" value="85,2"/> d	<input type="text" value="8,5"/> d	<input type="text" value="76,7"/> d	<input type="text" value="19 674"/> €	progress : 10 %
cost :		<input type="text" value="5 000"/> €	<input type="text" value="21 544"/> €	<input type="text" value="1 870"/> €	<input type="text" value="19 674"/> €		

The progress information will impact Planning calculation, and is also calculated during Planning calculation.


Field	Description
Requested start date	Wished start date.
Requested end date	Wished end date.
Requested duration	Wished duration (in working days).
Validated start date	Committed start date : activity should not start later.
Validated end date	Committed end date : activity should not end later.
Validated duration	Committed duration : activity should not last longer.
Validated work / cost	Committed work / cost : total work / cost of the activity should not be more.
Assigned work / cost	Sum of all the assigned work / cost for the assignments on the activity. Read only.
Planned start date	Calculated start date, taking into account all the constraints (see related topic). Read only.
Planned end date	Calculated end date, taking into account all the constraints (see related topic). Read only.
Planned duration	Calculated duration, taking into account all the constraints (see related topic). Read only. "planned duration" = "planned end date" - "planned start date" (in working days, whatever the workload unit)
Planned work / cost	Calculated total work / cost needed to complete the task. Read only. "planned work" = "real work" + "left work" / "planned cost" = "real cost" + "left cost"
Real start date	Date of the first real work input entered by an resource on the "real work allocation" screen. Read only.
Real end date	If activity is "done", date of the last real work input entered by an resource on the "real work allocation" screen. Read only.
Real duration	Calculated duration : "real duration" = "real end date" - "real start date" (in working days). Read only.
Real work / cost	Sum of all the work / cost really spent on the activity, entered by resources on the "real work allocation" screen. Read only.
Left work / cost	Left work / cost to complete the activity. Sum of the left work / cost on the assignments on the activity. Read only. Read only.
Priority	Priority of the activity. Smaller priority activities are planned first (see related topic).
Planning	Planning mode for the activity, forcing the way the activity will be planned (see related topic).
Wbs	Work Breakdown Structure. Hierarchical position of the activity in the global planning.
Progress	Actual progress of the work on activity, in percent. Progress = "real work" / "planned work" * 100.




Predecessor element				
+	type	id	name	status
-	Activity	#3	Evolutoin X - Analysis	recorded

Successor element				
+	type	id	name	status
-	Activity	#5	Evolution X - Tests	recorded

Activities can have predecessors and successors, to generate dependencies. Predecessors and successors can be Activities, Milestones or Projects.

Click  on the corresponding section to add a predecessor or successor. A "add predecessor" or "add successor" pop up will be displayed. Select the type of element to add as predecessor or successor. The list of items below will then be automatically updated. Select the item in the list and validate (OK). Multi-line selection is possible using [CTRL] key while clicking. Recursive loops are controlled on saving.

Click on  to delete the corresponding dependency.

If activity A is predecessor of activity B, activity B is automatically successor of activity A.

Predecessors and successors must belong to the same project or be a project.

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

Field	Description
Type	"Activity", "Milestone" or "Project"
Id	The id of the predecessor or successor.
Name	Name of the predecessor or successor.
Status	Actual status of the predecessor or successor.

Add a Successor to element Milestone #1

linked element type :

#6 - Evolution Y
#5 - Evolution X - Tests
#4 - Evolution X - Development
#3 - Evolutoin X - Analysis
#2 - Evolution X

linked element :



Milestone (1/4)

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 transition from one phase to the following one.

Opposite to Activities, Milestones have no duration and no work.

In Project'Or RIA, two main types of Milestones exist depending on selected Planning Mode :

- **floating milestone** : the milestone will automatically move to take into account dependencies,
- **fixed milestone** : the 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.



Description

id : # 1 001-001-2-KEY-1

project :

milestone type :

name :

creation date :

issuer :

origin :

description :

Treatment

parent activity :

status :

responsible :

handled : ☐

done : ☐

closed : ☐

target version :

result :

Field	Description
Id	Unique Id for the milestone. Reference is displayed after id.
Project	The project concerned by the milestone. Mandatory.
Milestone type	Type of milestone.
Name	Short description of the milestone. Mandatory.
Creation date	Creation date. Automatically generated on creation. Can be changed.
Issuer	User who created the milestone. Can be changed (for instance if creator is not the issuer).
Origin	Origin element (may be automatically inserted on copy).
Description	Complete description of the milestone. The description can have many lines. The field will auto-extend.

Field	Description
Parent Activity	Parent activity for grouping purpose.
Status	Actual status of the milestone. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none"> • automatically sending emails, • automatically update "Handled", "Done" or "Closed", • some fields may become mandatory (see related topic) .
Responsible	Resource who is responsible for the treatment of the milestone.
Handled	Flag to indicate that milestone has been taken into account. Date of handling is saved. This generally means that Responsible has been named.
Done	Flag to indicate that milestone has been treated. Date of completion is saved.
Closed	Flag to indicate that milestone is archived. Milestone will not appear in lists any more, unless "show closed" is checked.
Target version	The target version of the product that will deliver the object of the milestone.
Result	Complete description of the treatment done on the milestone. The result can have many lines. The field will auto-extend.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



▼ Progress

due date : requested validated planned 21/10/2011 real planning :
progress : 0 % wbs : 1.2.1.4


Field	Description
Requested due date	Wished end date.
Validated due date	Committed end date : milestone should not end later.
Planned due date	Calculated end date, taking into account all the constraints (see related topic). Read only.
Real due date	Real end date, when milestone is set to "done".
Planning	Planning mode for the milestone , forcing the way the milestone will be planned (see related topic).
Wbs	Work Breakdown Structure. Hierarchical position of the activity in the global planning.




Predecessor element				
+	type	id	name	status
-	Activity	#5	Evolution X - Tests	recorded

Successor element				
+	type	id	name	status
-	Activity	#6	Evolution Y	recorded

Milestones can have predecessors and successors, to generate dependencies. Predecessors and successors can be Activities, Milestones or Projects.

Click  on the corresponding section to add a predecessor or successor. A "add predecessor" or "add successor" pop up will be displayed. Select the type of element to add as predecessor or successor. The list of items below will then be automatically updated. Select the item in the list and validate (OK). Multi-line selection is possible using [CTRL] key while clicking. Recursive loops are controlled on saving.

Click on  to delete the corresponding dependency.

If activity A is predecessor of activity B, activity B is automatically successor of activity A.

Predecessors and successors must belong to the same project or be a project.

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

Add a Successor to element Milestone #1

linked element type :

#6 - Evolution Y
#5 - Evolution X - Tests
#4 - Evolution X - Development
#3 - Evolution X - Analysis
#2 - Evolution X

linked element :

Cancel

OK

Field	Description
Type	"Activity", "Milestone" or "Project"
Id	The id of the predecessor or successor.
Name	Name of the predecessor or successor.
Status	Actual status of the predecessor or successor.



Action (1/3)

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 todo list.

The actions are the main activities of the risk management plan.
They must be regularly followed-up.



Description

id : # 1 001-001-PRO-1

project :

action type :

name :

creation date :

issuer :

priority :

description :

Treatment

status :

responsible :

initial due date :

planned due date :

handled : ☐

done : ☐

closed : ☐





result :

Field	Description
Id	Unique Id for the action. Reference is displayed after id.
Project	The project concerned by the action. Mandatory.
action type	Type of action.
Name	Short description of the action. Mandatory.
Creation date	Creation date. Automatically generated on creation. Can be changed.
Issuer	User who created the action. Can be changed (for instance if creator is not the issuer).
Priority	Priority requested to the treatment of the action.
Description	Complete description of the action. The description can have many lines. The field will auto-extend.

Field	Description
Status	Actual status of the action. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none"> • automatically sending emails, • automatically update "Handled", "Done" or "Closed", • some fields may become mandatory (see related topic) .
Responsible	Resource who is responsible for the treatment of the action.
Initial due date	Initially expected end date of the action.
Planned due date	Updated end date of the action.
Handled	Flag to indicate that action has been taken into account. Date of handling is saved. This generally means that Responsible has been named.
Done	Flag to indicate that action has been treated. Date of completion is saved.
Closed	Flag to indicate that action is archived. Action will not appear in lists any more, unless "show closed" is checked.
Result	Complete description of the treatment of the action. The result can have many lines. The field will auto-extend.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



Linked Risks			
	id	name	status
	#1	Performance	recorded
Linked Issues			
	id	name	status
	#1	No environment for performance testing	recorded


Field	Description
Id	Id of the linked element.
Name	Name of the linked element.
Status	Actual status of the linked element.

Actions can be linked to risks :

- risk mitigation actions
- impact mitigation actions

Actions can be linked to issues :


- when a risk occurs it becomes an issue

Click  on the corresponding section to add a link to a risk or an issue.

A "add link" pop up will be displayed.

Select the linked element in the list and validate (OK).

Multi-line selection is possible using [CTRL] key while clicking.

Click on  to delete the corresponding link.

If Action A is linked to Risk R and Issue I, Issue I and Risk R are automatically linked to Action A.

Add a link between element Action #1 and element Risk

linked element type : Risk

#1 - Performance

linked element :

Cancel OK

Linked risks and issues must belong to the same project.

Click on the name of a risk or of an issue will directly move to it.



Real work allocation

This screen is devoted to input of real work.
The input is for one resource, on a weekly basis.

resource year week

Depending on rights management, users can only select themselves as a resource, or select any resource affected to a managed project.
Just changing year and/or week will display the corresponding sheet.

analyst B - week 2011-35					29/08/2011 - 04/09/2011							02/09/2011	
task	start	end	assigned	real	Mo 29	Tu 30	We 31	Th 01	Fr 02	Sa 03	Su 04	left	planned
<input type="checkbox"/> project one													
<input type="checkbox"/> project one - development													
<input type="checkbox"/> Evolution X													
Evolution X - Analysis	05/09/2011	08/09/2011	5,0	2,5					1,00			2,5	5,0
Evolution X - Tests	12/09/2011	14/09/2011	3,0	0,0								3	3,0
					0	0	0	0	0	0	0		

Left work is automatically decreased on input of real work, but it is important that resources think of updating this data to reflect the really estimated left work. This way, planning can be efficient.
The cost corresponding to the work is automatically updated to the assignment, activity and project.

The icon indicates there is a comment on the affectation. Just move the mouse over the activity to see the comment.

One line is displayed for each affectation, displaying the name of the activity.
As it is possible to affect several times the same resource on one activity, it is possible to have several lines for the same activity, with the same name.

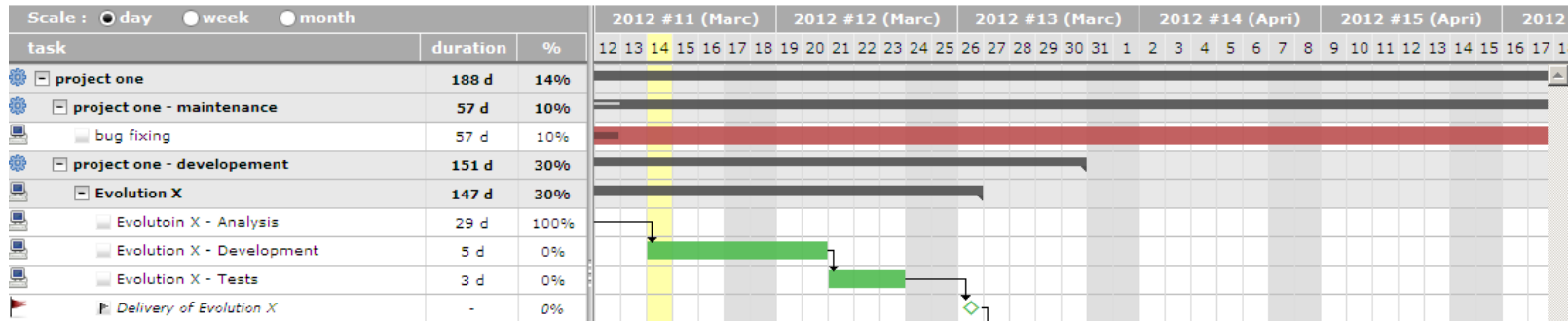
Planned work is indicated over each input cell, on top right corner, in light blue color.
This data can be hidden un-checking the corresponding checkbox.

Show planned work ☒



Planning (1/4)

Planning is displayed as a Gantt chart, showing dependencies between tasks.



Overdue tasks appear in red, others in green.
Milestones appear as squares, filled if completed, empty if not.

You can change the scale to have a daily, weekly or monthly view of the chart.

Scale : ☒ day ☐ week ☐ month

You can select to show tasks' WBS before the names.

show WBS ☐

You can select to show resource name or initials (depending on parameter) on right on tasks.

Show resources ☐

You can change the starting **Display from** 14/03/2012 or ending **Display to** date to display the chart.

To recalculate the planning, click on . Calculation is not automatic.

You then have to select the project to re-calculate, and the start date for the new planning.

Planning calculation for project

project :

start date :



If a resource is assigned to several projects, re-calculation for one will not impact the planning for the others, so new calculation will only use available time slots.
Use correct resource affectation rate to manage multi-projects affectations.



Planning is calculated "as simply as possible".

This means that no complex algorithm, with high level mathematic formula, is involved. The principle is simply to reproduce what you could do on your own, with a simple Excel sheet, but automatically.

Planning is Cross-Project, through affectation rate on the projects.

All the left work is planned, from starting date, to the max date to be able to plan the work. Calculation is executed task by task, ordering thanks to :

- dependencies (if an activity has a predecessor, the predecessor is calculated first),
- planning mode : regular between dates are planned first
- priority : the smaller values are calculated first
- wbs : smaller wbs are planned first, so that planning is done from top to bottom of gantt

Planning will distribute left work on future days, taking into account several constraints :

A resource has a capacity

Most of the time Capacity = 1 FTE (1 full time equivalent), but it may be more (if the resource is not a person but a team) or less (if the person work only partial time).

A resource is affected to a project, at a certain rate

If resources are not shared between projects, so rate will probably always be 100%.

But if resources are shared, then rate could be less than 100%. If a resource is equally shared between two projects, then each project should enter a rate of 50%. This will lead to control that planning for each project will not overtake rate capacity, so that first project planning its activity will not take all the availability of the resource.

Project affectation capacity is controlled on a weekly basis. This means that planning for a project (including sub-projects) will not be more than (Resource Capacity) x (Resource affectation rate) x 5 for a given week.



A resource is assigned to an activity, at a certain rate

By default, assignment rate is 100%. But it may be less. This means that planning will keep some availability for other tasks.

Assignment capacity is controlled on a daily basis. This means that planning for an activity will not be more than (Resource Capacity) x (Resource assignment rate) for a given day.

An activity has dependencies

An activity will always be planned after its predecessors (and this is recursive).

An activity has a priority and planning mode

Activity with lower priority will be planned first (after taking account of dependencies).

Default priority is 500 (medium).

Possible Planning modes are :

- **As soon as possible:** Default planning behavior. Task is planned to finish as soon as possible
- **As late as possible:** Task is planned from end to start.
Validated end date must be set-up
- **Regular between dates:** Planning will be equally dispatched from start to end. This mode is best fitted for management activity of recurrent activities not easy to precisely plan.
Validated start date and Validated end date must be set-up
- **Regular in full days:** Same as above but planning will try to fill full days activity and not partial activity every day.
- **Regular in half days:** Same as above but planning will try to fill half days activity.
- **Fixed duration:** Similar to regular, but with no validated dates. The activity is "floating" depending on predecessors. The duration of this activity will always be kept, even if no work is assigned or left.

A milestone also has a planning mode, possible Planning modes are :

- **Floating:** milestone will move depending on dependencies
- **Fixed:** milestone will never move from fixed date



Planning is based on Progress elements :

- start date,
- end date,
- duration,
- work,

declined on several levels:

- requested,
- validated,
- assigned (only for work),
- planned,
- real,
- left (only for work).

"Requested" and "Validated" are "read/write", as committed elements.

"Assigned work" is directly calculated through assignment to activity (sum of work).

"Planned" data is calculated through planning functionality (and is "read only").

"Real" data is calculated through imputation data (real work) and "real end date" also depends on status of the activity.

"Left work" is directly what the user input in imputation form.

So, in "Progress" section (of Activity or Project) columns "planned", "real" and "left" are "read only".



Report

category

- work
- planning
- tickets**
- current status
- costs
- change history

Select the Category of report in the List.
This will update the "report" list

report

- yearly report for tickets**
- yearly report for tickets by type
- report for tickets by qualifying - weekly
- report for tickets by qualifying - monthly
- report for tickets by qualifying - yearly
- report for tickets by qualifying - global
- report for openned tickets - weekly
- report for openned tickets - monthly
- report for openned tickets - yearly
- report for openned tickets - global

Select the report in the List.
This will display specific parameters for the report.

parameters

project : holidays

year : 2010

ticket type :

requestor :

issuer :

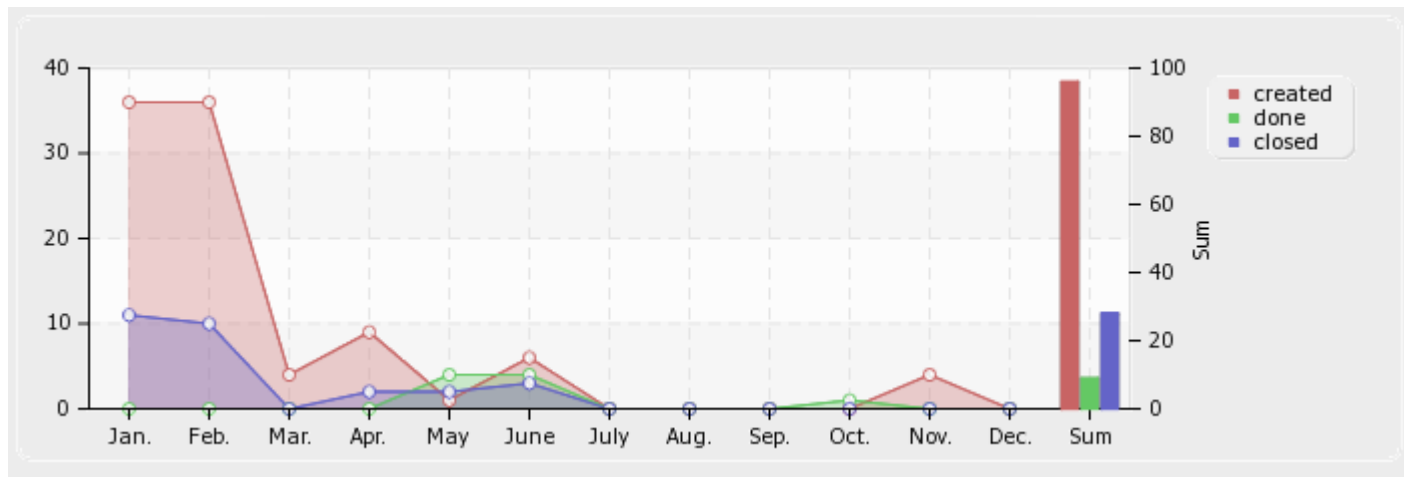
responsible :

Update the parameters to get the information you need.

Click on to display the report.

Click on to get a printable version of the report.

Click on to export the report as PDF format.





Individual Expense (1/3)

Project'Or
RIA

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

id : # 1 001-001-EXP-1

project :

resource :

type :

name :

description :

Treatment

status :

planned date :

planned amount : €

real date :

real amount : €

closed : ☐

Field	Description
Id	Unique Id for the expense. Reference is displayed after id.
Project	The project concerned by the expense. Mandatory.
Resource	Resource concerned by the expense.
Type	Type of expense.
Name	Short description of the expense. Mandatory.
Description	Complete description of the expense. The description can have many lines. The field will auto-extend.

Field	Description
Status	Actual status of the expense. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none"> • automatically update "Closed", • some fields may become mandatory (see related topic) .
Planned date	Planned date of the expense. When planned date is set, planned amount must also be set.
Planned amount	Planned amount of the expense. This will help to have an overview of project total costs, even before expense is realized. When planned amount is set, planned date must also be set.
Real date	Real date of the expense. When real date is set, real amount must also be set.
Real amount	Real amount of the expense. If detail lines are entered, real amount is automatically calculated as sum of detail amounts, and is then locked.
Closed	Flag to indicate that expense is archived. Expense will not appear in lists any more, unless "show closed" is checked.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



Detail					
	date	name	type	detail	amount
	05/03/2012	Travel to London - Plane	justified expense		945,00 €
	05/03/2012	Lunch	lunch for guests	3,00 guests x 32,00 €/guest	96,00 €
	05/03/2012	Travel to Airport	travel by car	42,00 km x 0,54 €/km	22,68 €

Detail of individual expense can be entered line by line :

Click on the corresponding section to add a detail line.

A "Expense detail" pop up will be displayed.

Click on to modify an existing detail line.

Click on to delete the corresponding link.

When a line is entered, expense real amount is automatically updated to sum of lines amount.

Expense detail #1

name :

travel by car

date :

12/12/2010

type :

travel by car

327

km

x

0,54

€/km

amount :

176,58

€

Cancel

OK

Field	Description
Name	Name of the detail
Date	Date of the detail. This allows to input several items, during several days, for the same expense, to have for instance one expense per travel or per month.
Type	Type of expense detail. Depending on type, new fields will appear to help calculate of amount.
Amount	Amount of the detail. Automatically calculated from fields depending on type. May also be input for type "justified expense".



Project Expense (1/2)

Project'Or
RIA

A project expense stores information about project costs that are not resource costs.

This can be used for all kind of project cost :

- Machines (rent or buy)
- Softwares
- Office
- Any logistic item



Description

id : # 2 001-001-MAC-1

project :

type :

name :

description :

Treatment

status :

planned date :

planned amount : €

real date :

real amount : €

closed : ☐

Field	Description
Id	Unique Id for the expense. Reference is displayed after id.
Project	The project concerned by the expense. Mandatory.
Type	Type of expense.
Name	Short description of the expense. Mandatory.
Description	Complete description of the expense. The description can have many lines. The field will auto-extend.

Field	Description
Status	Actual status of the expense. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none">• automatically update "Closed",• some fields may become mandatory (see related topic) .
Planned date	Planned date of the expense. When planned date is set, planned amount must also be set.
Planned amount	Planned amount of the expense. This will help to have an overview of project total costs, even before expense is realized. When planned amount is set, planned date must also be set.
Real date	Real date of the expense. When real date is set, real amount must also be set.
Real amount	Real amount of the expense. When real amount is set, real date must also be set.
Closed	Flag to indicate that expense is archived. Expense will not appear in lists any more, unless "show closed" is checked.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



A term is a planned trigger for billing.


Terms are mandatory to bill "Fixed price" project.

You can define as many terms as you wish, to define the billing calendar.


A term has triggers : the activities that should be billed at this term.

You may or may not insert activities as triggers.


This is a help (as a reminder) as the summary for activities is displayed for validated and planned amount and end date. You can then define the term amount and date corresponding to these data.

Trigger elements for the term				
	type	id	name	status
	Activity	#2	Evolution X	 In progress

Field	Description
Type	Type of the trigger (activity, milestone or project)
#id	Id of the trigger
Name	Name of the trigger
Status	Current status of the trigger

Click  on the corresponding section to add a trigger (activity, milestone or project)
"Predecessor" pop up will be displayed.

Click on  to modify an existing trigger.

Click on  to delete the corresponding trigger.

When a trigger is entered, planned and validated values (amount and date) are automatically updated to sum and max of triggers amount.

Add a Predecessor to element Term #1

linked element type : Activity

#1 - bug fixing

linked element :

Cancel OK



▼ Description

id : # 1

name :

project : ▼ 🔍

bill : ▼

closed : ☐

▼ Fixed price for term

	real	validated	planned
amount :	<input type="text" value="2 400"/> €	<input type="text" value="0"/> €	<input type="text" value="4 810"/> €
date :	<input type="text" value="31/03/2012"/>	<input type="text"/>	<input type="text" value="26/03/2012"/>

Field	Description
Id	Unique Id for the term. Reference is displayed after id.
Name	Short description of the expense. Mandatory.
Project	The project concerned by the term. Mandatory.
Bill	Bill name that uses these term. Readonly.
Closed	Flag to indicate that term is archived. Term will not appear in lists any more, unless "show closed" is checked.

Field	Description
Real amount	Defined amount for term
Real date	Defined date for term
Validated amount	Sum of validated amounts of activities defined as triggers. Readonly.
Validated date	Max of validated end dates of activities defined as triggers. Readonly.
Planned amount	Sum of planned amounts of activities defined as triggers. Readonly.
Planned date	Max of validated end dates of activities defined as triggers. Readonly.

Field	Description
Notes	(see related topic)
Change History	(see related topic)



A bill is a request for payment for delivered work.

Billing will depend on billing type defined for the bill.

Each bill is linked to project, a project has a project type, and a project type is linked to a billing type. So billing type is automatically defined from selected project (field is read only).

The defined billing types taken into account in the tools are :

- **At terms** : a term must be defined to generate the bill, generally following a billing calendar.
Used for instance for : Fixed price projects.
- **On produced work** : no term is needed, the billing will be calculated based on produced work for resources on selected activities, on a selected period.
Used for instance for : Time & Materials projects.
- **On capped produced work** : no term is needed, the billing will be calculated based on produced work for resources on selected activities, on a selected period, taking into account validated work so that total billing cannot be more than validated work.
Used for instance for : Capped Time & Materials projects.
- **Manual billing** : 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

Each bill has bill lines.

Input for each bill line depends on billing type.



Description

id : # 1

bill type :

name :

date :

project :

customer :

bill contact :

recipient :

billing type :

Treatment

bill id :

status :

done : ☐

closed : ☐

untaxed amount : €

tax (%) :

full amount : €

comments :



Field	Description
Id	Unique Id for the term. Reference is displayed after id.
Bill type	Type of bill (default types of bill are "partial", "final", "complete")
Name	Short description of the expense. Mandatory.
Date	Date of the bill.
Project	The project concerned by the term. Mandatory.
Customer	Customer who will pay for the bill. Automatically updated from project customer.
Bill contact	Contact who will receive the bill
Recipient	Recipient who will receive the payment for the bill.
Billing type	Type of billing. Calculated from project, project type, billing type. Will influence bill lines format.

Field	Description
Bill id	Id, calculated when status of bill is "done", taking into account "start number for bill" (defined in "Global parameters")
Status	Actual status of the bill. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none"> • automatically update "Done" or "Closed", • some fields may become mandatory (see related topic) .
Done	Flag to indicate that action has been treated. Date of completion is saved.
Closed	Flag to indicate that action is archived. Action will not appear in lists any more, unless "show closed" is checked.
Untaxed amount	Amount for the bill, without taxes.
Tax	Tax rate
Full amount	Amount for the bill, including taxes.
Comments	Comments for the bill.

Field	Description
Notes	(see related topic)
Change History	(see related topic)



Bill lines

	id	n°	quantity	description	detail	price	sum
 	#1	1	1.00	March 2012 - 50%	Evolution X	2400.00	2400.00

Input for each bill line depends on billing type.

At terms

Bill line #1

n° :

quantity :

term :

description :

detail :

price :

On produced work & On capped produced work

Bill line #4

n° :

quantity :

resource :

activity price :

start date :

end date :

description :

detail :

price :

Manual billing

Bill line #2

n° :

quantity :

description :

detail :

price :

Field	Description
N	Number of the line for the bill
Quantity	Quantity of billed element
Description	Description of the line. Automatically created depending on billing type. Can be modified on update.
Detail	Detail of the line. Automatically created depending on billing type. Can be modified on update.
Price	Unitary price of billed element.
Sum	Total price for the line = Price x Quantity
Term	Billed term for "At terms" bill.
Resource	Resource whose work is billed for "on produced work" bill
Activity price	Activity price defining the billed activity type for "on produced work" bill
Start date	Start date of the period to take into account work to be billed for "on produced work" bill
End date	End date of the period to take into account work to be billed for "on produced work" bill

Some fields are not displayed on creation.
 Some fields are not displayed on update.
 Some fields are only inputable on creation.
 Some fields are only inputable on update.



Activity Price

Activity price defines daily price for activities of a given Activity type and a given project.

This is used to calculate bill amount for billing type "On produced work".

Description

id : # 1

project : project two

activity type : Management

name : Management (not included in fixed price)

price of the activity : 900 €

sort order : 0

closed : ☐

Field	Description
Id	Unique Id for the Activity price.
Project	The project concerned by the Activity Price. Mandatory.
Activity type	Type of activities concerned by the Activity Price. Mandatory.
Name	Short description of the Activity price. Mandatory.
Price of the activity	Daily price of the activities of the given activity type and the given project
Sort order	Number to define order of display in lists
Closed	Flag to indicate that Activity Price is archived. Activity Price will not appear in lists any more, unless "show closed" is checked.



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
- follow-up actions
- identify risks that finally occur (becoming an issue)



Description

id : # 1 001-001-CON-1

project :

type :

name :

creation date :

issuer :

cause :

impact :

severity :

likelihood :

criticality :

description :

Treatment

status :

responsible :

initial end date :

planned end date :

handled :

done :

closed :

result :

Field	Description
Id	Unique Id for the risk. Reference is displayed after id.
Project	The project concerned by the risk. Mandatory.
Type	Type of risk.
Name	Short description of the risk. Mandatory.
Creation date	Creation date. Automatically generated on creation. Can be changed.
Issuer	User who created the risk. Can be changed (for instance if creator is not the issuer).
Cause	Description of the event that may trigger the risk.
Impact	Description of the estimated impact on the project if the risk occurs.
Severity	Level of importance of the impact for the project.
Likelihood	Probability level of the risk to occur.
Criticality	Global evaluation level of the risk. Automatically calculated from Severity and Likelihood values. Can be changed
Description	Complete description of the risk. The description can have many lines. The field will auto-extend.

Field	Description
Status	Actual status of the risk. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none"> • automatically sending emails, • automatically update "Handled", "Done" or "Closed", • some fields may become mandatory (see related topic) .
Responsible	Resource who is responsible for the treatment of the risk.
Initial end date	Initially expected end date of the risk.
Planned end date	Updated end date of the risk.
Handled	Flag to indicate that risk has been taken into account. Date of handling is saved. This generally means that Responsible has been named.
Done	Flag to indicate that risk has been treated. Date of completion is saved.
Closed	Flag to indicate that risk is archived. Risk will not appear in lists any more, unless "show closed" is checked.
Result	Complete description of the treatment done on the risk. The result can have many lines. The field will auto-extend.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



Linked Actions		
id	name	status
#1	Build a new environment for testing purpose	recorded

Linked Issues		
id	name	status
#1	No environment for performance testing	recorded


Field	Description
Id	Id of the linked element.
Name	Name of the linked element.
Status	Actual status of the linked element.

Risks can be linked to actions :

- risk mitigation actions
- impact mitigation actions


Risks can be linked to issues :

- when a risk occurs it becomes an issue

Click  on the corresponding section to add a link to an action or an issue.

A “add link” pop up will be displayed.

Select the linked element in the list and validate (OK).

Click on  to delete the corresponding link.

If Risk R is linked to Action A and issue I, Issue I and Action A are automatically linked to Risk R.

Add a link between element Risk #1 and element Action

linked element type : Action

linked element :

#1 - Build an environment for performance tests

Cancel OK

Linked actions and issues must belong to the same project.

Click on the name of an action or of an issue will directly move to it.



Issue (1/3)

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.



Description

id : # 1 001-001-TEC-1

project :

type :

name :

creation date :

issuer :

cause :

impact :

criticality :

priority :

description :

Treatment

status :

responsible :

initial end date :

planned end date :

handled :

done :

closed :

result :

Field	Description
Id	Unique Id for the issue. Reference is displayed after id.
Project	The project concerned by the issue. Mandatory.
Type	Type of issue.
Name	Short description of the issue. Mandatory.
Creation date	Creation date. Automatically generated on creation. Can be changed.
Issuer	User who created the issue. Can be changed (for instance if creator is not the issuer).
Cause	Description of the event that led to the issue.
Impact	Description of the impact of the issue on the project.
Criticality	Level of importance of the impact for the project.
Priority	Priority requested to the treatment of the issue.
Description	Complete description of the issue. The description can have many lines. The field will auto-extend.

Field	Description
Status	Actual status of the issue. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none"> • automatically sending emails, • automatically update "Handled", "Done" or "Closed", • some fields may become mandatory (see related topic) .
Responsible	Resource who is responsible for the treatment of the issue.
Initial end date	Initially expected end date of the issue.
Planned end date	Updated end date of the issue.
Handled	Flag to indicate that issue has been taken into account. Date of handling is saved. This generally means that Responsible has been named.
Done	Flag to indicate that issue has been treated. Date of completion is saved.
Closed	Flag to indicate that issue is archived. Issue will not appear in lists any more, unless "show closed" is checked.
Result	Complete description of the treatment of the issue. The result can have many lines. The field will auto-extend.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



Linked Actions		
+	id	name
-	#1	Build a new environment for testing purpose
		status
		recorded

Linked Risks		
+	id	name
-	#1	Performance
		status
		recorded


Field	Description
Id	Id of the linked element.
Name	Name of the linked element.
Status	Actual status of the linked element.

Issues can be linked to risks :

- When a risk occurs, it becomes an issue


Issues can be linked to actions :

- impact mitigation actions
- resolution action

Click  on the corresponding section to add a link to a risk or an action.

A "add link" pop up will be displayed.

Select the linked element in the list and validate (OK).

Click on  to delete the corresponding link.

If Issue I is linked to Risk R and Action A, Action A and Risk R are automatically linked to Issue I.

Add a link between element Issues #000001 and element Action

linked element type :

linked element :

#1 - Build an environment for performance tests

Cancel OK

Linked risks and actions must belong to the same project.

Click on the name of a risk or of an action will directly move to it.



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

- Progress Meetings
- Steering committees
- Functional workshops
- ...

In fact, you should keep trace 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.



Description

id : # 1 001-001-STE-1

project :

meeting type :

meeting date :

name :

attendees :

description :

Treatment

status :

responsible :

handled : ☐

done : ☐

closed : ☐

minutes :

Field	Description
Id	Unique Id for the meeting. Reference is displayed after id.
Project	The project concerned by the meeting. Mandatory.
Meeting type	Type of meeting.
Meeting date	Date of the meeting (initially expected date).
Attendees	List of persons attending (or expecting to attend) the meeting.
Description	Description of the meeting. Can be used to store Agenda.

Field	Description
Status	Actual status of the meeting. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none">• automatically sending emails,• automatically update "Handled", "Done" or "Closed",• some fields may become mandatory (see related topic) .
Responsible	Resource who is responsible for the organization of the meeting.
Minutes	Minutes of the meeting. You can enter here only a short summary of the minutes and attach the full minutes as a file.
Handled	Flag to indicate that meeting has been taken into account. Date of handling is saved. This generally means that Responsible has been named.
Done	Flag to indicate that meeting has been held. Date of meeting is saved.
Closed	Flag to indicate that meeting is archived. Meeting will not appear in lists any more, unless "show closed" is checked.

Field	Description
Attachments	You may attach Minutes file here. (see related topic)
Notes	(see related topic)
Change History	(see related topic)



Decisions taken		
+	id	name
-	#1	Go for deployment
		status
		recorded
Questions raised or solved		
+	id	name
-	#1	Who will be first deployed users ?
		status
		recorded


Field	Description
Id	Id of the linked element.
Name	Name of the linked element.
Status	Actual status of the linked element.

Meetings can be linked to decisions :

- Decisions taken during the meeting


Meetings can be linked to questions :

- Questions raised during the meeting
- Questions answered during the meeting

Click  on the corresponding section to add a link to a decision or a question.

A "add link" pop up will be displayed.

Select the linked element in the list and validate (OK).

Click on  to delete the corresponding link.

If Meeting M is linked to Question Q and Decision D, Decision D and Question Q are automatically linked to Meeting M.

Add a link between element Meeting #000001 and element Decision

linked element type :

linked element :

#1 - Go/NoGo for evolution 2

Cancel OK

Linked Decisions and Questions must belong to the same project.

Click on the name of a Decision or of a Question will directly move to it.



Decision (1/3)

Project'Or
RIA

Decisions are stored to keep trace 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.



Description

id : # 1 001-001-FUN-1

project :

decision type :

name :

description :

Validation

status :

decision date :

origin :

accountable :



closed : ☐

Field	Description
Id	Unique Id for the decision. Reference is displayed after id.
Project	The project concerned by the decision. Mandatory.
Decision type	Type of decision.
Name	Short description of the decision. Mandatory.
Description	Complete description of the decision. The description can have many lines. The field will auto-extend.

Field	Description
Status	Actual status of the decision. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none">• automatically sending emails,• automatically update "Handled", "Done" or "Closed",• some fields may become mandatory (see related topic) .
Decision date	Date of the decision
Origin	Origin of the decision. It can be either the reference to a meeting where decision was taken (so also add the reference to the meetings list), or a short description of why the decision was taken.
Accountable	Resource accountable for the decision. (the person who took the decision)
Closed	Flag to indicate that decision is archived. Decision will not appear in lists any more, unless "show closed" is checked.


Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



Meeting where held			
	id	name	status
	#1	Steering Committee 2012-03-15	 recorded


Decisions can be linked to meetings :

- Meeting during which decision was taken

Click  on the corresponding section to add a link to a meeting.

A "add link" pop up will be displayed.

Select the linked element in the list and validate (OK).

Click on  to delete the corresponding link.

If Decision D is linked to Meeting M, Meeting M is automatically linked to Decision D.

Linked Meetings must belong to the same project.

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

Field	Description
Id	Id of the linked element.
Name	Name of the linked element.
Status	Actual status of the linked element.

Add a link between element Decision #000001 and element Meeting

linked element type : Meeting

#1 - Steering Committee 2011-09-30

linked element :

Cancel OK



Question (1/3)

Questions are stored to keep trace 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.



Description

id : # 1 001-001-FUN-1

project :

question type :

name :

creation date :

issuer :

description :

Answer

status :

responsible :

initial due date :

planned due date :

replier :

handled : ☐

done : ☐

closed : ☐

response :

Field	Description
Id	Unique Id for the question. Reference is displayed after id.
Project	The project concerned by the question. Mandatory.
Question type	Type of question.
Name	Short description of the question. Mandatory.
Creation date	Creation date. Automatically generated on creation. Can be changed.
Issuer	User who created the question. Can be changed (for instance if creator is not the issuer).
Description	Complete description of the question. The description can have many lines. The field will auto-extend.

Field	Description
Status	Actual status of the question. May be linked to a workflow. Change of the status can have several impacts : <ul style="list-style-type: none"> • automatically sending emails, • automatically update "Handled", "Done" or "Closed", • some fields may become mandatory (see related topic) .
Responsible	Resource who is responsible for the follow-up of the question.
Initial due date	Initially expected date for the answer to the question.
Planned due date	Updated expected date for the answer to the question.
Replier	Name of the person who provided the answer.
Handled	Flag to indicate that question has been taken into account. Date of handling is saved. This generally means that Responsible has been named.
Done	Flag to indicate that question has been answered. Date of answer is saved.
Closed	Flag to indicate that question is archived. Question will not appear in lists any more, unless "show closed" is checked.
Response	Complete description of the answer to the question. The response can have many lines. The field will auto-extend.

Field	Description
Attachments	(see related topic)
Notes	(see related topic)
Change History	(see related topic)



Meeting where held

	+	id	name	status
	-	#1	Steering Committee 2012-03-15	recorded

Questions can be linked to meetings :

- Meeting during which question was raised or answered

Click **+** on the corresponding section to add a link to a meeting.

A “add link” pop up will be displayed.

Select the linked element in the list and validate (OK).

Click on **-** to delete the corresponding link.

If Question Q is linked to Meeting M, Meeting M is automatically linked to Question Q.

Linked Meetings must belong to the same project.

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

Field	Description
Id	Id of the linked element.
Name	Name of the linked element.
Status	Actual status of the linked element.

Add a link between element Question #000001 and element Meeting

linked element type : Meeting

#1 - Steering Committee 2011-09-30

linked element :

Cancel OK



Emails

You can have a look at the list of the automatic emails sent (see related topic).

You will have all the information about the email, including the status showing whether the email was correctly sent or not.

The information in the screen is read-only.

Email description	Concerned item
id : # 3	project : project one
user : admin	element updated : Question
sent date : 15/03/2012 21:30	id : 1
addressees : project.manager@toolware.fr	status : recorded
sent status : ERROR	
closed : <input type="checkbox"/>	

text of the mail
title of email : [Project'Or RIA] Question #1 moved to status recorded
text of email : The status of Question #1 [What will be first deployed users] has changed to recorded Question #1 project : project one question type : Functional name : What will be first deployed users description : issuer : admin status : recorded



Alerts

You 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.

This screen is read only.

If you are the receiver of the alert, and the alert is not tagged "read" yet (for instance you clicked "remind me" when alert was displayed), you will have a button to "mark as read" the alert.

Description	Message
<p>id : # 17</p> <p>project : <input type="text" value="project one - maintenance"/></p> <p>element : Activity</p> <p>1</p> <p>receiver of alert : <input type="text" value="manager1"/></p> <p>type : <input type="text" value="ALERT"/></p> <p>generation date : <input type="text" value="14/03/2012"/> <input type="text" value="21:30"/></p> <p>reminder date : <input type="text" value="14/03/2012"/> <input type="text" value="21:30"/></p> <p>read : <input type="checkbox"/></p> <p>closed : <input type="checkbox"/></p>	<p>title : Alert - Activity #1</p> <p>message : <input type="text" value="bug fixing"/></p> <p>indicator : planned work compared to validated work</p> <p>target value : 0 d</p> <p>alert value : 0 d</p>



Message

You can define some message that will be displayed on the “today” screen of users.

You can limit the display to some profile and/or project and/or user.

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

Description

id : # 1

title : Welcome

message type : INFO

profile :

project :

user :

Message


message : Welcome to ProjectOr web application

Field	Description
Message	Complete text of the message. The message can have many lines. The field will auto-extend.

Field	Description
Id	Unique Id for the message.
Title	Header of the message. Mandatory.
Message type	Type of message.
Profile	The profile of users who will see the message.
Project	The project to limit display. Only resources affected to the project will see the message
User	User who will see the message. Useful to send a message to one user only . As user is more restrictive than Profile and/or Project, you should not select these ones when selecting user.
Closed	A status to stop showing the message. You then don't have to delete it, for instance to be able to show it again later...



Imports work from CSV files (and only CSV files on actual version).

The first line of the file must contain the name of the fields : look into the Model class : the names are the same. Just click on specific help button  to have help on fields.

You may or may not add an "id" column to the file :

- if column "id" exists and "id" is set for a line, the import will try to update the corresponding element, and will fail if it does not exist
- if column "id" does not exist or if "id" is not set for a line, the import will create a new element from the data.

In any case, columns with no data will not be updated : then you can update only one field on an element.

To clear a data, enter the value "NULL" (not case sensitive).

For columns corresponding to linked tables ("idXxxx"), you can indicate as the column name :

- either "idXxxx" : the code of the element in the linked table is expected
- either "Xxxx" (without "id") : the name of the element in the linked table is then expected, bringing better readability to the file.

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

Dates are expected in format "YYYY-MM-DD".

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 (working from version V1.3.0).



Import (2/2)

element type to import ?

file format to import

file

Select the element type from the list. The content of the imported file must fit the element type description.

To know the data that may be imported, click on the ? button.

id	idProject	idTicketType	name	idUrgency	creationDateTime	idUser	idContact	originType	originId	idOriginalVersion	description	idActivity	idStatus	idResource
id	project	ticket type	name	urgency	creation date/time	issuer	requestor	[colOriginType]	[colOriginId]	original version	description	planning activity	status	responsible
int(12)	int(12)	int(12)	varchar(100)	int(12)	datetime	int(12)	int(12)	varchar(100)	int(12)	int(12)	varchar(4000)	int(12)	int(12)	int(12)

After selecting file format (only cvs for current version) and file to import, you can Import Data.

You will then have a full report of the import :

id	project	activity type	name	description	creation date	issuer	parent activity	status	responsible	result	handled	handled date	done	done date	closed	closed date	planning mode	initial start date	validated start date	initial end date	validated end date	initial duration	validated duration	validated work	priority	Import result
1	1	21	Updated name	Updated description				4	3	Updated result	1	2010-10-01	1	2010-10-15	0		1									Activity #1 updated
2	1																4	2010-09-01	2010-10-01	2010-12-31	2010-12-15			27	200	Activity #2 updated
	1	22	New activity	Description of new Activity	2010-11-05	3		1									1	2010-09-02	2010-10-02	2010-11-30	2010-12-01			42		Activity #13 inserted



Pay attention if you intend to import users :

- 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..)
- The password field must be cut and pasted from the database because it is encrypted, then if you enter some readable password, the users will not be able to connect.
- Always keep in mind that your import may have some impact on administrator user. So be sure to keep an operational admin access.



The affectation defines that a Resource, or Contact or User works on a given project, and so has visibility to the given elements of the project (depending on habilitation).

Description

id : # 18

resource :

or contact :

or user :

project :

rate (%) :

closed : ☐

description :

Field	Description
Id	Unique Id for the affectation. Automatically generated on creation.
Resource Or Contact Or User	Affected Resource, or contact or User. When selecting one of the three, if the selected item is also of another king, then corresponding list is automatically selected. For instance, if you select Resource R1 and that this resource is also a User U1, then U1 will automatically be selected in User list.
Project	Project to affect to.
Rate (%)	Affectation rate, in percent. 100% means a full time affectation.
Closed	Flag to indicate that user is archived. User will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the user. The description can have many lines. The field will auto-extend.



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

The login id will be the user name.

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

The issuer of items is a user.

▼ Description

id : # 3

user name :

email address :

password :

profile :

is a contact : ☐

is a resource : ☒

name :

initials :

locked : ☐

closed : ☐

description :







The password is always hidden.

In fact passwords are store in a non bijective encryption format. This means that it is impossible to find the original value.


Administrator can reset the password to default value. He then needs to save and "send information to the user".


Field	Description
Id	Unique Id for the user. Automatically generated on creation.
User name	Name of the user., used as login to connect to the application. This information will be displayed in lists. Must be unique.
Email address	Email address of the user. Automatic emailing will use this address.
Password	Password to connect to the application. Always hidden. Administrator can only reset password to default value.
Profile	Profile of the user (see related topic)
Is a contact	Is this user also a user ? Check this if the user must also be a requestor. This user will then appear in the "Contact" list.
Is a resource	Is this user also a resource ? Check this if the user must also be assigned to activities and be able to input real work . The user will then also appear in the "Resources" list.
Name	Resource and/or Contact name. Can contain first and last name Mandatory if "Is resource" or "Is contact" is checked.
Locked	Flag used to lock the user, to prohibit connections. Administrator can unlock the user.
Closed	Flag to indicate that user is archived. User will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the user. The description can have many lines. The field will auto-extend.




Affections			
  	id	project	rate (%)
	1	project one	80
	2	project two	20
	3	holidays	0
	18	project one - developement	100

Affections of user can be directly created from user definition.

Click  on to create a new affectation.
A "add affectation" pop up will be displayed.

Click on  to update an existing affectation.

Click on  to delete the corresponding affectation.

Affectation ✕

project :

resource :

rate (%) :

closed : ☐

Field	Description
Id	Id of the affectation
Project	Project the user is affected to.
Resource	Name of the user. Readonly.
Rate	Rate (in %) of the affectation to the project.
Closed	Flag to indicate that affectation in not active any more, without deleteing it.



Description

Resource (1/2)

The Resource is a person that will work on activities.

A resource can also be a machine or any material resource which availability must be controlled through planning. The resource is the power to run the project.

The responsible of items is a resource.

Description

id : # 3

name :

initials :

capacity (FTE) :

team :

is a user : ☒

profile :

user name :

is a contact : ☐

email address :

phone :

mobile :

fax :

closed : ☐

description :

Field	Description
Id	Unique Id for the resource. Automatically generated on creation.
Name	Name of the resource. Can contain first and last name. This information will be displayed in lists.
Initials	Initials of the resource
Capacity (FTE)	Capacity of the resource, in Full Time Equivalent. Capacity can be lesser than one (for part time working resource) or greater than one (for Virtual resource or teams, to use for instance to initialize a planning)
Team	The team to which the resource belongs.
Is a user	Is this resource also a user ? Check this if the resource must connect to the application. You must then define the user name, that can be the same as the resource name or not, and the profile. The resource will then also appear in the "Users" list.
Profile	Profile of the user (see related topic)
User name	User name. (see related topic) Mandatory if "Is a user" is checked.
Is a contact	Is this resource also a contact ? Check this if the resource must also be a requestor.
Email address	Email address of the resource. Automatic emailing will use this address.
Phone	Phone number of the resource. Informative data.
Mobile	Mobile phone number of the resource. Informative data.
Fax	Fax number of the resource. Informative data.
Closed	Flag to indicate that resource is archived. Resource will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the resource. The description can have many lines. The field will auto-extend.



Resource (2/2)

Function, Cost and Affectation

Function & cost

main function :

	function	cost	start date	end date
  	Manager	500,00 € / d		









Resource Cost

function :


cost :


start date :


Affectations

	id	project	rate (%)
  	1	project one	80
  	2	project two	20
  	3	holidays	0
  	18	project one - developement	100

Affectations of user can be directly created from resource definition.

Click  on to create a new affectation.
A "add affectation" pop up will be displayed.

Click on  to update an existing affectation.

Click on  to delete the corresponding affectation.

Field	Description
Function	Function of the resource for the selected cost
Cost	Cost of the resource for the selected function. Cost is in currency per day, even if you manage work in hours.
Start date	Start date for the cost of the resource, for the selected function. Not selectable for the first cost of a given function for the resource. Mandatory for others. Then previous cost will be updated to finish at date minus 1 day.

Affectation

project :

resource :

rate (%) :

closed : ☐

Field	Description
Id	Id of the affectation
Project	Project the user is affected to.
Resource	Name of the resource. Readonly.
Rate	Rate (in %) of the affectation to the project.
Closed	Flag to indicate that affectation is not active any more, without deleting it.



Contact (1/2)

The Contact is a person into the organization of the customer.
The requestor of a ticket must be a contact.

It can be interesting to define all the informative data of the contact to be able to contact him when needed.

Description

id : # 5

name : external project leader one

initials :

customer : client one

is a user : ☒

profile : External Project Leader

user name : external1

is a resource : ☐

email address :

phone :

mobile :




fax :

closed : ☐


description :


Field	Description
Id	Unique Id for the contact. Automatically generated on creation.
Name	Name of the contact. Can contain first and last name. This information will be displayed in lists.
Initials	Initials of the contact
Customer	The Customer the contact belongs to (the contact is a person into the organization of the customer).
Is a user	Is this contact also a user ? Check this if the contact must connect to the application. You must then define the user name, that can be the same as the contact name or not, and the profile. The contact will then also appear in the "Users" list.
Profile	Profile of the user (see related topic)
User name	User name (see related topic) Mandatory if "Is a user" is checked.
Is a resource	Is this contact also a resource ? Check this if the contact must also be assigned to activities and be able to input real work . The contact will then also appear in the "Resources" list.
Email address	Email address of the contact. Automatic emailing will use this address.
Phone	Phone number of the contact. Informative data.
Mobile	Mobile phone number of the contact. Informative data.
Fax	Fax number of the contact. Informative data.
Closed	Flag to indicate that contact is archived. Contact will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the contact. The description can have many lines. The field will auto-extend.




Affections			
	id	project	rate (%)
  	15	project one	100

Affectations of user can be directly created from contact definition.

Click  on to create a new affectation.
A "add affectation" pop up will be displayed.

Click on  to update an existing affectation.

Click on  to delete the corresponding affectation.

Affectation ✕

project :

resource : external project leader one ▼

rate (%) :

closed : ☐

Field	Description
Id	Id of the affectation
Project	Project the contact is affected to.
Resource	Name of the user. Readonly.
Rate	Rate (in %) of the affectation to the project.
Closed	Flag to indicate that affectation is not active any more, without deleting it.



Customer

The Customer is the entity for which the Project is set.
It is generally the owner of the project, and in many cases it is the payer.

It can be an internal entity, into the same enterprise, or a different enterprise, or the entity of an enterprise.
The customer defined here is not a person. Real persons into customer entity are called "Contacts".

Description

id : # 1

customer name :

customer code :

delay for payment (in day) :

tax (%) :

closed : ☐

description :

Projects

Projects : ☐ project one
☐ project one - maintenance
☐ project one - developement

Contacts

Contacts : ☐ external project leader one
☐ external business leader one

Field	Description
Id	Unique Id for the customer. Automatically generated on creation.
Customer name	Short name of the customer. Mandatory.
Customer code	Code of the customer. Informative data.
Delay for payment	Delay forpayment (in days) that can be displaued in the bill.
Tax (%)	Tax rates that are applied to bill amounts for this customer.
Closed	Flag to indicate that customer is archived. Customer will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the customer. The description can have many lines. The field will auto-extend.

Field	Description
Projects	List of the projects of the customer
Contacts	List of the contacts known in the entity of the customer.



Recipient

The Recipient is the beneficiary of bill payments.
Recipinets are mainly defined to store billing information.

Description

id : # 1

name : Client 1 Recipient

Company number : 123 456 789

tax number : TAX 01 01 01

tax free : ☐

International Bank Account Number (IBAN)

Bank : BARCLAYS BANK

country (IBAN) : 21

key (IBAN) : 17

account number (BBAN) : 1234567890

closed : ☐

Address

designation : M. CLIENT

street : rue blanche

complement :

zip code : 75001

city : PARIS

state :

country : FRANCE

Field	Description
Id	Unique Id for the recipient. Automatically generated on creation.
Name	Name of the recipient. Mandatory.
Company number	Company number, to be displayed on bill.
Tax number	Tax reference number, to be displayed on bill.
Tax free	Flag to indicate that tax is automatically set to zero for this recipient.
Bank	Bank name.
Contry	Contry code. IBAN format.
Key	Key code. IBAN format. Automatically claculated from other IBAN fields.
Account number	Full acount number defining the BBAN account code. Format depends on country.
Closed	Flag to indicate that recipient is archived. Recipient will not appear in lists any more, unless "show closed" is checked.

Field	Description
Designation	Full name of the recipient as it appears in the address.
Street	Street name, including street number.
Complement	Complement of adress
Zip code	Zip code
State	State
Country	Country



Team

Team is a group of resources gathered on any criteria.
A resource can belong to only one team.

The actual version of the tool does not use much of team notion.

Description

id : # 1

name :

closed : ☐

description :

Team members

members :

project manager

analyst A

analyst B

web developer

affect all team members to a project

Field	Description
Id	Unique Id for the team. Automatically generated on creation.
Name	Name of the team.
Closed	Flag to indicate that team is archived. Team will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the team. The description can have many lines. The field will auto-extend.

Field	Description
Team members	List of the resources member of the team.

It is possible to directly affect every team member to a project, using the corresponding button.

Affectation

project :

resource :

rate (%) :

closed : ☐

Cancel

OK

Field	Description
Project	Project the team mebers are affected to.
Resource	Not needed here. Readonly.
Rate	Rate (in %) of the affectations to the project.
Closed	Not needed here. Readonly.



Product

Product is the element de project is built for.

A project works on one or more versions of the product .

A product is any element delivered by the project. For IT/IS Projects, products are generally Applications.

Description

id : # 1

name : web application

customer : client one

prime contractor : external project leader one

is sub-product of :

creation date : 01/09/2011

closed : ☐

description :

Product versions

versions : wa V1.0

wa V2.0

Field	Description
Id	Unique Id for the product. Automatically generated on creation.
Name	Name of the product
Customer	The customer the product should be delivered to.
Prime contractor	The contact, into customer organization, who will be responsible for the product delivery.
Creation date	Creation date. Automatically generated on creation. Can be changed.
Closed	Flag to indicate that product is archived. Product will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the product. The description can have many lines. The field will auto-extend.

Field	Description
Products versions	List of the versions defined for the product.



Version

Version is the declination of the product life.

A project works on one or more versions of the product .

A version of product is any stable status of the element delivered by the project. For IT/IS Projects, versions are generally Applications Versions.

Description

id : # 3

product : swing application

name : sa V1.0

prime contractor : external project leader two

responsible : project manager

creation date : 01/09/2011




entry into service : initial planned real done

end date :


description :

Field	Description
Id	Unique Id for the version. Automatically generated on creation.
Product	The product on which the version applies.
Name	Name of the version.
Prime contractor	The contact, into customer organization, who will be responsible for the version delivery. Can be different from Product prime contractor.
Responsible	Resource responsible of the version.
Creation date	Creation date. Automatically generated on creation. Can be changed.
Entry into servie	Intial, planned and real entrey into service date of the version. Done is checked when real is set.
End date	Intial, planned and real end dates of the version. Done is checked when real is set, corresponding to closed version.
Description	Complete description of the version. The description can have many lines. The field will auto-extend.


Projects linked to this version

	project	start date	end date	closed
  	project two	01/09/2011	31/12/2011	<input type="checkbox"/>

Projects can be directly linked to version.

Click  on to create a new link to project.

A "Project – Version link" pop up will be displayed.

Click on  to update an existing link to project.

Click on  to delete the corresponding link to project.

Project - Version link

project :

version : sa V1.0

start date :

end date :

closed : ☐

Cancel OK

Field	Description
Project	Project linked to the version.
Version	Current version. Readonly.
Start date	Start date for validity of the link
End date	End date for validity of the link
Closed	Flag to indicate that link is not active any more, without deleteing it.



The contexts defines list of elements selectable to define ticket context.

Contexts are initilally 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.

▼ Description

id : # 1

Context type : Environment ▼

name : Production

sort order : 100

closed : ☐

Field	Description
Id	Unique Id for the context. Automatically generated on creation.
Context type	One on the three context type. List is fixed. Captions are translated and so can be changed in language file (see related topic)
Name	Name of the context
Sort order	Number to define order of display in lists
Closed	Flag to indicate that context is archived. Context will not appear in lists any more, unless "show closed" is checked.



Planning dispatches work on every open days.

By default, open days are days from Monday to Friday, excluding week ends.

The Calendar screen sets possibility to defined off days (for instance New Year, National day). As these days are different from one country to the other, it must be entered manually. On the calendar screen, you can also define some specific 'opened' week-end days. The calendar information is taken into account when calculating planning. You must re-calculate an existing planning to take into account changes on the calendar.

▼ Description

id : # 3

name :

date :

is off day : ☐

A calendar of current year is displayed to give a global overview of the exceptions existing : in blue exception off days, in red exception open days (in bold current item). On creation, it is possible to directly select the exception date by clicking on the calendar view.

Field	Description
Id	Unique Id for the calendar exception. Automatically generated on creation.
Name	Name of the calendar exception.
Date	Date of the calendar exception
Is off day	Set to define that an standard 'open' day becomes a 'off' day. Unset to define that a standard 'off' day (week-end) becomes an 'open' day. Setting this flag to a off day or unsetting it to a week-end will have no effect to the calendar.

2011

2011																																	
January	S1	S2	M3	T4	W5	T6	F7	S8	S9	M10	T11	W12	T13	F14	S15	S16	M17	T18	W19	T20	F21	S22	S23	M24	T25	W26	T27	F28	S29	S30	M31		
February	T1	W2	T3	F4	S5	S6	M7	T8	W9	T10	F11	S12	S13	M14	T15	W16	T17	F18	S19	S20	M21	T22	W23	T24	F25	S26	S27	M28					
March	T1	W2	T3	F4	S5	S6	M7	T8	W9	T10	F11	S12	S13	M14	T15	W16	T17	F18	S19	S20	M21	T22	W23	T24	F25	S26	S27	M28	T29	W30	T31		
April	F1	S2	S3	M4	T5	W6	T7	F8	S9	S10	M11	T12	W13	T14	F15	S16	S17	M18	T19	W20	T21	F22	S23	S24	M25	T26	W27	T28	F29	S30			
May	S1	M2	T3	W4	T5	F6	S7	S8	M9	T10	W11	T12	F13	S14	S15	M16	T17	W18	T19	F20	S21	S22	M23	T24	W25	T26	F27	S28	S29	M30	T31		
June	W1	T2	F3	S4	S5	M6	T7	W8	T9	F10	S11	S12	M13	T14	W15	T16	F17	S18	S19	M20	T21	W22	T23	F24	S25	S26	M27	T28	W29	T30			
July	F1	S2	S3	M4	T5	W6	T7	F8	S9	S10	M11	T12	W13	T14	F15	S16	S17	M18	T19	W20	T21	F22	S23	S24	M25	T26	W27	T28	F29	S30	S31		
August	M1	T2	W3	T4	F5	S6	S7	M8	T9	W10	T11	F12	S13	S14	M15	T16	W17	T18	F19	S20	S21	M22	T23	W24	T25	F26	S27	S28	M29	T30	W31		
September	T1	F2	S3	S4	M5	T6	W7	T8	F9	S10	S11	M12	T13	W14	T15	F16	S17	S18	M19	T20	W21	T22	F23	S24	S25	M26	T27	W28	T29	F30			
October	S1	S2	M3	T4	W5	T6	F7	S8	S9	M10	T11	W12	T13	F14	S15	S16	M17	T18	W19	T20	F21	S22	S23	M24	T25	W26	T27	F28	S29	S30	M31		
November	T1	W2	T3	F4	S5	S6	M7	T8	W9	T10	F11	S12	S13	M14	T15	W16	T17	F18	S19	S20	M21	T22	W23	T24	F25	S26	S27	M28	T29	W30			
December	T1	F2	S3	S4	M5	T6	W7	T8	F9	S10	S11	M12	T13	W14	T15	F16	S17	S18	M19	T20	W21	T22	F23	S24	S25	M26	T27	W28	T29	F30	S31		



Only one calendar is managed in the tool.

Each item only defines exception to standard open / closed days.

You cannot defined several calendar, forinstance to get one calendar per resource.



The document directories define a structure for document storage.

The document files (defined on document version) will be stored in the folder defined as "location" in the "document root" place. "Document root" is defined in the global parameters file.
the defined structure.

Description

id : # 5

parent directory : /Product

name : Conception

location : /Product/Conception

project :

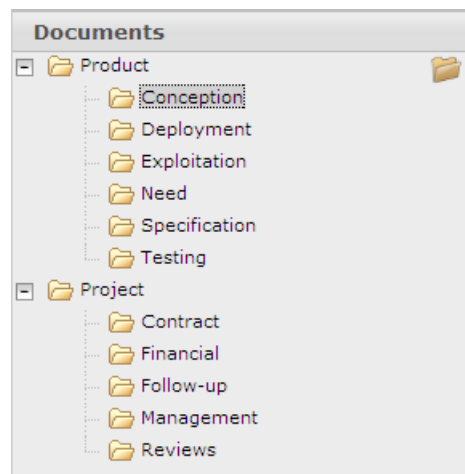
product :

default type :

closed : ☐

Field	Description
Id	Unique Id for the directory. Automatically generated on creation.
Parent directory	Name of the parent directory to define hierarchic struture. The current directory is then a sub-directory of parent.
Name	Name of the directory. Location will automatically be "parent location" / "name".
Location	Folder where files will be stored. Location is automatically defined as "parent location" / "name". Location is defined relatively to "document root", defined in global parameters.
Project	Project the directory is dedicated to. New document in this directory will have default project positionned to this value.
Product	Product the directory is dedicated to. New document in this directory will have default project positionned to this value.
Default type	Type of document the directory is dedicated to. New document in this directory will have default document type positionned to this value.
Closed	Flag to indicate that directory is archived. Context will not appear in lists any more, unless "show closed" is checked.

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





Function

The function defines the generic competency of a resource.

▼ Description

id : # 1

name :

sort order :

closed : ☐

description :

Field	Description
Id	Unique Id for the function. Automatically generated on creation.
Name	Name of the function.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that function is archived. Function will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the function. The description can have many lines. The field will auto-extend.



Status

The status is a 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 'handled', 'done' and 'closed' flags on items.

▼ Description


id : # 1

name :

handled status : ☐

done status : ☐

closed status : ☐

color : 

sort order :

closed : ☐

Field	Description
Id	Unique Id for the status. Automatically generated on creation.
Name	Name of the status.
Handled status	Defines whether 'handled' flag is automatically set for this status.
Done status	Defines whether 'done' flag is automatically set for this status.
Closed status	Defines whether 'closed' flag is automatically set for this status.
Color	Color to display the status in element lists
Sort order	Number to define order of display in lists
Closed	Flag to indicate that status is archived. Status will not appear in lists any more, unless "show closed" is checked.



%

Likelihood

The likelihood is the probability for a risk to occur.
The more likely a risk is, the more critical it is.

▼ Description

id : # 1

name :

value :

color : ▼

sort order :

closed : ☐

Field	Description
Id	Unique Id for the likelihood. Automatically generated on creation.
Name	Name of the likelihood.
Value	Value used to calculate criticality from likelihood and severity (see below)
Color	Color to display the likelihood in element lists
Sort order	Number to define order of display in lists
Closed	Flag to indicate that likelihood is archived. Likelihood will not appear in lists any more, unless "show closed" is checked.

$$[\text{Criticality value}] = [\text{Likelihood value}] \times [\text{Severity value}] / 2$$

Criticality		Severity			
		1	2	4	
Likelihood	1	1	1	2	
	2	1	2	4	
	4	2	4	8	

Criticality		Severity			
		Low	Medium	High	
Likelihood	Low	Low	Low	Medium	
	Medium	Low	Medium	High	
	High	Medium	High	Critical	




Criticality

The criticality is the importance of an element to its context.

The risk criticality designs the level of impact the risk may have to the project.

The ticket criticality is the estimated impact that the subject of the ticket may have to the product.

Description

id : # 1
name : Low
value : 1
color : 
sort order : 10
closed : ☐

Field	Description
Id	Unique Id for the criticality. Automatically generated on creation.
Name	Name of the criticality.
Value	Value used to calculate criticality from likelihood and severity, and to calculate priority from criticality and urgency. (see below)
Color	Color to display the criticality in element lists
Sort order	Number to define order of display in lists
Closed	Flag to indicate that criticality is archived. Criticality will not appear in lists any more, unless "show closed" is checked.

$$[\text{Priority value}] = [\text{Criticality value}] \times [\text{Urgency value}] / 2$$

Priority		Urgency			
		1	2	4	8
Criticality	1	1	1	2	4
	2	1	2	4	8
	4	2	4	8	16
	8	4	8	16	32

Priority		Urgency			
		Low	Medium	High	Critical
Criticality	Low	Low	Low	Medium	High
	Medium	Low	Medium	High	Critical
	High	Medium	High	Critical	Critical
	Critical	High	Critical	Critical	Critical

$$[\text{Criticality value}] = [\text{Likelihood value}] \times [\text{Severity value}] / 2$$

Criticality		Severity			
		1	2	4	
Likelihood	1	1	1	2	
	2	1	2	4	
	4	2	4	8	

Criticality		Severity			
		Low	Medium	High	
Likelihood	Low	Low	Low	Medium	
	Medium	Low	Medium	High	
	High	Medium	High	Critical	



Severity


The risk severity designs the level of impact the risk may have to the product.

Description

id : # 1

name :

value :

color : 

sort order :

closed : ☐

Field	Description
Id	Unique Id for the severity. Automatically generated on creation.
Name	Name of the severity.
Value	Value used to calculate criticality from likelihood and severity (see below)
Color	Color to display the severity in element lists
Sort order	Number to define order of display in lists
Closed	Flag to indicate that severity is archived. Severity will not appear in lists any more, unless "show closed" is checked.

$$[\text{Criticality value}] = [\text{Likelihood value}] \times [\text{Severity value}] / 2$$

Criticality		Severity			
		1	2	4	
Likelihood	1	1	1	2	
	2	1	2	4	
	4	2	4	8	

Criticality		Severity			
		Low	Medium	High	
Likelihood	Low	Low	Low	Medium	
	Medium	Low	Medium	High	
	High	Medium	High	Critical	



Urgency

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

▼ Description

id : # 3

name :

value :

color : ▼

sort order :

closed : ☐

Field	Description
Id	Unique Id for the urgency. Automatically generated on creation.
Name	Name of the urgency.
Value	Value used to calculate priority from criticality and urgency (see below)
Color	Color to display the urgency in element lists
Sort order	Number to define order of display in lists
Closed	Flag to indicate that urgency is archived. Urgency will not appear in lists any more, unless "show closed" is checked.

$$[\text{Priority value}] = [\text{Criticality value}] \times [\text{Urgency value}] / 2$$

Priority		Urgency			
		1	2	4	8
Criticality	1	1	1	2	4
	2	1	2	4	8
	4	2	4	8	16
	8	4	8	16	32

Priority		Urgency			
		Low	Medium	High	Critical
Criticality	Low	Low	Low	Medium	High
	Medium	Low	Medium	High	Critical
	High	Medium	High	Critical	Critical
	Critical	High	Critical	Critical	Critical

$$[\text{Criticality value}] = [\text{Likelihood value}] \times [\text{Severity value}] / 2$$



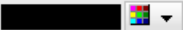
The ticket priority defined the order to treat different tickets.

▼ Description

id : # 4

name : Critical priority

value : 8

color : 

sort order : 10

closed : ☐

Field	Description
Id	Unique Id for the priority. Automatically generated on creation.
Name	Name of the priority.
Value	Value used to calculate priority from criticality and urgency (see below)
Color	Color to display the priority in element lists
Sort order	Number to define order of display in lists
Closed	Flag to indicate that priority is archived. Priority will not appear in lists any more, unless "show closed" is checked.

$$[\text{Priority value}] = [\text{Criticality value}] \times [\text{Urgency value}] / 2$$

Priority		Urgency			
		1	2	4	8
Criticality	1	1	1	2	4
	2	1	2	4	8
	4	2	4	8	16
	8	4	8	16	32

Priority		Urgency			
		Low	Medium	High	Critical
Criticality	Low	Low	Low	Medium	High
	Medium	Low	Medium	High	Critical
	High	Medium	High	Critical	Critical
	Critical	High	Critical	Critical	Critical

$$[\text{Criticality value}] = [\text{Likelihood value}] \times [\text{Severity value}] / 2$$



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 tem.

Description

id : # 1

name : Default

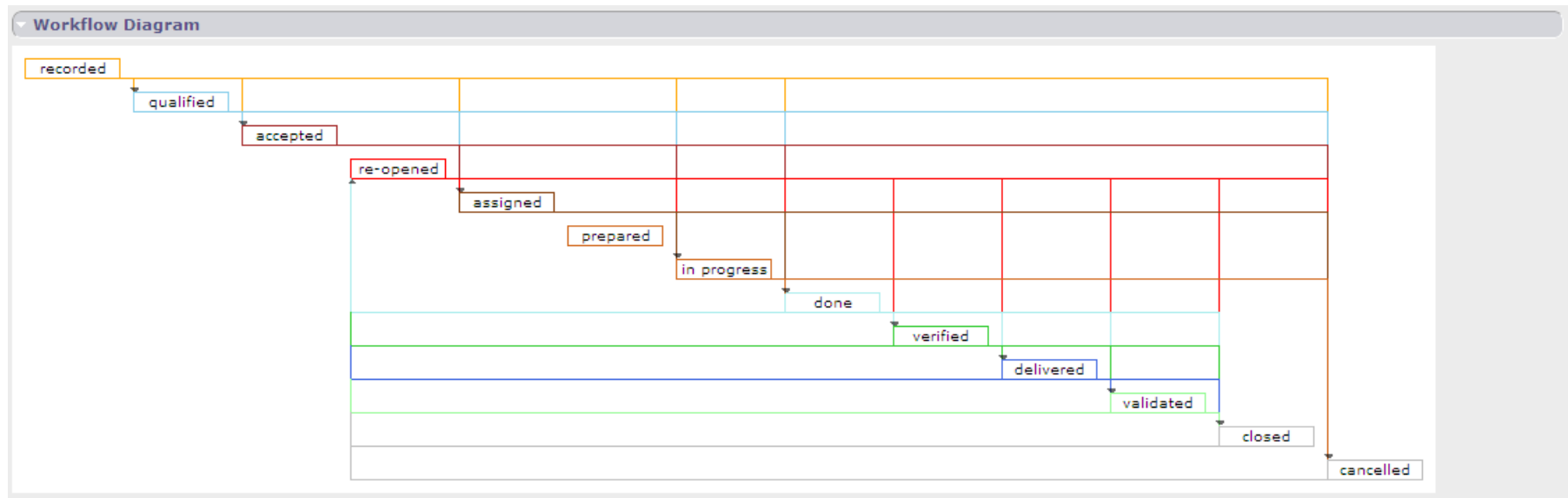
sort order :

closed :

description : Default workflow with just logic constraints.
Anyone can change status.

Field	Description
Id	Unique Id for the workflow. Automatically generated on creation.
Name	Name of the workflow.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that workflow is archived. Workflow will not appear in lists any more, unless "show closed" is checked.
Description	Complete description of the workflow. The description can have many lines. The field will auto-extend.

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





Workflow (2/2)

Table

The habilitation table helps defining who can move from one status to another one.

Each line correspond to the status from which you want to be able to move.

Each column correspond 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.

Habitations to change from a status to another														
from \ to	recorded	qualified	accepted	re-opened	assigned	prepared	in progress	done	verified	delivered	validated	closed	cancelled	
recorded		<input checked="" type="checkbox"/> all	<input checked="" type="checkbox"/> all	<input type="checkbox"/> all	<input checked="" type="checkbox"/> all	<input type="checkbox"/> all	<input checked="" type="checkbox"/> all	<input checked="" type="checkbox"/> all	<input type="checkbox"/> all	<input type="checkbox"/> all	<input type="checkbox"/> all	<input type="checkbox"/> all	<input checked="" type="checkbox"/> all	recorded
		<input checked="" type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	
		<input checked="" type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	
		<input checked="" type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	
		<input checked="" type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	
		<input checked="" type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	
		<input checked="" type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	
qualified		<input type="checkbox"/> all		<input type="checkbox"/> all	<input checked="" type="checkbox"/> all	<input type="checkbox"/> all	<input checked="" type="checkbox"/> all	<input checked="" type="checkbox"/> all	<input type="checkbox"/> all	<input type="checkbox"/> all	<input type="checkbox"/> all	<input type="checkbox"/> all	<input checked="" type="checkbox"/> all	qualified
		<input type="checkbox"/> Administrator		<input type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input type="checkbox"/> Administrator	<input checked="" type="checkbox"/> Administrator	
		<input type="checkbox"/> Supervisor		<input type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Supervisor	
		<input type="checkbox"/> Project Leade		<input type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input type="checkbox"/> Project Leade	<input checked="" type="checkbox"/> Project Leade	
		<input type="checkbox"/> Project Memt		<input type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input type="checkbox"/> Project Memt	<input checked="" type="checkbox"/> Project Memt	
		<input type="checkbox"/> External Projt		<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	
		<input type="checkbox"/> External Projt		<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input type="checkbox"/> External Projt	<input checked="" type="checkbox"/> External Projt	
from \ to	recorded	qualified	accepted	re-opened	assigned	prepared	in progress	done	verified	delivered	validated	closed	cancelled	

In the upper example, anyone can move an item from "recorded" to "assigned" and from "recorded" to "cancelled".

No one can move an item from "qualified" status to any other status. In this case, pay attention that it must never be possible to move an item to "qualified" status, because it will not be possible to leave this status.



Mails on status change

The application is able to automatically send mails on status change.
This must be defined for each type of element, and each new status

▼ Description

id : # 63

element updated : Question

new status : cancelled

closed : ☐

▼ Mail receivers

requestor : ☐

issuer : ☒

responsible : ☒

project team : ☐

project leader : ☐

other : ☐

Field	Description
Id	Unique Id for the Status Mail. Automatically generated on creation.
Element updated	Type of elements that will be concerned by automatic emailing.
New status	New status. Positioning the element to this status will generate emails.
Closed	Flag to indicate that Status Mail is archived. Team will not appear in lists any more, unless "show closed" is checked.

Field	Description
Mail addressees	List of addressees 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 (for instance member of the "project team" and "responsible"). If "other" is checked, an input box is displayed to enter a static mail address list. Several addresses can be entered, separated by semicolon.



The message of the mails is defined in the parameters.



Delay for Ticket

It is possible to define default delay for tickets, for each ticket type and each urgency of ticket.
On creation, due date will automatically be calculated as creation date + delay.

Description

id : # 6

ticket type : Anomaly / Bug

urgency : Urgent

value : 2 open days

closed : ☐

Field	Description
Id	Unique Id for the delay definition. Automatically generated on creation.
Ticket type	Ticket type the delay applies to.
Urgency	Urgency of ticket the delay applied to.
Value	Value of delay. Unit for the value can be : <ul style="list-style-type: none">- days : simple calculation as days- hours : simple calculation as hours- open days : calculation excluding off days (week-ends and off days defined on "calendar")- open hours : calculation only on the "standard open hours" defined on the global parameters.
Closed	Flag to indicate that delay definition is archived.



Indicator

It is possible to define indicators on each type of element.

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

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

For each indicator a warning value and an alert value can be defined.

Description

id : # 6

element :

type :

indicator :

reminder :

alert :

closed : ☐

Mail receivers

issuer : ☐

responsible : ☐

project team : ☐

requestor : ☐

project leader : ☒

Internal alert receivers

issuer : ☐

responsible : ☒

project team : ☒

requestor : ☐

project leader : ☒

Field	Description
Id	Unique Id for the indicator definition. Automatically generated on creation.
Element	The elements the indicator applies to.
Type	Type of the elements the indicator applies to.
Urgency	Urgency of ticket for which delay is applicable.
Reminder	Delay before due date or % of work or % or cost to send a warning
Alert	Delay before due date or % of work or % or cost to send an alert
Closed	Flag to indicate that indicator is archived.

Field	Description
Mail addressees	List of addressees 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 (for instance member of the "project team" and "responsible").
Internal alert receivers	List of addressees of the internal alert. The list is not nominative but defined as roles on the element.

Unit for the delays can be :

- days : simple calculation as days
- hours : simple calculation as hours
- open days : calculation excluding off days (week-ends and off days defined on "calendar")
- open hours : calculation only on the "standard open hours" defined on the global parameters.



Project type

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

Some important behaviour will depend on code :

- **OPE : Operational project.**
Most common project to follow activity.
- **ADM : Administrative project**
Type of project to follow non productive work : holidays, sickness, training, ...
Every resource will be able to enter some real work on such projects, without having to be affected to the project, nor assigned to project activities.
- **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 affected to them.

▼ Description

id : # 48

name : Fixed Price

code : OPE

workflow : Default

billing type : at terms

description : ☐ mandatory

sort order : 10

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Values are fixed. OPE : operational project ADM : administrative project TMP : template project All new types are created with OPE code.
Workflow	Defined the workflow ruling status change for items of this type
Billing type	Will define billing behaviour. (see related topic)
Description	Defines whether the description is mandatory or not for items of this type.
Sort order	Number to define order of display in lists.
Closed	



Ticket type

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

Description

id : # 16

name : Incident

code : INC

workflow : Default

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order : 10

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Activity type

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

Description

id : # 26

name : Task

code : TAS

workflow : Default

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order : 1

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Milestone type



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

Description

id : # 23

name :

code :

workflow :  

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order :

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Individual expense type

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

Description

id : # 39

name : Expense report

workflow : Simple with Project Leader validation

description : ☐ mandatory

lock closed : ☐ closed must be changed by status

sort order : 10

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Project expense type

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

▼ Description

id : # 40

name :

workflow : ▼ 🔍

description : ☐ mandatory

lock closed : ☐ closed must be changed by status

sort order :

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Expense detail type

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

Description

id : # 1

name : travel by car

sort order : 10

value / unit : km

value / unit : 0,54 â‚¬/km

value / unit :

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Sort order	Number to define order of display in lists
Value / unit	3 lines to define calculation mode for the detail type. 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 value.
Closed	Flag to indicate that type is archived.



Bill type



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

Description

id : # 72

name :

code :

workflow :  

comments : ☐ mandatory

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order :

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the bill type
Workflow	Defined the workflow ruling status change for items of this type
Comments	Defines whether the comments are mandatory or not for items of this type
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Risk type

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

Description

id : # 1

name : Contractual

code : CON

workflow : Default

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order : 10

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Action type

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

Description

id : # 27

name :

code :

workflow :

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order :

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Issue type

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

Description

id : # 4

name :

code :

workflow :

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order :

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Meeting type



Meeting type is a way to define common behavior on group of meetings.

Description

id : # 30

name :

code :

workflow :  

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order :

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Decision type

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

Description

id : # 33

name : Functional

code : FUN

workflow : Validation

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order : 10

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Question type

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

Description

id : # 37

name : Functional

code : FUN

workflow : Simple with validation

description : ☐ mandatory

responsible : ☒ mandatory on handled status

result : ☒ mandatory on done status

lock handled : ☒ handled must be changed by status

lock done : ☒ done must be changed by status

lock closed : ☒ closed must be changed by status

sort order : 10

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Responsible	Defines whether the responsible is mandatory or not for items of this type when the handled status is on.
Result	Defines whether the result is mandatory or not for items of this type when the done status is on.
Lock handled	Defines whether the handled check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock done	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Lock closed	Defines whether the done check is locked or not for items of this type. If locked, this flag can only be update through status change.
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Message type


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

▼ Description

id : # 13

name : ALERT

description : ☐ mandatory

color : 

sort order : 10

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Description	Defines whether the description is mandatory or not for items of this type
Color	Display color for messages of this type
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Document type



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

Description

id : # 63

name :

code :

workflow :  

description : ☐ mandatory

sort order :

closed : ☐

Field	Description
Id	Unique Id for the type. Automatically generated on creation.
Name	Name of the type.
Code	Code of the type. Used to calculate reference.
Workflow	Defined the workflow ruling status change for items of this type
Description	Defines whether the description is mandatory or not for items of this type
Sort order	Number to define order of display in lists
Closed	Flag to indicate that type is archived.



Profile

The profile is a group of habilitations and right access to the data.
Each user is linked to a profile to defined the data he can see and possibly manage.

Description

id : # 1

name : Administrator

Profile code :

sort order :

closed : ☐

description :

Field	Description
Id	Unique Id for the profile. Automatically generated on creation.
Name	Name of the profile. Translatable.
Profile code	A code that may be internally used when generating emails and alerts. <ul style="list-style-type: none">• ADM will designate administrator.• PL will designate Project Leader
Sort order	Number to define order of display in lists
Closed	Flag to indicate that profile is archived.
Description	Complete description of the profile. The description can have many lines. The field will auto-extend.



Access mode

The access mode defines a combination of rights to read, created, update or delete items. Each access is defined as scope of visible and/or updatable elements, that can be :

- No element : no element is visible and/or updatable
- Own elements : only the elements created by the user
- Elements of own project : only the elements of the projects the user/resource is affected to
- All elements on all projects : all elements, whatever the project

Description

id : # 1

name : Reader

read rights : ▼

create rights : ▼

update rights : ▼

delete rights : ▼

sort order :

closed : ☐

description :

Field	Description
Id	Unique Id for the access mode. Automatically generated on creation.
Name	Name of the access mode. Translatable.
Read rights	Scope of visible items
Create rights	Scope of possibility to create items
Update rights	Scope of updatable items
Delete rights	Scope of deletable items
Sort order	Number to define order of display in lists
Closed	Flag to indicate that access mode is archived.
Description	Complete description of the access mode. The description can have many lines. The field will auto-extend.



Project'Or

Access to forms defines for each screen the profiles of users that can access to the screen. Users belonging to a profile not checked for a screen will not see the corresponding menu.

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Today	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work							
	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Tickets	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Milestones	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Actions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Follow-up							
Financial							
Risk & Issue Management							
Review logs							
Tools							
Environmental parameters							



Project'Or

Access to reports defines for each report the profiles of users that can access to the report. Users belonging to a profile not checked for a report will not see the corresponding report in the report list.

work							
	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
work - weekly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
work - monthly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
work - yearly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
detailed work per resource - weekly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
detailed work per resource - monthly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
detailed work per resource - yearly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
planning							
tickets							
current status							
change history							
costs							
billing							



Access mode to data

Project'Or
RIA

Access mode defines for each "Project dependent" screen the access mode (scope of visibility and updatability) for each profile.

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Projects	Manager+	Reader+	Manager	No access	No access	No access	No access
Documents	Manager+	Reader+	Manager	Manager	Reader+	Reader+	No access
Work							
	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Tickets	Manager+	Reader+	Manager	Manager	Manager	Creator	Reader
Activities	Manager+	Reader+	Manager	Updater	Reader	Reader	Reader
Milestones	Manager+	Reader+	Manager	Updater	Reader	Reader	Reader
Actions	Manager+	Updater+	Manager	Updater	Updater	Reader	Reader
Financial							
Risk & Issue Management							
Review logs							
Tools							
Environmental parameters							



Specific access mode


Project'Or
RIA

Real work allocation access mode defines the visibility a user can have on "real work allocation". It is mostly used to define profiles who will be able to see and/or update "real work" for other users (such as project leader)

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Access on real work allocation for resources	All elements on	Own elements	Elements of ow	Own elements	No element	No element	No element

Work and cost visibility defines for each profile the scope of visibility of work and cost data.

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Work visibility	All visible	All visible	All visible	All visible	Only Validated	None visible	None visible
Cost visibility	All visible	All visible	All visible	None visible	Only Validated	None visible	None visible

Display of combo detail button defines for each profile whether a  button will be displayed or not, facing every combo list box. Through this button, it is possible to select item and/or create new item. This button may also be hidden depending on access right (if the user has no read right to corresponding elements)

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Display button	Yes	No	Yes	No	No	No	No

Planning calculation defines for each profile the ability to calculate planning or not.

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Calculate planning	Yes	No	Yes	No	No	No	No

Document unlock defines for each profile the ability to unlock any document. Otherwise, each user can only unlock the document locked by himself.

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Unlock any document	Yes	No	Yes	No	No	No	No



Administration screen access should be restricted to administrators.

Background task is a specific threaded treatment that regularly checks for indicators to generate corresponding alerts and warnings when needed.

Background tasks

alerts generation : stopped

Administrator can send an internal alert to one or all users.

Send an internal alert

addressees : all users

creation date/time : 18/03/2012 23:46

type : information

title :

message :

Administrator has the possibility to close and delete sent emails and alerts, and to update reference for any kind of element.

Maintenance of Data

close emails : sent since more than 7 days

delete emails : sent since more than 30 days

close alerts : sent since more than 7 days

delete alerts : sent since more than 30 days

update reference for : all



Global parameter screen access should be restricted to administrators.

Daily work hours

AM start time : 08:00

AM end time : 12:00

PM start time : 14:00

PM end time : 18:00

Units for work

unit for real work allocation : days

unit for workload : days

number of hours per day : 8

Alerts management

delay (in second) to check alerts : 60

Ldap management parameters

default profile for Ldap users : Project Guest

message on creation new user from Ldap : No

Format for reference numbering

prefix format for reference : {PROJ}-{TYPE}-

number of digits for reference number :

change reference on type change : No

Miscellaneous

check for new version : Yes

separator for csv files : ;

Definition of regular "work hours".
Used to calculate delays based on "open hours".

Definition of the unit (days or hours) for reals work allocation and for all work data. Remember that data is always stored in days. If both values are different, rounding errors may occur.
Attention : duration will always be displayed in days, whatever the workload unit.

Delay between each check on indicators for alert and warning generation

Information about behavior on creation of new user from Ldap connection.

Global parameters for bill reference formatting :

- Prefix : can contain {PROJ} for project code and {TYPE} for type code
- Number of digit for formatting
- Wether the reference must be changed on type change

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

Global parameters must be saved before leaving the screen.



Global parameter screen access should be restricted to administrators.

Document

root directory for documents :

separator for draft in version name :

Billing

prefix for bill n° :

suffix for bill n° :

number of digits for bill number :

start number for bill :

Planning

show resource in Gantt : ▼

Definition of regular "work hours".
Used to calculate delays based on "open hours".

Definition of the unit (days or hours) for reals work allocation and for all work data. Remember that data is always stored in days. If both values are different, rounding errors may occur.
Attention : duration will always be displayed in days, whatever the workload unit.

Select if resource can be displayed in Gantt chart, and format for display : name or initials.

Global parameters must be saved before leaving the screen.



User parameters

Project'Or
RIA

User parameter screen access should be allowed to all users.

<div><div>▼ Display parameters</div><div>theme : <input type="text" value="Project'Or RIA theme"/></div><div>language : <input type="text" value="English"/></div></div>	}	Generic display parameter for user.
<div><div>▼ Graphic interface behaviour</div><div>display history : <input type="text" value="No"/></div><div>hide menu : <input type="text" value="No"/></div><div>switched mode : <input type="text" value="No"/></div></div>	}	Selection of graphic interface behavior
<div><div>▼ Print & Export parameters</div><div>print in new window : <input type="text" value="No"/></div><div>pdf export in new window : <input type="text" value="No"/></div></div>	}	Selection of destination for printing and PDF export.
<div><div>▼ Miscellaneous</div><div>default project : <input type="text" value="All projects"/></div></div>	}	Default selected project

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



Some items have a translatable name.

This means that when you have such an item, what is displayed is not directly its name, but a translation of its name.

These items are easily identified : they have a property `$_isNameTranslatable = true`;

Most of these items are internal lists, not updatable through the tool.

But two of them can be modified : "profile" and "access mode".

They are easily identified, because under the name field appears the translated name (display only).

This means you can add one new item, but then how do you set its name ?

Here is an example on how to add a new profile :

Add the new profile, and set its name to a significant value, without spaces or special characters, and ideally starting with "profile" (to be easily identified in the translation table). For instance, we will name it "profileNewValue".

Enter all the other values as desired and save.

After saving, you can see displayed value is "[profileNewValue]", meaning this value is not found in the translation table.

You must then add a new line in the lang.xls file. First download it from the "download" menu.

Open it in Excel, and allow macros.

Then, you must add a new line in lang.xls, with string="profileNewValue" (example) and default, en, fr and de columns with the caption you want to display.

Then, "save as" (to position the default directory in Excel, don't use direct "save") and click on "Generate".

This will generate a lang.js file in the current directory and in the en, fr and de sub-directories.

Then you may copy these files to replace existing ones in the /tool/i18n/nls directory on your server.

Just display the profile again : the name is now translated.

NB: don't forget to save your lang.xls file and identify your changes (for instance using vers. column) because you will have to re-apply them after each new version deployment.



You changed the status of a ticket and the tool replied "Item updated – email sent".
But what contained that email ? And why did you not receive this email ?

Just go to Menu "Tools" ⇒ "Sent emails" to see the content of the email !

You'll see who was addressee of the email.

If you're not in the list, just check with you're admin, it's a question of email parameters.
But this is another story...




Basically, you should at least see the emails you've sent.

But you can also have visibility on all your project's emails or all the emails.


This can be done by the administrator, who can parameter emails visibility.


Sure he will reserve to himself the last option (see all the emails).



Attachments						
	id	date	user	size	type	file
 	#2	13/10/2011 18:28:19	admin	1.2 KB		readme.txt 


Users can attach files on most of items.

To attach a file, just click on the  icon.
An attachment pop-up will appear :

Attachment 



file :

description :

An attachment can not be modified.
It can only be deleted with  icon.

Only the user who created the attachment can delete it.

Click on  icon to download the attached file.

Field	Description
Id	Unique Id for the attachment. Automatically generated on creation. Id are shared for all projects and all attachments.
Date	Date of creation of the attachment.
User	Name of the user who attached the file.
Type	Mime type of the file.
Size	Size of the file.
File	File name.
Description	A comment to describe the file.  If description is entered, the note  icon will appear on file column, and moving the mouse over the file name will display the description.






Attached files are stored on server side, on a place specified by the administrator on parameters.





Attachment section can be folded or unfolded, clicking on the section title.
Each user can change on user parameters the default display of the section (folded or not).




Notes				
 	id	date	user	note
	#1	19/03/2012 00:13:58	admin	New comment. For testing...

Users can add notes on most items.
Notes are comments, that can be shared to track some information or progress.

To add a note, just click on the  icon.
A note pop-up will appear :

Note 

Field	Description
Id	Unique Id for the note. Automatically generated on creation. Id are shared for all projects and all notes.
Date	Date of creation or modification of the attachment. Creation date is displayed straight. Last modification date is displayed in italic.
User	Name of the user who created the note.
Type	Mime type of the file.
Note	Text of the note.

A note can be modified with the  icon.
This will display the note pop-up for editing the note.

A note can be deleted with  icon.

Only the user who created the note can modify or delete it.



Note section can be folded or unfolded, clicking on the section title.
Each user can change on user parameters the default display of the section (folded or not).



Change History

Change history					
date	user	operation	data	value before	value after
31/01/2012 23:21:15		update	reference		001-001-INC-1
13/10/2011 17:24:39	admin	update	actual due date/time	2011-09-02 18:30:00	2011-09-09 18:30:00
02/09/2011 01:54:52	admin	update	priority		Low priority
			initial due date/time		2011-09-02 18:00:00
			actual due date/time		2011-09-02 18:30:00
			handled	0	1
			handled time		2011-09-02 01:54:00
02/09/2011 01:54:51	admin	update	urgency		Urgent
			creation date/time	2011-09-02 01:44:00	2011-09-01 12:00:00
			original version		wa V1.0
			status	recorded	in progress
			responsible		project manager
			criticality		Low
02/09/2011 01:45:12	admin	insert			

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.

Field	Description
Date	Date of change operation.
User	Name of the user who operated the change.
Operation	The operation on the item (insert or update)
Data	The field modified.
Value before	The value of the field before the update.
Value after	The value of the field after the update.



Change history section can be folded or unfolded, clicking on the section title.
Each user can change on user parameters the default display of the section (folded or not) or even select to hide this section.



Backup is a good practice.

You should regularly backup your Data to be able to retrieve it in case of a crash.

How often ?

It just depends on your need ...

Just ask yourself : what is acceptable to lose in case of a crash ? 1 day, 1 week ?

You should also always backup your Data before any application upgrade... in case of ...

So, how to back-up ?

The simplest way is to use phpMyAdmin export capacity, using "SQL" format, saving result to a file.

Then you'll be able to import Data from this exported file.

Hints :

- be sure to use UTF-8 charset when exporting / importing
- you cannot import into a full Database (with existing Data) :
 - ⇒ either you truncate the tables before import
(you must then assure to import Data into a structure of the same version of application !)
 - ⇒ you drop the tables before import
 - ⇒ you export data including 'Drop tables'
- regularly test your back-up files, trying to restore it on an empty Database
(so many times backup are never tested, and can not be imported when needed...)



Shortcuts

Project'Or
RIA

Shortcut keys	Effect
[CTRL]+s	Save the current item
[F1]	Open manual, on dedicated contextual topic (if exists)



Hofstadter's Law

"It always takes longer than you expect, even if you take Hofstadter's Law into account"

Murphy's Law

"Whatever can go wrong will go wrong"

"... and at the worst possible time, in the worst possible way."

This simply means that whatever your planning is, it is wrong !
So, you'd better manage risks and follow-up all the events on your project...

Change History of Project'Or RIA can be found on the web site:

<http://projectorria.toolware.fr>

You can also access to the track Database (running as a Project'Or RIA instance) to see details of changes as tickets.