Technical Documentation

Installation Guide

The Projects and Portfolio Management Open Source Tool

INVESTMENT, PORTFOLIO AND PROJECT MANAGEMENT

RISK, CHANGE AND KPI´S MANAGEMENT

INFORMATION INTEGRATION CENTER

DESIGNED BY AND FOR PROJECT MANAGERS

ORIENTED TO PMI AND ISO STANDARDS

OPEN SOURCE WITHOUT LICENSE FEE

For any help or questions, please see our **OpenPPM** support section at:www.talaia-openppm.com

Thank you for downloading **OpenPPM**!!

We offer you two options to install your **OpenPPM** software:

- **Easy Installation** (recommended for non-technical users): you deploy a virtual machine with all the components included. (Application Server, Data Base and **OpenPPM**)

- **Customized Installation** (recommended for advanced users only): you deploy all the elements separately allowing you to choose:
    - Virtual Machine
    - Data Base (Maria DB, MySQL or Oracle)
    - Tomcat Version (v.7 or higher)

This installation Guide Contains:

- Section I Installation Guide
    - Section I-A: Easy Installation Guide
    - Section I-B: Customized Installation Guide
- Section II: Configuration: Admin + OPA Settings
- Section III: User Guide

Section I: Installation Guide

Section I-A:Easy Installation Guide

Before getting started make sure that you have downloaded the .OVA file at the following link:

http://www.mediafire.com/download/w4to6124xc62ycw/Ubuntu-OpenppmCommunity.ova

Due to the file size, the download might take between 30 to 40 minutes.

- **System Minimum Requirements**

In order to be able to deploy **OpenPPM**, we recommend that your system complies with the following minimum requirements:

- 2 GB Disk Space
- 4 GB Memory
- Virtual Technology Capability

Step I: Installation Virtual Machine

In order to deploy your **OpenPPM** you need to install a Virtual Machine and import the OVA file downloaded from SourceForge which contains:

- Ubuntu 14.02.2 LTS (64 bits) as a OS
- MariaDB 5.5
- Tomcat 7
- OpenJDK 1.7.0_79
- OpenPPM Community

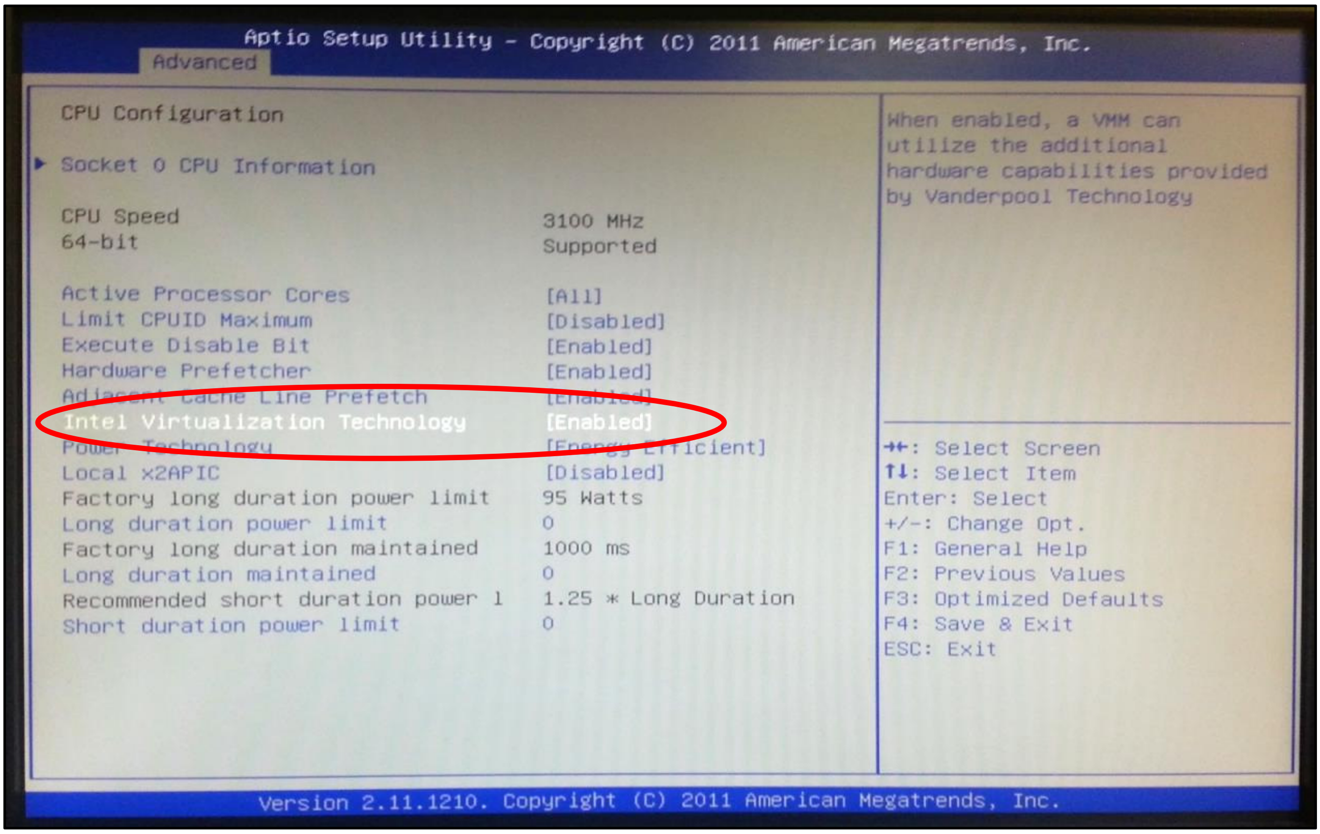
In order to install the Virtual Machine the following steps must be followed:

- **Access your BIOS**

To install **OpenPPM**, you have first to deploy a virtual machine and therefore enable the virtualization technology feature of your system, if using a laptop or PC

To do so, start your computer and press the indicated key on your screen to enter your BIOS configuration settings.
Please refer to your product manufacture which will indicate you how proceed further with your computer. (Usually the indicator key to enter your BIOS appears on the first screen and stays only for few seconds, PAY ATTENTION!). The press key is likely to be: F1, F2, F3, Esc or Delete key.

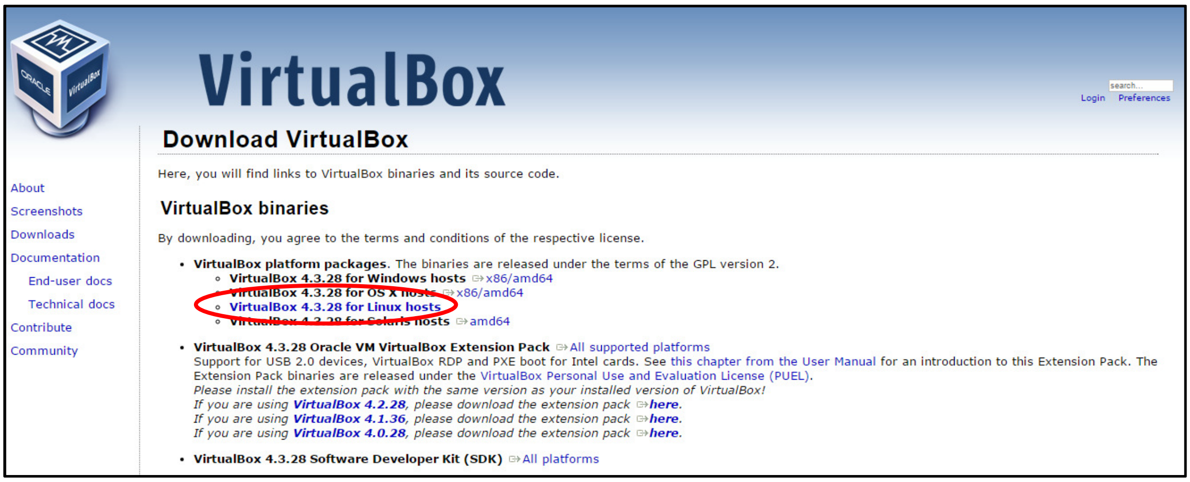
As an example we had attached a print screen sample:



- **Download Virtualbox**

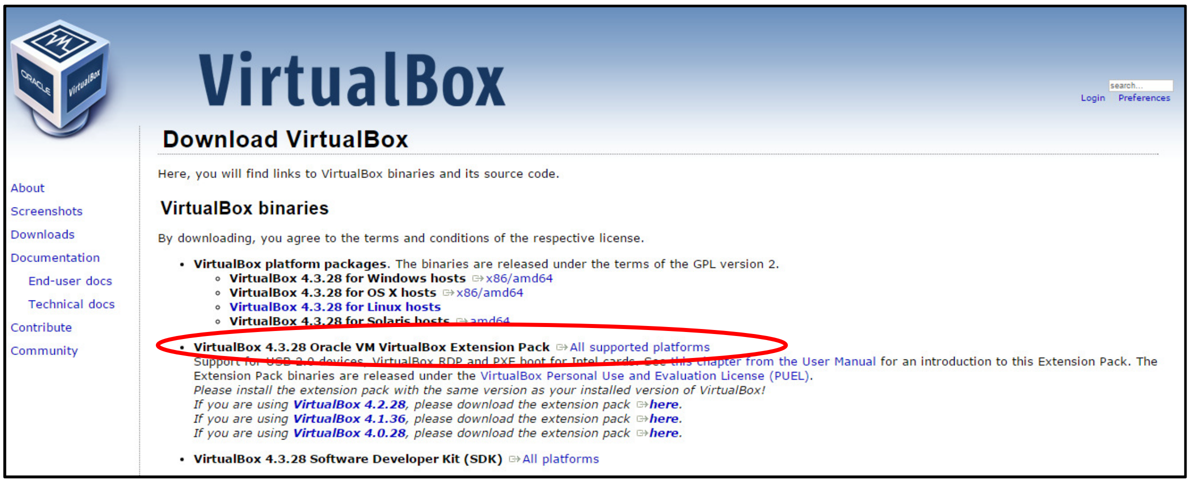
  - Go to the following website: https://www.virtualbox.org/

  - Download one of the virtual platform packages.(We recommend downloading the VirtualBox 4.3.28 for Linux hosts)



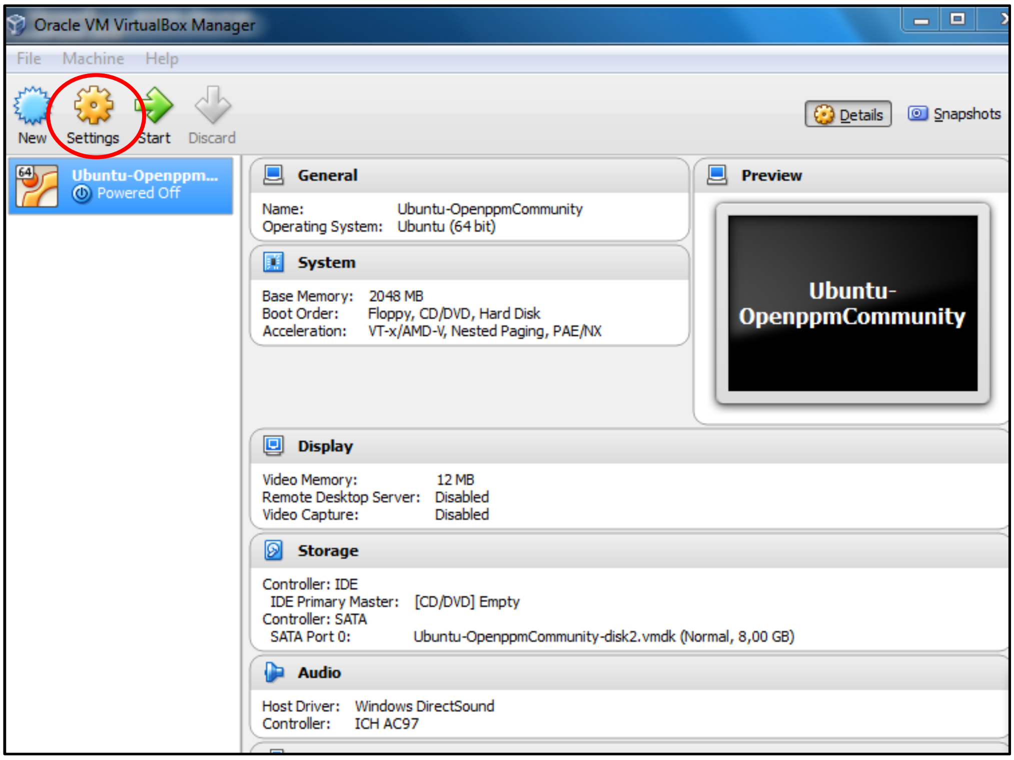
After installing the program, Go back to the VirtualBox home page: https://www.virtualbox.org/

Download the Oracle VM Virtualbox extension pack for all supported platforms.

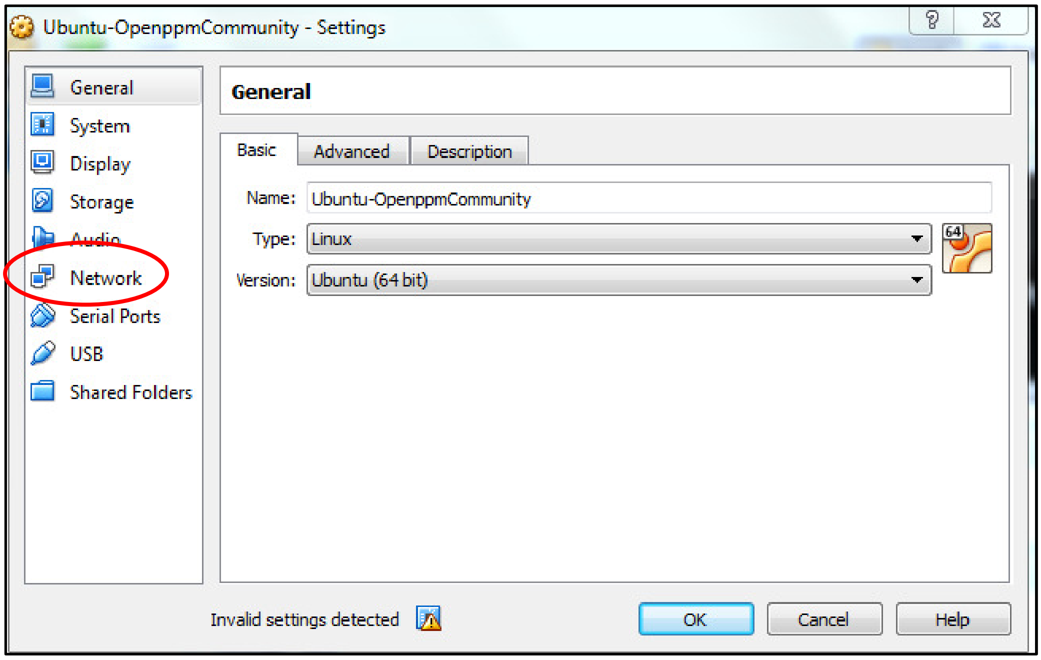


- ## Configure your Virtual Machine

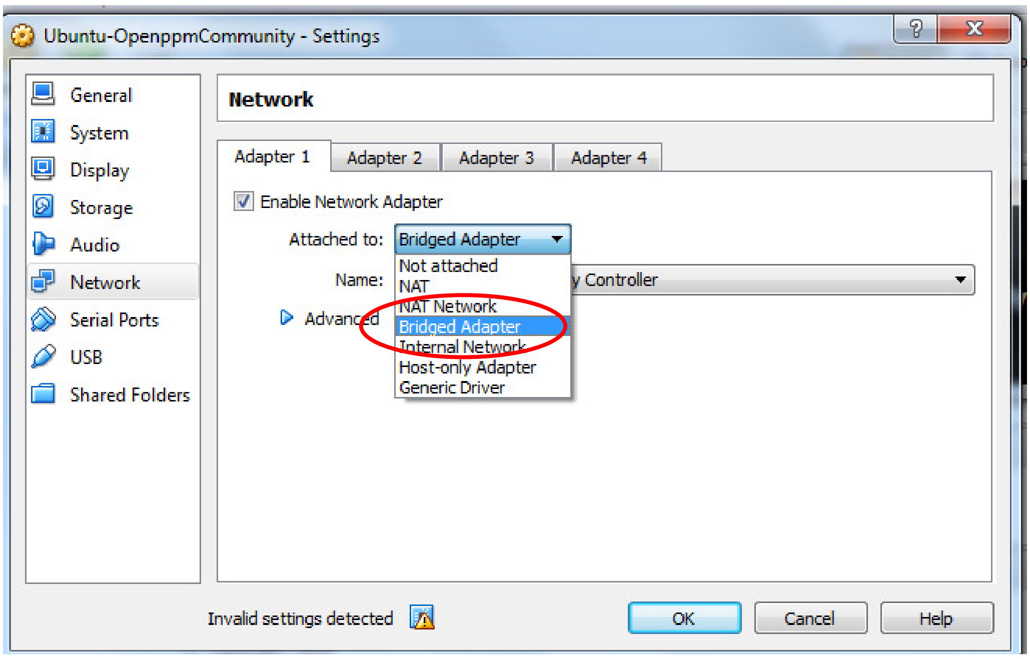
  - Enter to the Oracle VM VirualBox Manager. Go to settings:



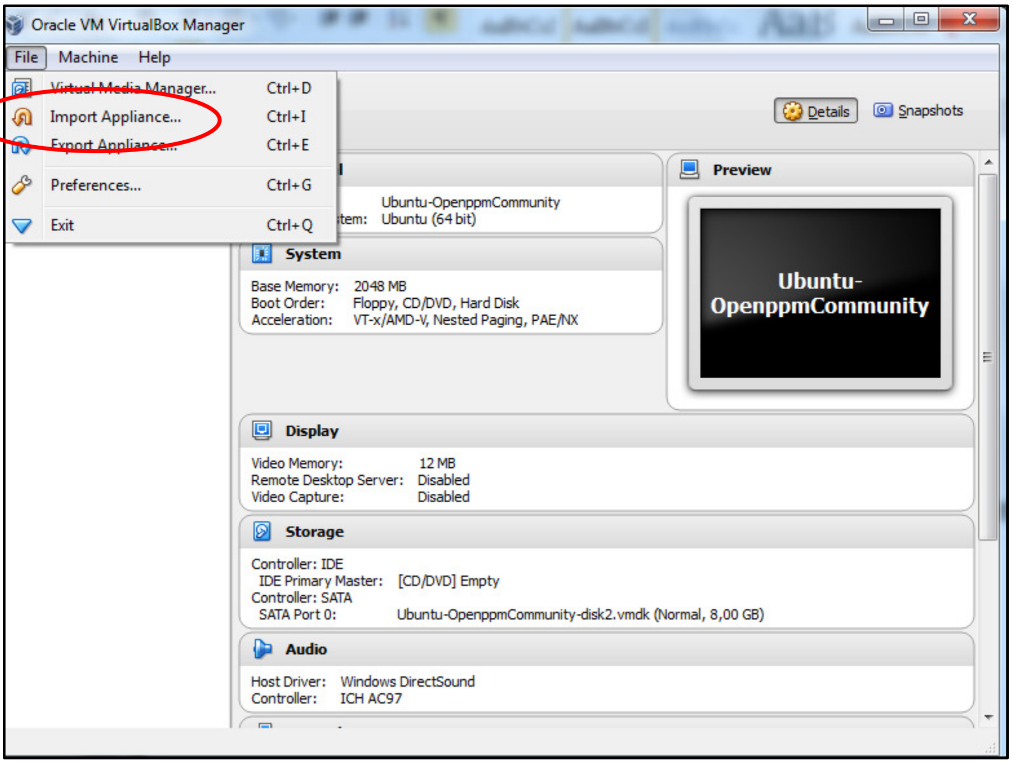
- Then Go to network:



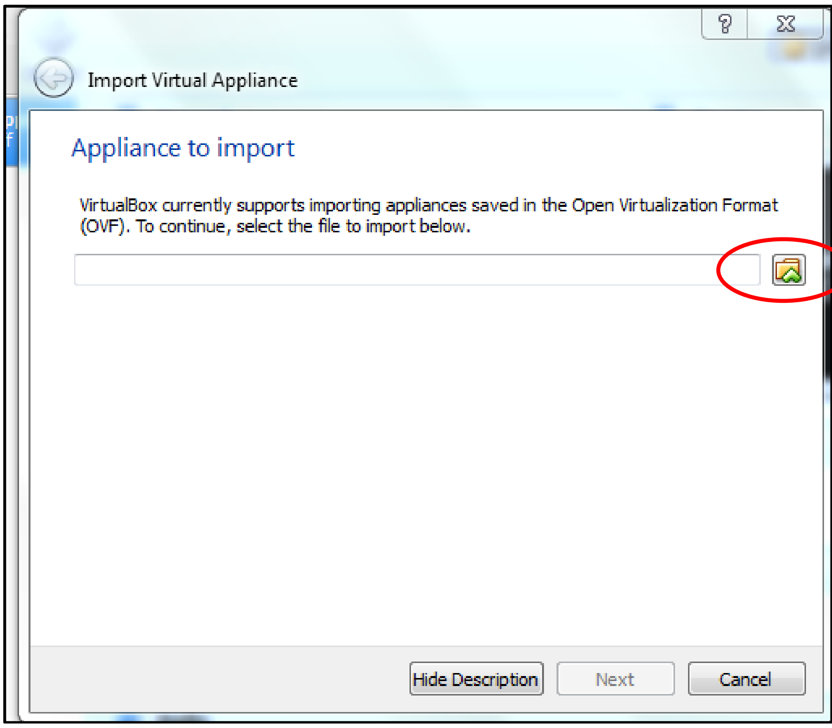
- Enable Network Adapter and choose attached to <u>Bridged Adapter.</u>



- Import the Ubuntu-OpenppmCommunity.ova file.

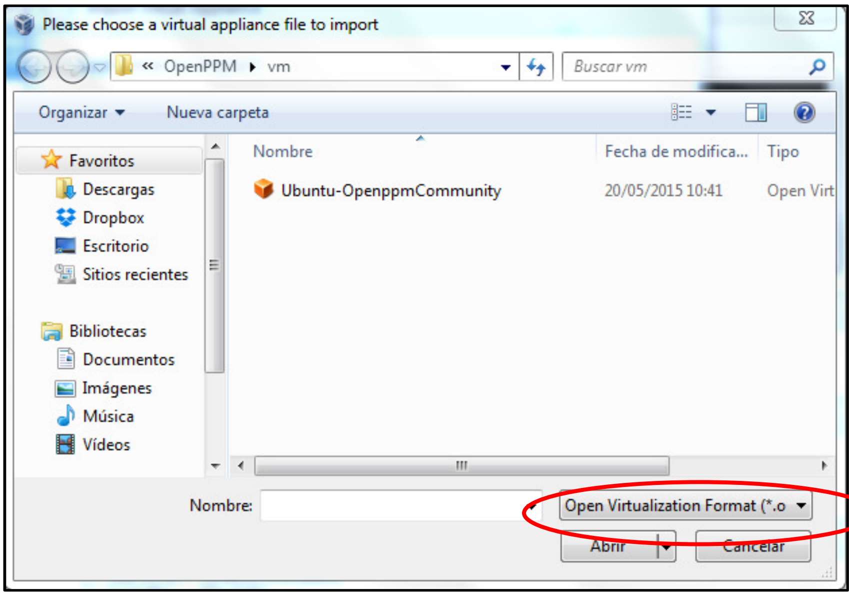


- Double-Click to open the file.

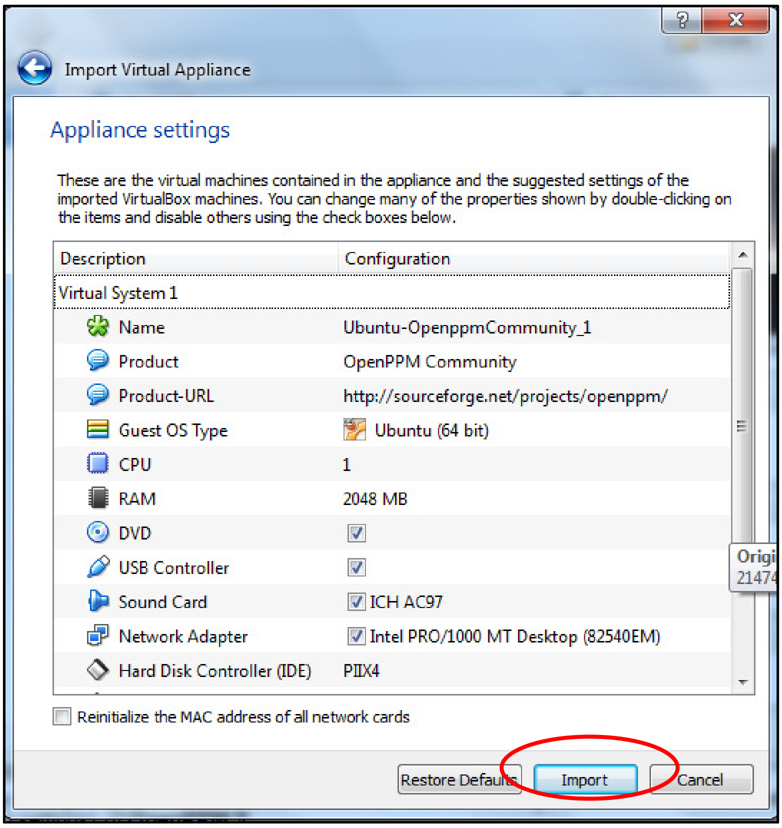


Click on Button

- Select the Ova file and click on Open Virtualization Format:

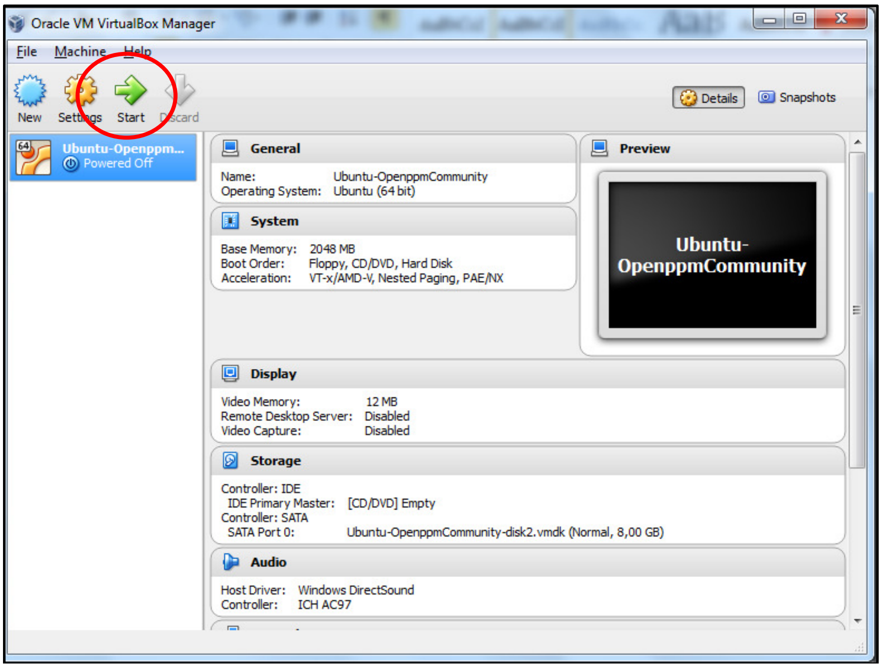


- Click on import. This can take few minutes:



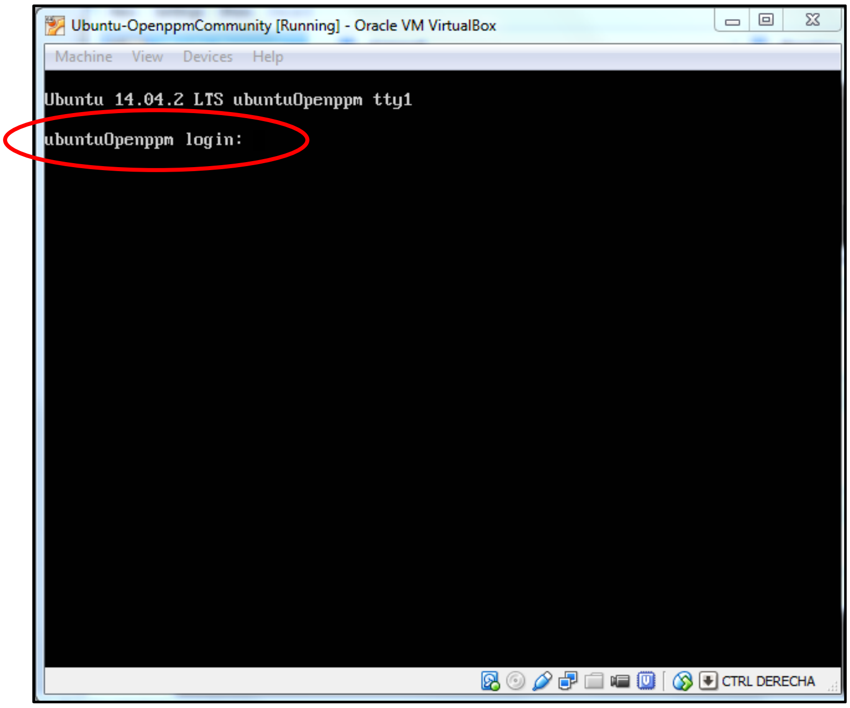
Once the import is completed you will be able to see the virtual machine on the list.

- Click on start to launch the virtual machine:

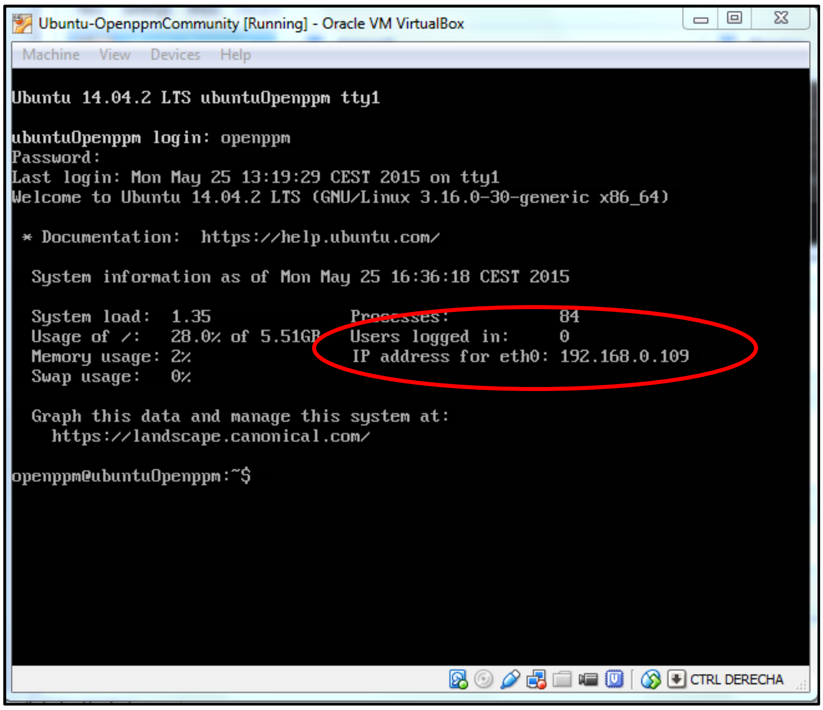


Once the virtual machine is running, you can log in with the following information:

ubuntuOpenppm Login:	openppm
password:	openppm

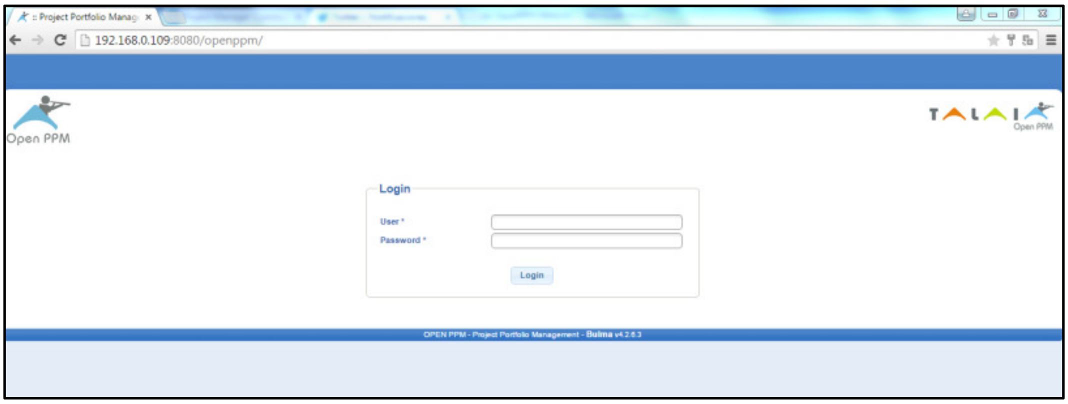


In the screen, you will be able to identify the IP address where your Virtual Machine will be accessible from:



You can now access your **OpenPPM** application from any web browser.

- Open your Web browser and add the following url: http://192.168.0.109:8080/openppm



Section I-B:- Customized Installation Guide

This document describes the installation process of **OpenPPM.**

- **Requirements**

Hereunder is our minimum requirement recommendation to install **OpenPPM** based upon:

- 150 + active users
- 200 + active projects

- **Hardware:** **OpenPPM** can be deployed on a physical or virtual machine:
    - Virtual Machine
    - 2 Virtual CPU
    - Physical CPU: Quad Core @ 2.6 GHz Xeon4 or similar.

- **Software:** Our certified and therefore recommended software configuration is the following:

Operating System	Ubuntu Server	v.10.04.3	4 GB RAM
	Linux RedHat Enterprise	v.6.3	
Application Server	Apache Tomcat	v.7.0.29 or higher	2 GB RAM
Programming Language	Java	v.1.7 or higher	
Database	MariaDB	v5.5 or higher	
	mySQL	v.5.1 or higher	
	Oracle	v.10g or higher	
Hypervisor	VMWare		
Web Browser	IE, Chrome, Firefox. Safari		

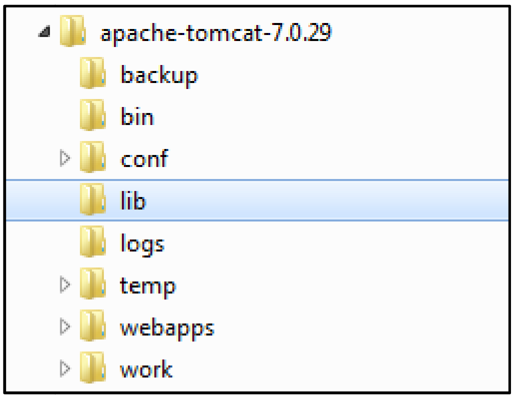
Nevertheless, **OpenPPM** could be installed with any other Operating System compatible with APACHE TOMCAT application server, and any other database apart from the ones certified above. If this is the case, please, contact us.

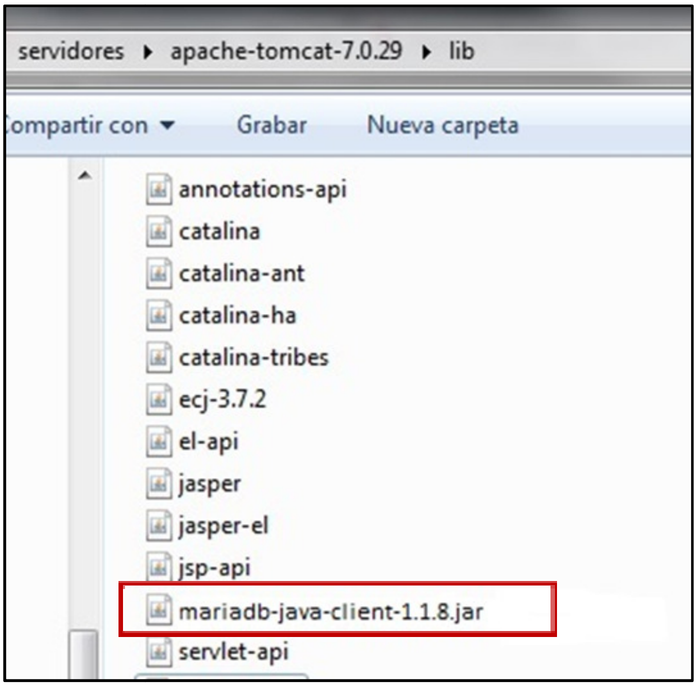
- **Apache Server installation**

Download the application server from http://tomcat.apache.org/download-70.cgiand choose the distribution depending on the operating system of the server that will host **OpenPPM**.

- ## JAVA – MariaDB Connector Installation

For a MariaDB setting it is necessary to include the connection library (mariadb-java-client-1.1.8.jar) to the folder “Tomcat 7.x/lib/” as shown:





- ## Database Connection Settings

You will find attached a connection database example of an XML (openppm.xml). This file needs to be modified to adapt to the specific database setting of the new installation.

```
<?xml version='1.0' encoding='utf-8'?>
<!--

-->
<!-- The contents of this file will be loaded for OpenPPM application -->
<Context>

    <WatchedResource>WEB-INF/web.xml</WatchedResource>
        <Realm className="org.apache.catalina.realm.JAASRealm"
        appName="OpenPPMWeb"
        userClassNames="es.sm2.openppm.auth.PlainUserPrincipal"
        roleClassNames="es.sm2.openppm.auth.PlainRolePrincipal"
        useContextClassLoader="true"/>

        <Resource name="jdbc/openppmDB"
                auth="Container"
                type="javax.sql.DataSource"
                username="openppm"
                password="openppm"
                driverClassName="org.mariadb.jdbc.Driver"
                url="jdbc:mariadb://localhost:3306/openppm?autoReconnect=true"
                maxActive="50"
                maxIdle="0"
                testWhileIdle="true"
                timeBetweenEvictionRunsMillis="600000"
                />
</Context>
```

IP address : Port / Scheme

Note 1: The file will aways be named “openppm.xml” (and please, double-check that it is the same name shown in the .war file, i.e. openppm.war) and it needs to be placed in the Tomcat folder: conf/catalina/localhost

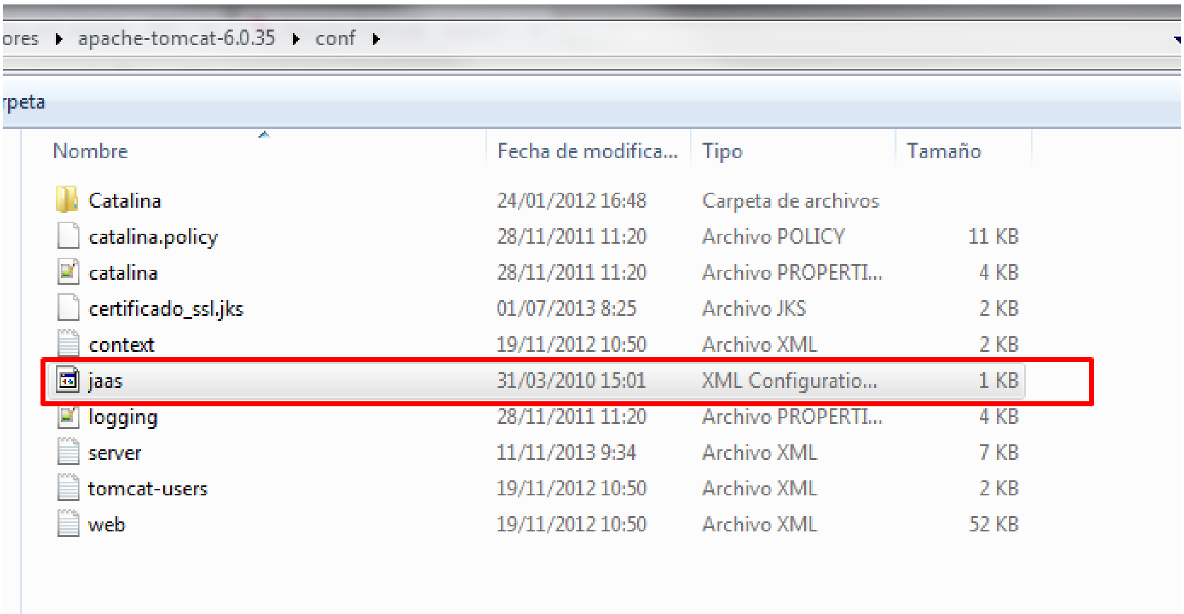
- ## Tomcat Settings (Security, Memory and Encoding)

In the “openppm.xml” file, if the **OpenPPM** security is internal to the application, the security information lines can be found as shown:

```
<?xml version='1.0' encoding='utf-8'?>
<!--

-->
<!-- The contents of this file will be loaded for OpenPPM application -->
<Context>

    <WatchedResource>WEB-INF/web.xml</WatchedResource>
        <Realm className="org.apache.catalina.realm.JAASRealm"
        appName="OpenPPMWeb"
        userClassNames="es.sm2.openppm.auth.PlainUserPrincipal"
        roleClassNames="es.sm2.openppm.auth.PlainRolePrincipal"
        useContextClassLoader="true"/>

        <Resource name="jdbc/openppmDB"
                auth="Container"
                type="javax.sql.DataSource"
                username="openppm"
                password="openppm"
                driverClassName="org.mariadb.jdbc.Driver"
                url="jdbc:mariadb://localhost:3306/openppm?autoReconnect=true"
                maxActive="50"
                maxIdle="0"
                testWhileIdle="true"
                timeBetweenEvictionRunsMillis="600000"
                />
</Context>
```

Internal Security Configuration Data

Moreover, the “jaas.config” file is provided during the first installation and should be copied in the “Tomcat 7.x/conf/” path



A file called setenv.xx is included in the Tomcat download files where xx will depend if the application server operating system is Linux or Windows (Linux .sh and Windows .bat) where the “jaas.config” refers to. It is necessary to check if the path to the folder is correct:

- -Djava.security.auth.login.config=”/Tomcat absolute path/conf/jaas.config “

Also check encoding and memory adjustments:

- -Dfile.encoding=UTF8
- -Xmx1024m -XX:MaxPermSize=512m -server

If you wish to change the security type (LDAP, Mix or External) you have to refer to the **OpenPPM** Administration panel, once the application is deployed.

- **OpenPPM Application Deployment**

In order to deploy the application **for the first time**, the following steps need to be executed (**once points 1.2 to 1.5 of this guide are done**):

1. Create the user “openppm” in the database.
2. Import the export file (e..g. installationdump20140430.sql) from the root of the “scripts” folder & Execute ALL the scripts, one by one, contained in the script folders (ex: from 4.07 to 4.0.8, etc…) in the CHRONOGICAL Order
3. Give rights to the user “openppm” (created in point 1) in the created “openppm” database (the import of the export creates automatically such database).
4. Copy the “openppm.war” folder in the “Tomcat 7.x\webapps\” folder
5. Start the Tomcat application server
6. Go to the Browser and check it works (it takes a little time to start)

- **OpenPPM Application Update**

If you have already installed OpenPPM and need to update your version, then the following steps need to be executed:

1. Stop the application server Tomcat
2. Do a Backup of the database
3. Execute the scripts attached with the new version
4. Delete Tomcat temporary files in the following way:
   - “Tomcat 7.x\webapps\” → Delete “openppm” folder.
   - “Tomcat 7.x\logs\” → Delete the “logs” folder content (NOT the folder)
   - “Tomcat 7.x\work\Catalina\localhost\” → Delete “openppm” folder
   - “Tomcat 7.x\logs\” → Delete the “logs” folder content (NOT the folder)
5. Copy the NEW “openppm.war” file in the “Tomcat 7.x\webapps\” folder
6. Start the Tomcat application server: go to the Tomcat folder bin/ and execute startup file (.shsiestá en linux o .bat en windows)
7. Go to the Browser and check it works (it takes a little time to start)

Section II: Configuration Admin + OPA Settings

Section II: Configuration: Admin + OPA Settings

Now that you have deployed **OpenPPM** let's get started !!

In order to start using your new **OpenPPM** application you need to follow a 2 Step process to define a basic configuration enabling the basic functionalities of your product.

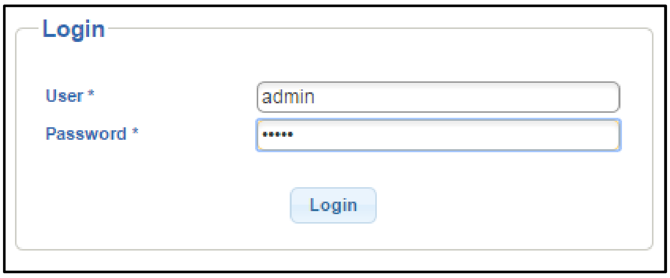
Step 1: Create a Perfoming Organization and a Default User:

In **OpenPPM**, a Performing organization (PO) is similar to your company department or division where projects are executed. Here is what you need to do to create a PO:

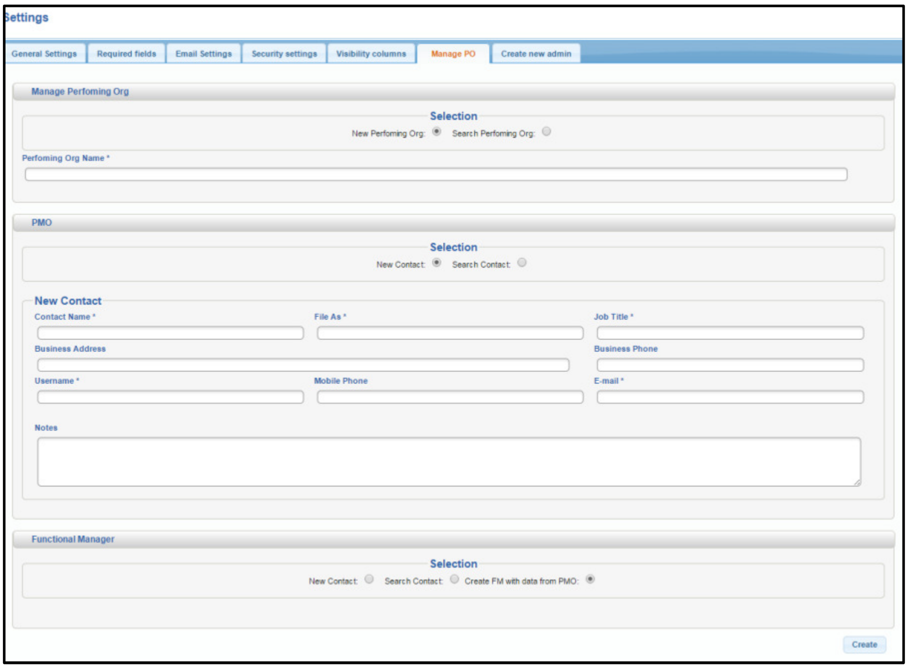
- **Log in as Admin:**

By default, an administration user is created with the following default credentials:

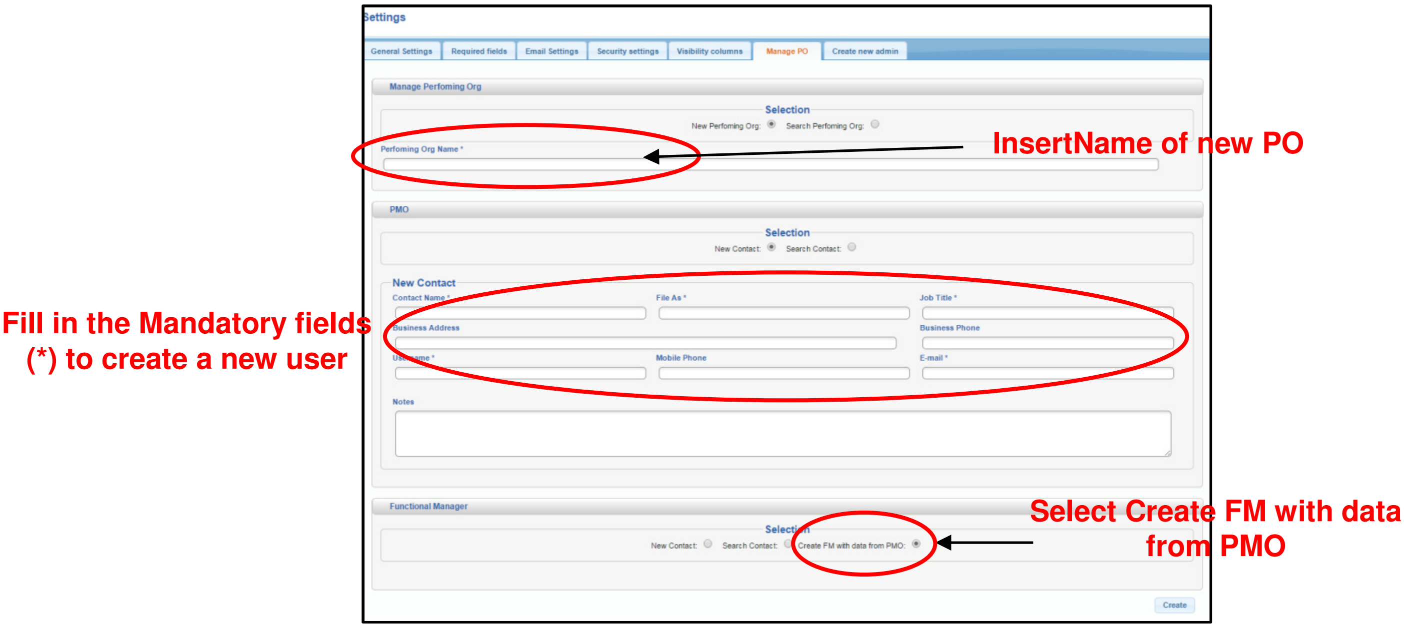
User: admin
Password: admin



- **Go to Manage PO Tab:**



- **Create a new PO and a PMO & Functional Manager User:**



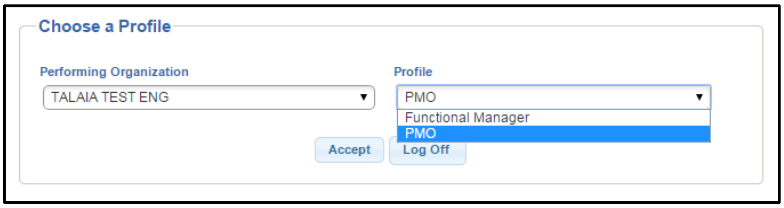
- Then, Log Off

Step 2: Define Basic Configuration Settings:

Log-In **OpenPPM** with the newly created user.

By default and before you activate the Notification features:
Password is always the same as username.

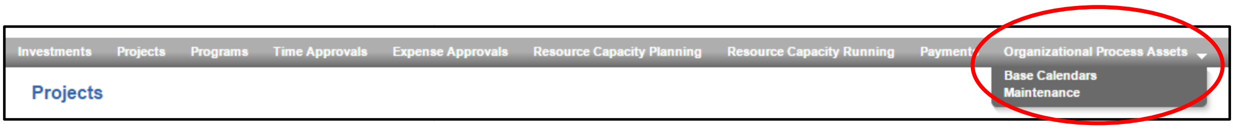
Choose the PMO profile as it is the only profile able to access the Organizational Process Assets Settings:



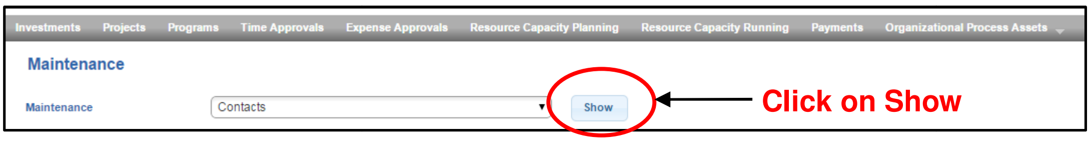
As a minimum configuration, you should at least define the following:

- Users with Profile PMO, Program Manager, Project Manager and Investment Manager
- Create a default Program

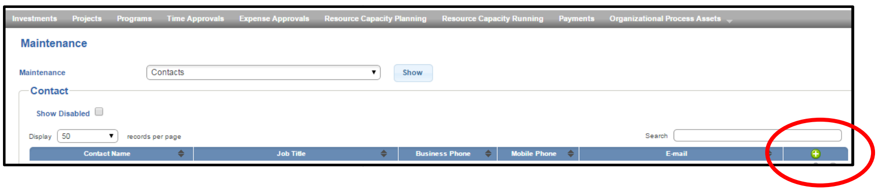
- **Go to Organizational Process Assets / Maintenance:**



- **Create new Users (Contacts):**

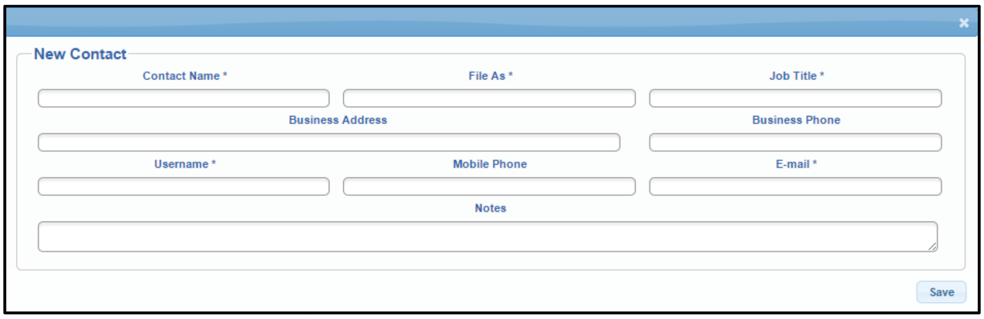


Click on Show



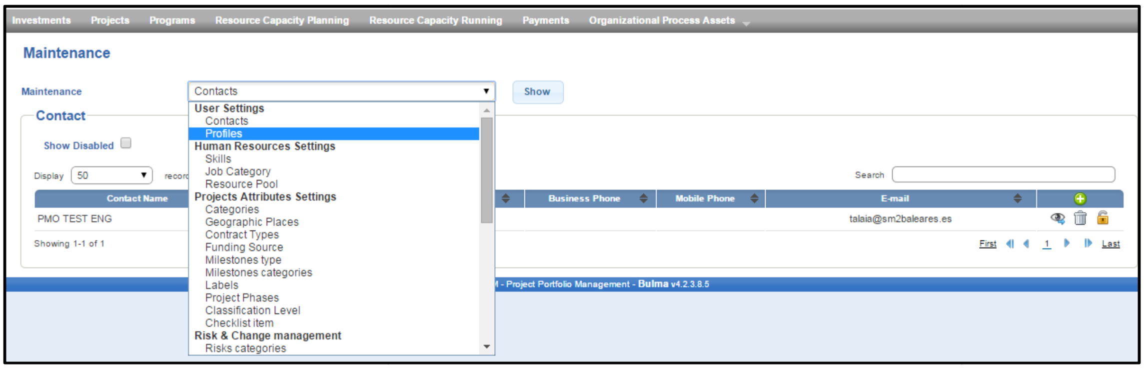
Click on ⊕ Button

- **Fill New User (Contact) Details**

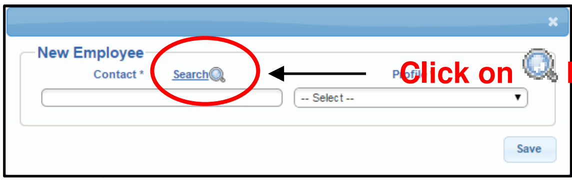


- Repeat those steps to create every new users of **OpenPPM**.

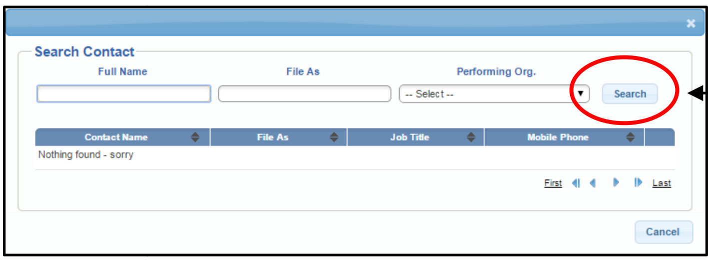
- **Add Profile to User**



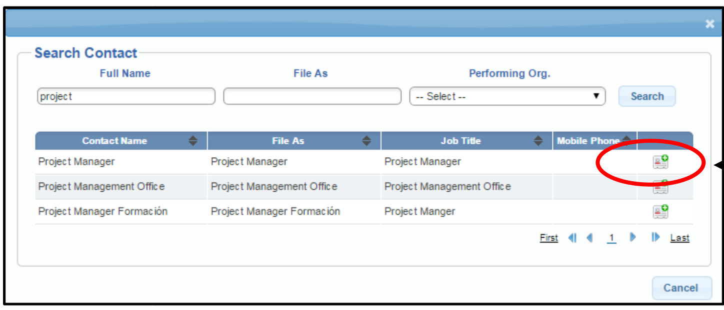
Click on Button



Click on Button

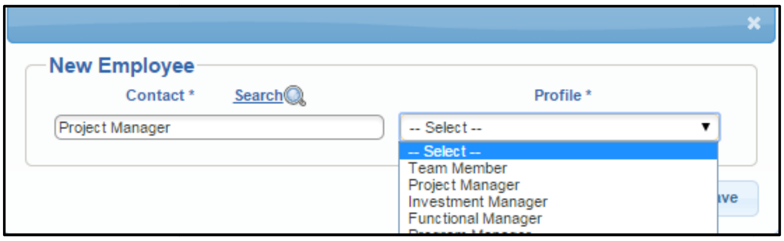


Click on Search Button



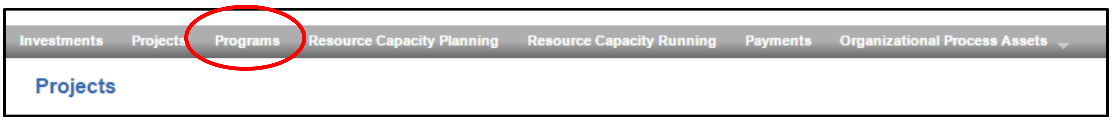
Click on Button of the User you want to add a Profile to

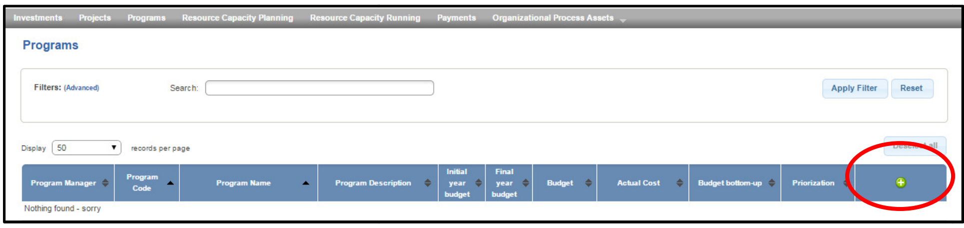
- ## Assign Profile to user



: You can add as many profiles per user as you want

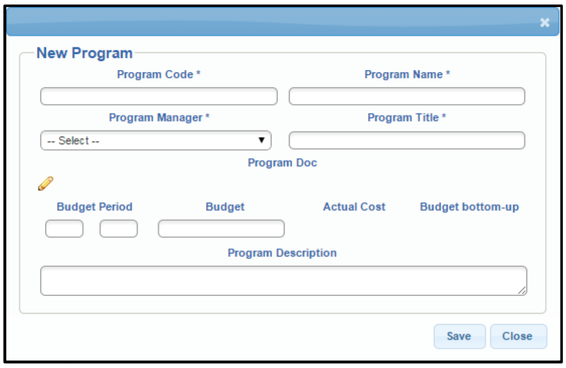
- ## Create a default Program





Click on Button

- Fill in all mandatory fields to create a Program:



More Advanced Configuration Settings

Organizational Process Assets Settings

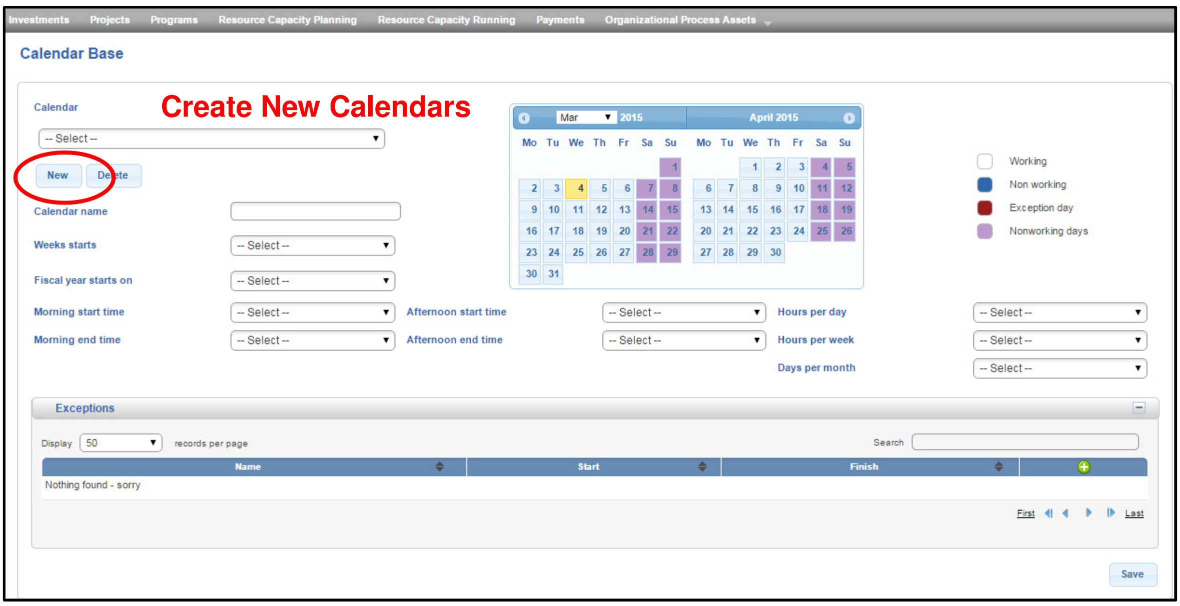
There are more parameters that you can configure from the Organizational Process/Maintenance.

- ***Human Resources Settings***

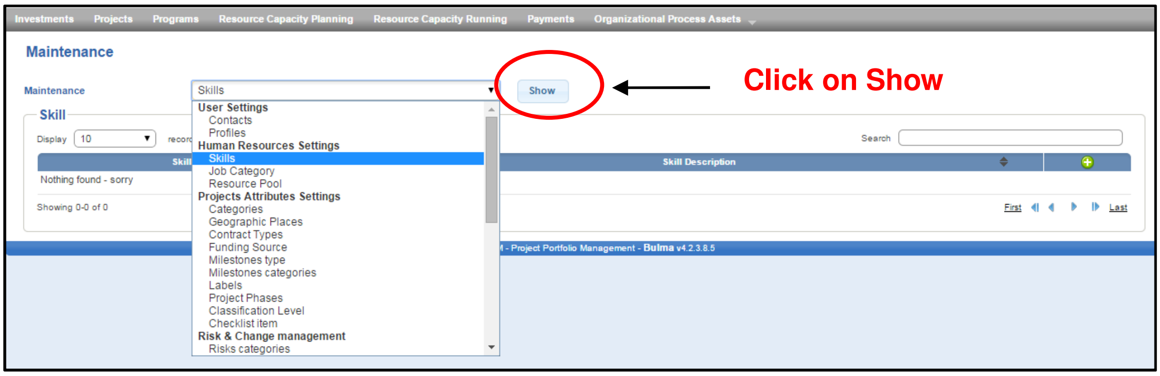
If you want to use the Human Resources functionalities than you need to:

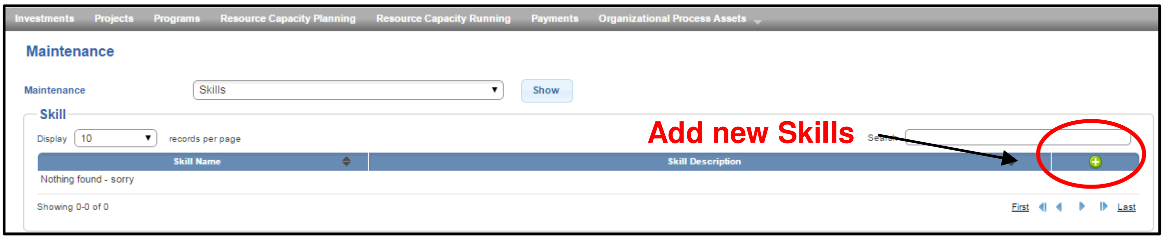
  - Define a Resource Calendar
  - Define Skills
  - Define Job Categories
  - Assign a Resource Manager Profile
  - Create a Resource Pool
  - Assign a Team Member Profile

- **Define Resource Calendar**

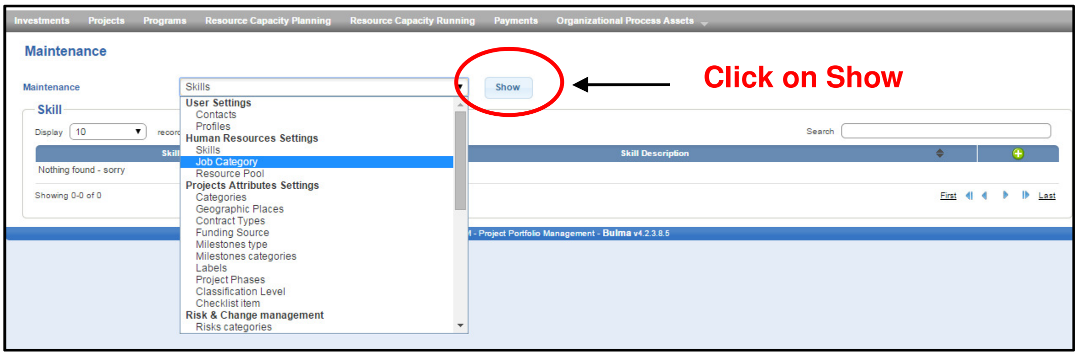


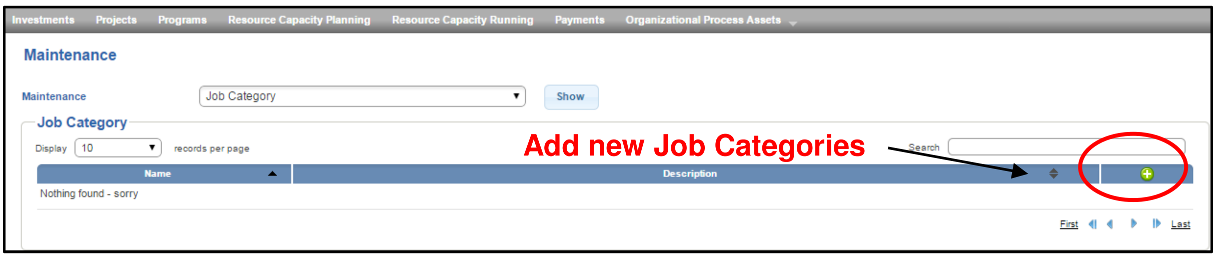
- **Define Skills**





- **Define Job Categories**



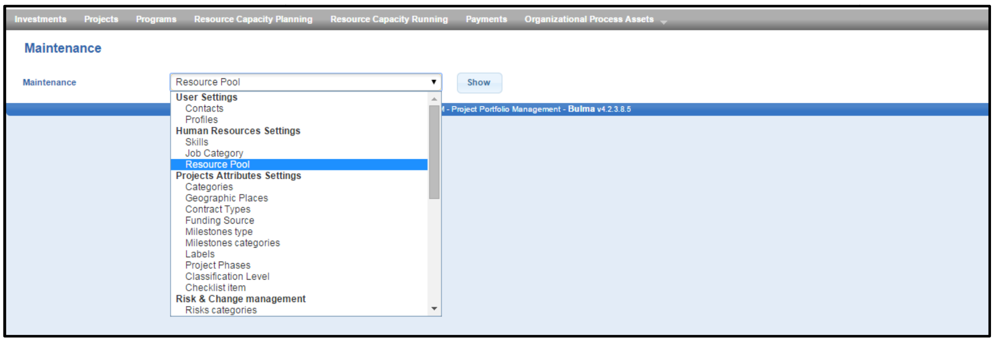


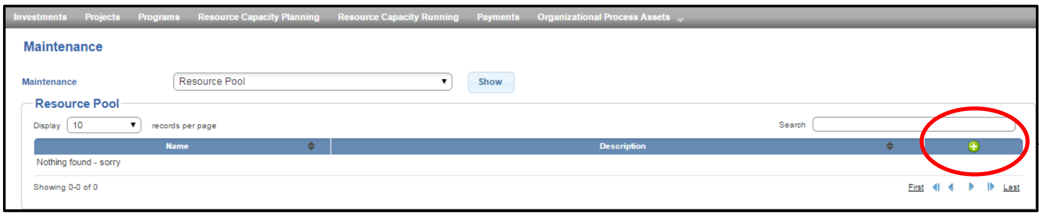
- **Assign a Resource Manager Profile**
  - Assign a Profile Resource Manager to a newly created user or to an existing user.

- ## Create a Resource Pool

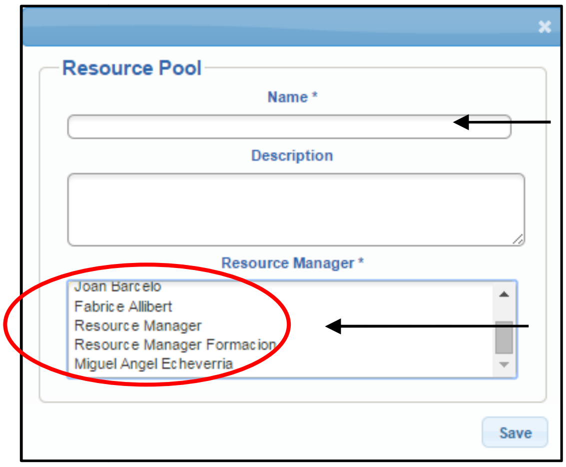
Create a Resource Pool and assign the Resource Manager to the Resource Pool as follow:

- Go to **Maintenance / Resource Pool**





Click on **Button**

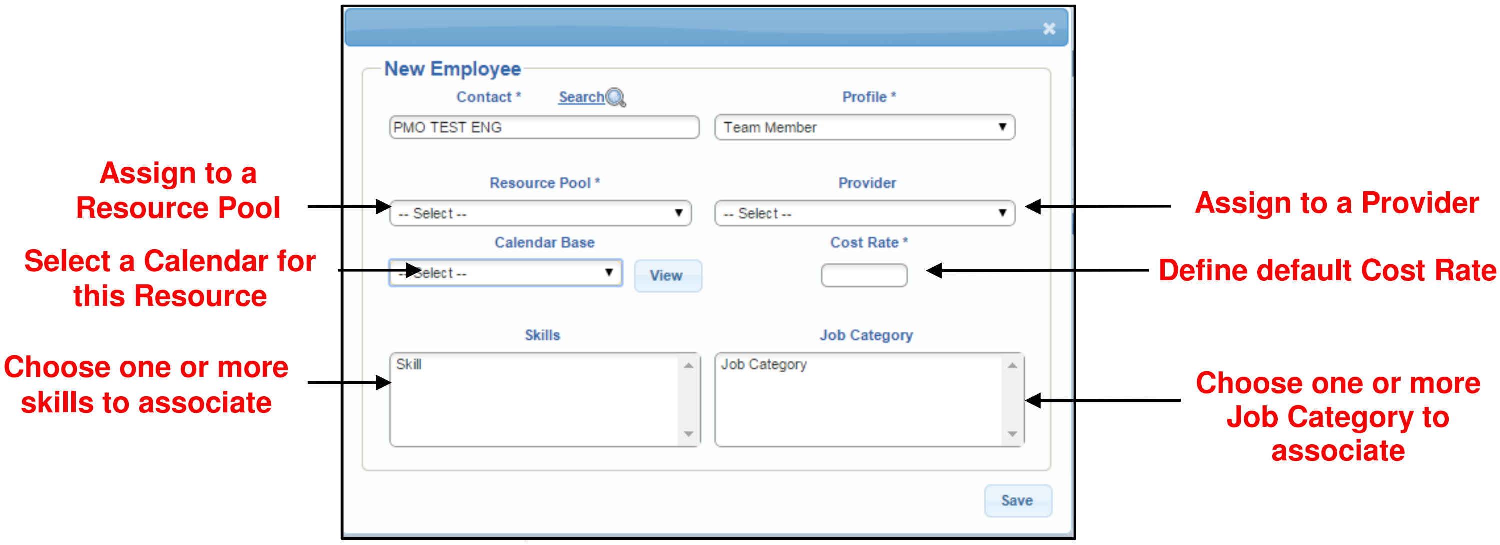


Add a Resource Pool

Select a Resource Manager

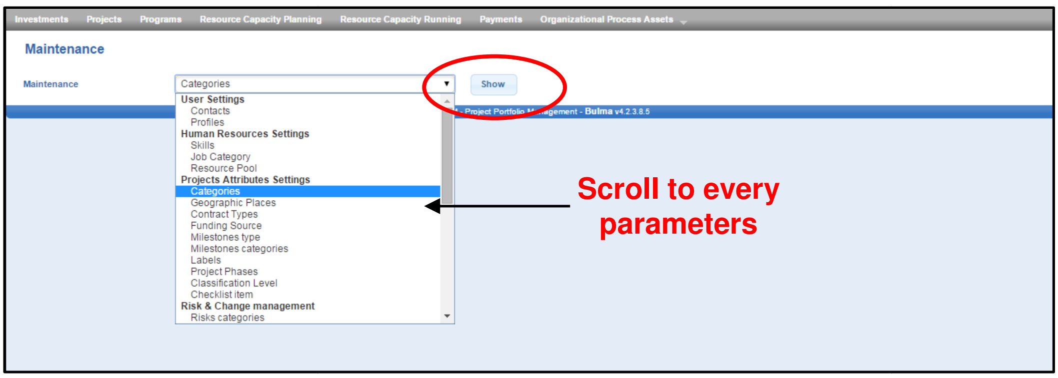
- ## Assign a Team Member Profile

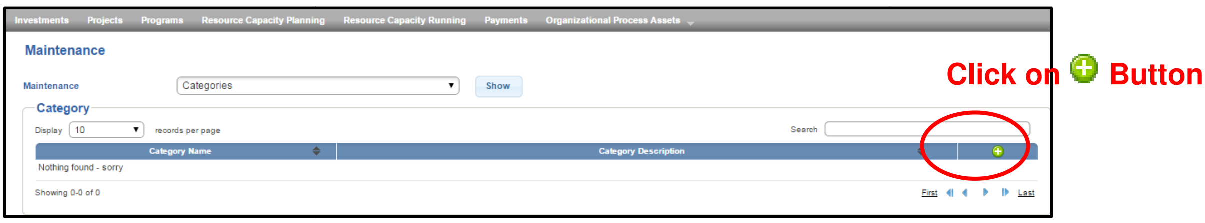
Assign a Team Member Profile to a newly created user or to an existing user.



- ***Project Attributes Settings***

In the Project Attributes Settings you can define all the parameters that you will be able to associate to your projects or Milestones.
Attributes can be Single (S) or Multiple (M) choice selection.



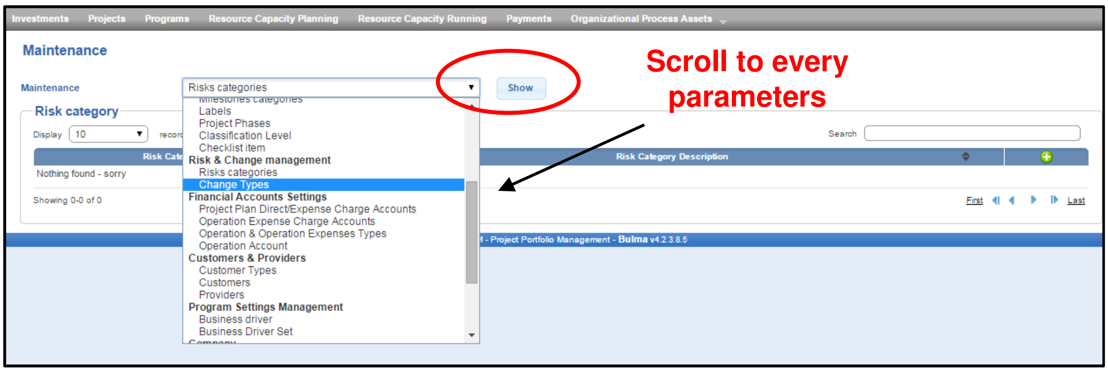


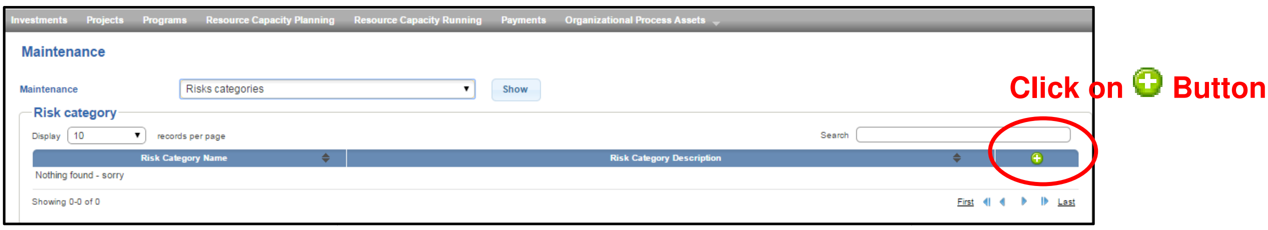
- **Define Categories (S)**
- **Geographic Places (S)**
- **Contract Types (S)**
- **Funding Source (M)**

- **Milestones Type (S)**
- **Milestones Categories (S)**
- **Labels (M)**
- **Project Phases (S)**
- **Classification Level (S)**
- **Check List Items (M)**

- ***Risk & Change Management Settings***

In the Risk & Change Management Settings you can define parameters that you will be able to associate to identified Risk and to the Change Management Requests



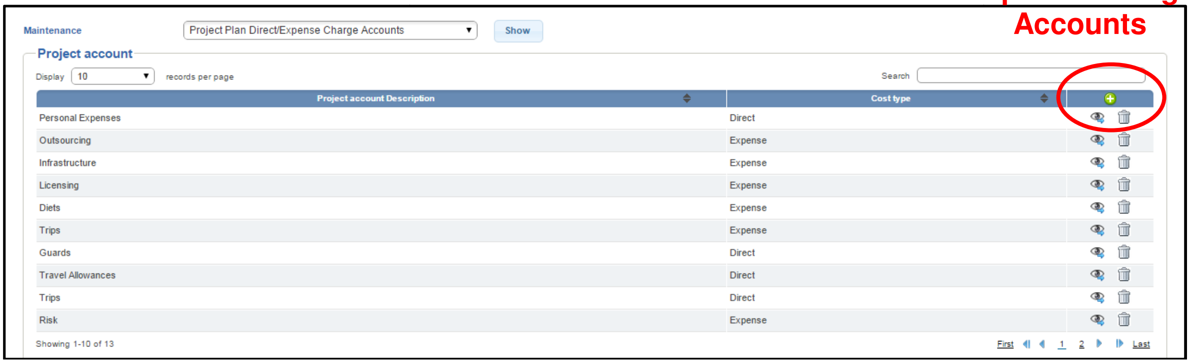


- **Risk Categories (S)**
- **Change Management Types (S)**

- ***Financial Account Settings***

- **Project Plan Direct/Expense Charge Accounts**

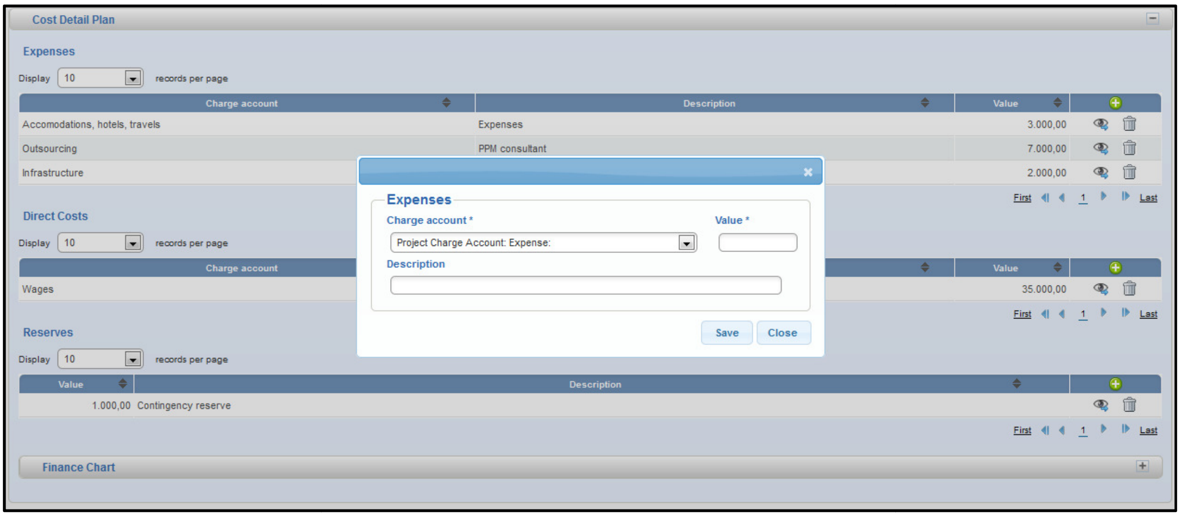
Click on Button to add Direct or Expense Charge Accounts



The Project Charge Accounts are used in the following section of **OpenPPM**:

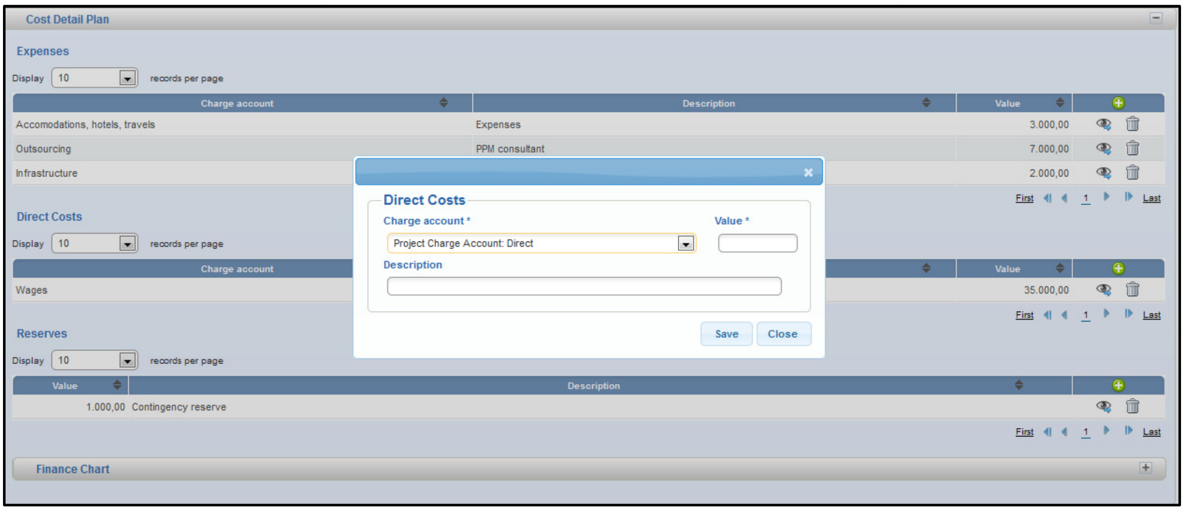
- *Project / Plan / Cost Detail Plan / Expenses:*

Allowing the Project Manager to define authorized expenses associated to a project



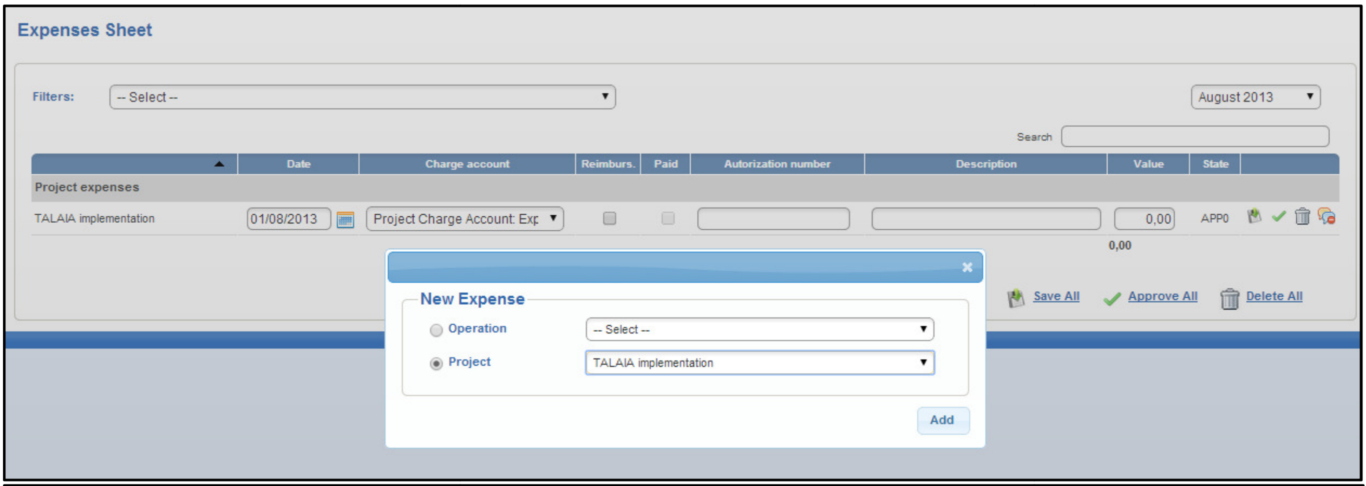
- *Project / Plan / Cost Detail Plan / Direct Costs*

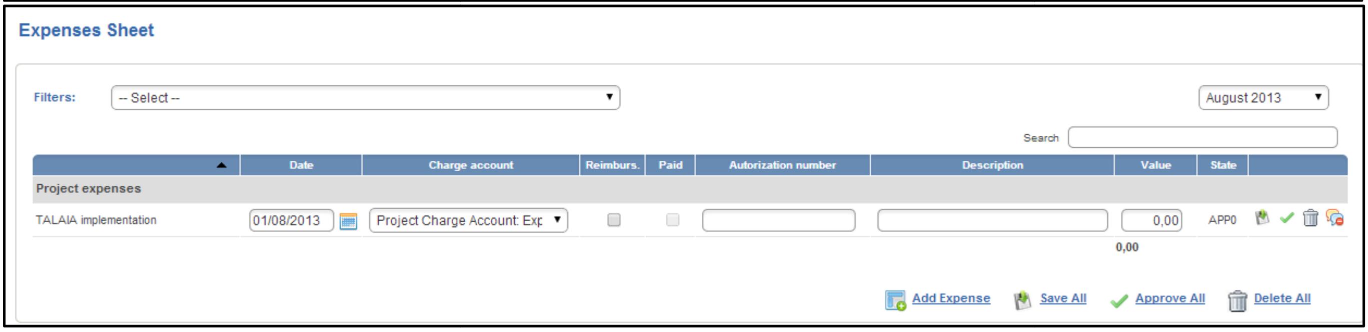
Allowing the Project Manager to define direct costs associated to a project



- ***Expenses Sheet / Project***

Allowing the Resources (Team Member) to declare expenses to predefined Expenses accounts to a project

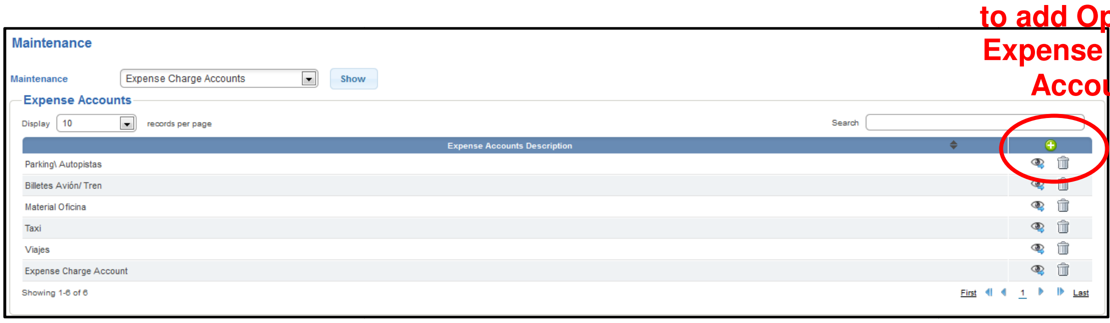




Only Project Expenses Accounts defined in the Project/Plan/Cost Detail Plan/Expenses will be available in the Dropdown field

- **Operation Expense Charge Accounts**

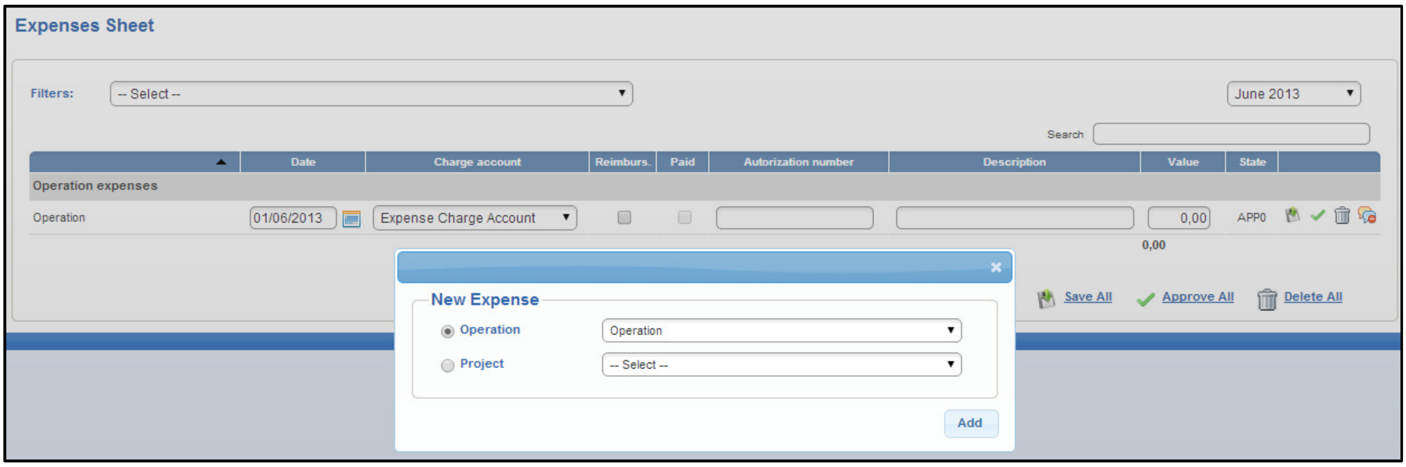
Click on Button to add Operation Expense Charge Accounts

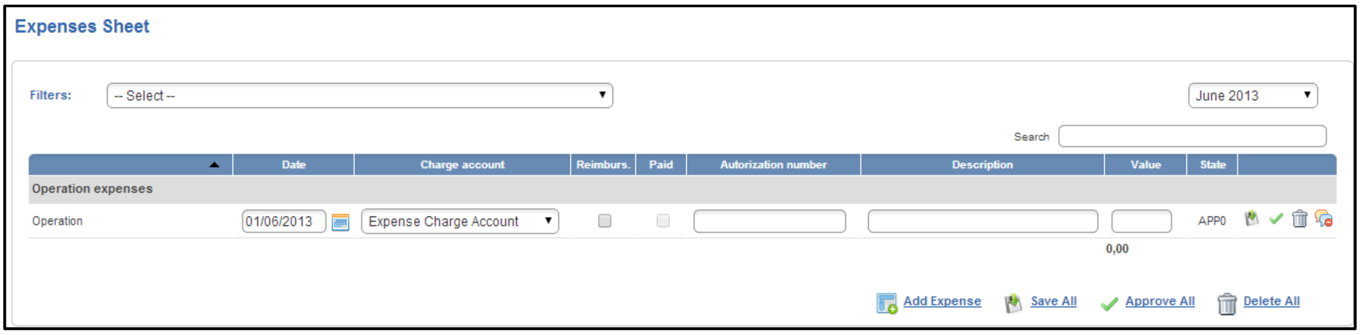


The Expense Charge Accounts are used in the following section of **OpenPPM**:

- *<u>Expenses Sheet / Operation</u>*

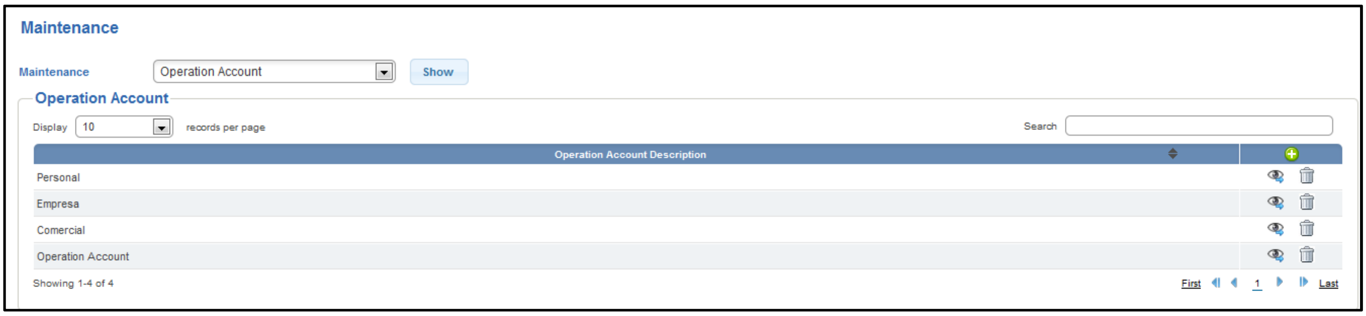
Allowing the Resources (Team Member) to declare expenses to non project activities (Operation Expenses)





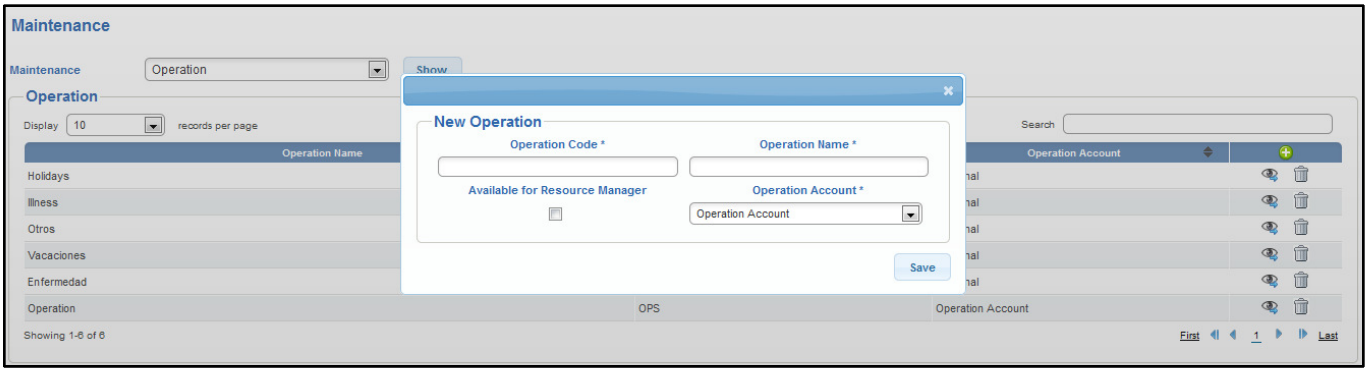
- ## Operation Account Types

In order to create Operation, it is necessary to establish first the Operation accounts



- ## Operation Accounts

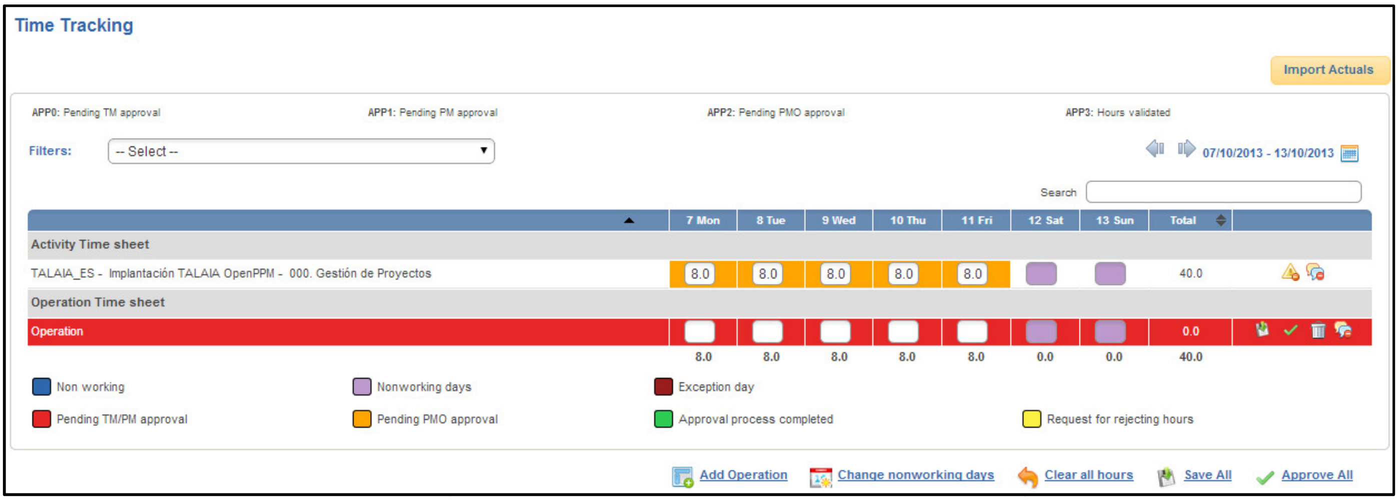
The Operations Account Types are linked to the Operation Accounts:



The Operations are used in the following section of **OpenPPM**:

- <u>Time Tracking:</u>

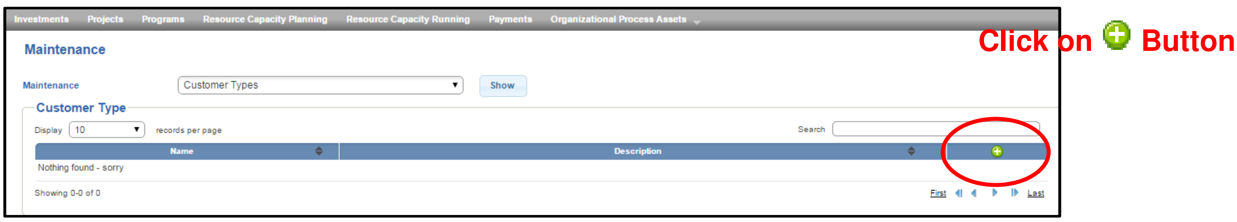
Allowing the Resources (Team Member) to declare hours to non project activities (Operation Activities)



- ***<u>Customers & Providers Settings</u>***

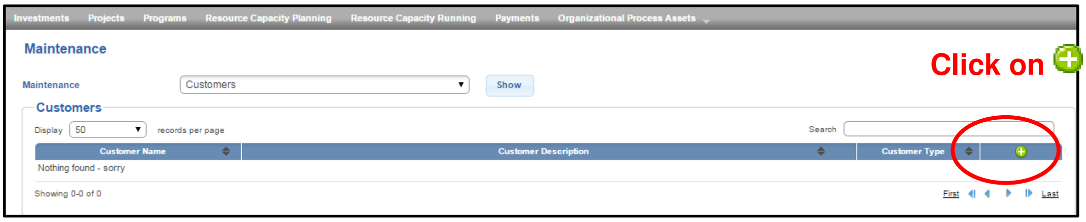
- ## Customer Types

Allow the possibility to associate customers to a customer type:



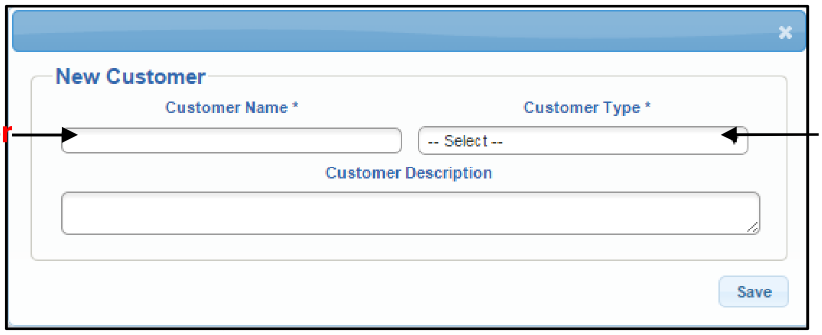
- ## Customers

The list of Customers is common to all the Performing Organization



Click on Button

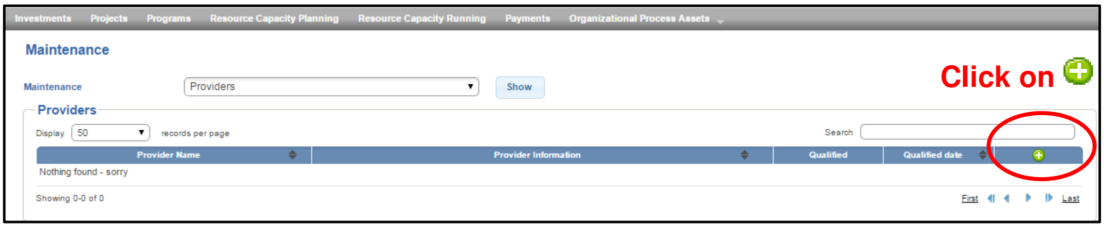
Add a New Customer



Associate Customer to a Customer Type available in the drop down list

- ## Providers

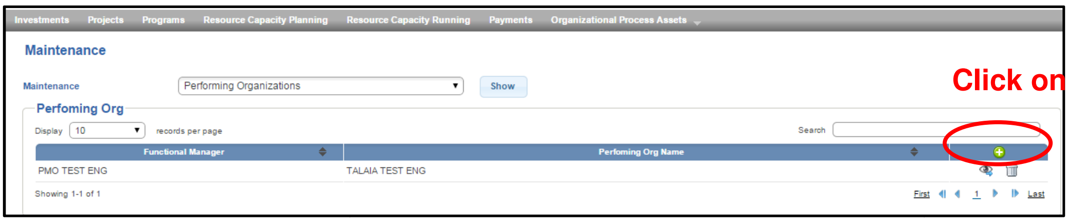
The list of Providers is common to all the Performing Organization



Click on Button

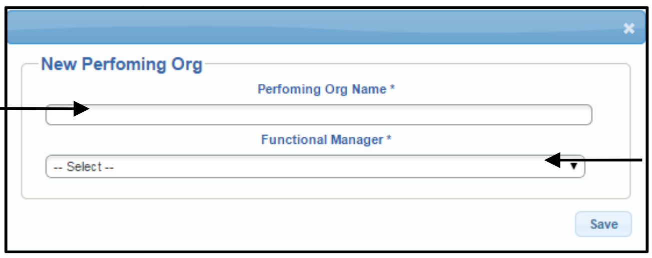
  - ***<u>Company Settings</u>***

- ## Performing Organizations



Click on Button

Add here new PO name

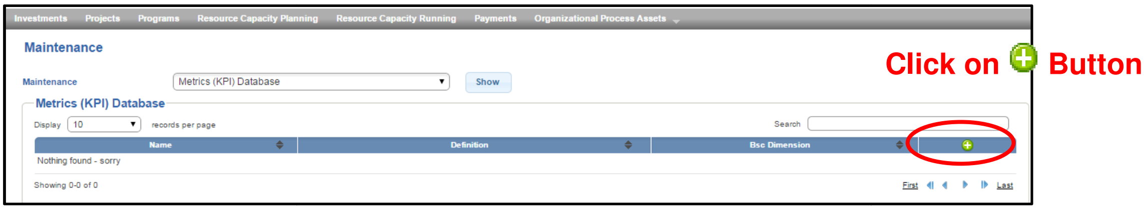


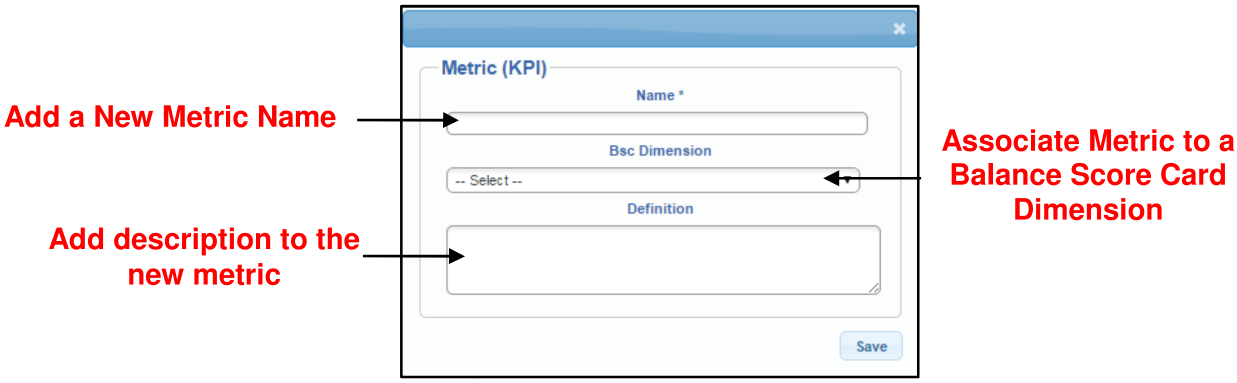
Choose Functional Manager from List

- ***Templates& Indicators Settings***

- ## Metric KPI Database

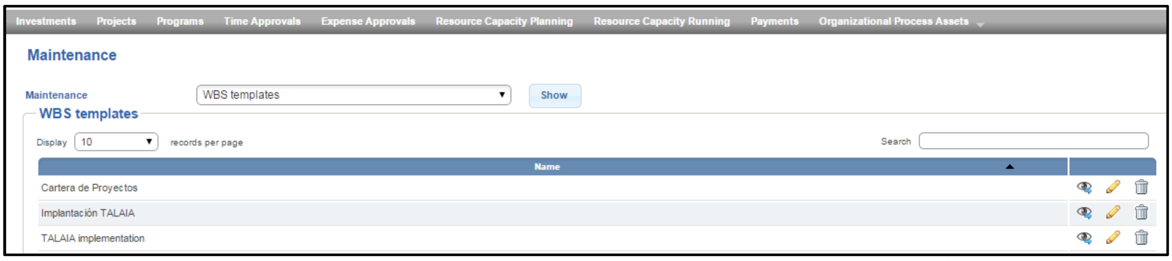
Allow to define KPIs Templates that can be attached to Projects when planning your Project KPIs Indicators:

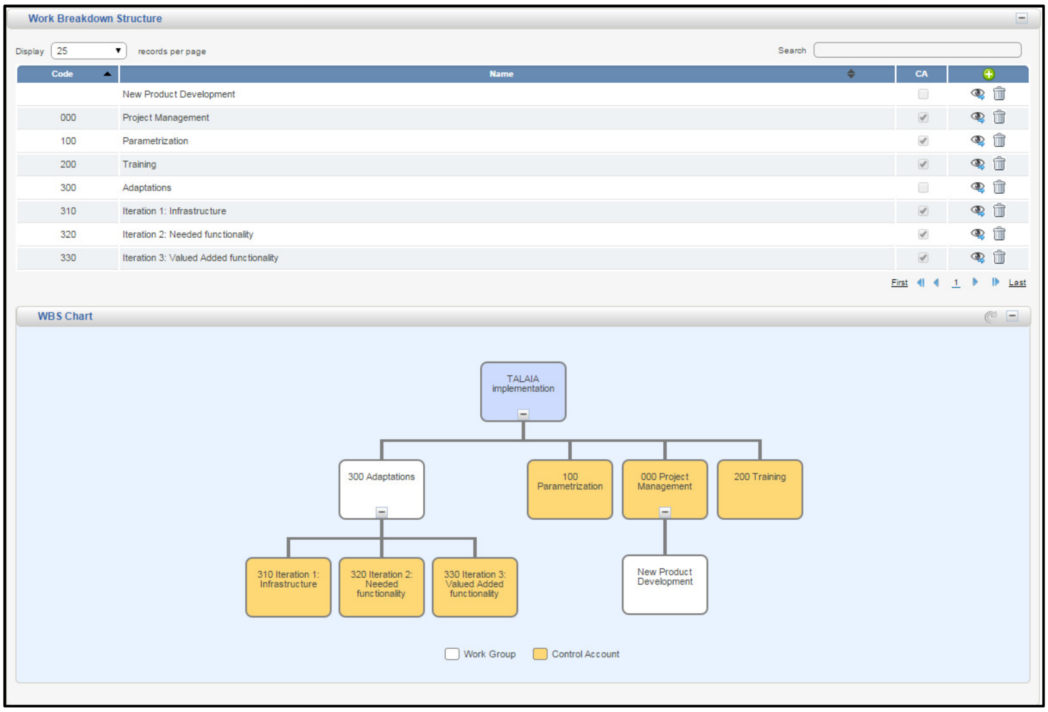




- ## WBS Templates

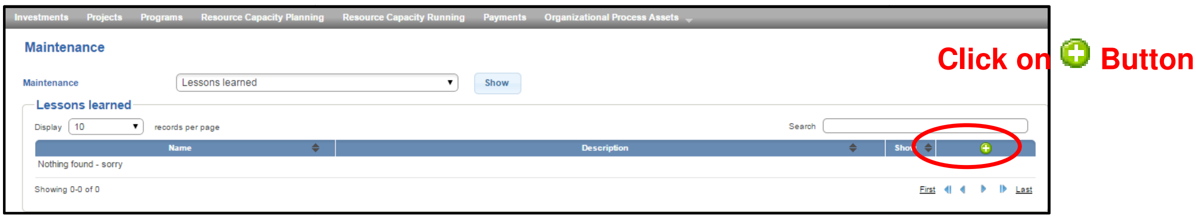
Once a project is initiated, you will be able to view, edit or delete Template WBS:





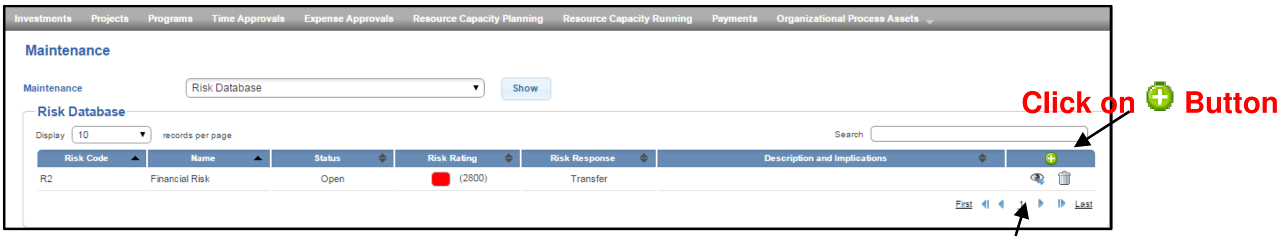
- ## Lessons Learned

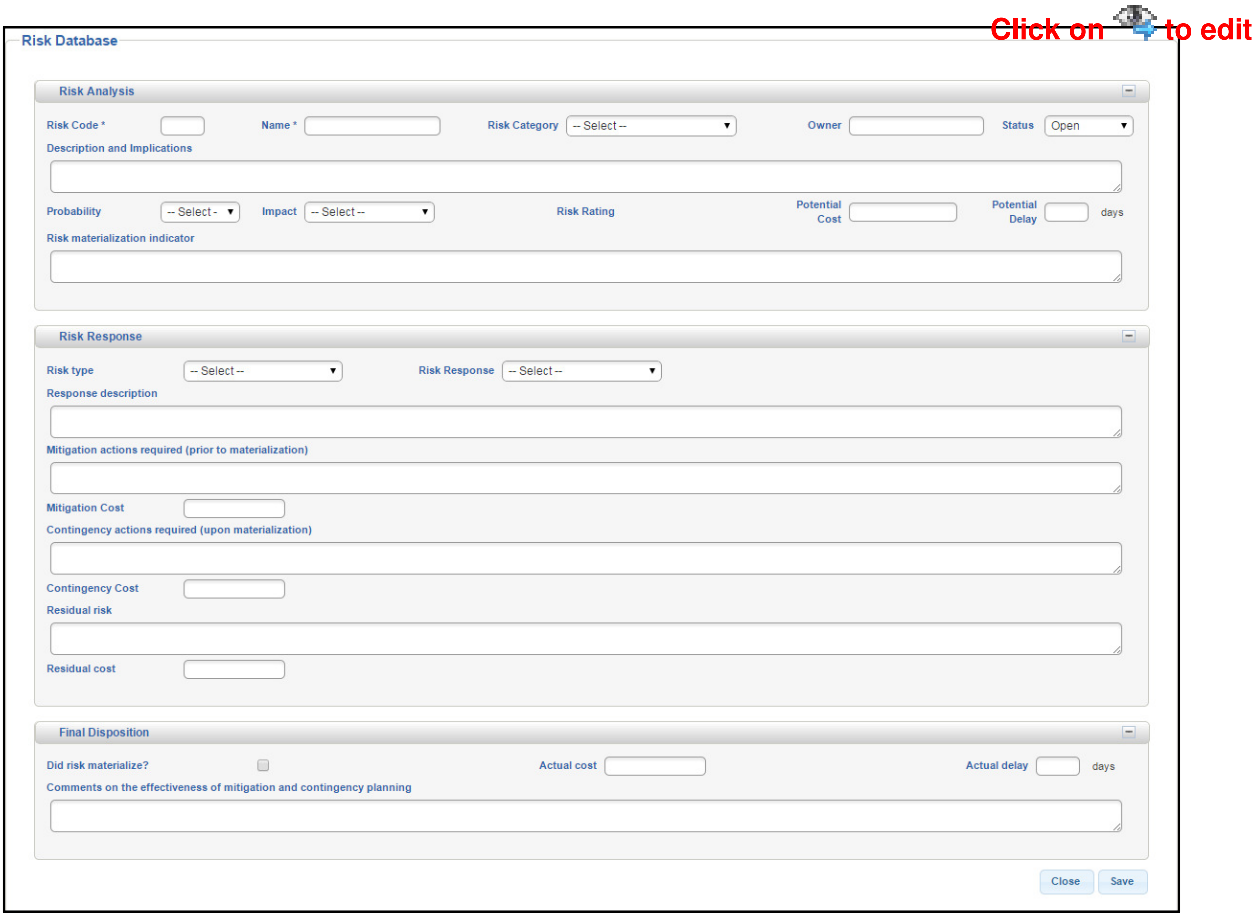
In the Closing Tab, you are able to associate Lessons Learned to each individual projects choosing from the list defined:



- ## Risk Database

You can define Risks and Project Managers can import them to their projects. Therefore, in this section you are able to create new risks or edit exported risk defined in projects:

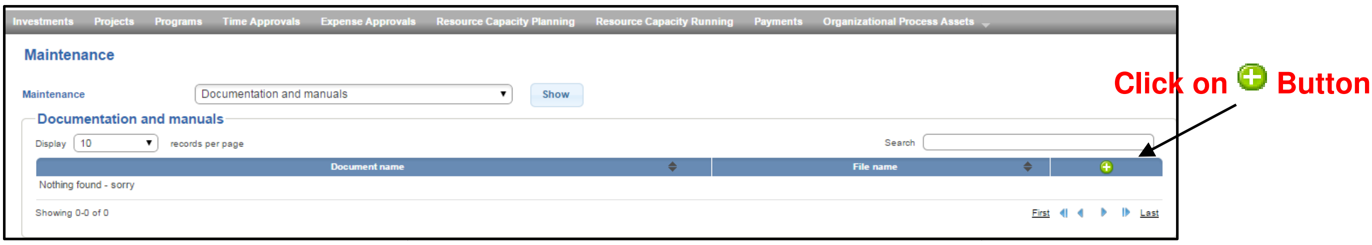


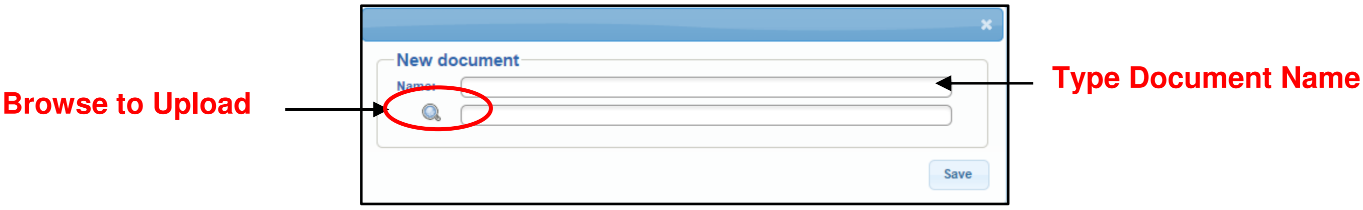


- ***Other Settings***

- ## Documentation & Manuals

You can add documents in **OpenPPM**, available for users to download



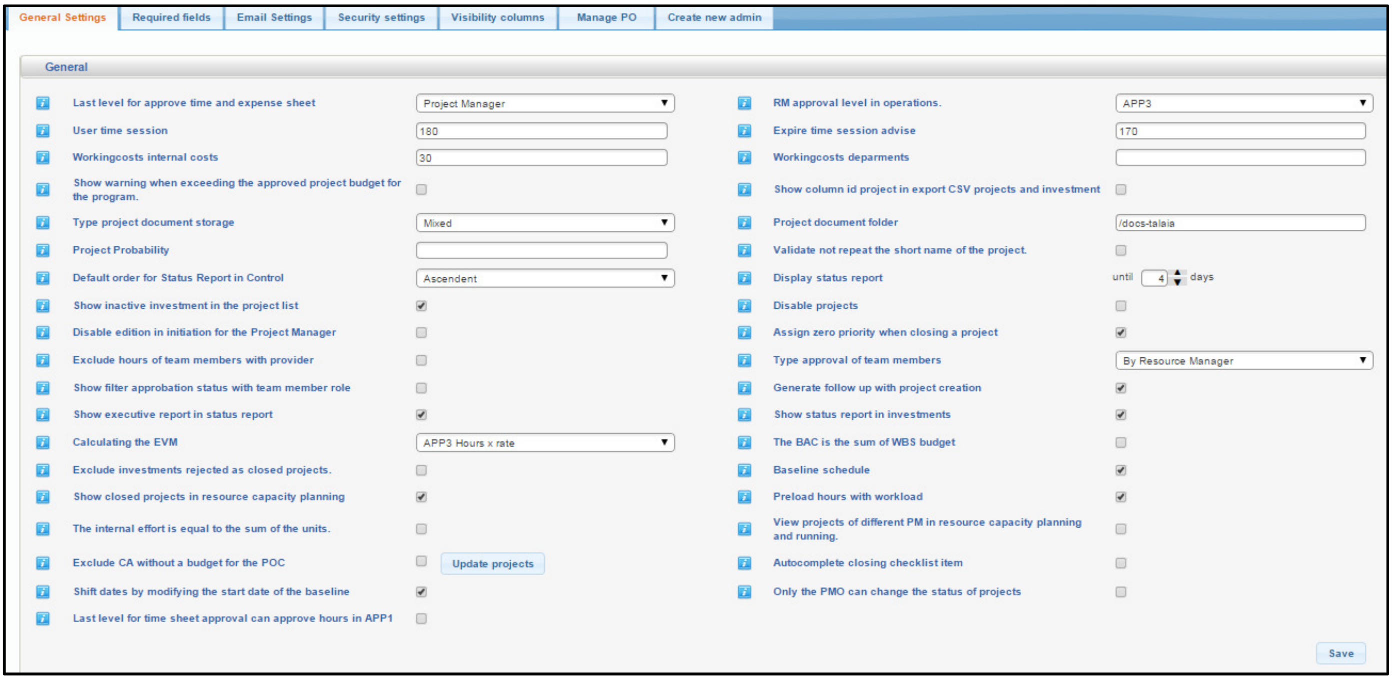

Browse to Upload
New document
Name:
Save
Type Document Name


Docs & Manuals
TALAIA TEST ENG | Switch
| User: PMO TEST ENG | Log Off

Administration Panel Settings

In the administration Panel, using the admin profile, you are able to manage different parameters settings that apply for all the Performing Organization of **OpenPPM**.

General Settings



- ### Last Level of Approval for time and expense sheet

  Allow to define the Time and Expense sheet Approval Process by defining the last level of approval:

  - 3 Steps Process: TM ➡ PM ➡ PMO
  - 3 Steps Process: TM ➡ PM ➡ FM
  - 2 Steps Process: TM ➡ PM

- ### RM Approval level for Operations Accounts

  Allow to define the Validation Level of the Resource Manager when reporting Operation on the Team Member Resources Calendar.

  - APP0: Follow the defined Time and Expense Sheet approval process
  - APP3: Directly Validated by the Resource Manager without further validation process

- ### User Time Session

  Set the number of minutes defining OpenPPM default user time session

- ### Expire Time Session Warning

  Set the number of minutes defining OpenPPM user time session message warning display

- **Default “Unit Rate” Direct Cost**

  Allow to define the default “unit rate”, when adding a Direct Cost in the Project Charter in the Initiation Tab

- **Default “Department” Direct Cost**

  Allow to define the default “department”, when adding a Direct Cost in the Project Charter in the Initiation Tab. This field can be a multiple choice option.Separate by “,” when entering more than one choice.

- **Alarm program budget**

  When checked, display a warning message when total approved projects budgets exceed program budget

- **Project ID in CSV Export**

  When checked, in investment and project panels, the unique project ID will appear in the CSV export

- **Document storage type**

  Allow to define ways to associate documentation to OpenPPM:

  - Link: Only allow to add links to document
  - File System: Only allow to upload document
  - Mixed: allow both ways

- **Document Folder Path**

  When File System or Mixed document storage types are defined, allow to define the folder path where uploaded document will be stored.

- **Project probability**

  Allow to define investment/projects probability levels from 0 to 99. Separate by “,” when entering more than one choice.

- **Duplication project short name**

  When checked, **OpenPPM** will not allow duplicated projects short names

- **Sort Status Report**

  In the control tab, allow to define how to sort status report.

- **Status Report Display**

  In the control tab, allow to set a maximum number of days before planned date, a status report is visible and can be filled

- **On Hold Investment Display**

  When checked, OpenPPM will show investmentsthat are in status On Hold

- **Disable Option**

  When checked, and when deleting a project OpenPPM will disable it and keep the record in the database instead or erasing it.

- **Initiation Tab Edition Option for Project Manager**

  When checked, the Project Manager will not be able to edit Initiation Tab data once investment has been approved.

- **Change priority closing project**

  If checked, project priority will be automatically set to 0 once project status change to closed

- **Team Members associated with Providers**

  If checked, for Team Members that are initially associated with a Provider, OpenPPM will not add their declared hours in the Actual Cost (Control Tab)

- **TM assignation approval process**

  OpenPPM allows 3 different approval processes for Team Member assignation validation:

  - By Resource Manager: All assignation requests go through the Resource Manager approval process
  - Automatic: All assignation requests by the PMs are automatically approved without going through the RM validation
  - Automatic only when TM = PM: All assignation requests go through the Resource Manager approval process, except when the PM assigns himself to an activity.

- **TM Assignation Status**

  If checked, Team Member will be able to view Project in Capacity Planning, using Assignation Status filter (Assigned, Pre-Assigned, Released, Proposed, Turned Down)

- **Status Report Follow up Date**

  If checked, Follow up date of Status Report will be created automatically as per Plan Value follow up date created in Planning Tab.

- **Executive Report**

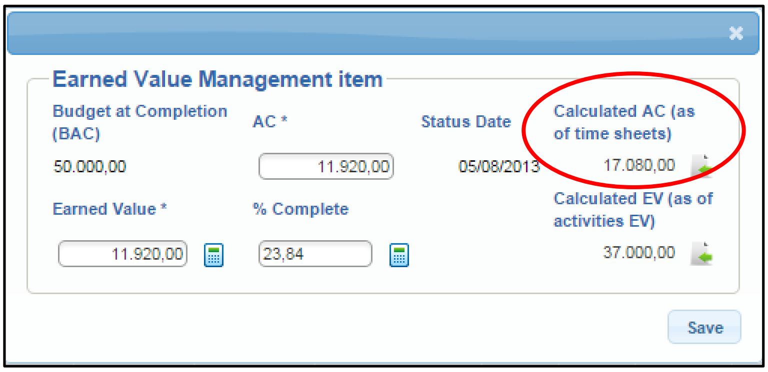
  If checked, Executive Reports will appear with Status Reports in the Control Tab

- **Status Report**

  If checked, Status Reports will appear in the investment Tab

- **AC Calculation in EVM**

  OpenPPM allows 2 ways to show AC for EVM Calculation in the Control Cost / Earned Value Management



  - Hours in APP3 x Sell Rate: The AC will be the validated hours of each Team Member multiplied by their respective sell rates
  - Internal Resources + Providers: The AC will be the validated hours of each Team Member multiplied by their respective sell rates + EV of subcontracted activities

- **BAC = WBS Budget**

  By default, BAC used for EVM calculation is the BAC field from the Initiation Tab. Instead, if checked, BAC will be the sum of WBS budgets from the Plan Tab.

- **Exclude Rejected Projects**

  If checked, rejected projects (therefore with status closed) will not appear when filtering by closed status.

- **Baseline**

  If checked, projects baseline will be the ones indicated in the Initiation Tab. Otherwise OpenPPM will define the baseline as the minor and major dates as registered in the Scheduling of the Plan Tab.

- **Closed Projects in Resource Capacity Planning**

  If checked, OpenPPM will show closed projects in the resource capacity planning view

- **Hours Preview**

  If checked, Team members will see the daily planned hours per activity as per the percentage of workload defined and assigned by the Project Manager

- **Internal Effort**

  If checked, OpenPPM will automatically sum up the internal effort which is the result of the unit rates of all the direct costs

- **Multi PM view of Resource Capacity Planning & Running**

  If checked, Project Managers will have visibility of the Resource Capacity Planning & Running of projects of other Project Managers from the same PO.

- **CA without Budget**

  If checked, Control Account Activities without budget are excluded from the Percentage of Completion calculation

- **Checklist Item auto-complete**

  If checked, Date and Responsible fields will be auto completed. Date will be today´s date and responsible will the user´s name.

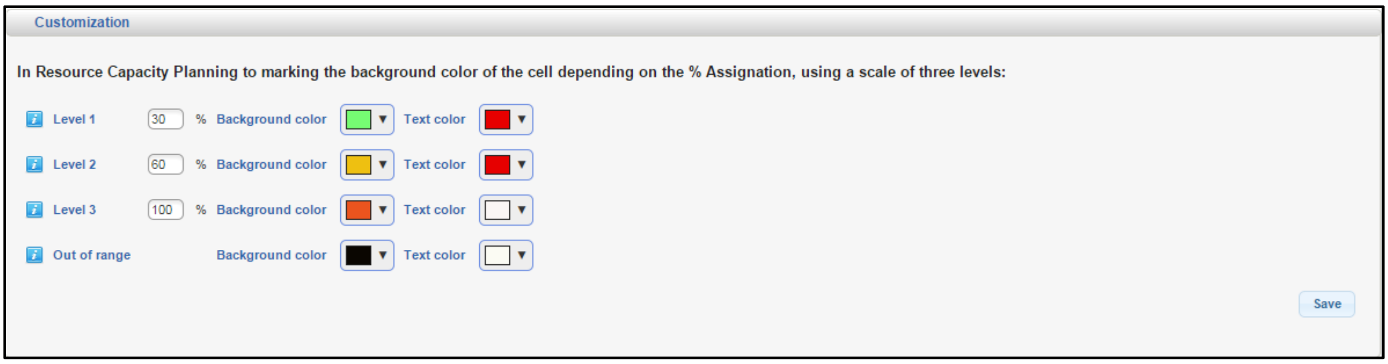
- **Projects Baseline Modification**

  If checked, when projects baseline get modified in the initiation Tab and a planning is already done, OpenPPM will update and shift activities baseline, milestones dates and Follow up dates according to the modification.

- **Projects Status Change**

  If checked, only PMO profiles will be able to change project status.

Customization

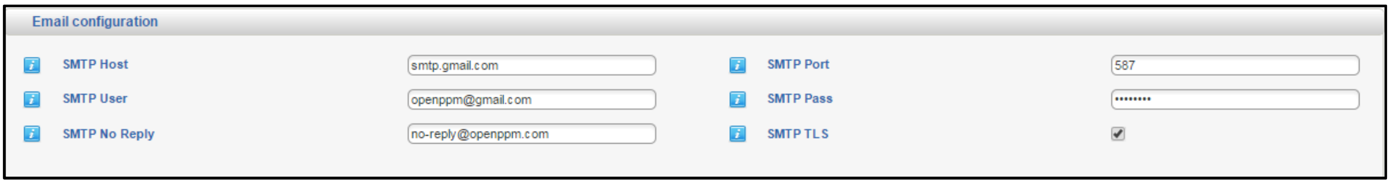


In this section, you can define color scheme that will be shown in the Resource Capacity Planning panel.

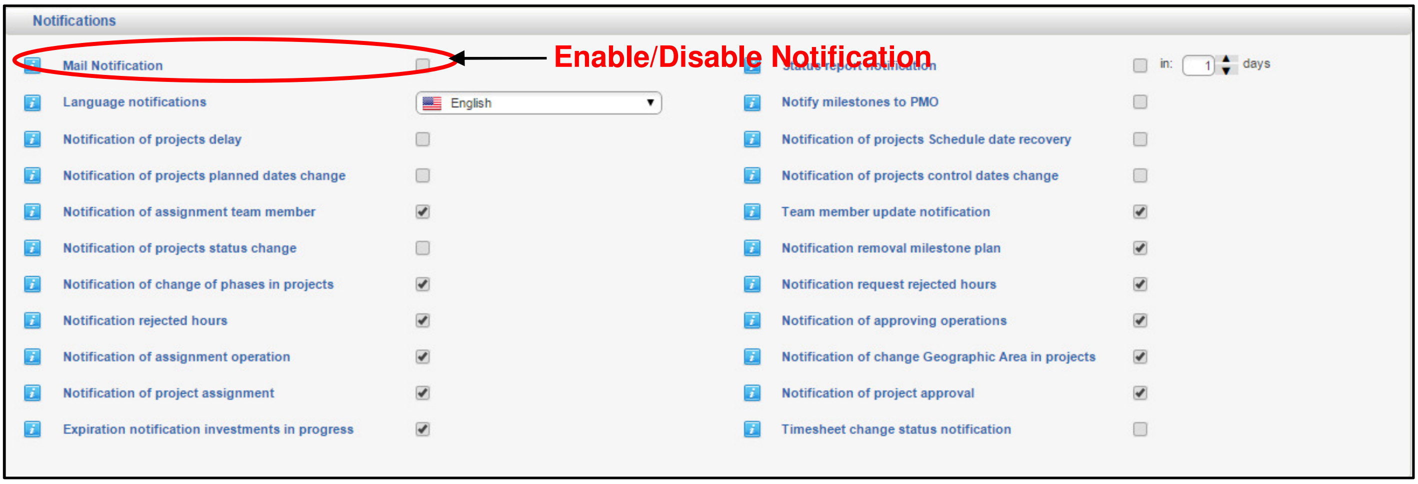
Required Fields

By adding a check in the box, you can define more minimum field, apart from the one defined by default (mark with a *) by **OpenPPM**, that are mandatory to create a new investment/project.

Email Settings

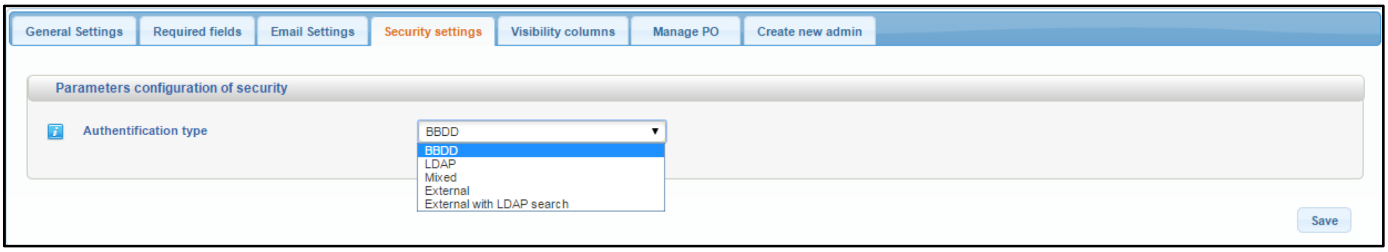


Before that **OpenPPM** can generate email, notification, you need to link it to a mail server by completing the fields of this panel



OpenPPM allows enable/disable specific notifications. The Mail Notification check, activate or deactivate all notifications as a whole then each notifications can be activated/deactivated individually.

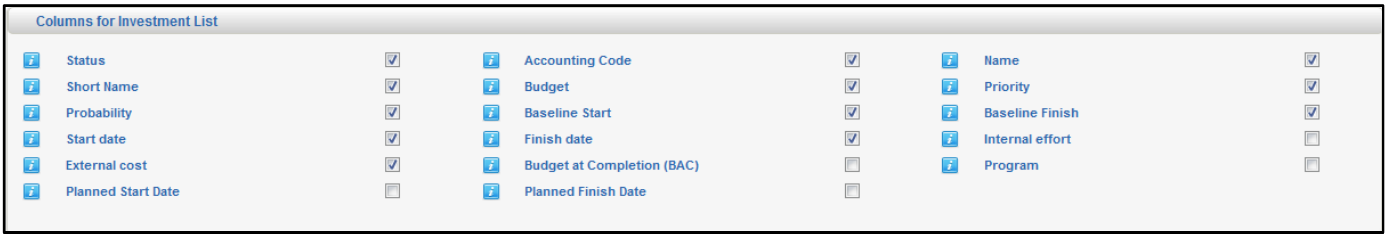
Security Settings



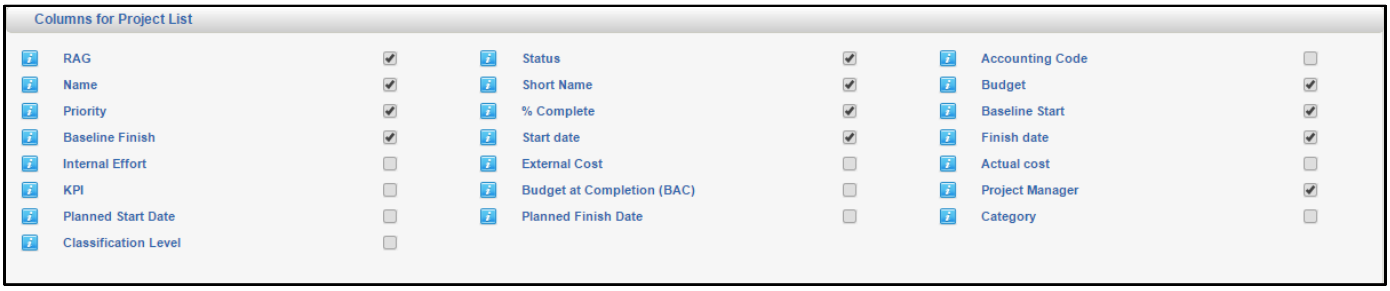
OpenPPM allows different authentication modes:

- **BBDD:** Database authentication only
- **LDAP:** LDAP authentication only
- **Mixed:** LDAP and Database authentication
- **External:** authentication through external system (ex: CAS)
- **External with LDAP Search:** authentication through external system and new user creation through LDAP

Visibility Columns



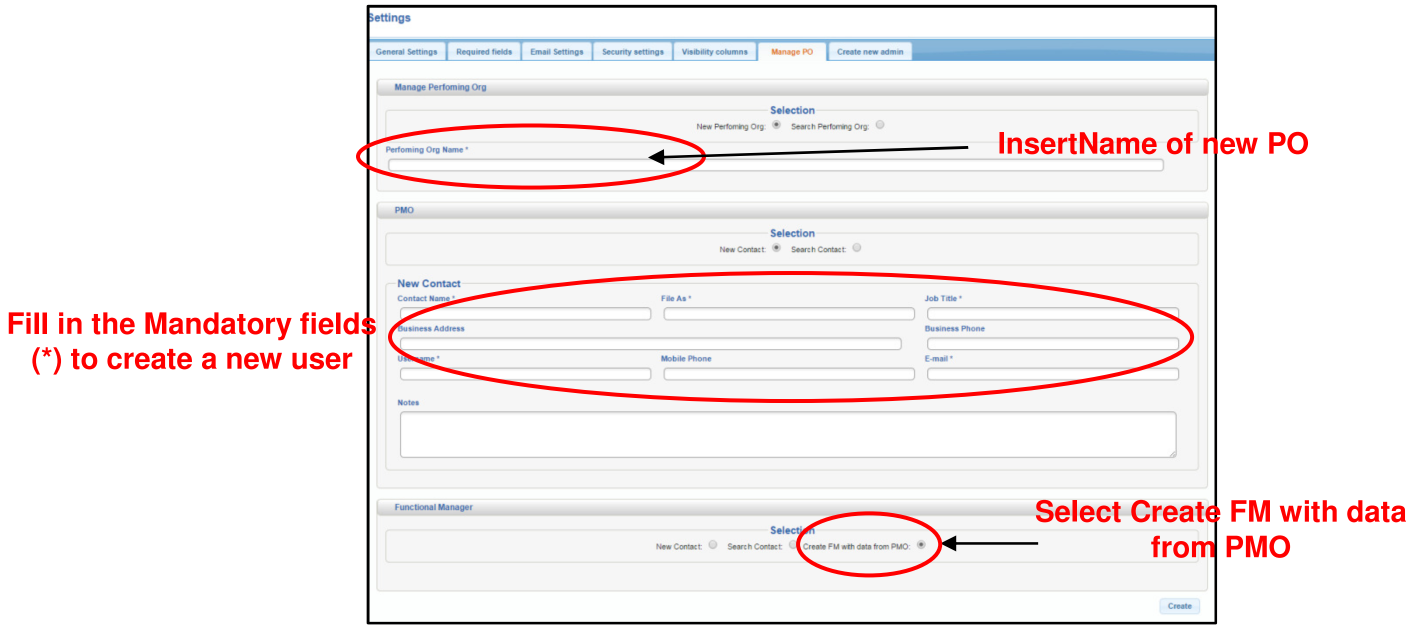
You can define which columns are visible in the Investment module list view by adding a check.



You can define which columns are visible in the Project module list view by adding a check.

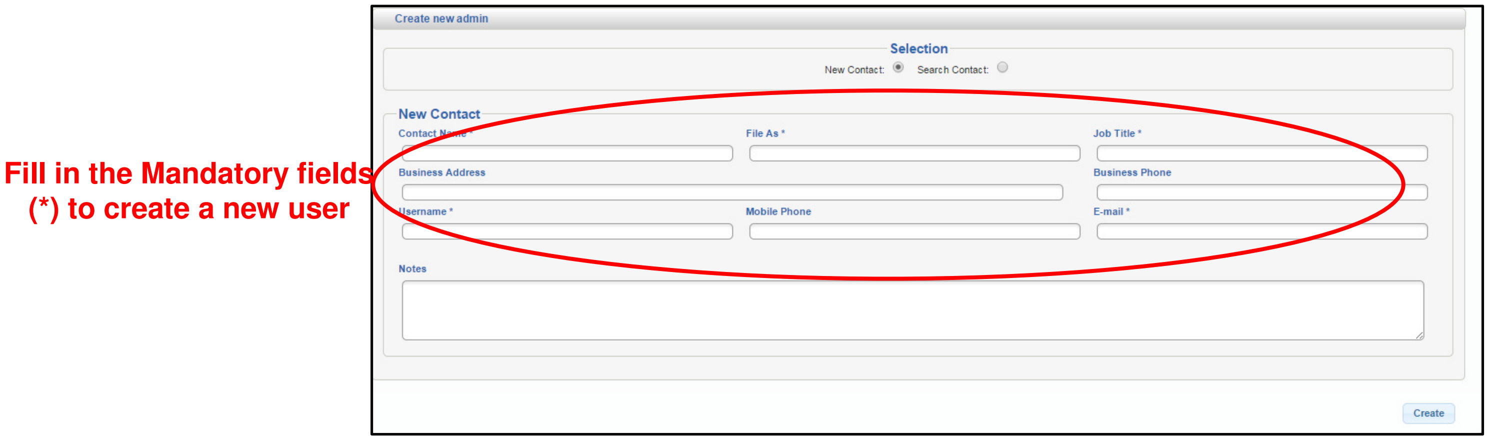
You can define other elements to be visible in different areas of the software by adding a check.

Manage PO



You can create new PO´s and associate a PMO and a FM from new or existing users.

Create New Admin



You can give new Admin profile and permission to newly created users or to existing users.

Section III: User Guide

Section III: User Guide

This section describes the experience of managing a project from the creation until the end of the project. This is a simple project that has 1 month duration with 2 activities and a budget of € 10,000.

Even though this example is far froma typical project, this sampledescribes the main features of management and how they can collaborate through **OpenPPM** different profiles such as: PMO, Program Manager, Project Manager and Stakeholder.

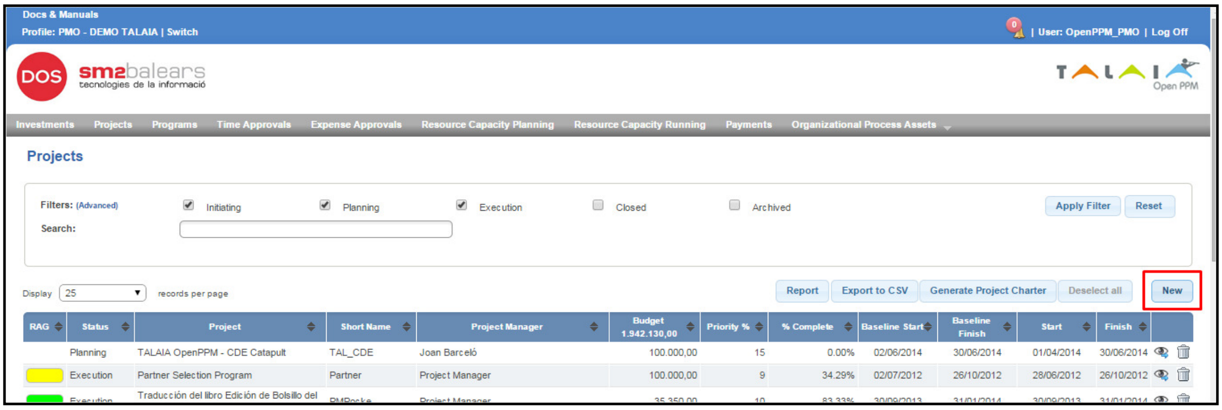
1 Step: PMO creates a new project:

Step1 begins when someone in the organization with a PMO profile creates a new project with the minimum basic information required.

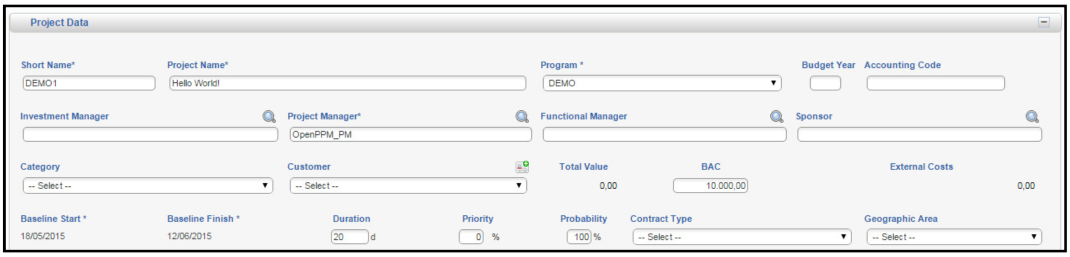
- **Login as PMO:**

- **Create a new project:**

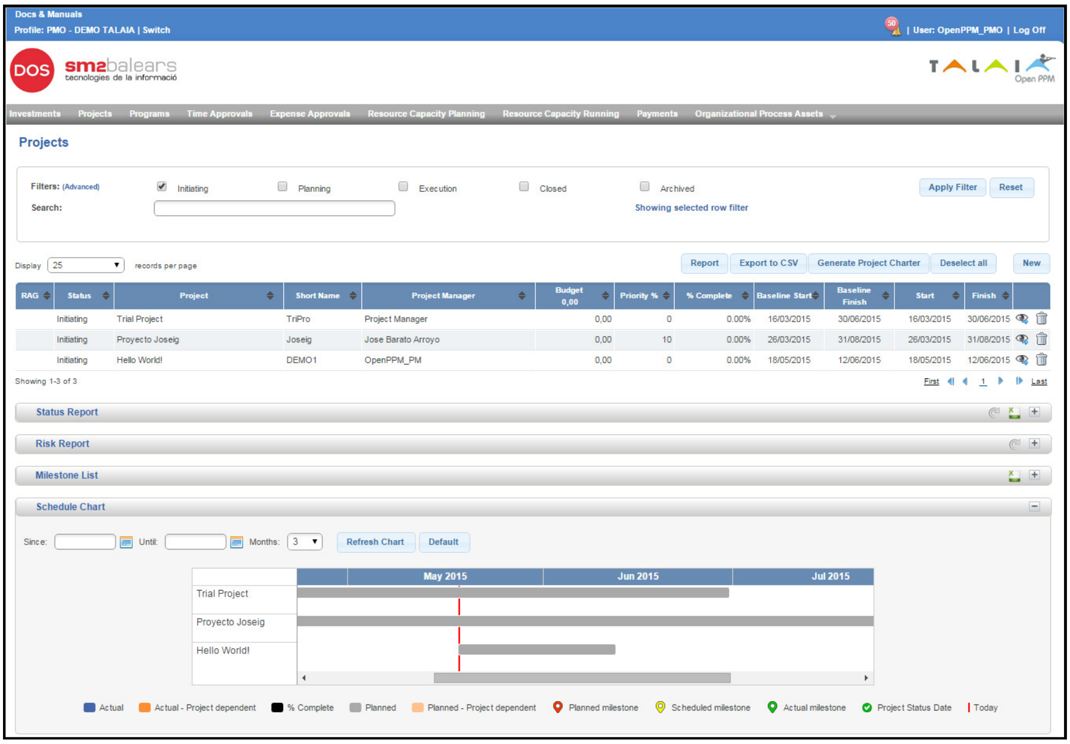
The menu ***Projects*** module will pop up as default. Here you can create a new project by clicking on the button ***New***.



- Create a project by completing the minimum basic information (Only * fields are mandatory at this stage to create the project)



At this stage, the PMO profile can visualize that a new project has beencreated with the initiating status in the project module:



Notice that in that same high level view, down in the Schedule Chart graph, the planned baseline project dates already appear.

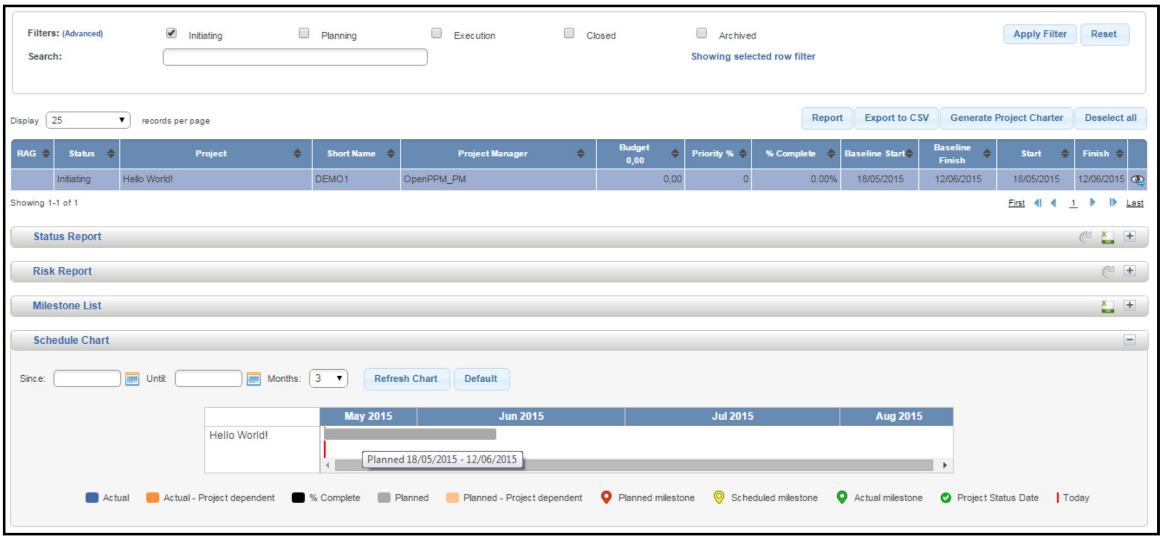
To continue managing this project as a Project Manager, exit the tool by Logging Off as PMO

Step 2: PM completes the initiating information:

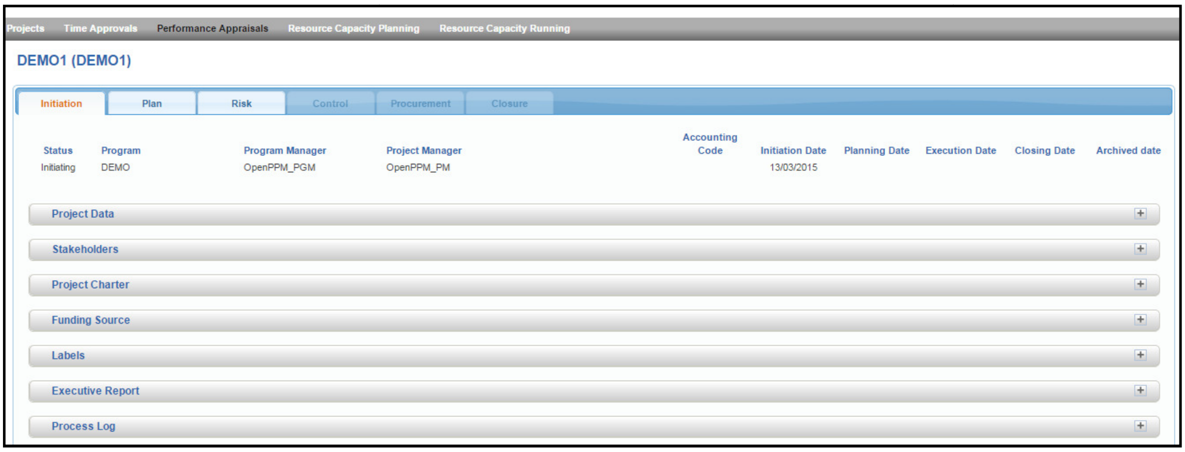
The PM profile assigned to the project, can now access the tool and continue the work, by for example completing the charter and registering the stakeholders.

- **Login as PM:**

By entering **OpenPPM**, this PM will be able to check in the Project list on the Project that has been assigned to him:

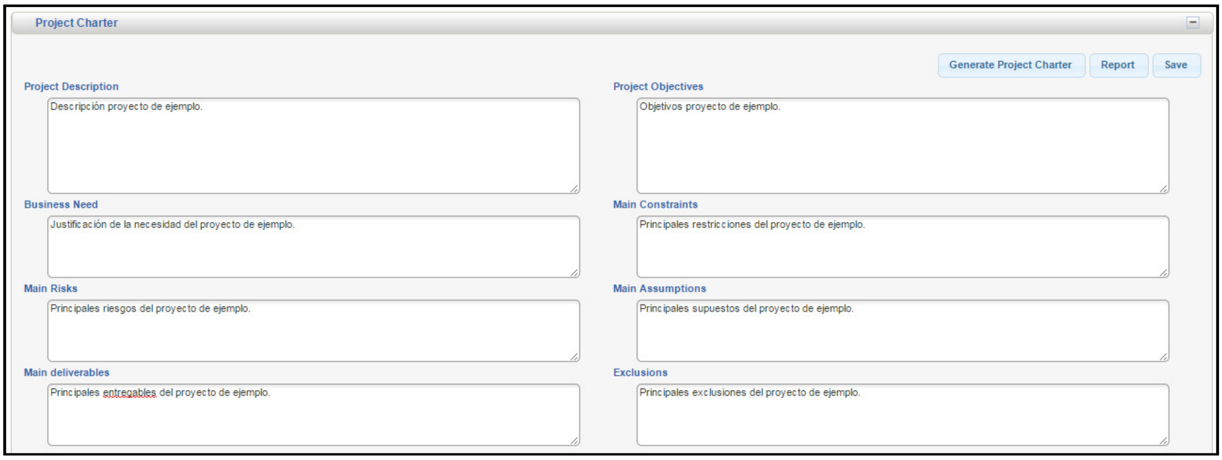


If you click the icon you can enter the details of management:

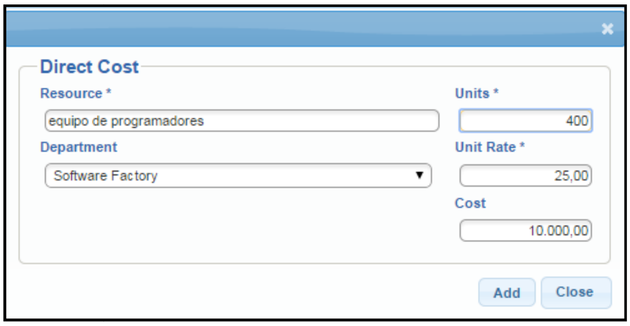


- ## Generating the Project Charter

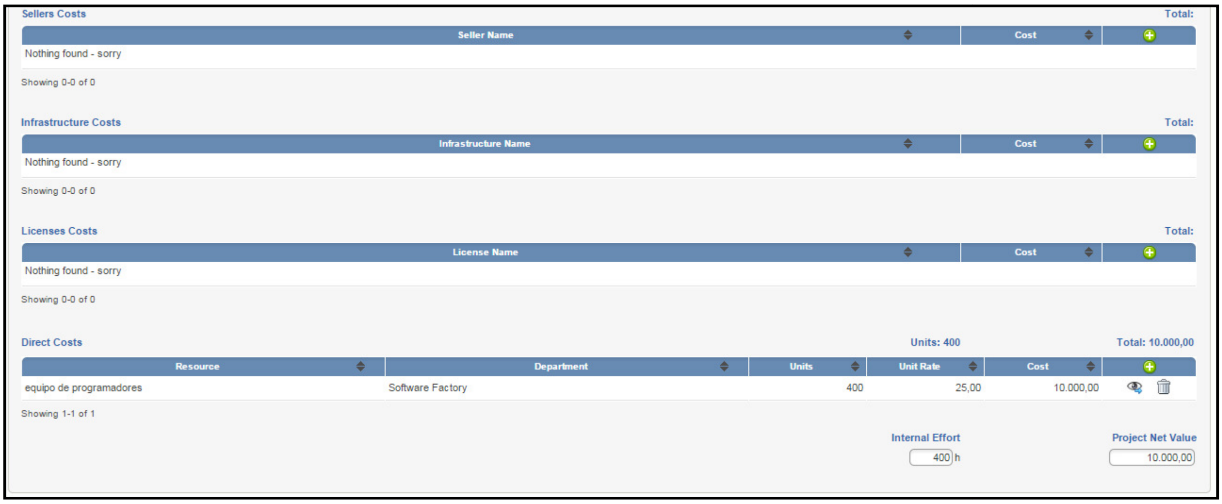
In the "Initiation"tab you can complete the information related to project management:



The charter may also contain financial information. For example, if a budget magnitude is estimated for 400 hours a team of programmers at 25 € / h, in the section on direct costs this information can be entered:

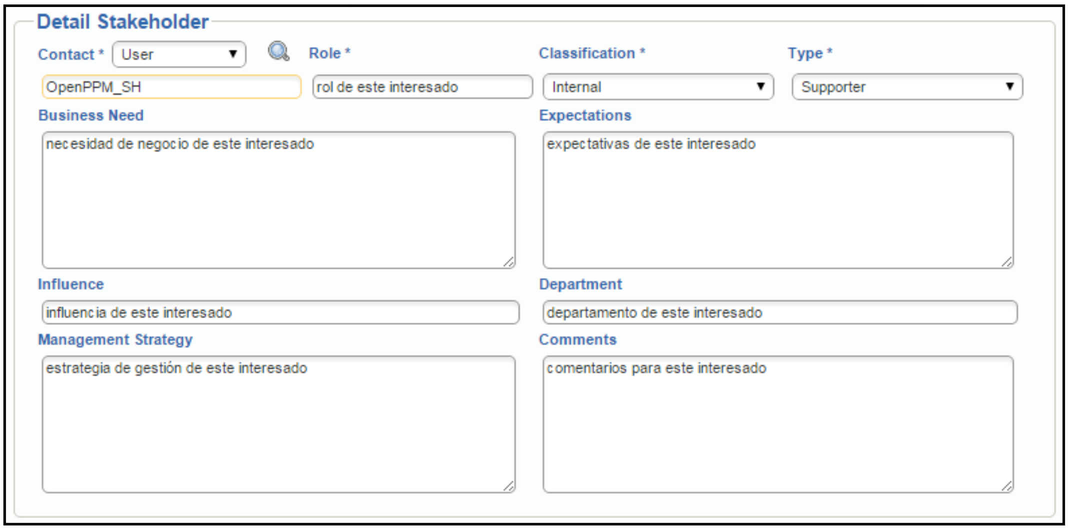


By Clicking on the button, this cost will be reflected in the charter. If it's the only cost and there are no further expenses, you can enter the net budget and hours of effort planned for this project:

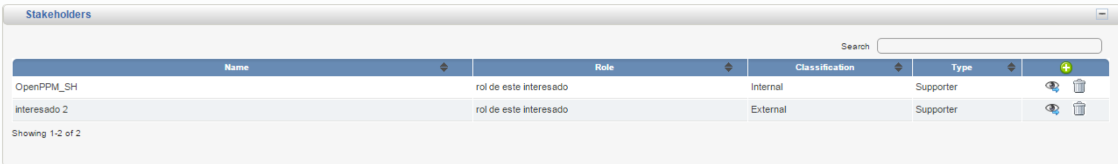


• Identify Stakeholders:

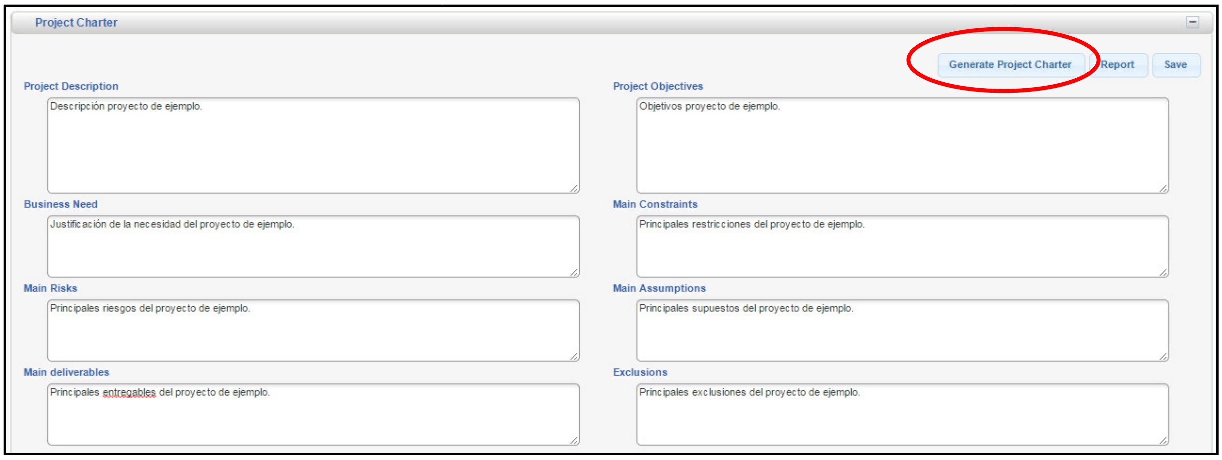
In the "initiation" tab, the PM opens the Stakeholders panel. Press the button to add a new one. It will be added as a "user" who is interested to have access to the project through **OpenPPM**:



Then add another stakeholder in a "nominal" mode, that is, without being a user of the tool. In the next picture you can see the two stakeholders identified so far:



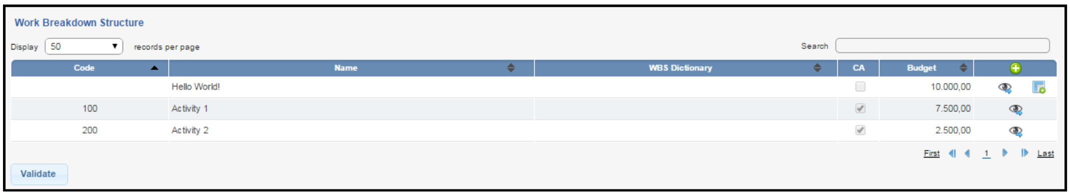
Once the requirements have been collected, the PM may generate the project charter by clicking the Generate project Charter button:



The Project Charter document generated can be saved and stored it in the **OpenPPM** document repository, by uploading the document or through a URL link if you decide to use a third party ECM (ex: Dropbox, Google drive, Alfresco, etc..)

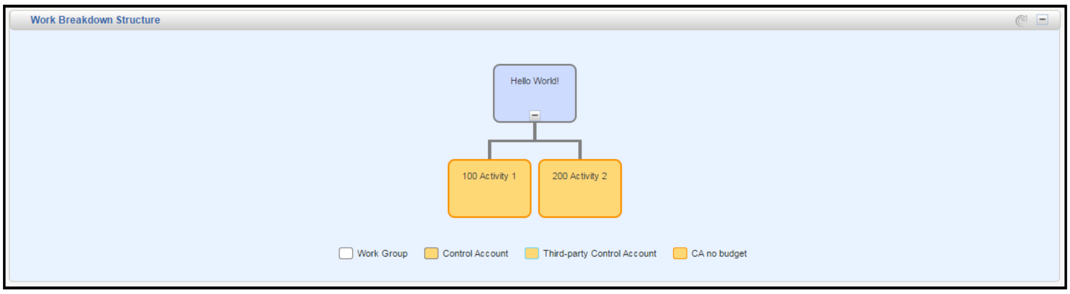
- ## Planning the scope:

Let´s now go to the Plan tab and start planningthe project itself. For simplicity, we will suppose that the project has only two work packages in the WBS. In the Plan Scope portlet, you should enter the data as shown in this table:



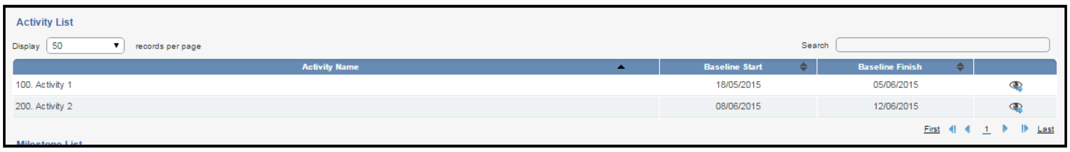
In order to enter work breakdown package, the Control Account (CA) of the project should be unchecked.

Note that the last two nodes have been marked as control accounts. The combined budgets of control accounts match the budget stated in the Project Data section project (BAC = 10000 €). The graphical representation of the WBS can be seen by opening the Work Breakdown Structure panel:

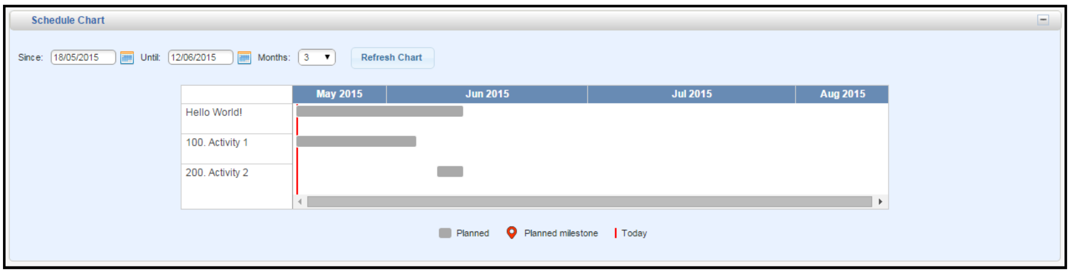


- ## Schedule Planning:

In the activity list of the Schedule portlet, you can enter the dates for the beginning and end of the two activities:



The graphical representation of the schedule can be viewed by opening the Timeline panel:



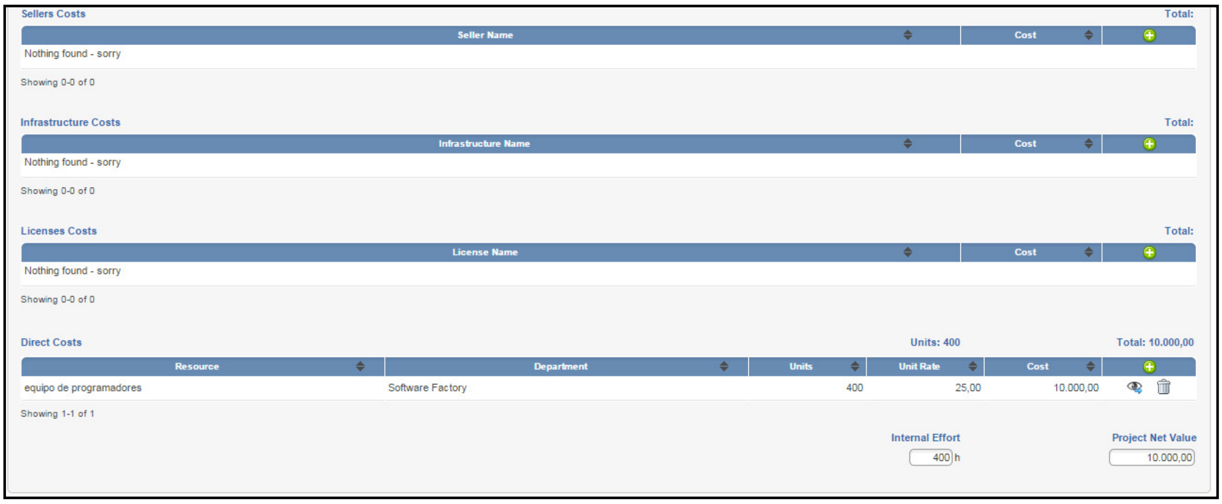
To continue managing this project as a Stakeholder, who has an interest to know how the project is going, exit the tool by Logging Off as PM

Step 3: Stakeholder displays the project information:

The Stakeholder profile that has been assigned to the project, can access to the tool and view information that has so far introduced by the PM.

- **Login as Stakeholder:**

As a Stakeholder, you can see the information recorded in the Project Charter of the project:



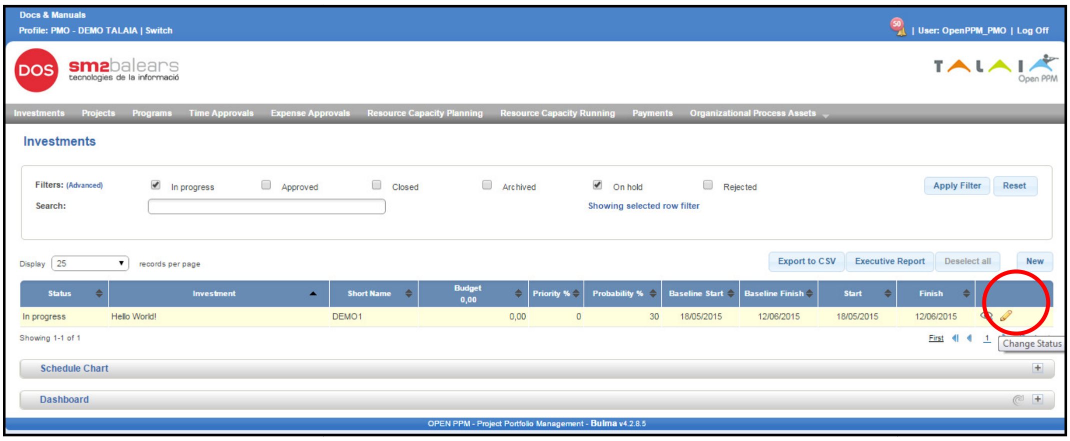
You will also see (always in “reading mode” meaning not allowed to make changes) information related to scope and schedule planning, etc.

To follow with the project lifecycle and with the approval of the project by the PMO, exit the tool by Logging Off as SH

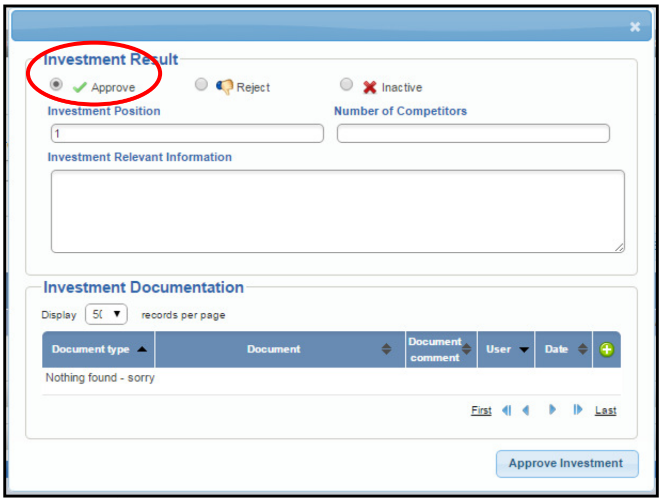
Step 4: PMO approves the project:

- **Login as PMO:**

- **Project Approval:**
  - Go to the Investment Module
  - Click on the on the right side of the project line to Edit Status Change:



The PMO can change the status of the Project to approve:



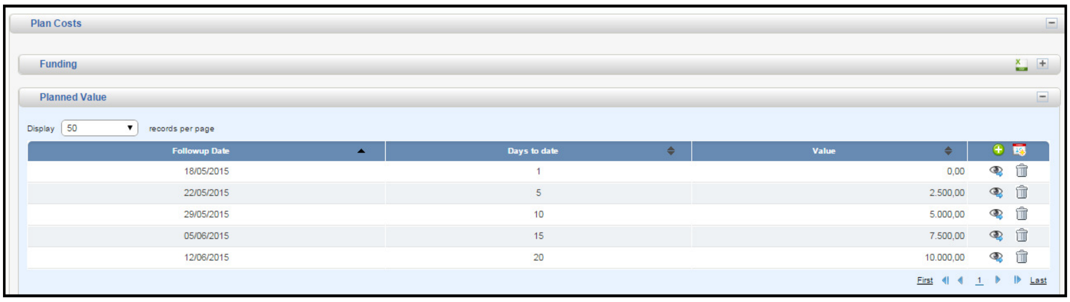
To follow with the project lifecycle and with the detail planning of the project by the PM, exit the tool by Logging Off as PMO

Step 5: PM Completes the Detail Planning:

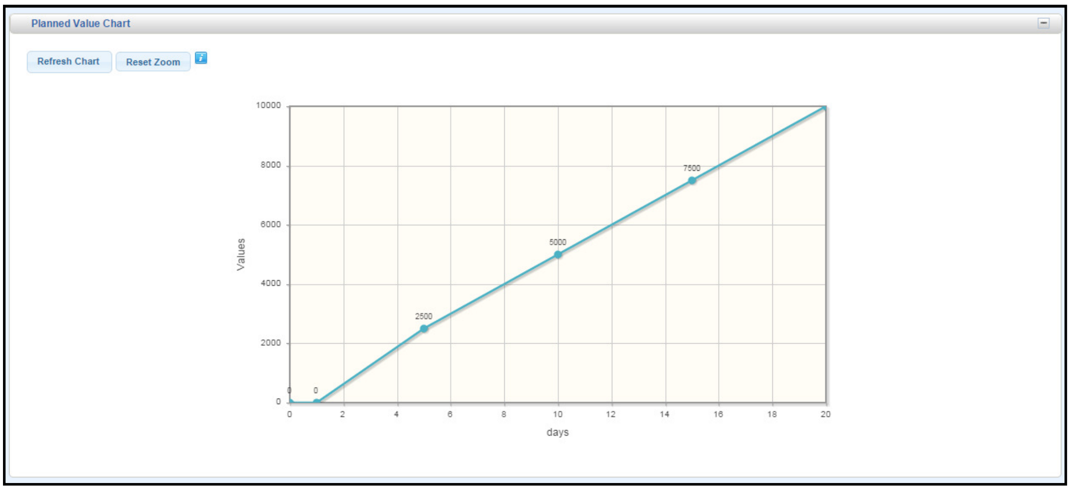
- **Login as PM:**

- **Plan Costs:**

In the Plan tab, in the Plan Costs/Planned Valueportlet, you can enter the tracking dates (follow up date) and the planned value for each follow up date:

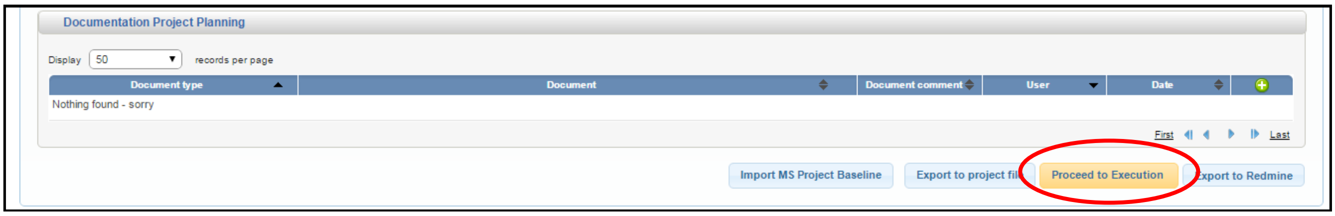


In the Planned Value Graph, you are now able to the graphical representation of the cost baseline of your project:



- **Going from Plan to Execution Status**

The PM can now click on the Proceed to Execution button situatedat the bottom of the Plan Tab to “run” the project. Other Tabs like "Control"and "Close" are now also available.

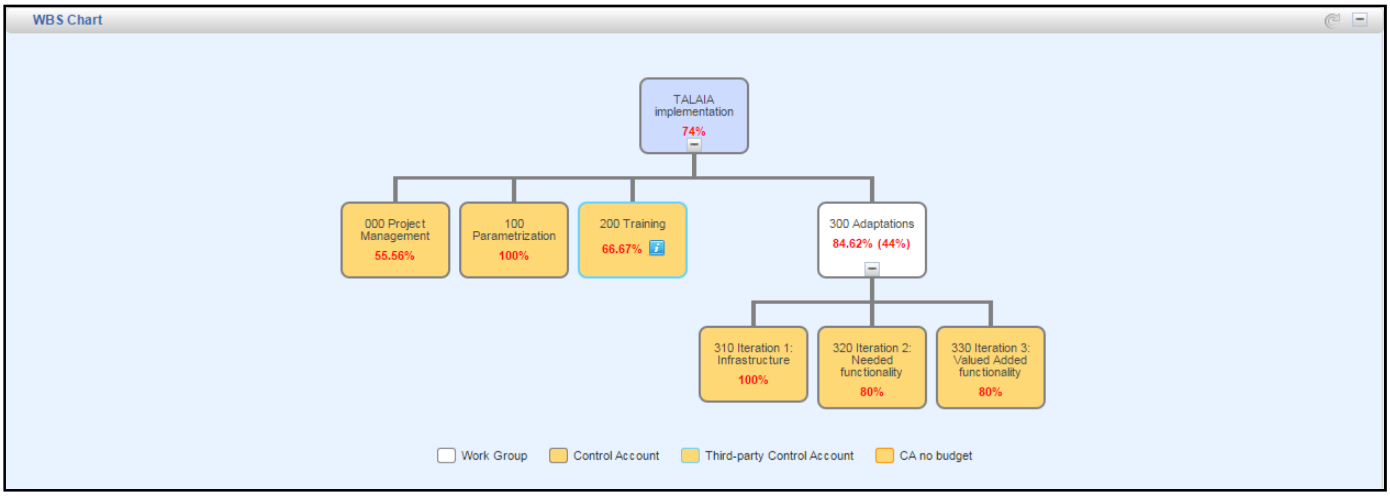


Step 6: Project Control:

When the project is in an execution phase, as a PM, you can now control your project by introducing real information in order to compare what is happening versus what you planned initially.
Like this, you are able to manage and take decision in order to achieve the project objectives.

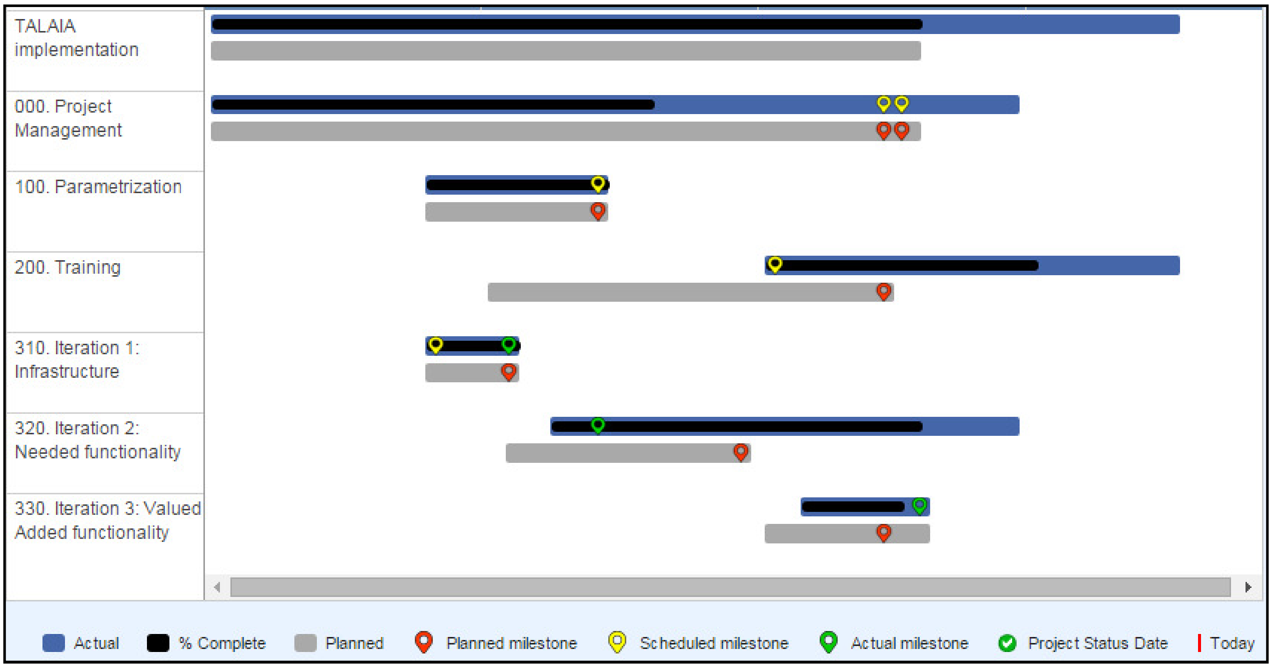
- ### Control Scope:

In the Control Scope you can report Percentage of Completion (POC) of your project activities and visualize your project progress:



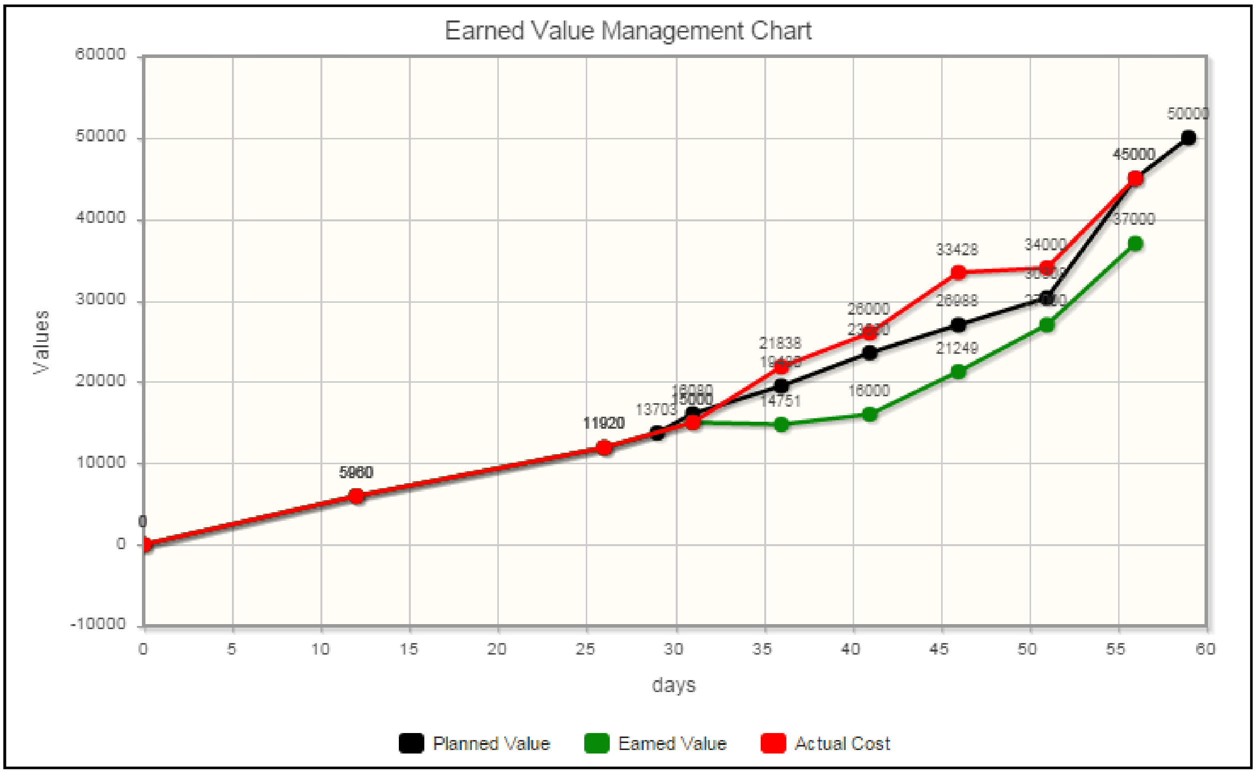
- ### Control Schedule:

By updating your real start and finish activities dates, you can see project and activity baseline deviation as well as if your milestones are in line toyour planning.



- ## Control Costs

From a cost management point of view, you can use the Earn Value Management Standard in order to control your earn value, actual costs and get an Estimated at Completion result.



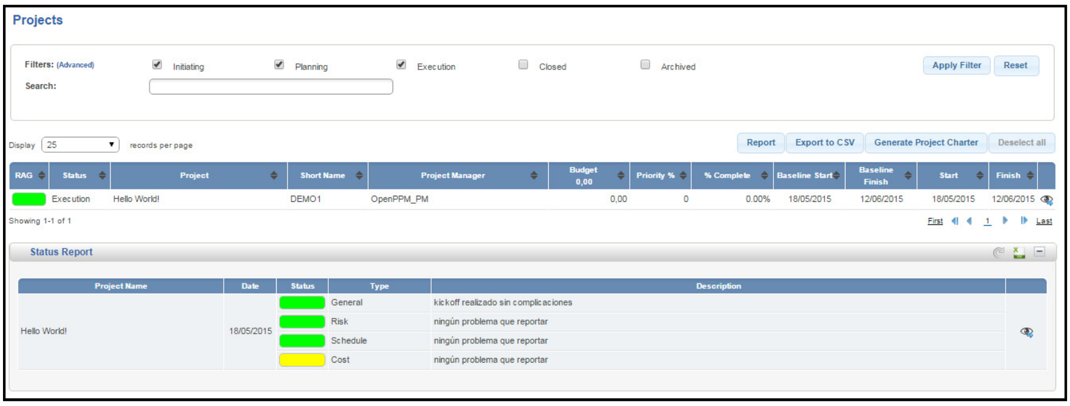
Step 7: High Level Project Tracking Information:

- **PM reports a first summary of the status of the project:**

The PM can now access the portlet "Control/Status Report" to report that, in our example, so far the project is "on track with no issue to report" in the areas of cost, schedule and risk, and the overall situation is "kickoff done without complications."By clicking the "Save" button this information will be recorded.

To follow with the project lifecycle and see how Stakeholders can keep track of the project progress, as by the update of the PM, exit the tool by Logging Off as PM.

- **Login as Stakeholder to review the summary of the status of the project:**



Another user with permission to view project information (e.g.: PMO) would get the same high level view.

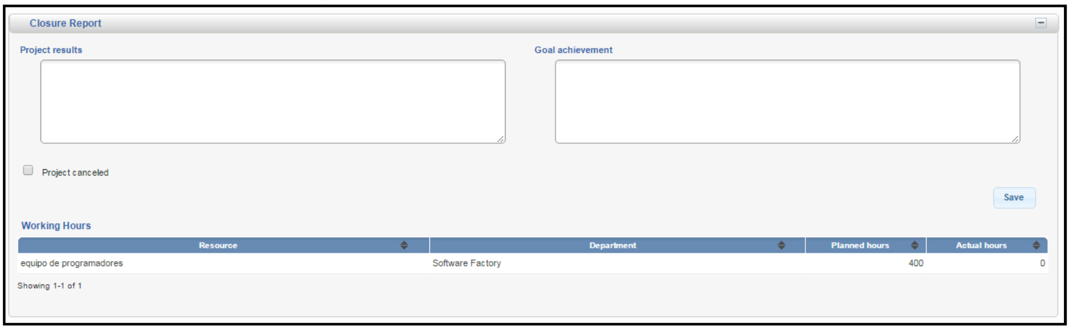
To follow with the project lifecycle and see how the PM can finalize and close the project,exit the tool by Logging Off as SH.

Step 8: Project Closing:

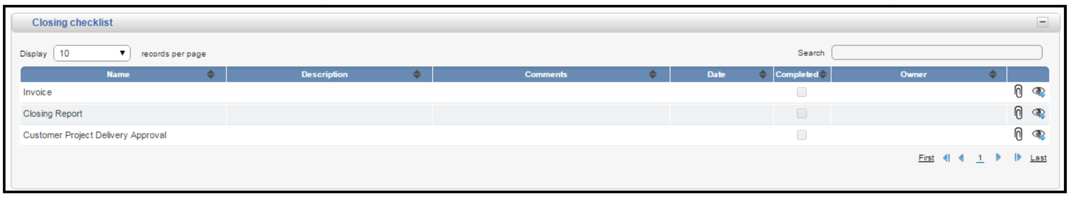
- **Login as PM:**

The PM accesses the project details by clicking on the icon. Then he reaches the Closure tab.

Inthe panel "Closure Report", the PM can enter information about the results and objectives achieved or detailroot causes if the project was canceled in an earlier stage.

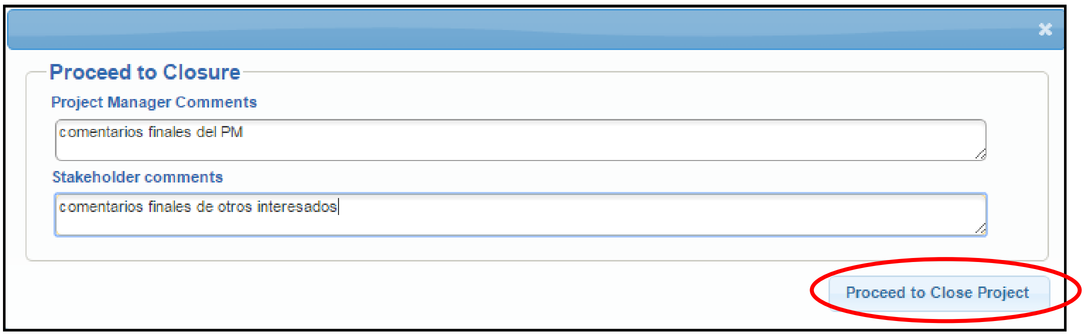


In the "closing checklist" panel, the PM can mark certain activities as completed (depends on each organization, to match a specific methodology):



Lessons learned are also available to link to the project for future exploitation by the organization:

Finally, by pressing the "Proceed to Closure" button, a pop-up window appears to enter the final notes of the performance:



Note: Once status is changed to “Closed” the PM cannot edit anymore information (only PMO can). Though a project finalized may be re-opened, and move back to an execution status if required by the PM. This action can only be perfomed by the role PMO.