



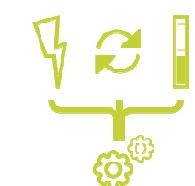
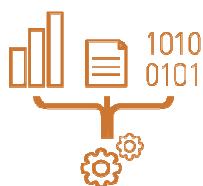
Open PPM

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:
 - o Virtual Machine
 - o Data Base (Maria DB, MySQL or Oracle)
 - o Tomcat Version (v.7 or higher)

This installation Guide Contains:

- Section I Installation Guide
 - o Section I-A: Easy Installation Guide
 - o 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**

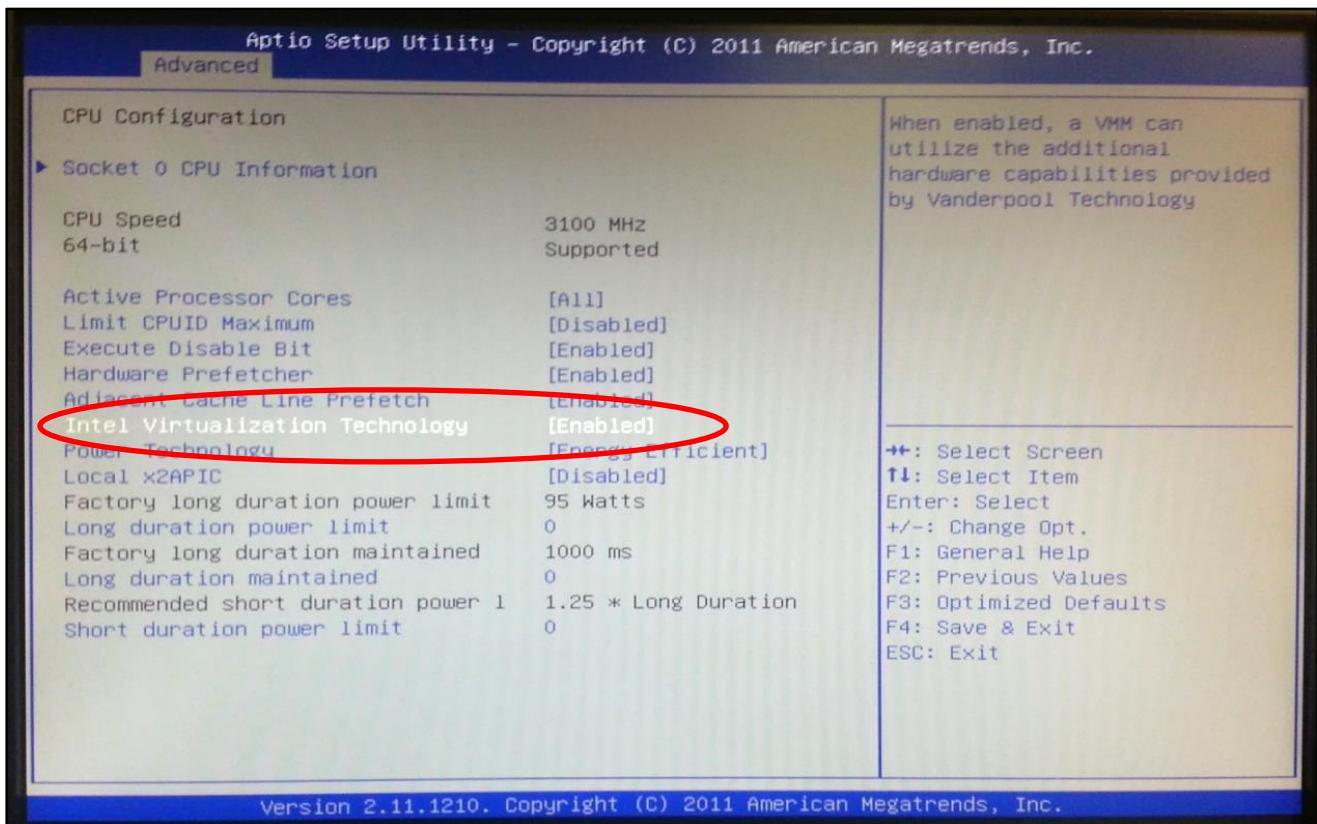
To install **OpenPPM**, you have first to deploy a virtual machine and therefore enable the virtualization technology feature of your system, if using a laptop or PC



To do so, start your computer and press the indicated key on your screen to enter your BIOS configuration settings.

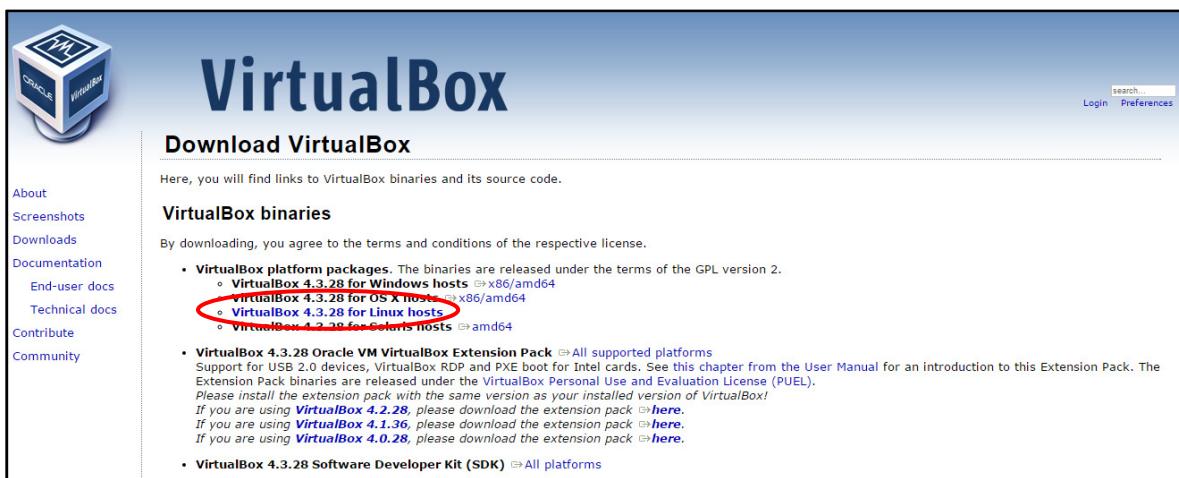
Please refer to your product manufacture which will indicate you how proceed further with your computer. (Usually the indicator key to enter your BIOS appears on the first screen and stays only for few seconds, PAY ATTENTION!). The press key is likely to be: F1, F2, F3, Esc or Delete key.

As an example we had attached a print screen sample:



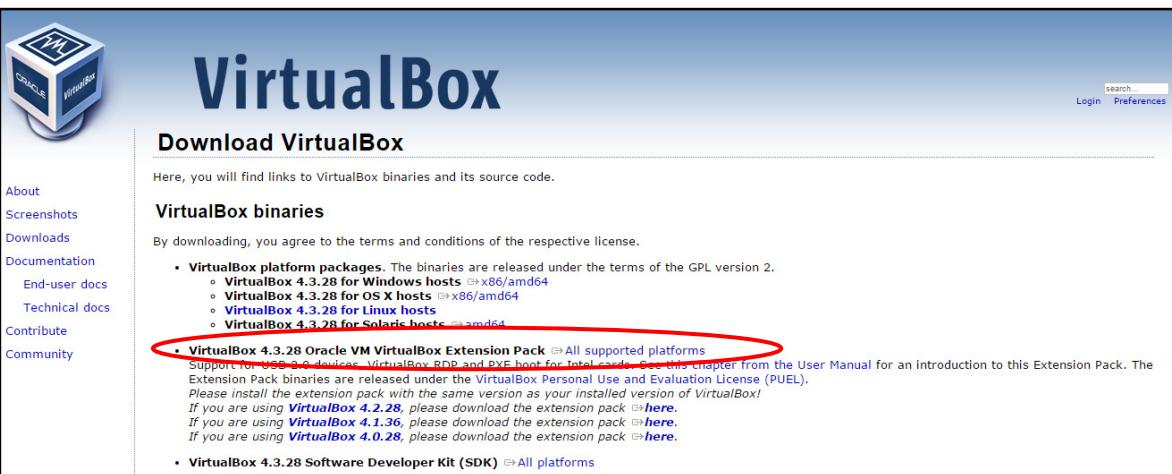
• Download Virtualbox

- 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/>

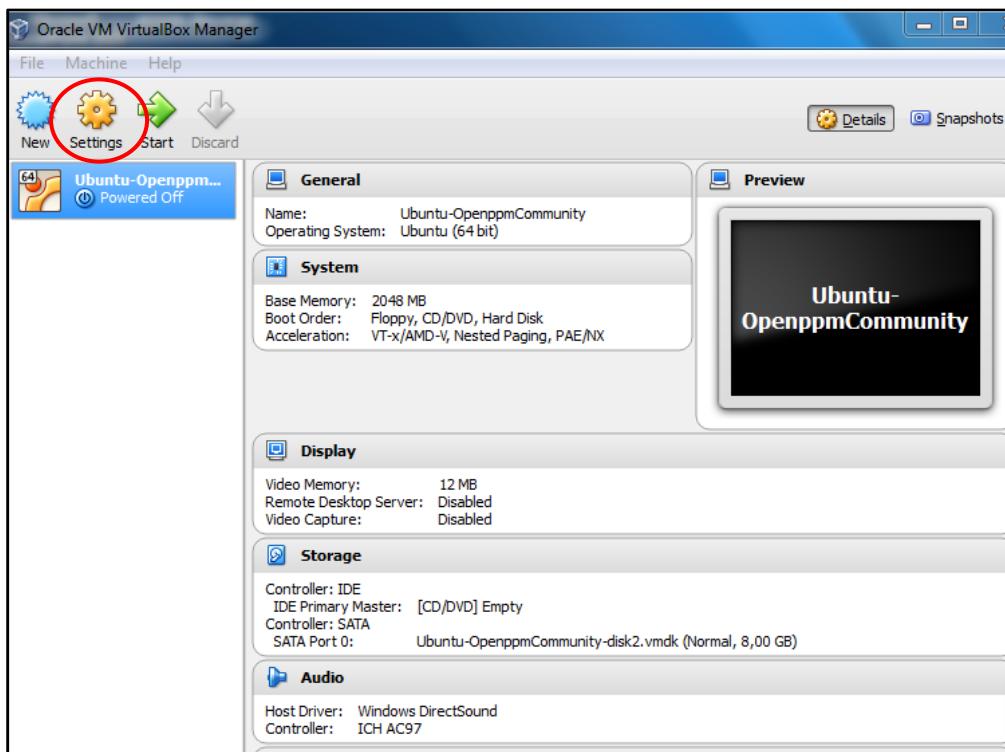
Download the Oracle VM Virtualbox extension pack for all supported platforms.



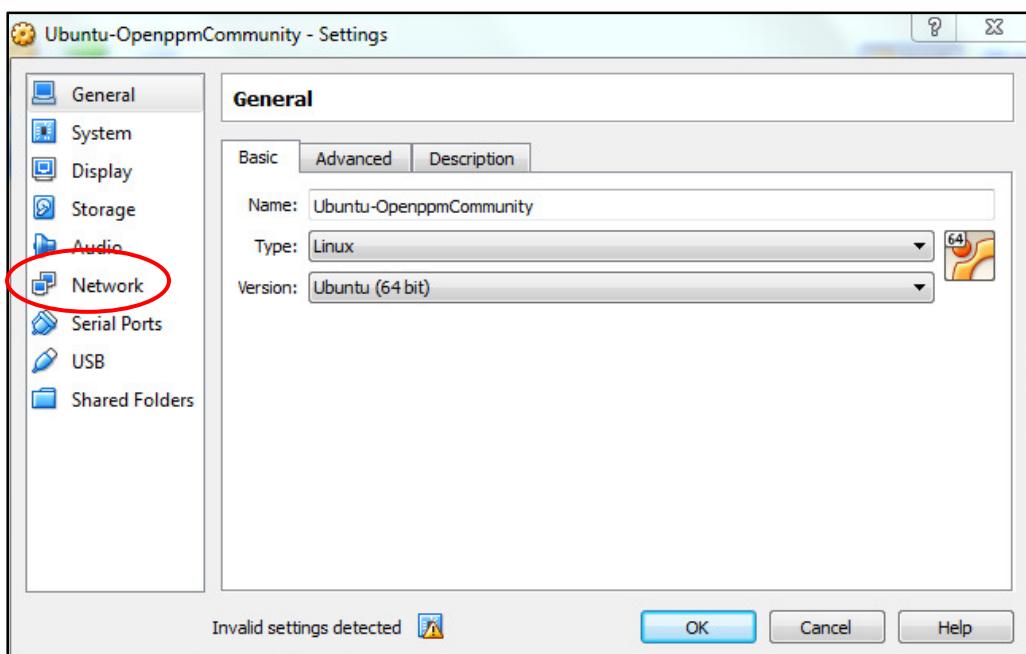
The screenshot shows the VirtualBox download page. On the left, there's a sidebar with links like About, Screenshots, Downloads, Documentation, End-user docs, Technical docs, Contribute, and Community. The main content area has a title 'VirtualBox' and a section 'Download VirtualBox'. It says 'Here, you will find links to VirtualBox binaries and its source code.' Below this is a section 'VirtualBox binaries' with a note about accepting terms and conditions. A list of binary packages is shown, with the 'VirtualBox 4.3.28 Oracle VM VirtualBox Extension Pack' link circled in red. This link leads to a page with more details about the extension pack, including support for USB 3.0 devices, VirtualBox RDP and PXE boot for Intel cards, and a note about the User Manual. It also provides download links for different versions of the extension pack based on the installed version of VirtualBox.

• Configure your Virtual Machine

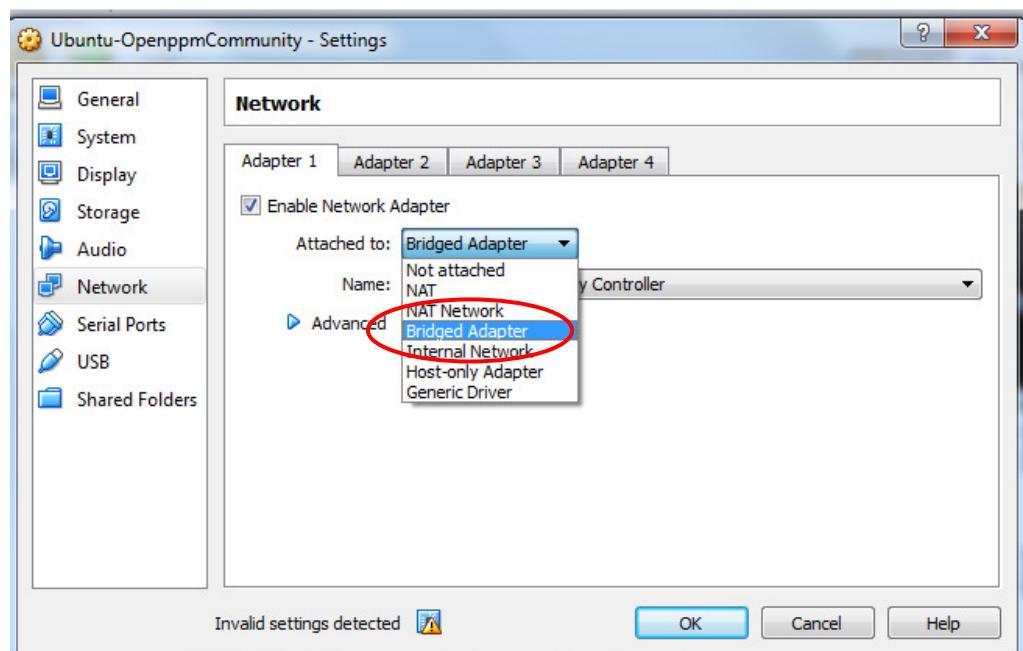
- Enter to the Oracle VM VirtualBox Manager. Go to settings:



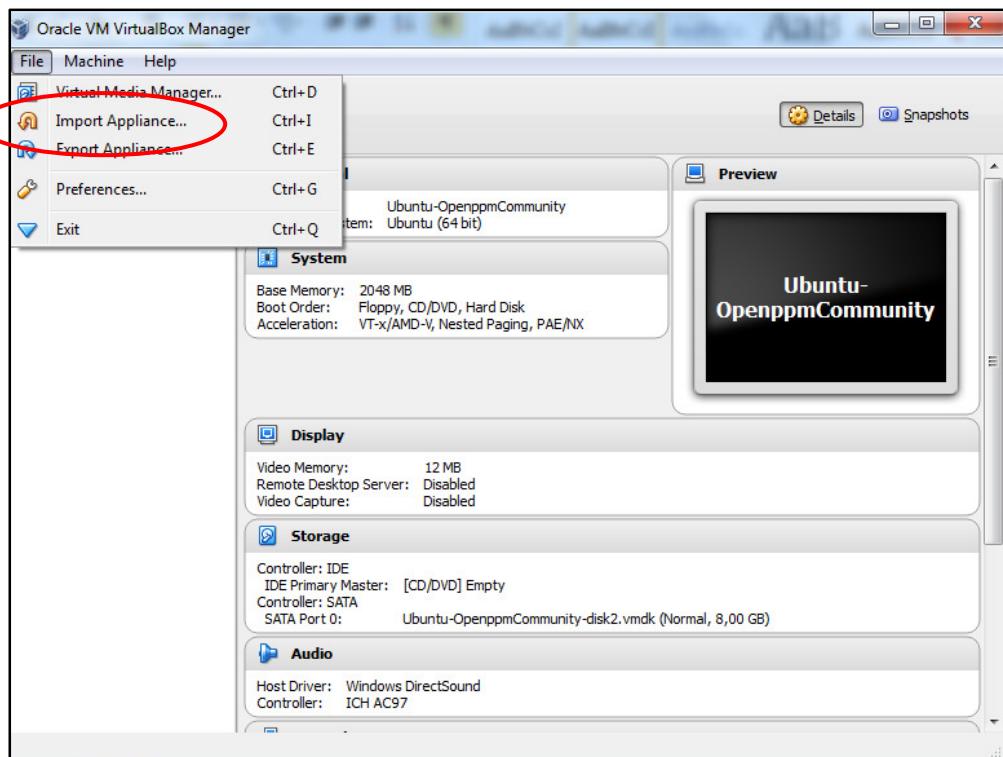
- Then Go to network:



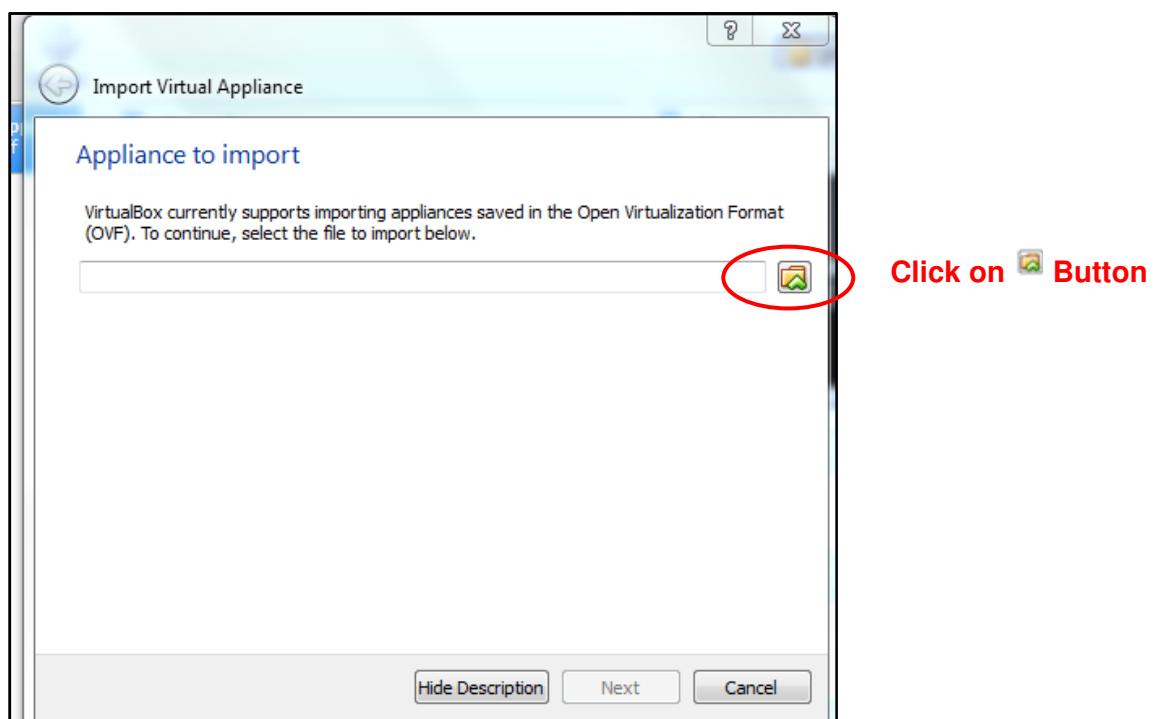
- Enable Network Adapter and choose attached to Bridged Adapter.



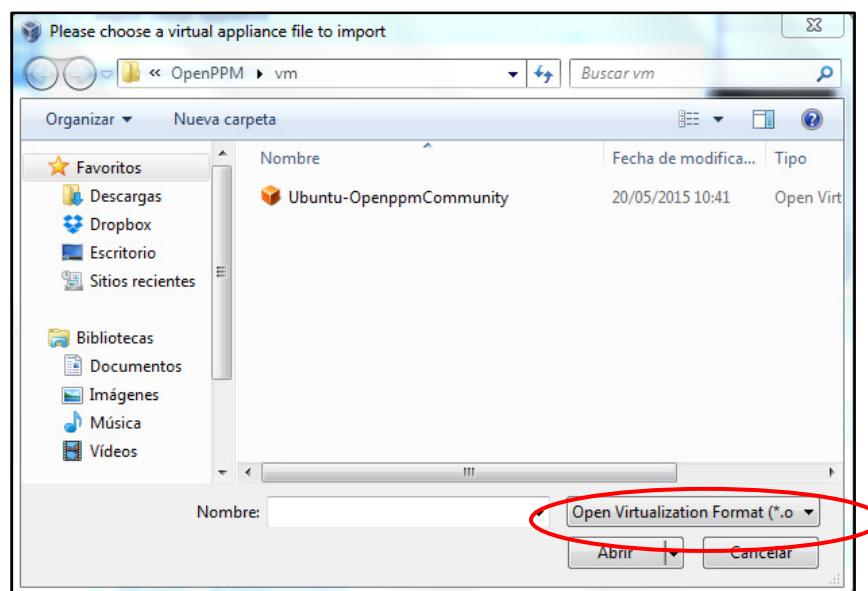
- Import the Ubuntu-OpenppmCommunity.ova file.



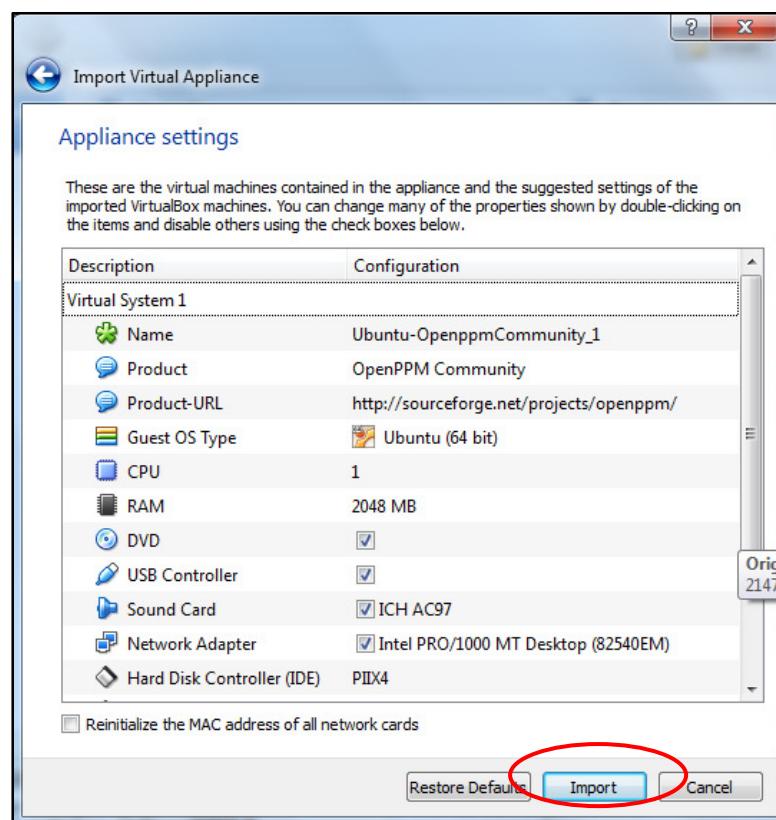
- Double-Click to open the file.



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

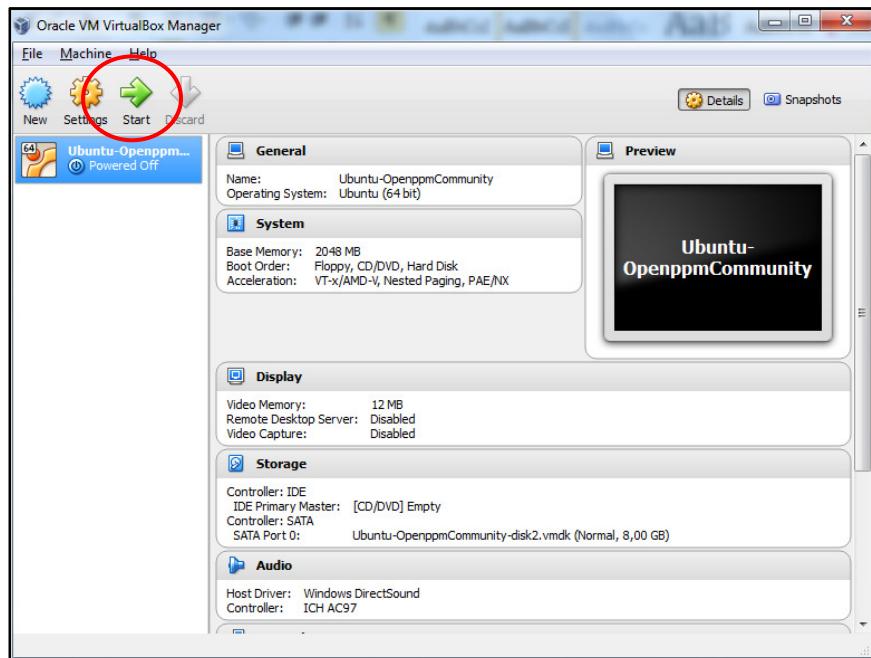


- Click on import. This can take few minutes:



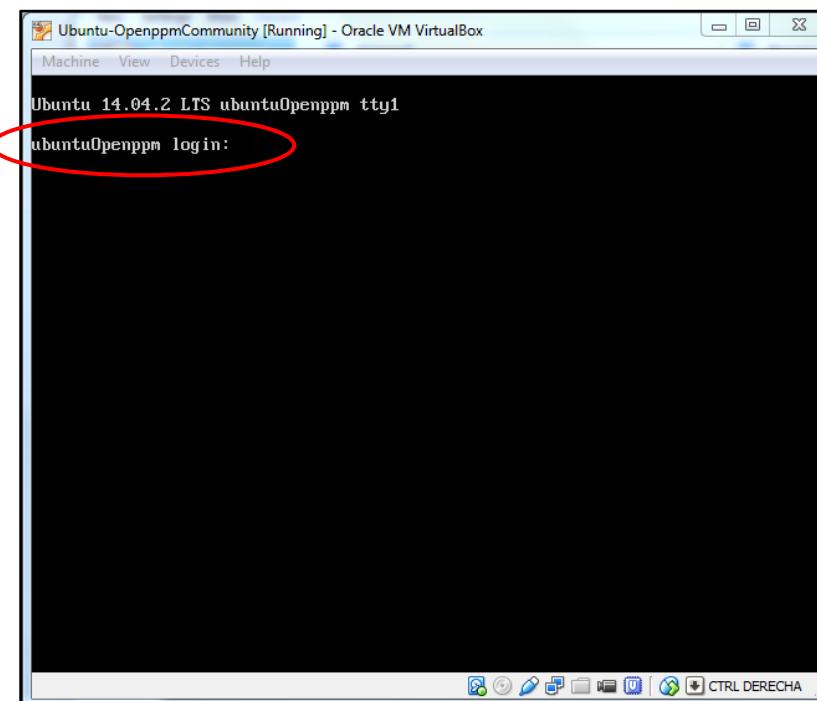
Once the import is completed you will be able to see the virtual machine on the list.

- Click on start to launch the virtual machine:

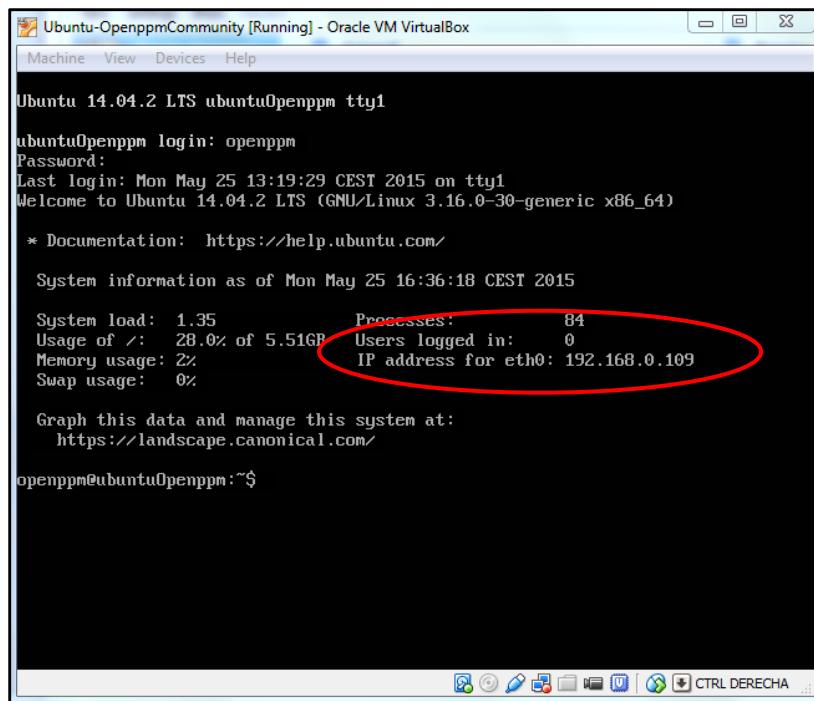


Once the virtual machine is running, you can log in with the following information:

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:



```
Ubuntu 14.04.2 LTS ubuntuOpenppm tty1
ubuntuOpenppm login: openppm
Password:
Last login: Mon May 25 13:19:29 CEST 2015 on tty1
Welcome to Ubuntu 14.04.2 LTS (GNU/Linux 3.16.0-30-generic x86_64)

 * Documentation: https://help.ubuntu.com/

 System information as of Mon May 25 16:36:18 CEST 2015

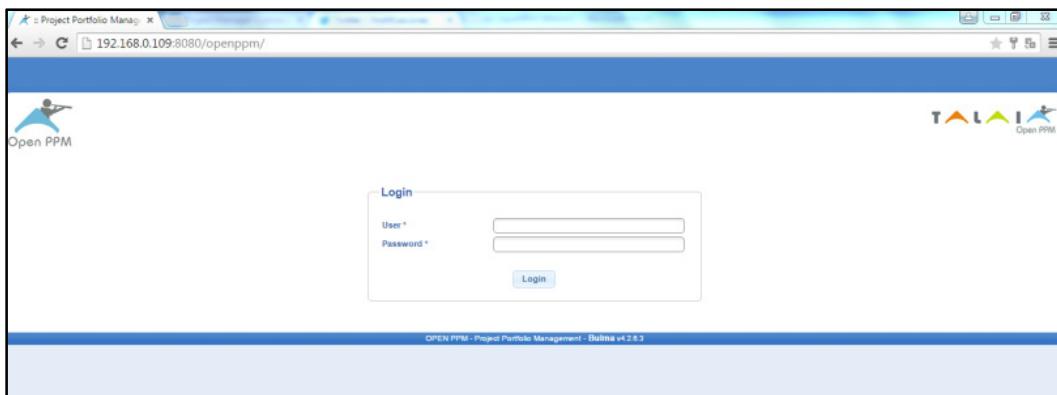
 System load: 1.35      Processes:          84
 Usage of /: 28.0% of 5.51GB  Users logged in:    0
 Memory usage: 2%
 Swap usage:  0%
 IP address for eth0: 192.168.0.109

 Graph this data and manage this system at:
 https://landscape.canonical.com/

openppm@ubuntuOpenppm:~$
```

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		

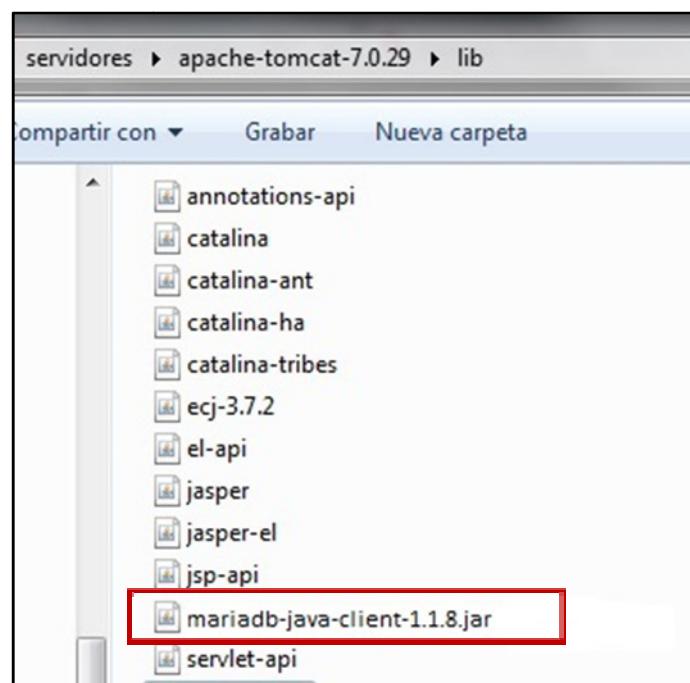
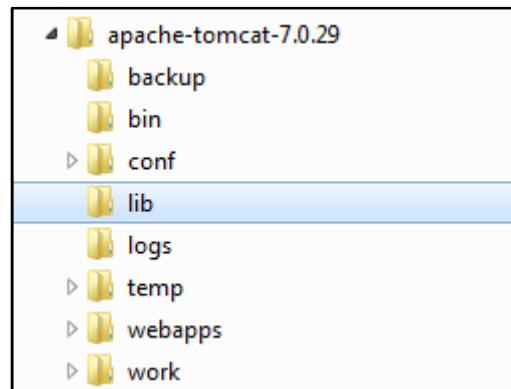
Nevertheless, **OpenPPM** could be installed with any other Operating System compatible with APACHE TOMCAT application server, and any other database apart from the ones certified above. If this is the case, please, contact us.

- **Apache Server installation**

Download the application server from <http://tomcat.apache.org/download-70.cgi> and 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 always 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)**

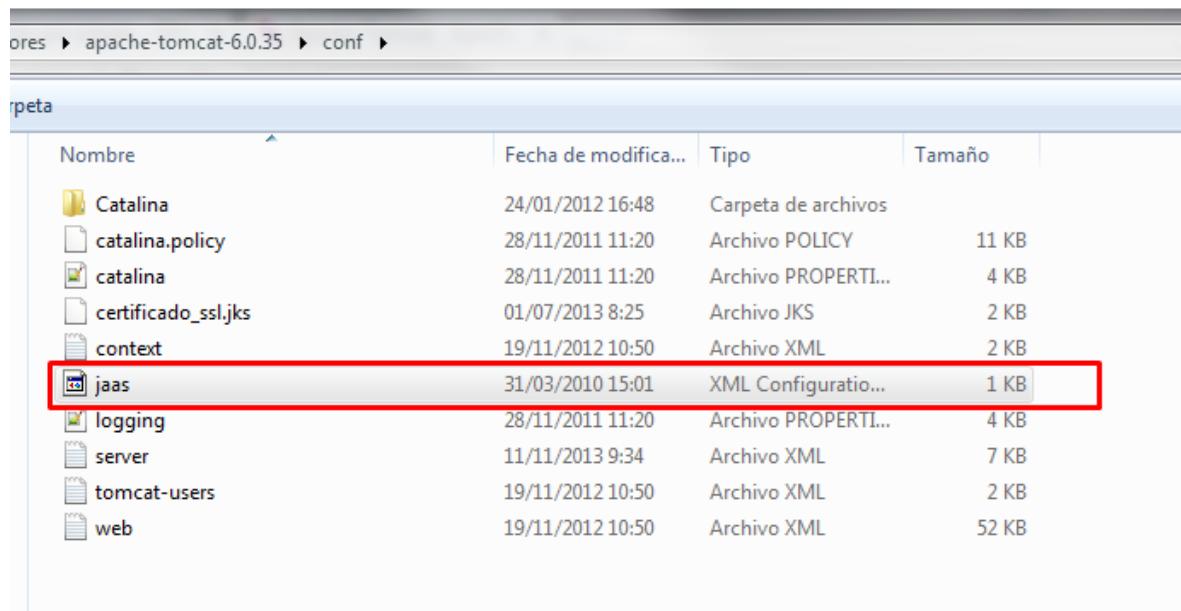
In the “openppm.xml” file, if the **OpenPPM** security is internal to the application, the security information lines can be found as shown:

```
<?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"/> Internal Security Configuration Data

        <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>
```

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



Nombre	Fecha de modifica...	Tipo	Tamaño
Catalina	24/01/2012 16:48	Carpeta de archivos	
catalina.policy	28/11/2011 11:20	Archivo POLICY	11 KB
catalina	28/11/2011 11:20	Archivo PROPERTI...	4 KB
certificado_ssl.jks	01/07/2013 8:25	Archivo JKS	2 KB
context	19/11/2012 10:50	Archivo XML	2 KB
jaas	31/03/2010 15:01	XML Configuratio...	1 KB
logging	28/11/2011 11:20	Archivo PROPERTI...	4 KB
server	11/11/2013 9:34	Archivo XML	7 KB
tomcat-users	19/11/2012 10:50	Archivo XML	2 KB
web	19/11/2012 10:50	Archivo XML	52 KB

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 (.sh si está 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.

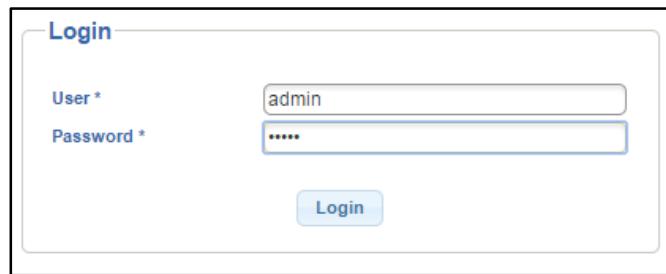
Step 1: Create a Performing Organization and a Default User:

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:

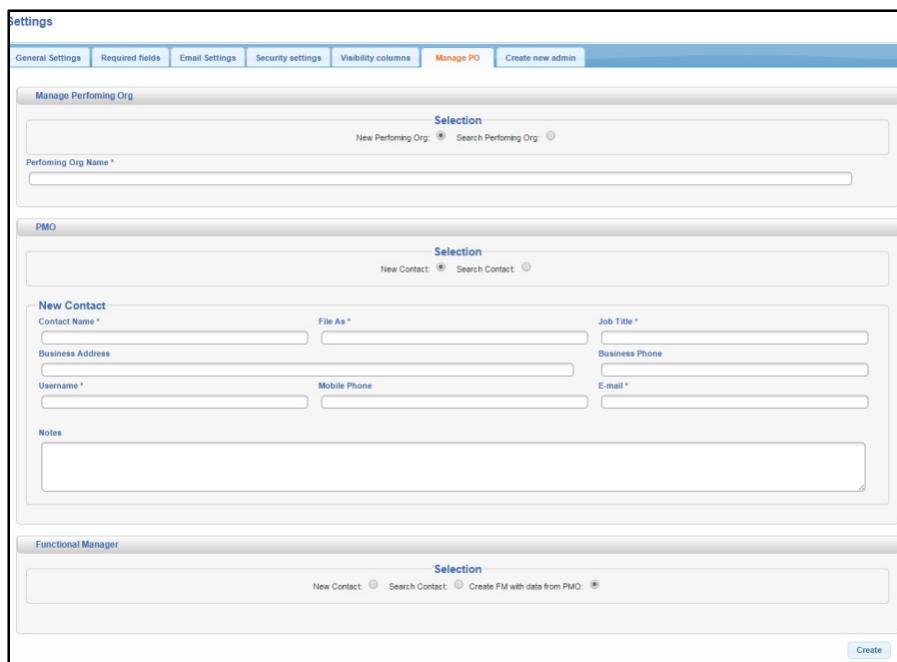
User: admin
Password: admin



The screenshot shows a 'Login' form with the following fields:

- User *: admin
- Password *: *****
-

- **Go to Manage PO Tab:**



The screenshot shows the 'Settings' section with the 'Manage PO' tab selected. The interface includes the following sections:

- Manage Performing Org**: Fields for 'Performing Org Name' and 'Selection' (New Performing Org: Search Performing Org:).
- PMO**: Fields for 'New Contact' (Contact Name, File As, Job Title, Business Address, Business Phone, Username, Mobile Phone, E-mail) and 'Notes' (a text area).
- Functional Manager**: Fields for 'Selection' (New Contact: Search Contact: Create FM with data from PMO:).

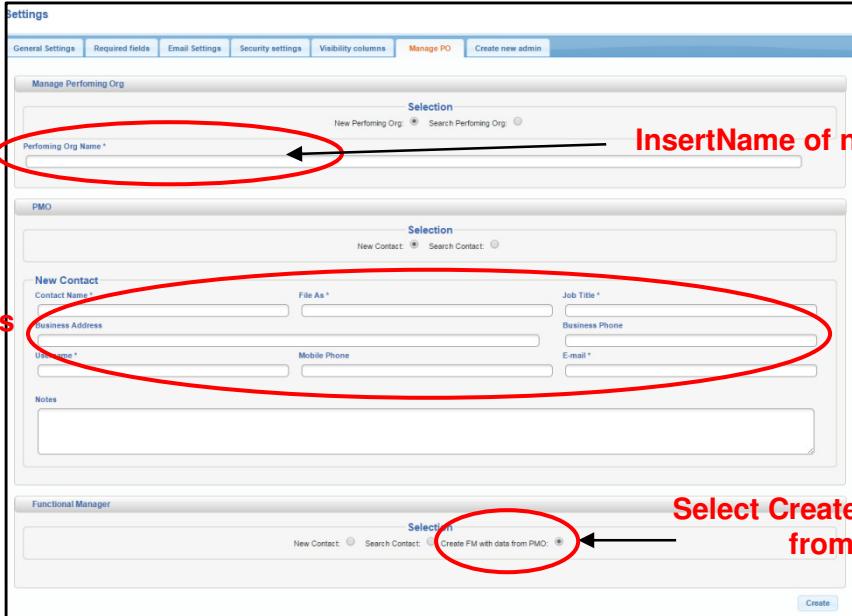
A 'Create' button is located at the bottom right of the functional manager section.

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

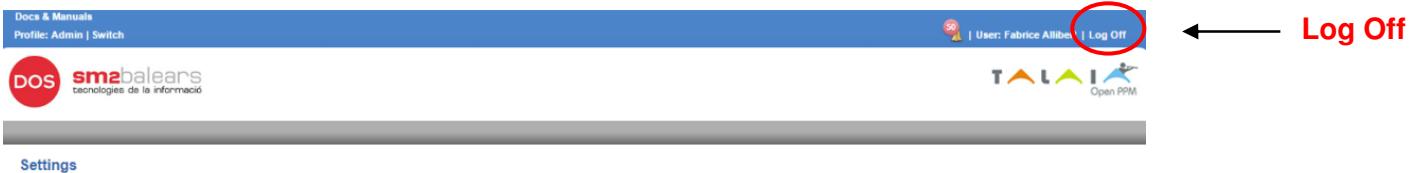
Fill in the Mandatory fields (*) to create a new user

InsertName of new PO

Select Create FM with data from PMO



- Then, Log Off

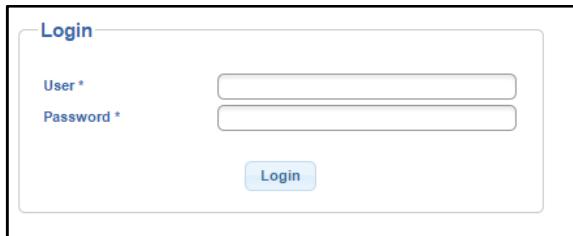


Step 2: Define Basic Configuration Settings:

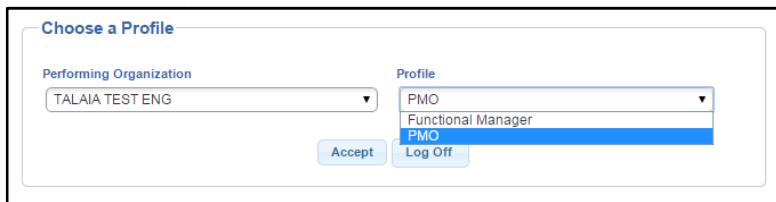
Log-In **OpenPPM** with the newly created user.



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

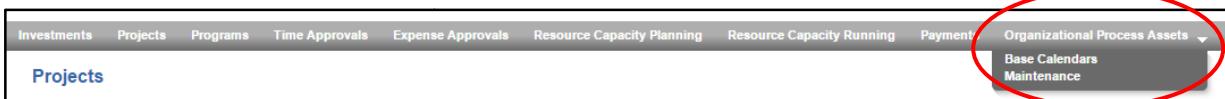


Choose the PMO profile as it is the only profile able to access the Organizational Process Assets Settings:



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

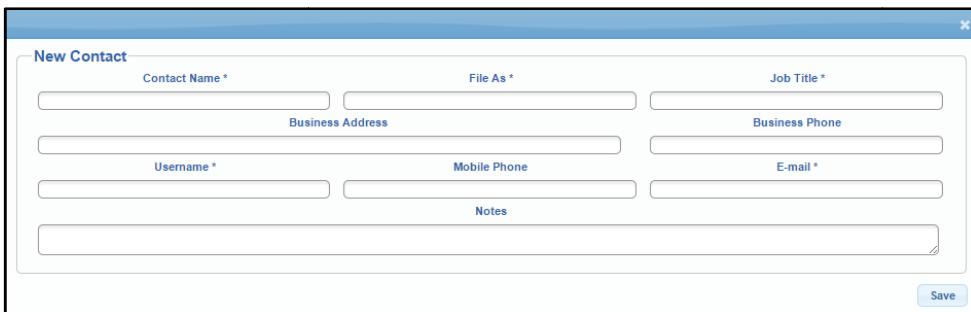
- Users with Profile PMO, Program Manager, Project Manager and Investment Manager
- Create a default Program
- **Go to Organizational Process Assets / Maintenance:**



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

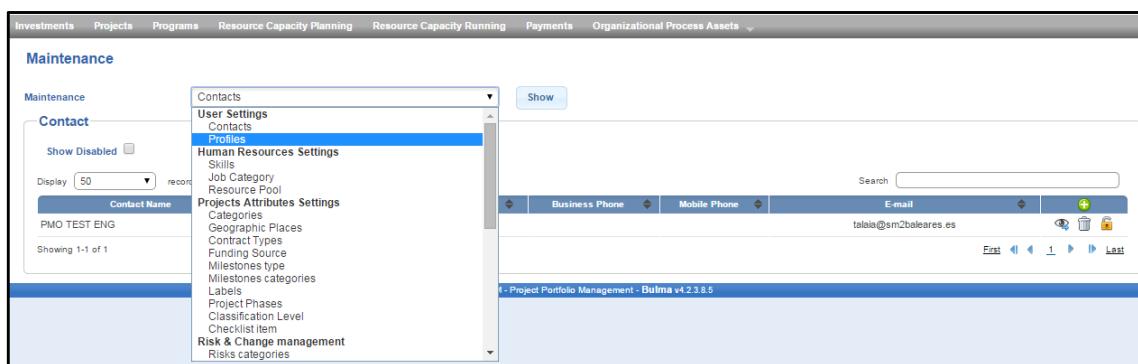



- **Fill New User (Contact) Details**



The screenshot shows the 'New Contact' form. It includes fields for Contact Name*, File As*, Job Title*, Business Address, Business Phone, Username*, Mobile Phone, E-mail*, Notes, and a Save button.

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

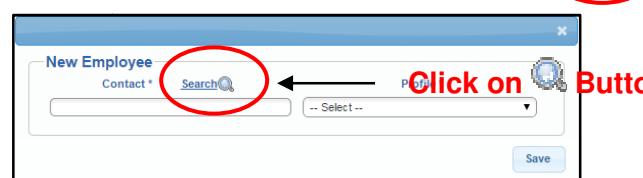


The screenshot shows the 'Maintenance' screen with 'Profiles' selected in the left sidebar. It displays contact details for 'talaia@sm2baleares.es' and a search bar.



The screenshot shows the 'Maintenance' screen with 'Employee' selected in the left sidebar. A red circle highlights the green '+' button at the top right of the search bar.

Click on  Button



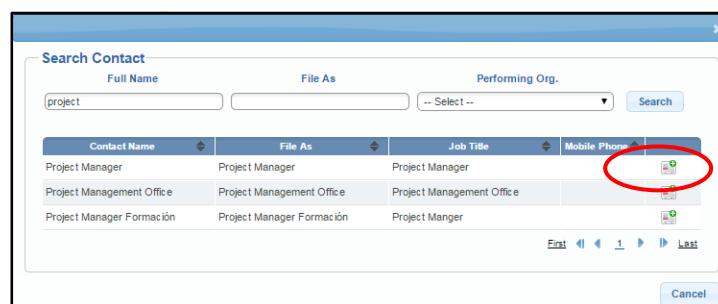
The screenshot shows the 'New Employee' form. A red circle highlights the 'Search' button next to the 'Contact*' input field.

Click on  Button



The screenshot shows the 'Search Contact' dialog. A red circle highlights the 'Search' button.

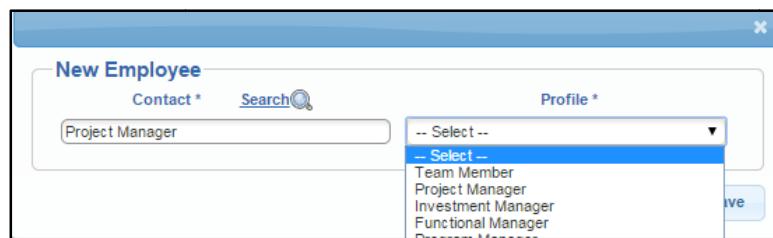
Click on Search Button



The screenshot shows the 'Search Contact' results. A red circle highlights the green '+' button next to the user 'Project Manager'.

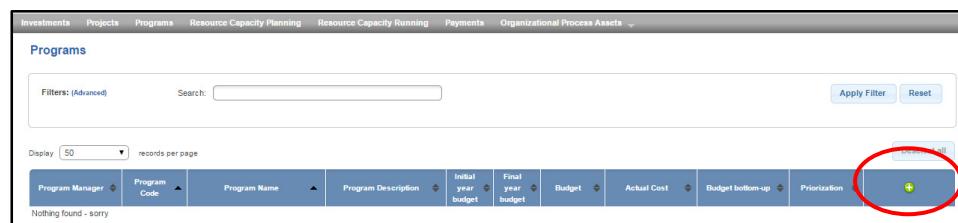
Click on  Button of the User you want to add a Profile to

- **Assign Profile to user**



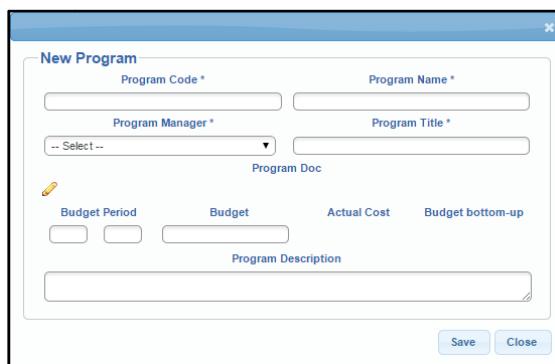

: You can add as many profiles per user as you want

- **Create a default Program**

Click on + Button

- Fill in all mandatory fields to create a Program:



More Advanced Configuration Settings

Organizational Process Assets Settings

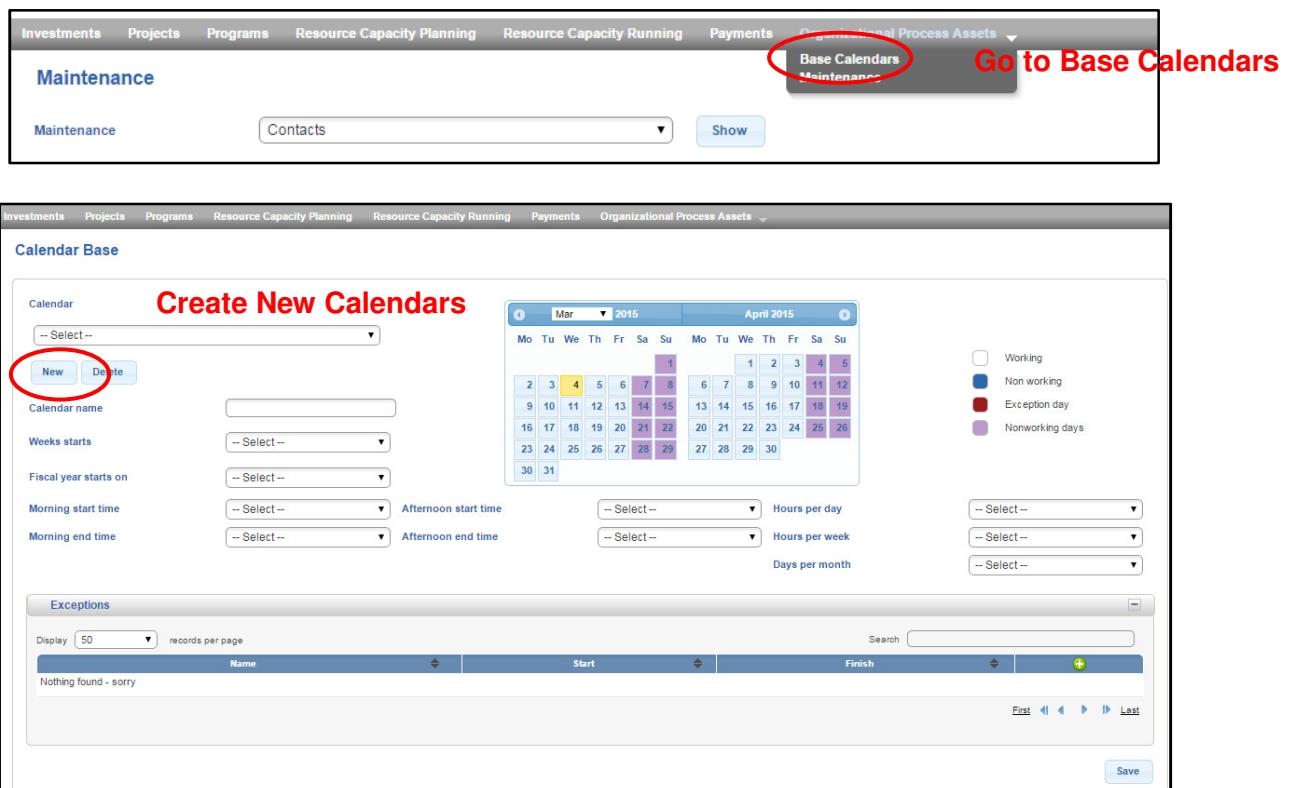
There are more parameters that you can configure from the Organizational Process/Maintenance.

- **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**

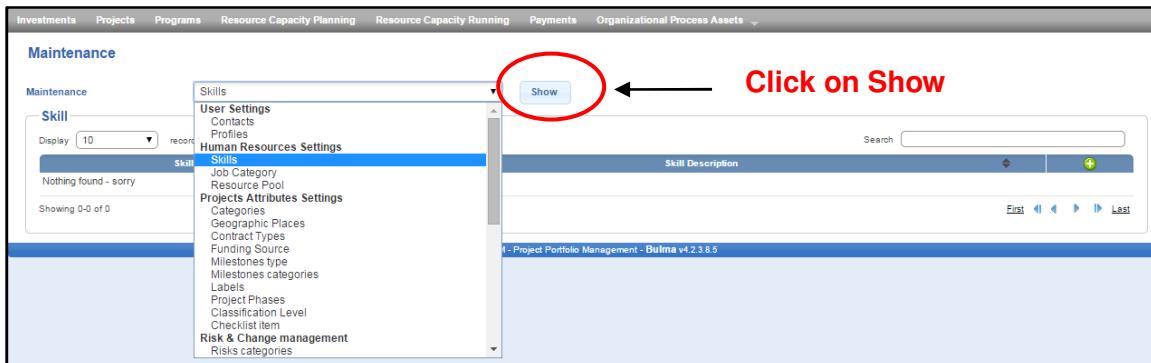


The screenshot shows the 'Maintenance' section of the Open PPM application. In the top navigation bar, the 'Organizational Process Assets' dropdown is open, and the 'Base Calendars' link is circled in red. Below the navigation, there's a search bar labeled 'Maintenance' and a 'Show' button. The main area is titled 'Calendar Base' and contains a sub-section titled 'Create New Calendars'. This section includes fields for 'Calendar name', 'Weeks starts', 'Fiscal year starts on', 'Morning start time', and 'Morning end time'. To the right of these fields is a calendar grid for March and April 2015, with days color-coded: blue for working days, dark blue for non-working days, red for exception days, and purple for non-working days. Below the calendar are sections for 'Exceptions' and a search bar. At the bottom right of the 'Create New Calendars' section is a 'Save' button.

- **Define Skills**



Go to Maintenance → **Maintenance**

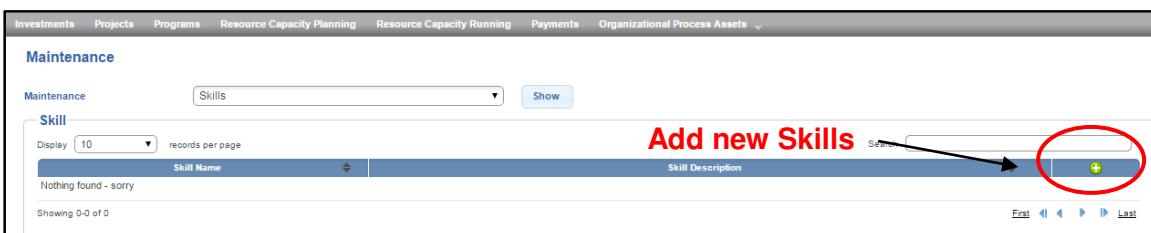


Maintenance

Skills

Show

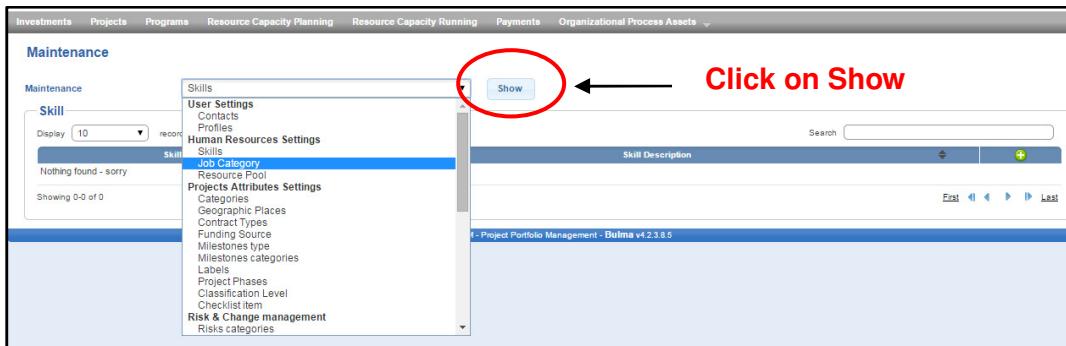
Click on Show



Add new Skills

+

- **Define Job Categories**

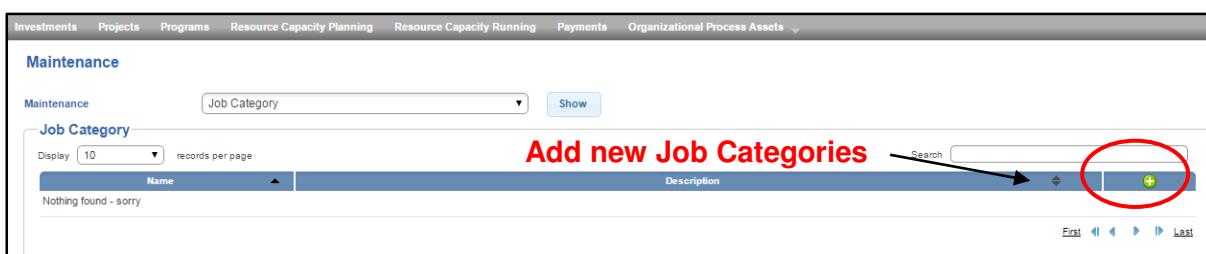


Maintenance

Skills

Show

Click on Show



Add new Job Categories

+

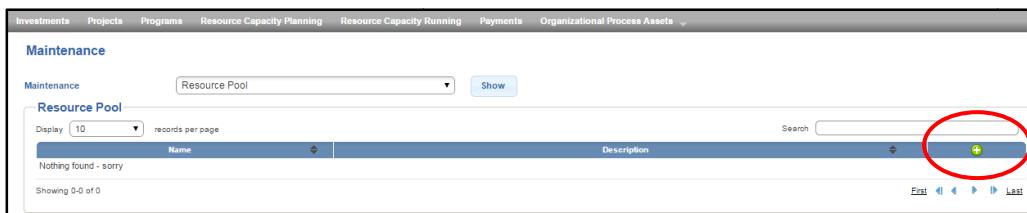
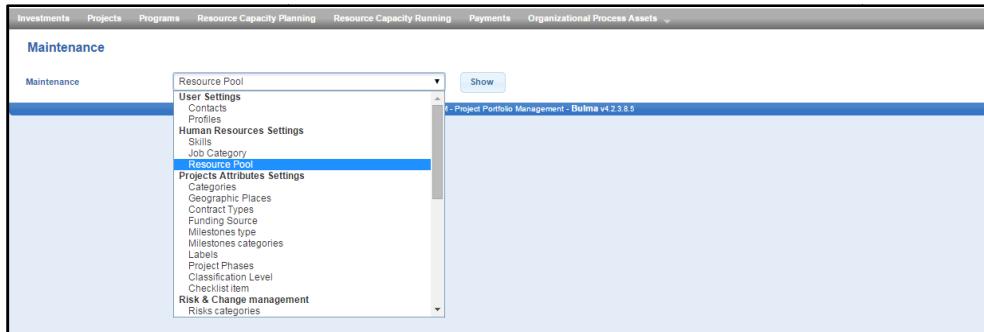
- **Assign a Resource Manager Profile**

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

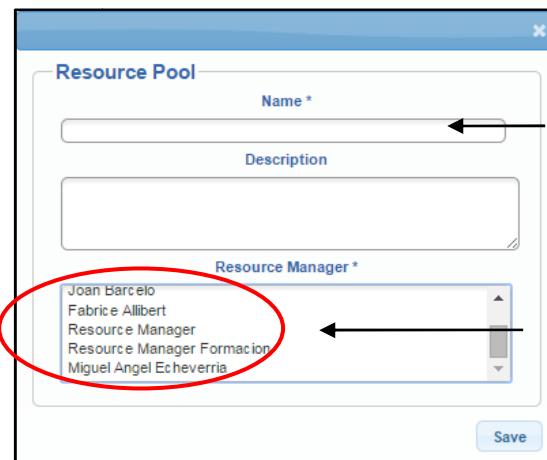
- **Create a Resource Pool**

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

- Go to **Maintenance / Resource Pool**



Click on + Button



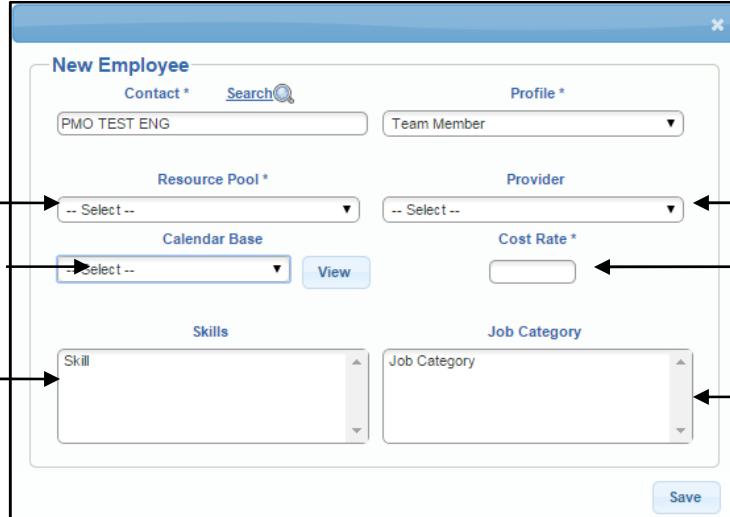
Add a Resource Pool

Select a Resource Manager

Name *	Description
Joan Barcelo	
Fabrice Allibert	
Resource Manager	
Resource Manager Formacion	
Miguel Angel Echeverria	

- **Assign a Team Member Profile**

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



Assign to a Resource Pool

Select a Calendar for this Resource

Choose one or more skills to associate

Assign to a Provider

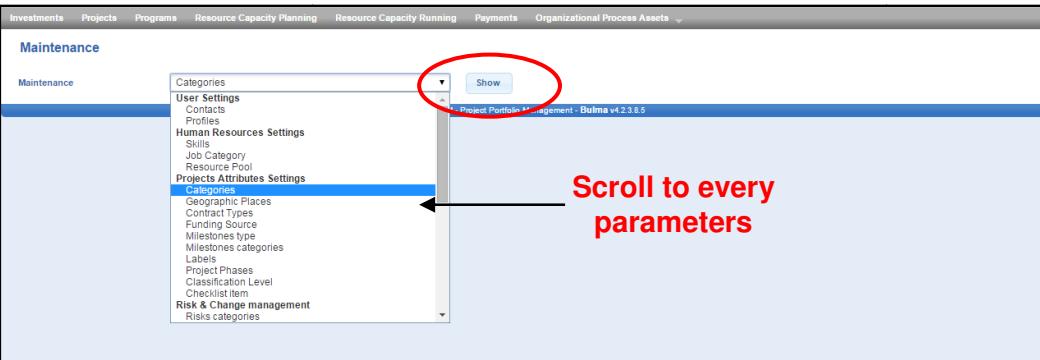
Define default Cost Rate

Choose one or more Job Category to associate

- **Project Attributes Settings**

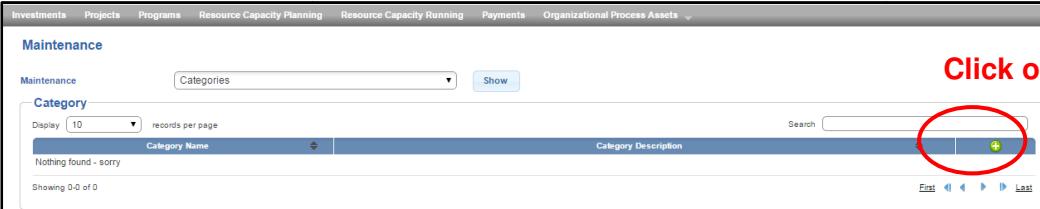
In the Project Attributes Settings you can define all the parameters that you will be able to associate to your projects or Milestones.

Attributes can be Single (S) or Multiple (M) choice selection.



Show

Scroll to every parameters



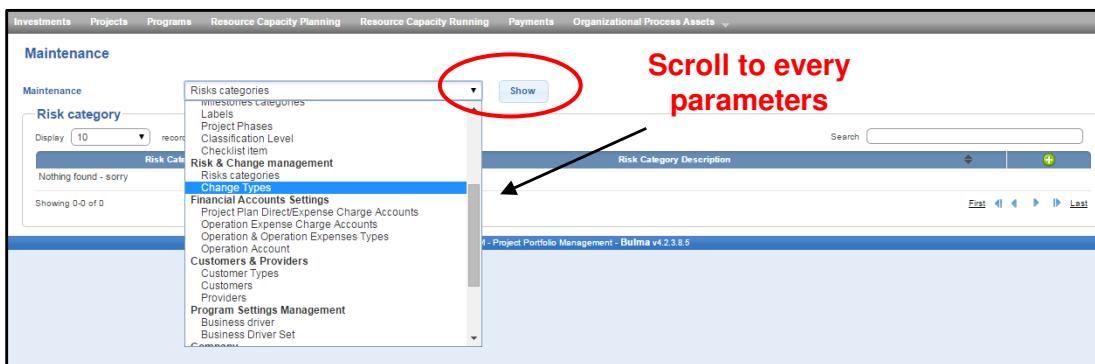
Click on + Button

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

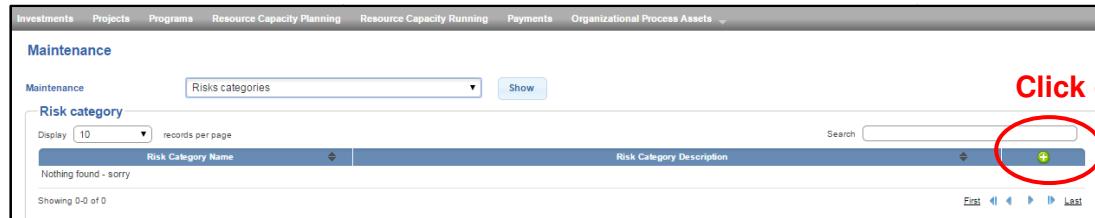
- **Milestones Type (S)**
- **Milestones Categories (S)**
- **Labels (M)**
- **Project Phases (S)**
- **Classification Level (S)**
- **Check List Items (M)**

- **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



Scroll to every parameters



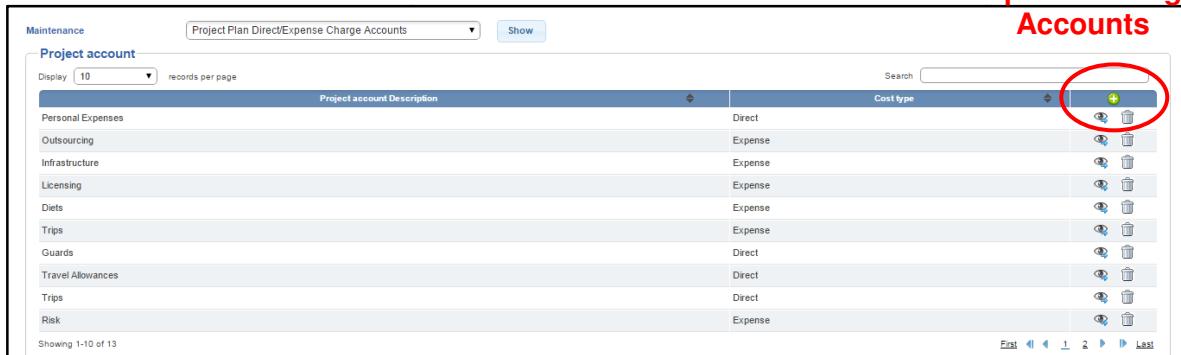
Click on  Button

- **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

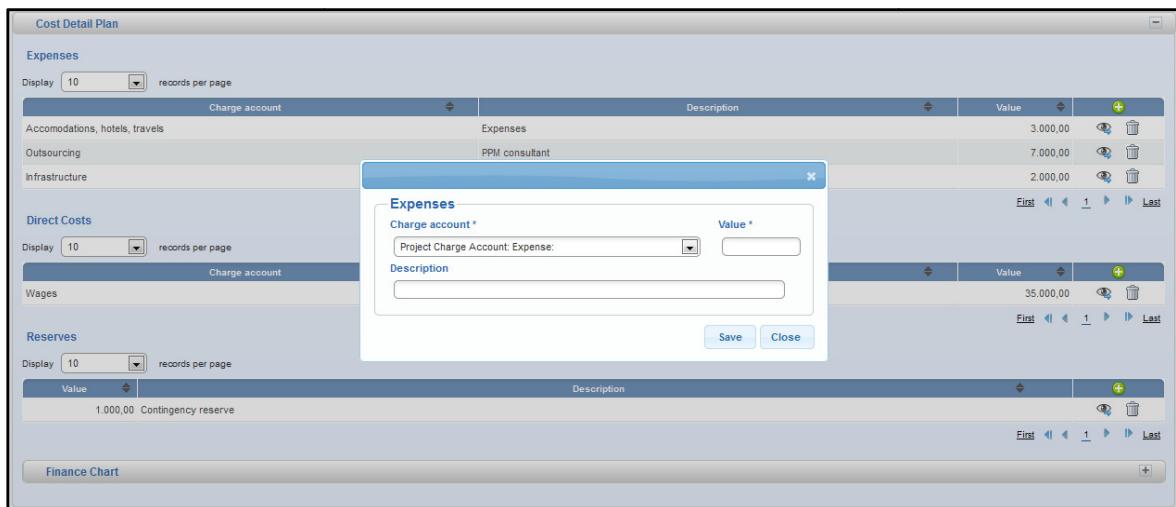


Project account Description	Cost type
Personal Expenses	Direct
Outsourcing	Expense
Infrastructure	Expense
Licensing	Expense
Diets	Expense
Trips	Expense
Guards	Direct
Travel Allowances	Direct
Trips	Direct
Risk	Expense

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

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

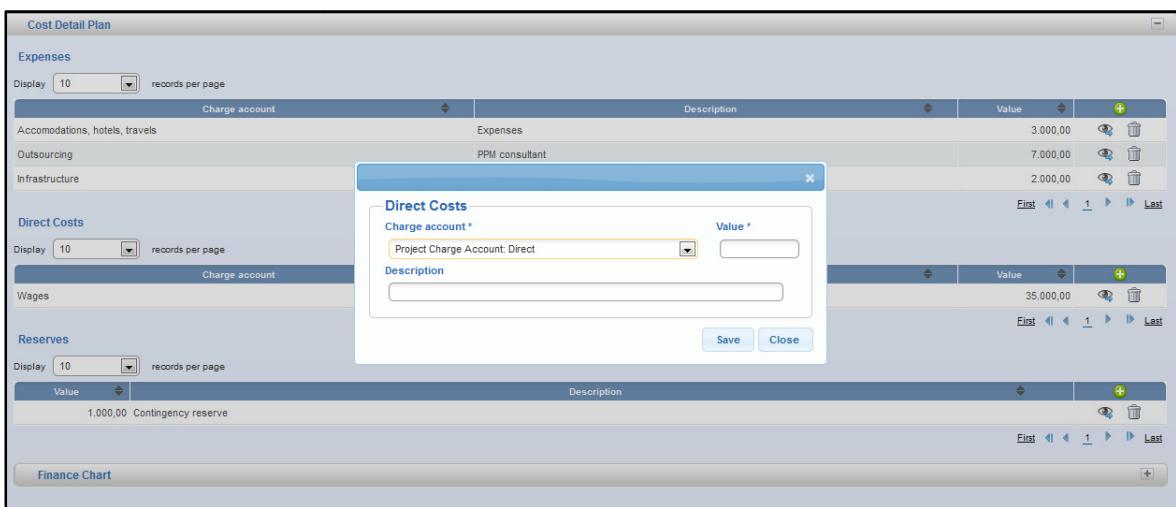
Allowing the Project Manager to define authorized expenses associated to a project



Charge account	Description	Value
Accommodations, hotels, travels	Expenses	3.000,00
Outsourcing	PPM consultant	7.000,00
Infrastructure		2.000,00

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

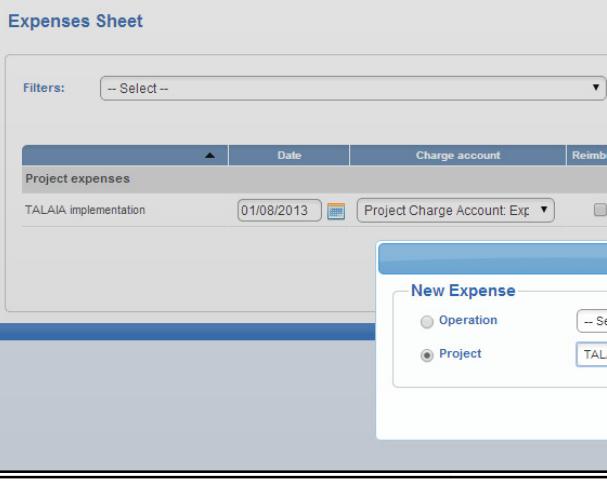
Allowing the Project Manager to define direct costs associated to a project

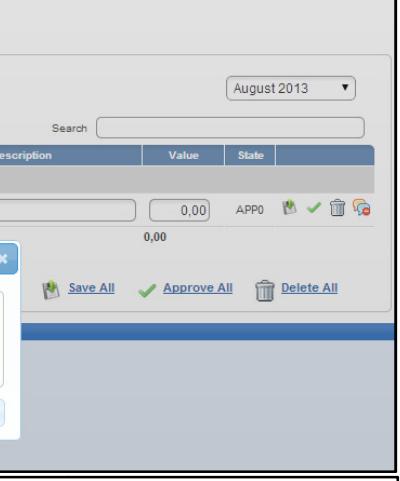


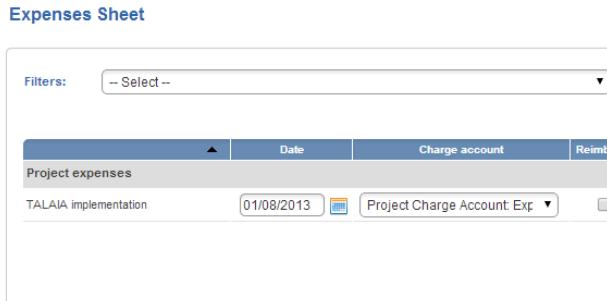
Charge account	Description	Value
Accommodations, hotels, travels	Expenses	3.000,00
Outsourcing	PPM consultant	7.000,00
Infrastructure		2.000,00

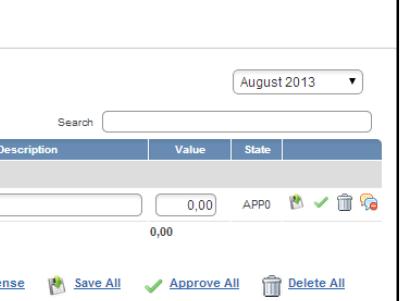
- [Expenses Sheet / Project](#)

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







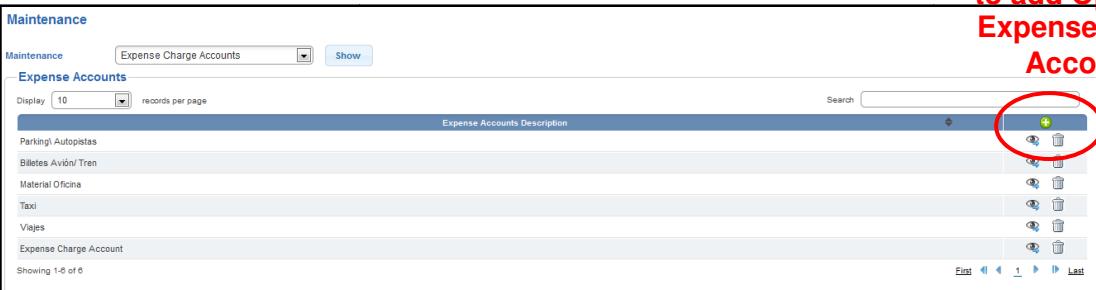




Only Project Expenses Accounts defined in the Project/Plan/Cost Detail Plan/Expenses will be available in the Dropdown field

- **Operation Expense Charge Accounts**

Click on Button to add Operation Expense Charge Accounts

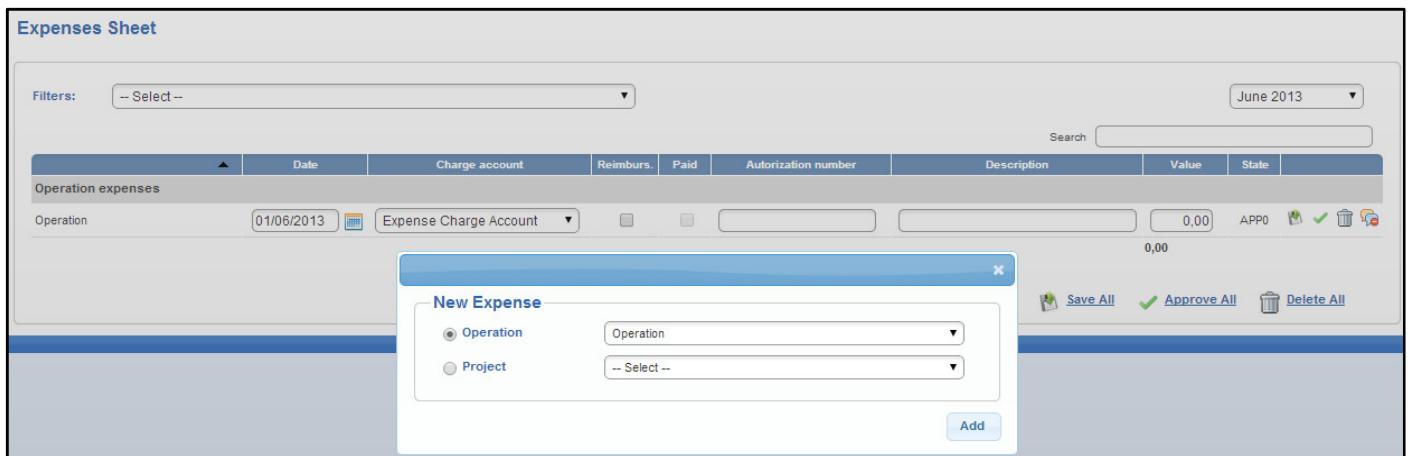


The Expense Charge Accounts are used in the following section of **OpenPPM**:

- [Expenses Sheet / Operation](#)

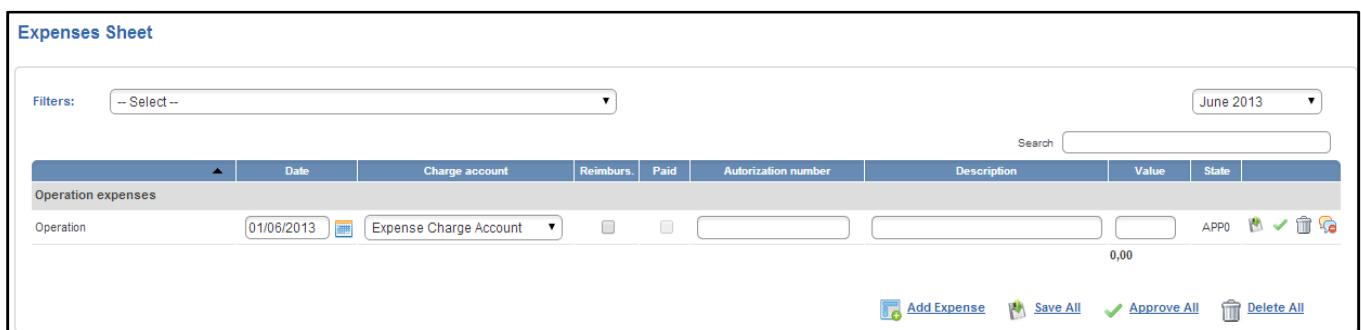
Allowing the Resources (Team Member) to declare expenses to non project activities (Operation Expenses)

Expenses Sheet



The screenshot shows the 'Expenses Sheet' interface. At the top, there are filters for 'Filters' (set to '-- Select --') and 'Search' (set to 'June 2013'). Below the filters is a table header with columns: Date, Charge account, Reimburs., Paid, Autorization number, Description, Value, and State. A sub-header 'Operation expenses' is visible above the main table area. In the center, a modal dialog titled 'New Expense' is open. It contains two radio buttons: 'Operation' (selected) and 'Project'. Next to each button is a dropdown menu. The 'Operation' dropdown is set to 'Operation'. The 'Project' dropdown is set to '-- Select --'. At the bottom right of the modal is a blue 'Add' button. To the right of the modal, there are buttons for 'Save All', 'Approve All', and 'Delete All'.

Expenses Sheet



This screenshot shows the same 'Expenses Sheet' interface as the previous one, but it does not have the 'New Expense' modal dialog open. The table header and sub-header are identical. The main table area shows a single row for an 'Operation' expense. The 'Value' column is set to '0,00'. At the bottom right, there are buttons for 'Add Expense', 'Save All', 'Approve All', and 'Delete All'.

• **Operation Account Types**

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

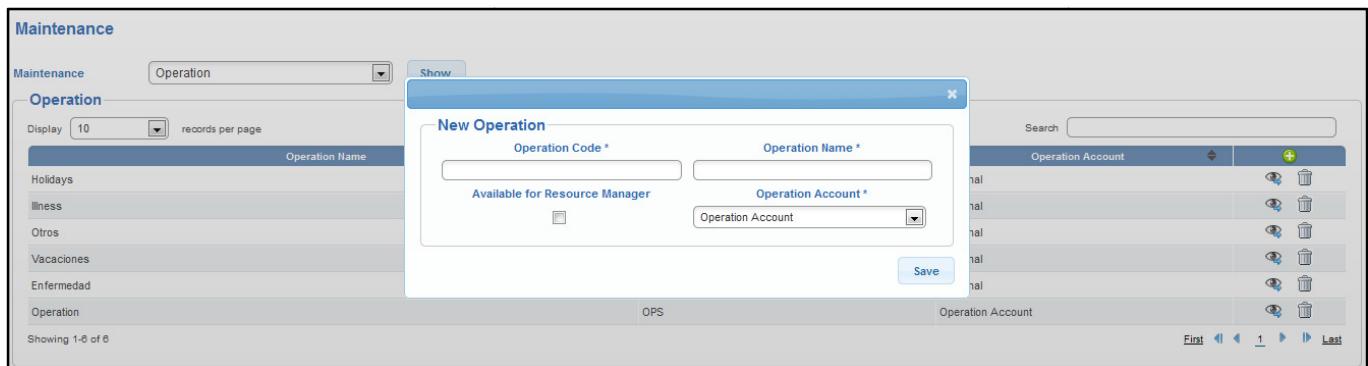
Maintenance



The screenshot shows the 'Maintenance' screen for 'Operation Account'. At the top, there is a dropdown menu 'Maintenance' set to 'Operation Account' and a 'Show' button. Below this is a table header with 'Operation Account Description' and a search bar. The table has columns for 'Operation Account Description' and actions (eye, edit, delete). The table shows four rows: 'Personal', 'Empresa', 'Comercial', and 'Operation Account'. At the bottom left, there is a 'Display' dropdown set to '10 records per page'. At the bottom right, there are navigation buttons for 'First', 'Previous', 'Next', 'Last', and a page number '1'.

- **Operation Accounts**

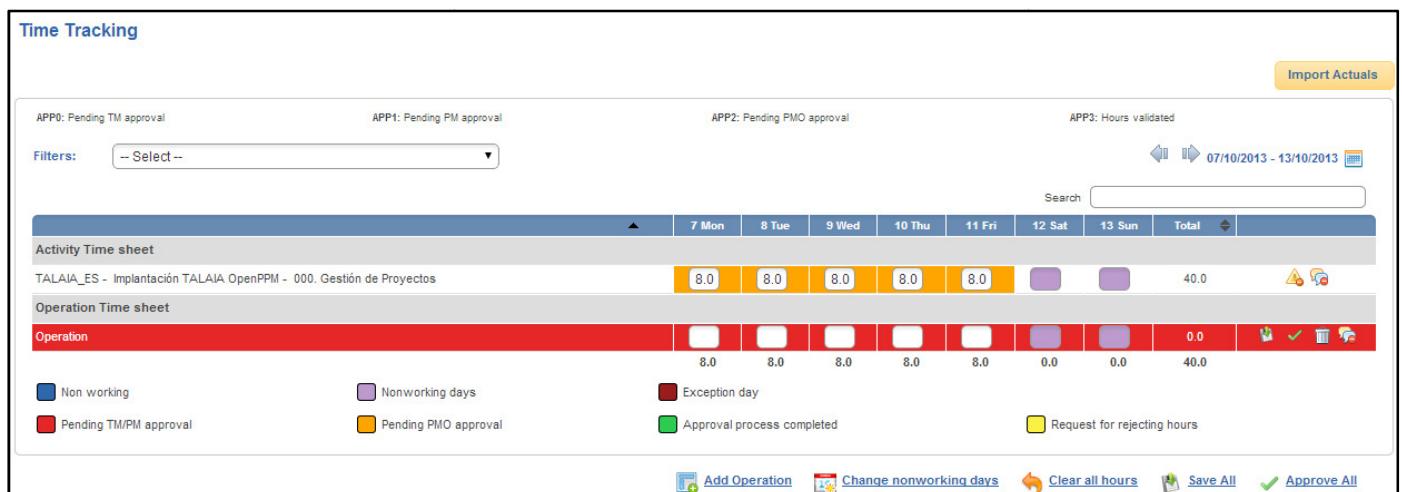
The Operations Account Types are linked to the Operation Accounts:



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

- **Time Tracking:**

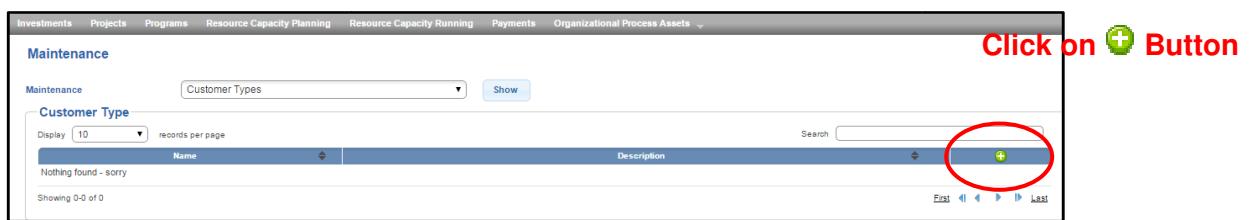
Allowing the Resources (Team Member) to declare hours to non project activities (Operation Activities)



- **Customers & Providers Settings**

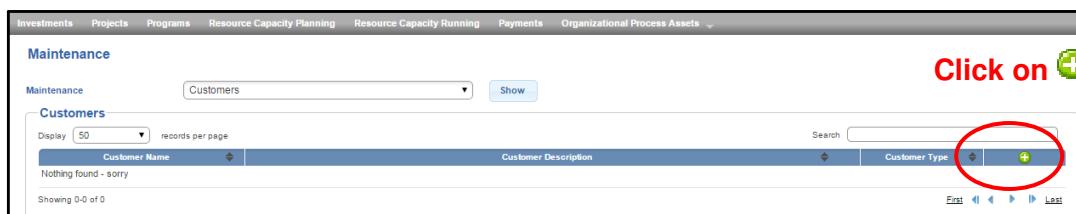
- **Customer Types**

Allow the possibility to associate customers to a customer type:



- **Customers**

The list of Customers is common to all the Performing Organization



Maintenance

Customers

Display 50 records per page

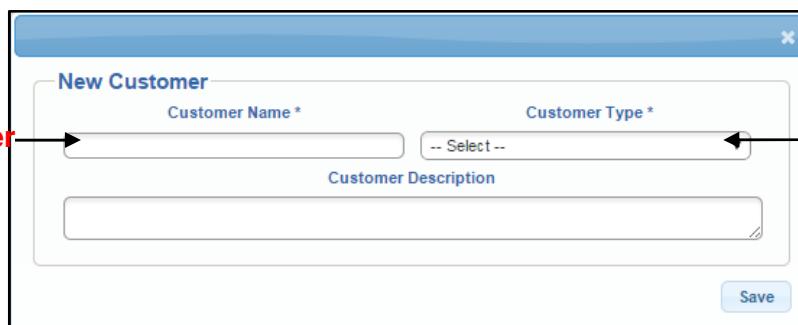
Customer Name | Customer Description | Customer Type

Nothing found - sorry

Show First < < > > Last

Click on  Button

Add a New Customer



New Customer

Customer Name * | Customer Type *

-- Select --

Customer Description

Save

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

- **Providers**

The list of Providers is common to all the Performing Organization



Maintenance

Providers

Display 50 records per page

Provider Name | Provider Information | Qualified | Qualified date

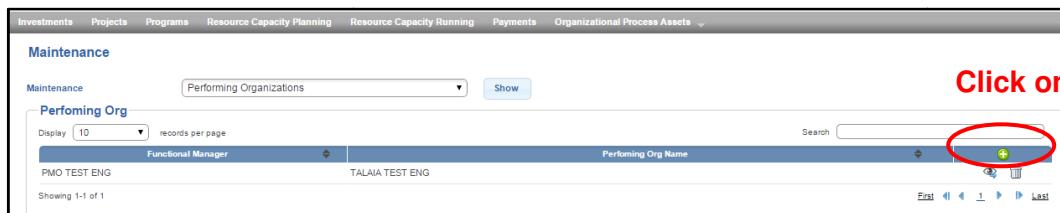
Nothing found - sorry

Show First < < > > Last

Click on  Button

- **Company Settings**

- **Performing Organizations**



Maintenance

Performing Org

Display 10 records per page

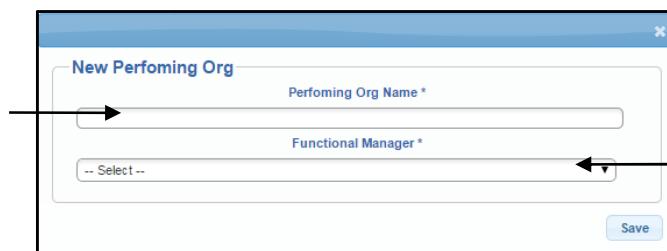
Functional Manager | Performing Org Name

PMO TEST ENG | TALAIA TEST ENG

Show 1-1 of 1

Click on  Button

Add here new PO name



New Performing Org

Performing Org Name *

Functional Manager *

-- Select --

Save

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:



Click on  Button

Add a New Metric Name

Add description to the new metric

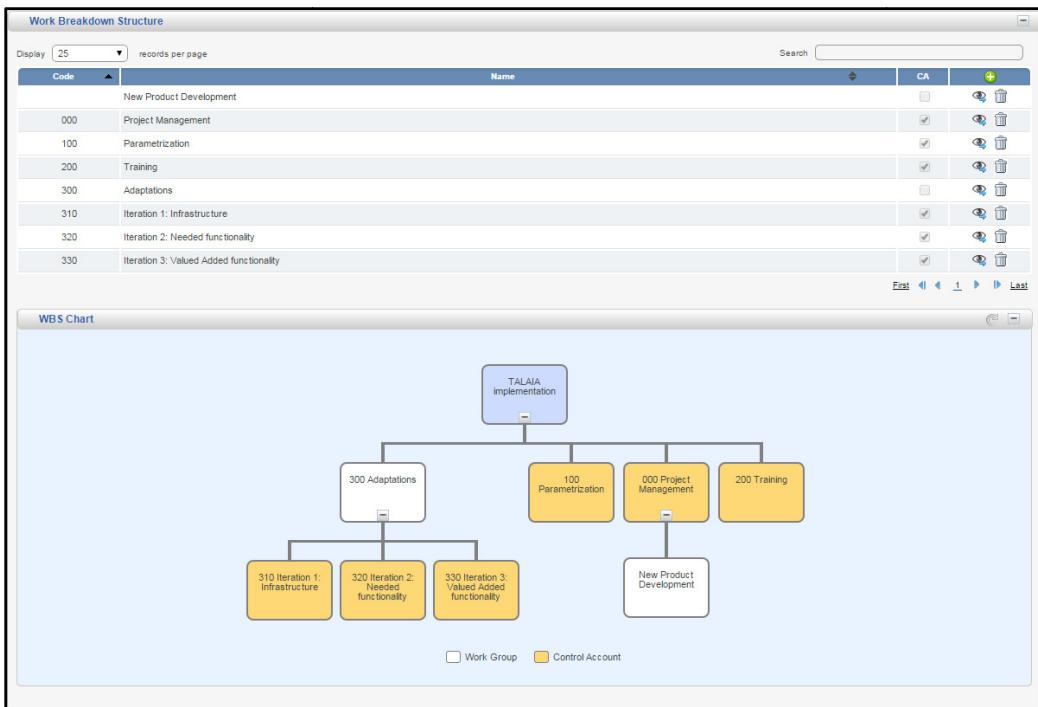
Associate Metric to a Balance Score Card Dimension

- **WBS Templates**

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



Name	CA	Action
Cartera de Proyectos		
Implantación TALAIA		
TALAIA implementation		



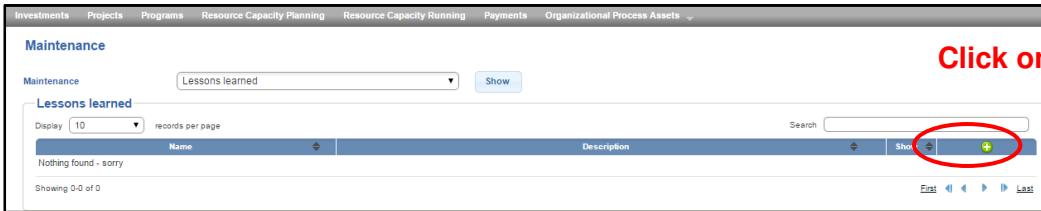
```

graph TD
    A[TALAIA implementation] --> B[300 Adaptations]
    A --> C[100 Parametrization]
    A --> D[000 Project Management]
    A --> E[200 Training]
    B --> F[310 Iteration 1: Infrastructure]
    B --> G[320 Iteration 2: Needed functionality]
    B --> H[330 Iteration 3: Valued Added functionality]
    
```

Legend: Work Group Control Account

- **Lessons Learned**

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

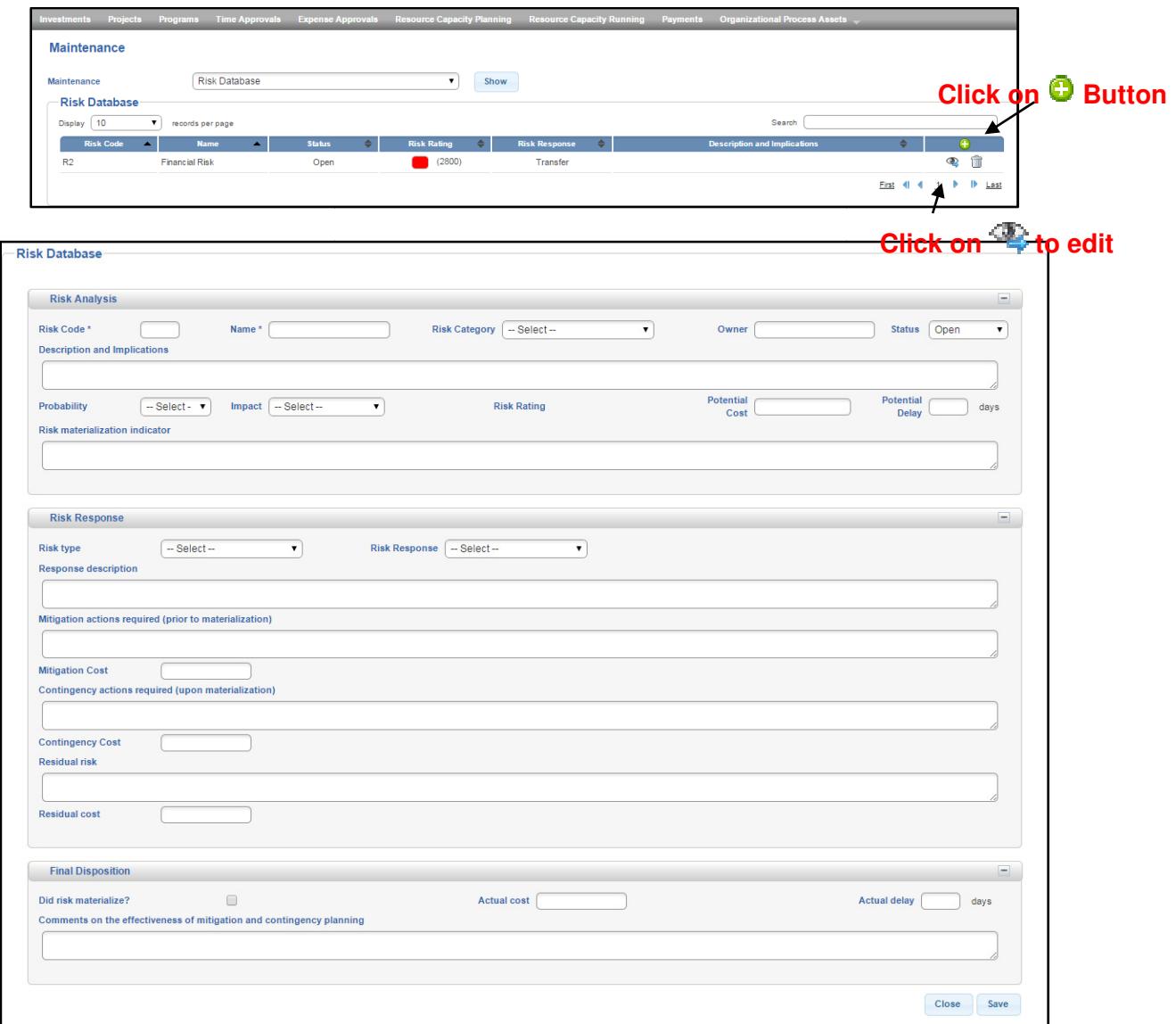


Click on Button

Name	Description	Action
Nothing found - sorry		

- **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:



The screenshot shows the Open PPM Risk Database maintenance interface. At the top, there's a navigation bar with links like Investments, Projects, Programs, Time Approvals, Expense Approvals, Resource Capacity Planning, Resource Capacity Running, Payments, and Organizational Process Assets. Below the navigation is a search bar labeled "Risk Database". The main area has a table titled "Risk Database" with columns: Risk Code, Name, Status, Risk Rating, Risk Response, and Description and Implications. A red annotation "Click on + Button" points to the green plus sign icon at the bottom right of the table header. Another red annotation "Click on eye icon to edit" points to the eye icon in the table footer. Below the table is a detailed "Risk Analysis" form with sections for Risk Code, Name, Risk Category, Owner, Status, Probability, Impact, Risk Rating, Potential Cost, Potential Delay, Risk materialization indicator, Risk Response, Response description, Mitigation actions required, Mitigation Cost, Contingency actions required, Contingency Cost, Residual risk, Residual cost, and Final Disposition. The final disposition section includes fields for Did risk materialize?, Actual cost, Actual delay, and Comments on the effectiveness of mitigation and contingency planning. Buttons for Close and Save are at the bottom right of the form.

- **Other Settings**

- **Documentation & Manuals**

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



The screenshot shows the Open PPM Documentation and manuals maintenance interface. It has a similar navigation bar and search bar as the Risk Database. The main area has a table titled "Documentation and manuals" with columns: Document name and File name. A red annotation "Click on + Button" points to the green plus sign icon at the bottom right of the table header. Below the table is a detailed "Documentation and manuals" form with sections for Document name and File name. The document name section includes fields for Name, Description, Type, Version, and Status. The file name section includes fields for Name, Type, Version, and Status. Buttons for Close and Save are at the bottom right of the form.

Browse to Upload

Type Document Name



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

General Settings		Required fields	Email Settings	Security settings	Visibility columns	Manage PO	Create new admin
General							
<input type="checkbox"/> Last level for approve time and expense sheet	Project Manager	<input type="checkbox"/> User time session	180	<input type="checkbox"/> Workingcosts internal costs	30	<input type="checkbox"/> RM approval level in operations.	APP3
<input type="checkbox"/> Show warning when exceeding the approved project budget for the program.		<input type="checkbox"/> Expire time session advise	170	<input type="checkbox"/> Workingcosts deparments		<input type="checkbox"/> Show column id project in export CSV projects and investment	
<input type="checkbox"/> Type project document storage	Mixed	<input type="checkbox"/> Default order for Status Report in Control	Ascendent	<input type="checkbox"/> Project document folder	docs-talisia	<input type="checkbox"/> Validate not repeat the short name of the project.	
<input type="checkbox"/> Project Probability		<input type="checkbox"/> Show inactive investment in the project list	<input checked="" type="checkbox"/>	<input type="checkbox"/> Display status report		<input type="checkbox"/> Disable projects	until <input type="text" value="4"/> days
<input type="checkbox"/> Show filter approbation status with team member role		<input type="checkbox"/> Disable edition in initiation for the Project Manager	<input type="checkbox"/>	<input type="checkbox"/> Assign zero priority when closing a project		<input type="checkbox"/> Type approval of team members	By Resource Manager
<input type="checkbox"/> Show executive report in status report		<input type="checkbox"/> Exclude hours of team members with provider	<input type="checkbox"/>	<input type="checkbox"/> Generate follow up with project creation		<input type="checkbox"/> Show status report in investments	
<input type="checkbox"/> Calculating the EVM	APP3 Hours x rate	<input type="checkbox"/> Show closed projects in resource capacity planning	<input checked="" type="checkbox"/>	<input type="checkbox"/> The BAC is the sum of WBS budget		<input type="checkbox"/> Baseline schedule	
<input type="checkbox"/> Exclude investments rejected as closed projects.		<input type="checkbox"/> The internal effort is equal to the sum of the units.	<input type="checkbox"/>	<input type="checkbox"/> Preload hours with workload		<input type="checkbox"/> View projects of different PM in resource capacity planning and running.	
<input type="checkbox"/> Shift dates by modifying the start date of the baseline	<input type="checkbox"/> Update projects	<input type="checkbox"/> Exclude CA without a budget for the POC	<input type="checkbox"/>	<input type="checkbox"/> Autocomplete closing checklist item		<input type="checkbox"/> Only the PMO can change the status of projects	
<input type="checkbox"/> Last level for time sheet approval can approve hours in APP1							
<input type="button" value="Save"/>							

- 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 investments that 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 of 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**

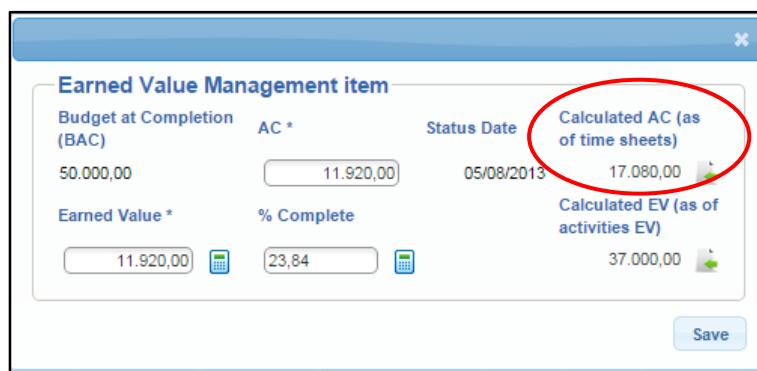
If checked, Executive Reports will appear with Status Reports in the Control Tab

- **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



Earned Value Management item			
Budget at Completion (BAC)	AC *	Status Date	Calculated AC (as of time sheets)
50.000,00	11.920,00	05/08/2013	17.080,00
Earned Value *	% Complete	Calculated EV (as of activities EV)	
11.920,00	23,84	37.000,00	
Save			

- 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 be 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

Customization

In Resource Capacity Planning to marking the background color of the cell depending on the % Assigmentation, using a scale of three levels:

<input type="checkbox"/> Level 1	30 %	Background color	█	Text color	█
<input type="checkbox"/> Level 2	60 %	Background color	█	Text color	█
<input type="checkbox"/> Level 3	100 %	Background color	█	Text color	█
<input type="checkbox"/> Out of range		Background color	█	Text color	█

Save

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

Required Fields

General Settings Required fields Email Settings Security settings Visibility columns Manage PO Create new admin

<input type="checkbox"/> Category	<input type="checkbox"/>	<input type="checkbox"/> Functional Manager	<input type="checkbox"/>	<input type="checkbox"/> Sponsor	<input type="checkbox"/>
<input type="checkbox"/> Budget Year	<input type="checkbox"/>	<input type="checkbox"/> Priority	<input type="checkbox"/>	<input type="checkbox"/> Project Phase	<input type="checkbox"/>
<input type="checkbox"/> Classification Level	<input type="checkbox"/>				

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

Email configuration

<input type="checkbox"/> SMTP Host	smtp.gmail.com	<input type="checkbox"/> SMTP Port	587
<input type="checkbox"/> SMTP User	openppm@gmail.com	<input type="checkbox"/> SMTP Pass	*****
<input type="checkbox"/> SMTP No Reply	no-reply@openppm.com	<input type="checkbox"/> SMTP TLS	<input checked="" type="checkbox"/>

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

Notifications

Mail Notification Enable/Disable Notification

<input type="checkbox"/> Language notifications	English	<input type="checkbox"/> Notify milestones to PMO	<input type="checkbox"/> in: 1 days
<input type="checkbox"/> Notification of projects delay	<input type="checkbox"/>	<input type="checkbox"/> Notification of projects Schedule date recovery	<input type="checkbox"/>
<input type="checkbox"/> Notification of projects planned dates change	<input type="checkbox"/>	<input type="checkbox"/> Notification of projects control dates change	<input type="checkbox"/>
<input type="checkbox"/> Notification of assignment team member	<input checked="" type="checkbox"/>	<input type="checkbox"/> Team member update notification	<input checked="" type="checkbox"/>
<input type="checkbox"/> Notification of projects status change	<input type="checkbox"/>	<input type="checkbox"/> Notification removal milestone plan	<input checked="" type="checkbox"/>
<input type="checkbox"/> Notification of change of phases in projects	<input checked="" type="checkbox"/>	<input type="checkbox"/> Notification request rejected hours	<input checked="" type="checkbox"/>
<input type="checkbox"/> Notification rejected hours	<input checked="" type="checkbox"/>	<input type="checkbox"/> Notification of approving operations	<input checked="" type="checkbox"/>
<input type="checkbox"/> Notification of assignment operation	<input checked="" type="checkbox"/>	<input type="checkbox"/> Notification of change Geographic Area in projects	<input checked="" type="checkbox"/>
<input type="checkbox"/> Notification of project assignment	<input checked="" type="checkbox"/>	<input type="checkbox"/> Notification of project approval	<input checked="" type="checkbox"/>
<input type="checkbox"/> Expiration notification investments in progress	<input checked="" type="checkbox"/>	<input type="checkbox"/> Timesheet change status notification	<input type="checkbox"/>

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

General Settings Required fields Email Settings **Security settings** Visibility columns Manage PO Create new admin

Parameters configuration of security

<input type="checkbox"/> Authentication type	BBDD
	BBDD
	LDAP
	Mixed
	External
	External with LDAP search

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

Columns for Investment List									
<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Accounting Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Priority	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Program	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Short Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Budget	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Baseline Start	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Baseline Finish	<input checked="" type="checkbox"/>	<input type="checkbox"/> Internal effort	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Probability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Baseline Start	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Finish date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Budget at Completion (BAC)	<input type="checkbox"/>	<input type="checkbox"/> Program	<input type="checkbox"/>
<input checked="" type="checkbox"/> Start date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Finish date	<input checked="" type="checkbox"/>	<input type="checkbox"/> Budget at Completion (BAC)	<input type="checkbox"/>	<input type="checkbox"/> Planned Finish Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> External cost	<input checked="" type="checkbox"/>	<input type="checkbox"/> Budget at Completion (BAC)	<input type="checkbox"/>	<input type="checkbox"/> Planned Finish Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Planned Start Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Columns for Project List									
<input checked="" type="checkbox"/> RAG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Accounting Code	<input type="checkbox"/>	<input checked="" type="checkbox"/> Budget	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Project Manager	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Short Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Baseline Start	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Baseline Finish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Priority	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> % Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Finish date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Actual cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Baseline Finish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Start date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Budget at Completion (BAC)	<input type="checkbox"/>	<input checked="" type="checkbox"/> Project Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Internal Effort	<input type="checkbox"/>	<input checked="" type="checkbox"/> External Cost	<input type="checkbox"/>	<input type="checkbox"/> Budget at Completion (BAC)	<input type="checkbox"/>	<input checked="" type="checkbox"/> Category	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> KPI	<input type="checkbox"/>	<input type="checkbox"/> Planned Finish Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Planned Start Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Classification Level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

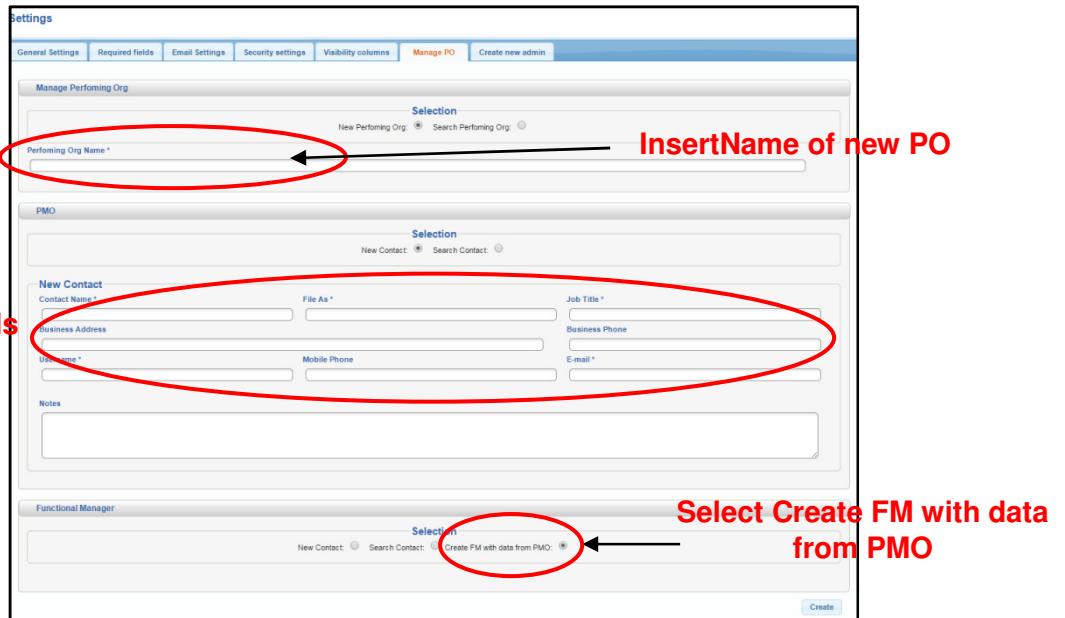
You can define which columns are visible in the Project module list view by adding a check.

Others									
<input checked="" type="checkbox"/> Show workingcosts quarters	<input type="checkbox"/>	<input checked="" type="checkbox"/> Show all documents at every stage of the project.	<input type="checkbox"/>	<input checked="" type="checkbox"/> Show project initiating external costs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Manage PO

**Fill in the Mandatory fields
(*) to create a new user**



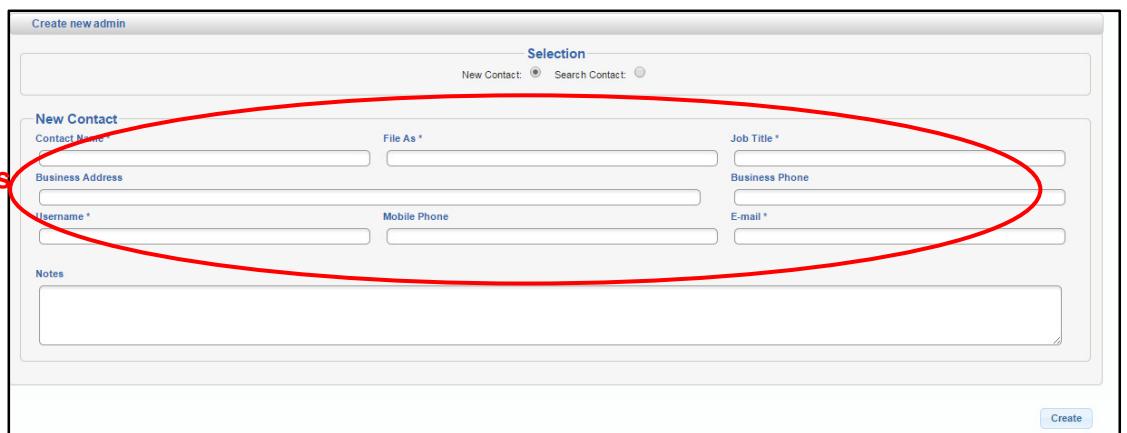
InsertName of new PO

Select Create FM with data from PMO

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

Create New Admin

**Fill in the Mandatory fields
(*) to create a new user**



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

Section III: User Guide

Section III: User Guide

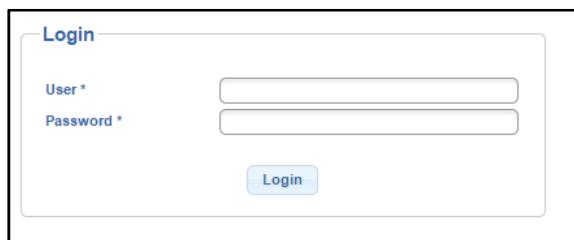
This section describes the experience of managing a project from the creation until the end of the project. This is a simple project that has 1 month duration with 2 activities and a budget of € 10,000.

Even though this example is far from a typical project, this sample describes 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:

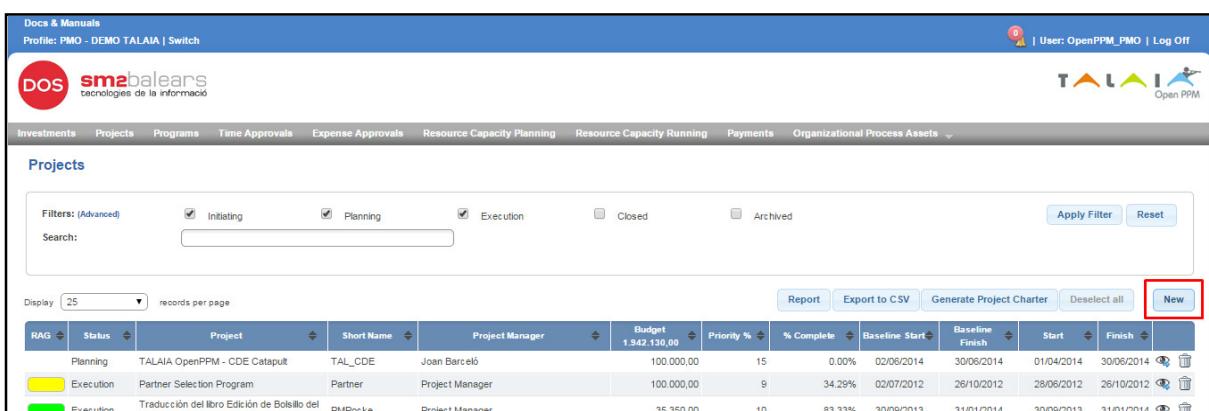
Step 1 begins when someone in the organization with a PMO profile creates a new project with the minimum basic information required.

- **Login as PMO:**



- **Create a new project:**

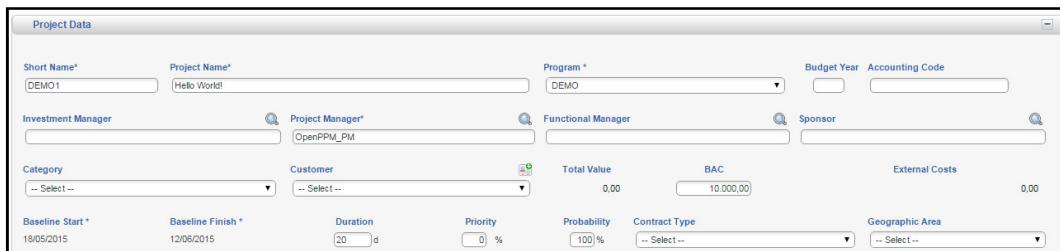
The menu **Projects** module will pop up as default. Here you can create a new project by clicking on the button **New**.



The screenshot shows the 'Projects' page of the OpenPPM system. At the top, there are navigation links for 'Investments', 'Projects', 'Programs', 'Time Approvals', 'Expense Approvals', 'Resource Capacity Planning', 'Resource Capacity Running', 'Payments', and 'Organizational Process Assets'. Below the header, there is a search bar and filter options for 'Initiating', 'Planning', 'Execution', 'Closed', and 'Archived' projects. A 'Display' dropdown set to '25 records per page' is also present. On the right side of the page, there is a 'Report', 'Export to CSV', 'Generate Project Charter', 'Deselect all', and a 'New' button, which is highlighted with a red box.

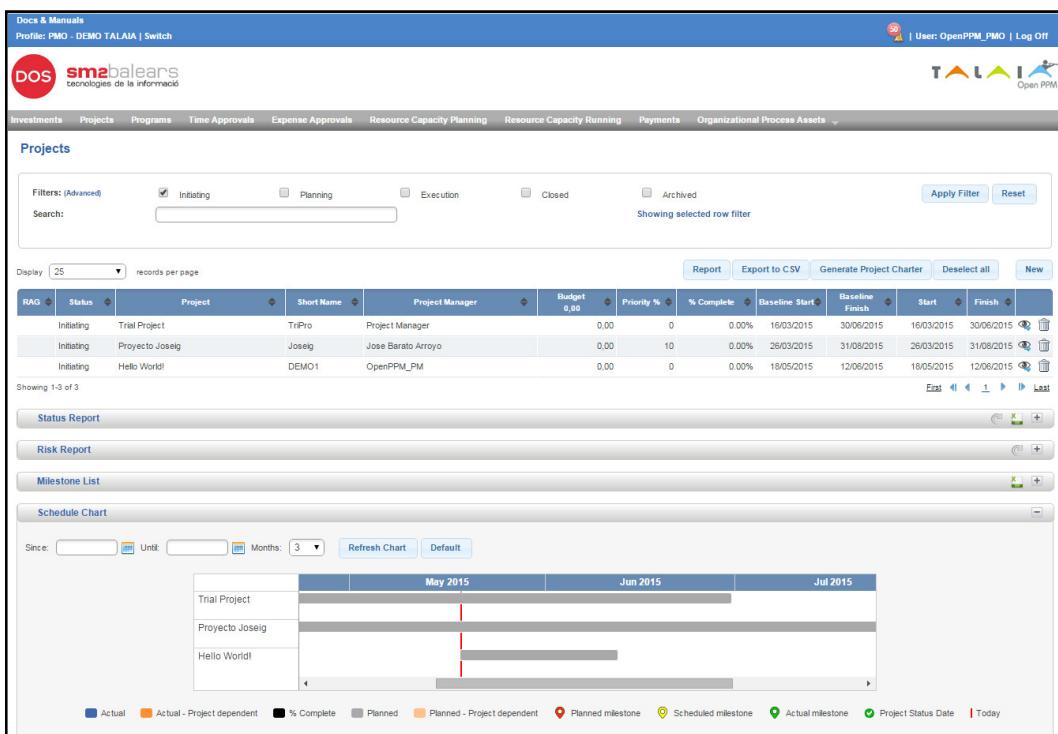
RAG	Status	Project	Short Name	Project Manager	Budget	Priority %	% Complete	Baseline Start	Baseline Finish	Start	Finish
Planning	Planning	TALAIA OpenPPM - CDE Catapult	TAL_CDE	Joan Barceló	1.942.130,00	15	0.00%	02/06/2014	30/06/2014	01/04/2014	30/06/2014
Execution	Execution	Partner Selection Program	Partner	Project Manager	100.000,00	9	34.29%	02/07/2012	26/10/2012	28/06/2012	26/10/2012
Execution	Execution	Traducción del libro Edición de Boleillo del patrón de la	Patrón de la	Project Manager	36.350,00	10	83.33%	30/06/2013	31/04/2014	30/09/2013	31/04/2014

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



The screenshot shows the 'Project Data' creation screen. It includes fields for Short Name (DEMO1), Project Name (Hello World!), Program (DEMO), Budget Year, Accounting Code, Investment Manager, Project Manager (OpenPPM_PM), Functional Manager, Sponsor, Category, Customer, Total Value, BAC, External Costs, Baseline Start (18/05/2015), Baseline Finish (12/06/2015), Duration (20 d), Priority (0 %), Probability (100 %), Contract Type, and Geographic Area.

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



The screenshot shows the 'Projects' module in the Open PPM interface. It lists three projects: Trial Project, Proyecto Joseig, and Hello World!. The Schedule Chart below shows the planned baseline dates for these projects.

RAG	Status	Project	Short Name	Project Manager	Budget	Priority %	% Complete	Baseline Start	Baseline Finish	Start	Finish
Initiating	Initiating	Trial Project	TriPro	Project Manager	0,00	0	0,00%	16/03/2015	30/06/2015	16/03/2015	30/06/2015
Initiating	Initiating	Proyecto Joseig	Joseig	Jose Barato Arroyo	0,00	10	0,00%	26/03/2015	31/08/2015	26/03/2015	31/08/2015
Initiating	Initiating	Hello World!	DEMO1	OpenPPM_PM	0,00	0	0,00%	18/05/2015	12/06/2015	18/05/2015	12/06/2015

Schedule Chart

Since: [] Until: [] Months: 3 Refresh Chart Default

Legend: Actual (blue bar), Actual - Project dependent (orange bar), % Complete (black bar), Planned (grey bar), Planned - Project dependent (light orange bar), Planned milestone (red dot), Scheduled milestone (green dot), Actual milestone (green dot), Project Status Date (green dot), Today (red dot).

The chart shows three horizontal bars representing the duration of each project from May to July 2015. The 'Trial Project' bar spans from May 16 to June 30. The 'Proyecto Joseig' bar spans from March 26 to August 31. The 'Hello World!' bar spans from May 18 to June 12.

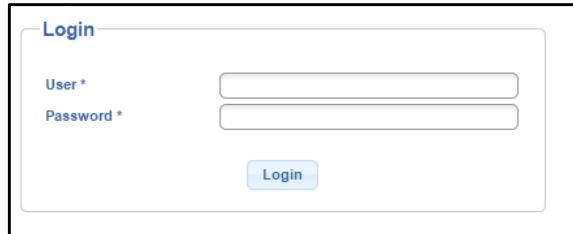
Notice that in that same high level view, down in the Schedule Chart graph, the planned baseline project dates already appear.

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

Step 2: PM completes the initiating information:

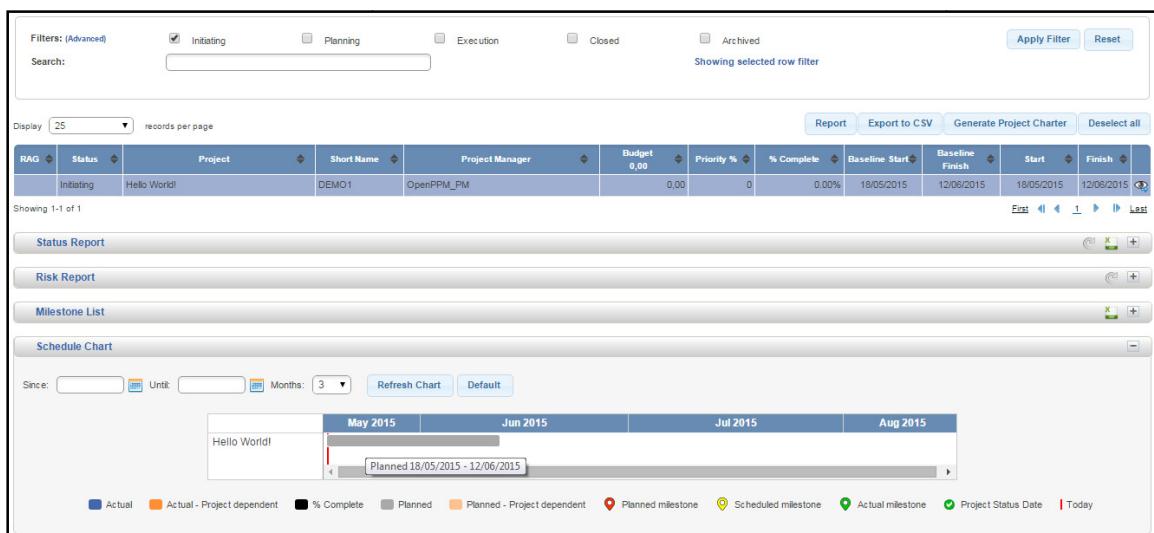
The PM profile assigned to the project, can now access the tool and continue the work, by for example completing the charter and registering the stakeholders.

- **Login as PM:**



The login screen shows fields for 'User *' and 'Password *', and a 'Login' button.

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



The interface shows a project list with the following details:

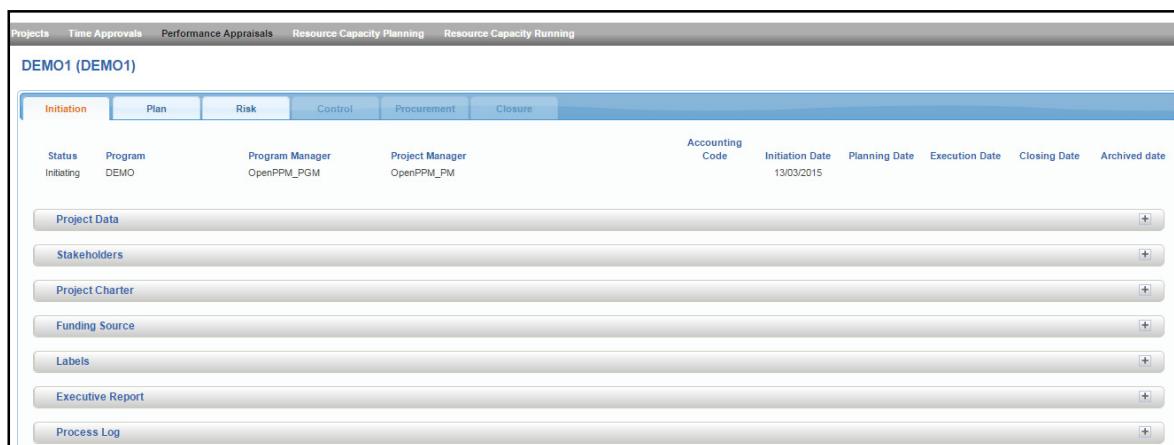
RAG	Status	Project	Short Name	Project Manager	Budget	Priority %	% Complete	Baseline Start	Baseline Finish	Start	Finish
Initiating	Initiating	Hello World!	DEMO1	OpenPPM_PM	0,00	0	0,00%	18/05/2015	12/06/2015	18/05/2015	12/06/2015

Below the table, there are several management tools:

- Status Report
- Risk Report
- Milestone List
- Schedule Chart

The Schedule Chart displays a timeline from May 2015 to August 2015. A red bar represents the project duration, labeled "Planned 18/05/2015 - 12/06/2015".

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



The interface shows detailed project management information for project DEMO1 (DEMO1). The tabs at the top include Projects, Time Approvals, Performance Appraisals, Resource Capacity Planning, and Resource Capacity Running. The 'Initiation' tab is selected.

Key details shown:

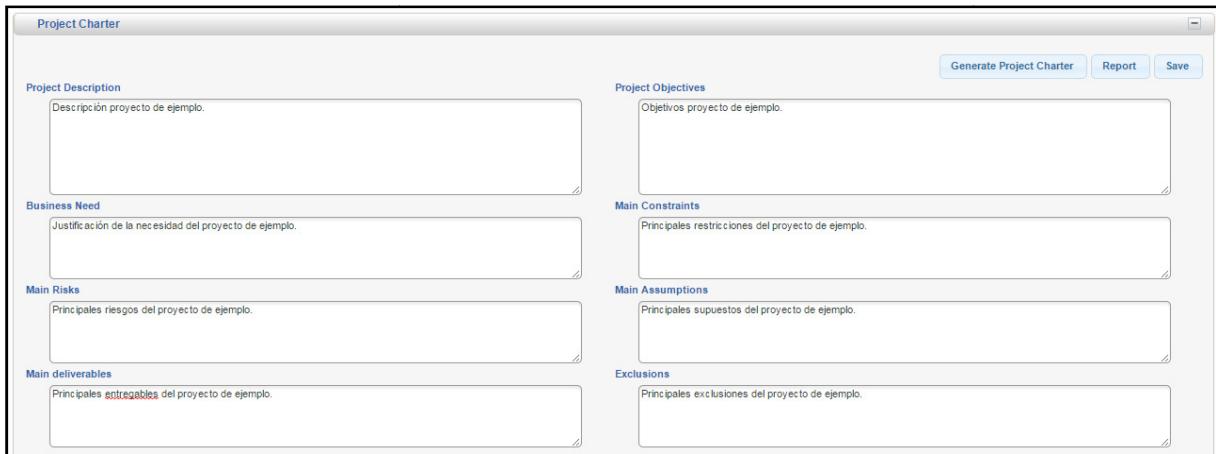
- Status: Initiating
- Program: DEMO
- Program Manager: OpenPPM_PGM
- Project Manager: OpenPPM_PM
- Accounting Code: 13/03/2015
- Initiation Date: 13/03/2015
- Planning Date: 13/03/2015
- Execution Date: 13/03/2015
- Closing Date: 13/03/2015
- Archived date: 13/03/2015

Below the main table, there are expandable sections for:

- Project Data
- Stakeholders
- Project Charter
- Funding Source
- Labels
- Executive Report
- Process Log

- **Generating the Project Charter**

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

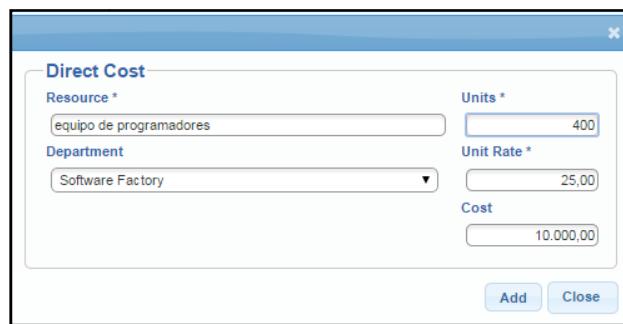


The screenshot shows a "Project Charter" form with the following sections:

- Project Description:** Descripción proyecto de ejemplo.
- Business Need:** Justificación de la necesidad del proyecto de ejemplo.
- Main Risks:** Principales riesgos del proyecto de ejemplo.
- Main deliverables:** Principales entregables del proyecto de ejemplo.
- Project Objectives:** Objetivos proyecto de ejemplo.
- Main Constraints:** Principales restricciones del proyecto de ejemplo.
- Main Assumptions:** Principales supuestos del proyecto de ejemplo.
- Exclusions:** Principales exclusiones del proyecto de ejemplo.

Buttons at the top right include "Generate Project Charter", "Report", and "Save".

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:

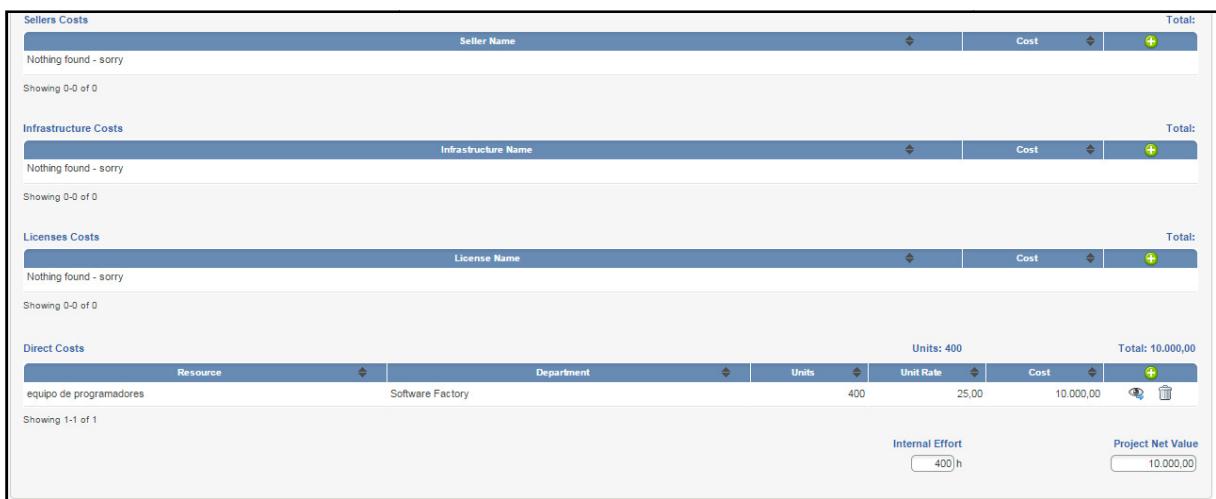


The "Direct Cost" dialog box contains the following fields:

Resource *	equipo de programadores	Units *	400
Department	Software Factory	Unit Rate *	25,00
Cost			
10.000,00			

Buttons at the bottom include "Add" and "Close".

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:



The cost management interface includes the following sections:

- Sellers Costs:** Nothing found - sorry. Showing 0-0 of 0.
- Infrastructure Costs:** Nothing found - sorry. Showing 0-0 of 0.
- Licenses Costs:** Nothing found - sorry. Showing 0-0 of 0.
- Direct Costs:**

Resource	Department	Units	Unit Rate	Cost	Total:
equipo de programadores	Software Factory	400	25,00	10.000,00	10.000,00

Buttons at the bottom right include a green plus icon, a magnifying glass, and a trash bin.

- **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**:

Detail Stakeholder

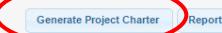
Contact *	User	Role *	Classification *	Type *
OpenPPM_SH		rol de este interesado	Internal	Supporter
Business Need				
necesidad de negocio de este interesado		Expectations		
Influence				
influencia de este interesado		Department		
Management Strategy				
estrategia de gestión de este interesado		Comments		
comentarios para este interesado				

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:

Stakeholders				
Name	Role	Classification	Type	
OpenPPM_SH	rol de este interesado	Internal	Supporter	 
interesado 2	rol de este interesado	External	Supporter	 
Showing 1-2 of 2				

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

Project Charter

Project Description Descripción proyecto de ejemplo.	Project Objectives Objetivos proyecto de ejemplo.	Generate Project Charter 	Report	Save
Business Need Justificación de la necesidad del proyecto de ejemplo.	Main Constraints Principales restricciones del proyecto de ejemplo.			
Main Risks Principales riesgos del proyecto de ejemplo.	Main Assumptions Principales supuestos del proyecto de ejemplo.			
Main deliverables Principales entregables del proyecto de ejemplo.	Exclusions Principales exclusiones del proyecto de ejemplo.			

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 planning the 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:

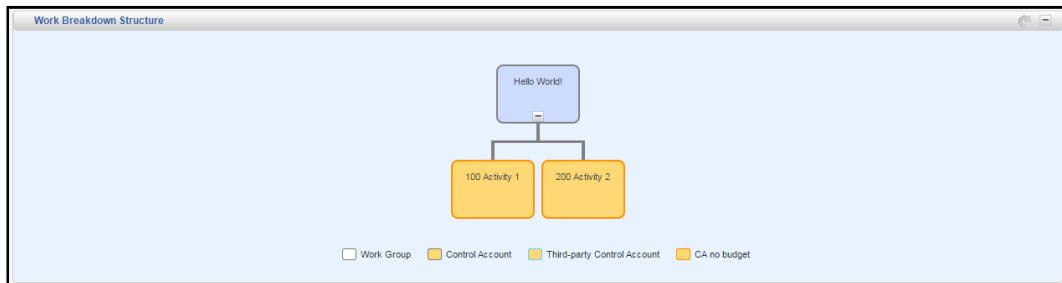
Work Breakdown Structure				
Code	Name	WBS Dictionary	CA	Budget
	Hello World!		<input type="checkbox"/>	10.000,00
100	Activity 1		<input checked="" type="checkbox"/>	7.500,00
200	Activity 2		<input checked="" type="checkbox"/>	2.500,00

[Validate](#)



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:

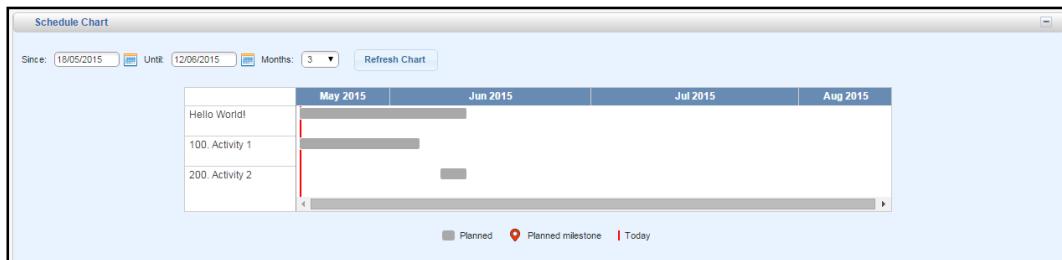


- **Schedule Planning:**

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

Activity List				
Activity Name	Baseline Start	Baseline Finish		
100. Activity 1	18/05/2015	05/06/2015		
200. Activity 2	08/06/2015	12/06/2015		

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:

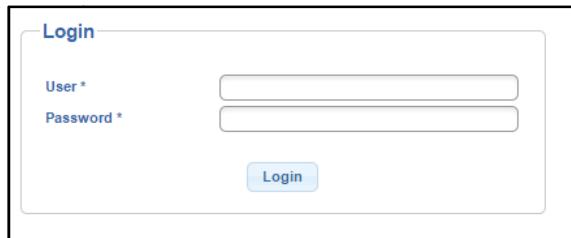
Sellers Costs		Total:
Nothing found - sorry		
Showing 0-0 of 0		
Infrastructure Costs		Total:
Nothing found - sorry		
Showing 0-0 of 0		
Licenses Costs		Total:
Nothing found - sorry		
Showing 0-0 of 0		
Direct Costs		Total: 10.000,00
Resource	Department	Units: 400
equipo de programadores	Software Factory	400 25,00 10.000,00
Showing 1-1 of 1		
Internal Effort		
400 h		
Project Net Value		
10.000,00		

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

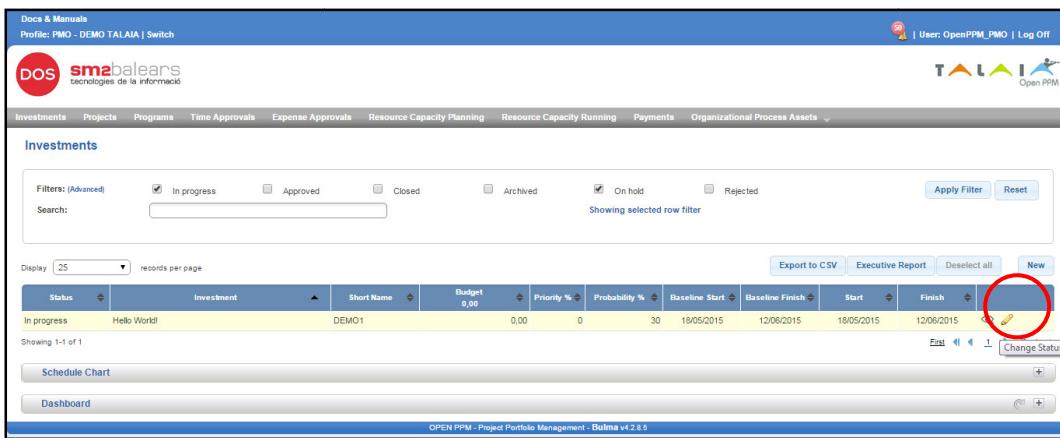
Step 4: PMO approves the project:

- **Login as PMO:**



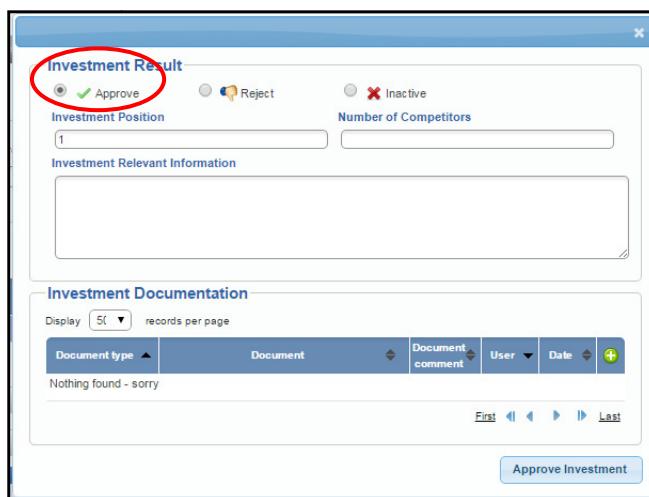
- **Project Approval:**

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



Status	Investment	Short Name	Budget	Priority %	Probability %	Baseline Start	Baseline Finish	Start	Finish	
In progress	Hello World!	DEMO1	0,00	0,00	0	30	18/05/2015	12/06/2015	18/05/2015	12/06/2015

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



Investment Result

Approve Reject Inactive

Investment Position
Number of Competitors

Investment Relevant Information

Investment Documentation

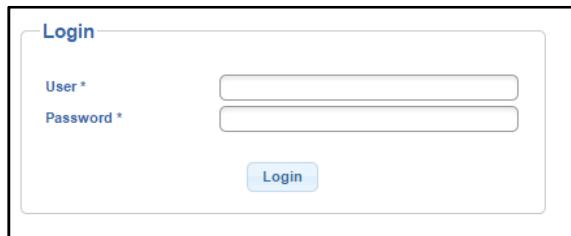
Document type	Document	Document comment	User	Date	Add
Nothing found - sorry					

Approve Investment

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:**



The login form consists of three fields: 'User *' and 'Password *' both with placeholder text 'User' and 'Password', and a blue 'Login' button.

- **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:



A screenshot of a table titled 'Plan Costs'. It has three tabs: 'Funding' (selected), 'Planned Value' (active), and 'Actual Value'. The 'Planned Value' tab shows a table with columns: Followup Date, Days to date, and Value. The data is as follows:

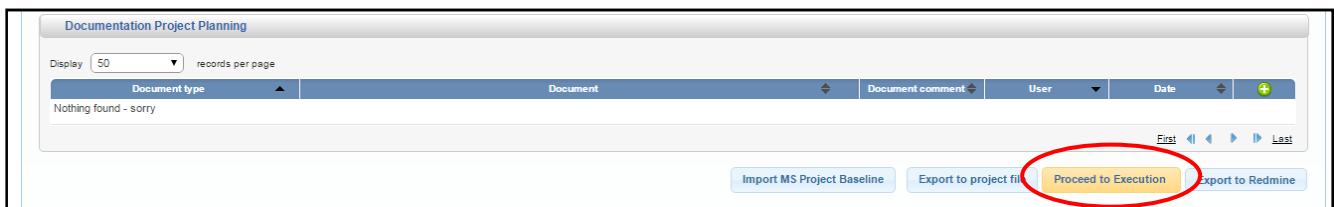
Followup Date	Days to date	Value
18/05/2015	1	0,00
22/05/2015	5	2.500,00
29/05/2015	10	5.000,00
05/06/2015	15	7.500,00
12/06/2015	20	10.000,00

In the Planned Value Graph, you are now able to see 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 situated at the bottom of the Plan Tab to "run" the project. Other Tabs like "Control" and "Close" are now also available.



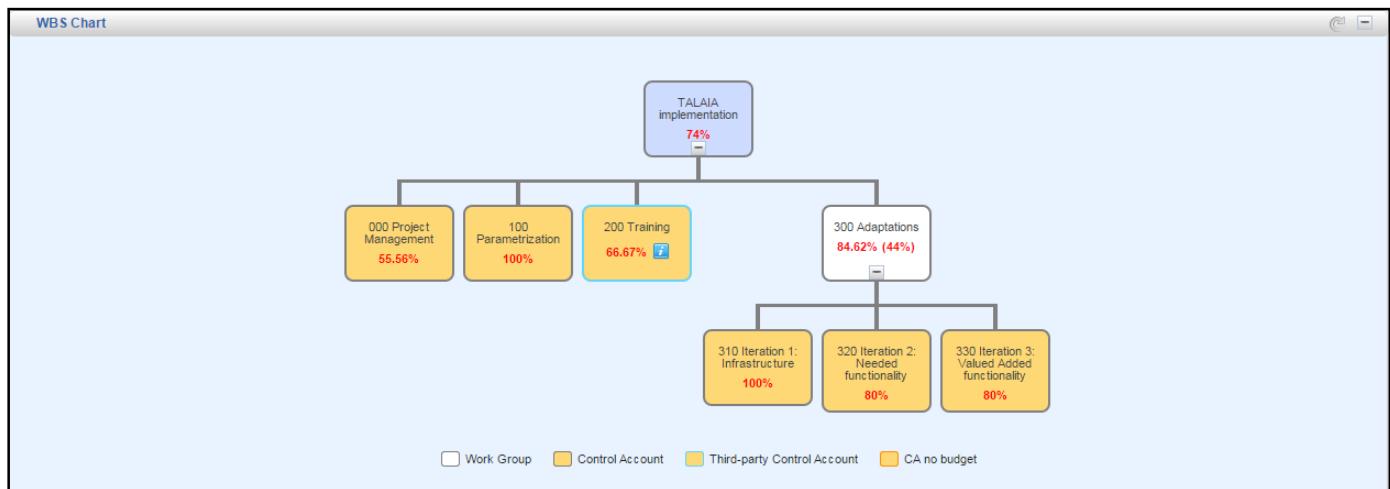
A screenshot of the 'Documentation Project Planning' form. At the bottom right, there is a row of buttons: 'Import MS Project Baseline', 'Export to project file', 'Proceed to Execution' (which is highlighted with a red oval), and 'Export to Redmine'.

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.

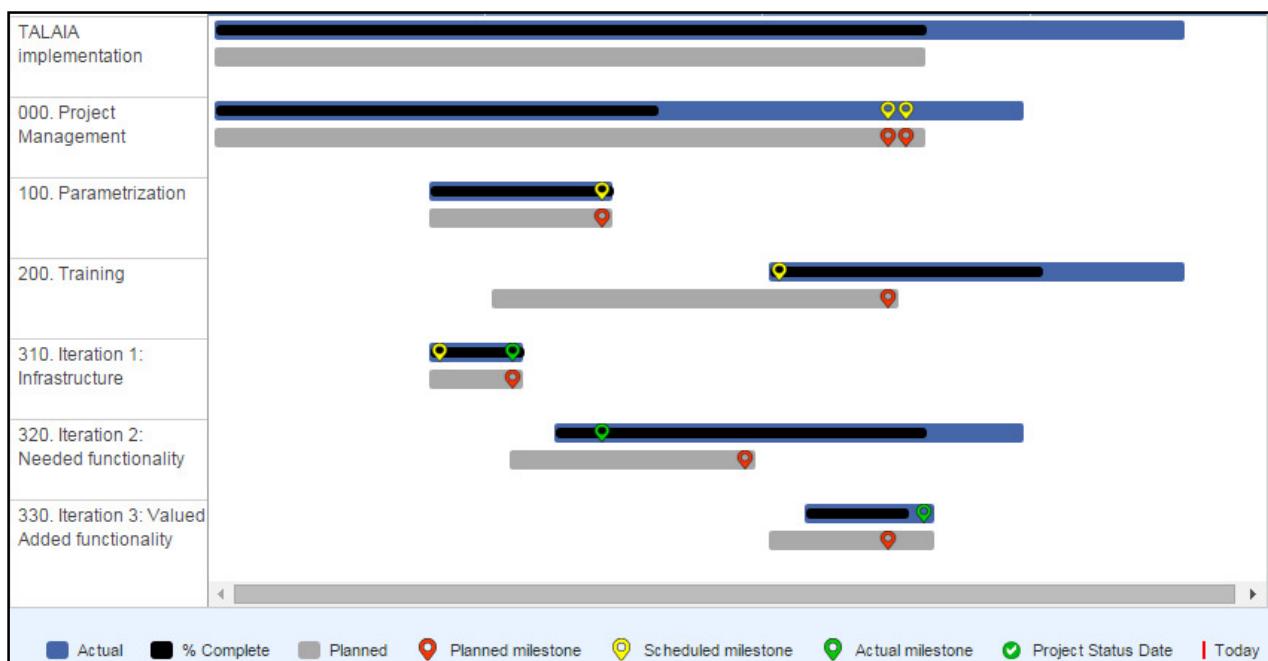
- **Control Scope:**

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



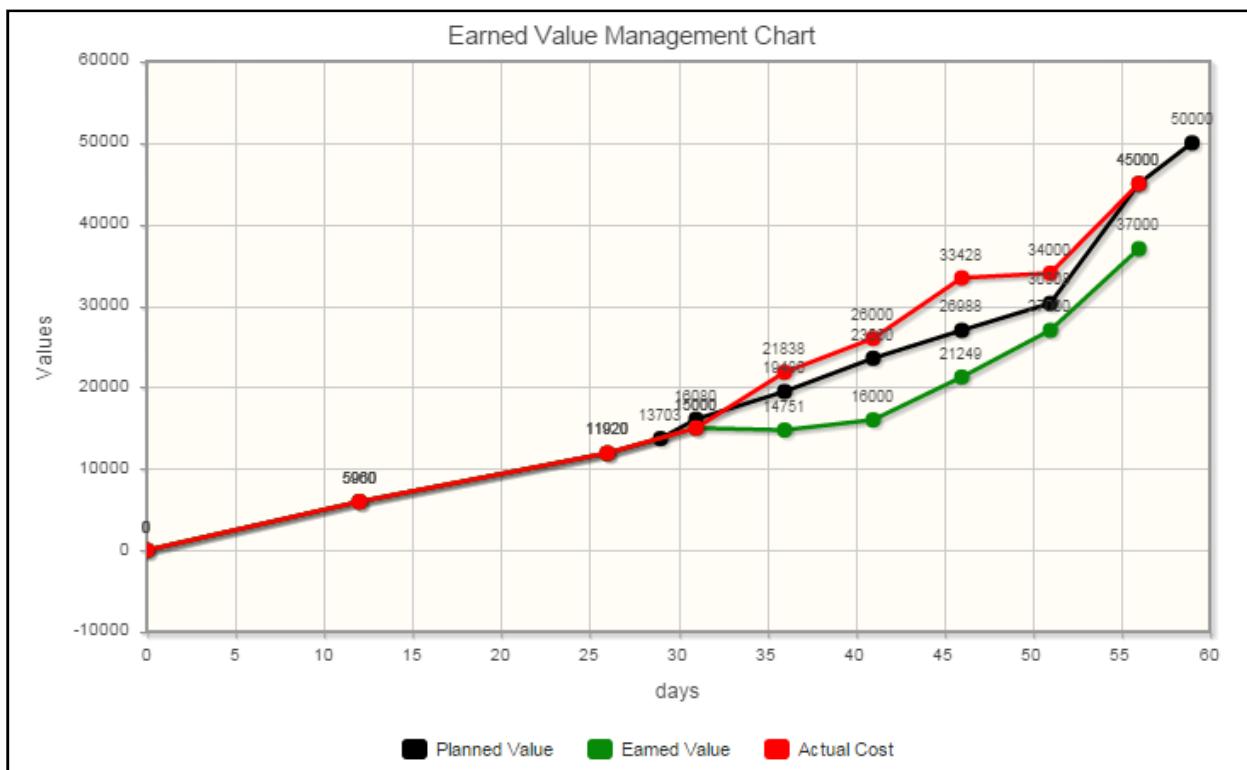
- **Control Schedule:**

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 to your 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:**

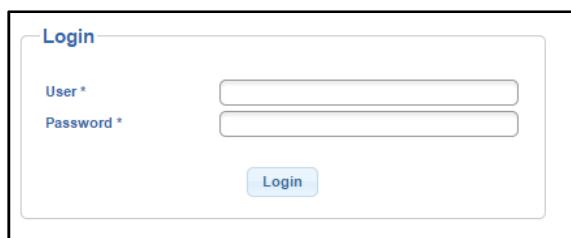
The PM can now access the portlet "Control/Status Report" to report that, in our example, so far the project is "on track with no issue to report" in the areas of cost, schedule and risk, and the overall situation is "kickoff done without complications." By clicking the "Save" button this information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



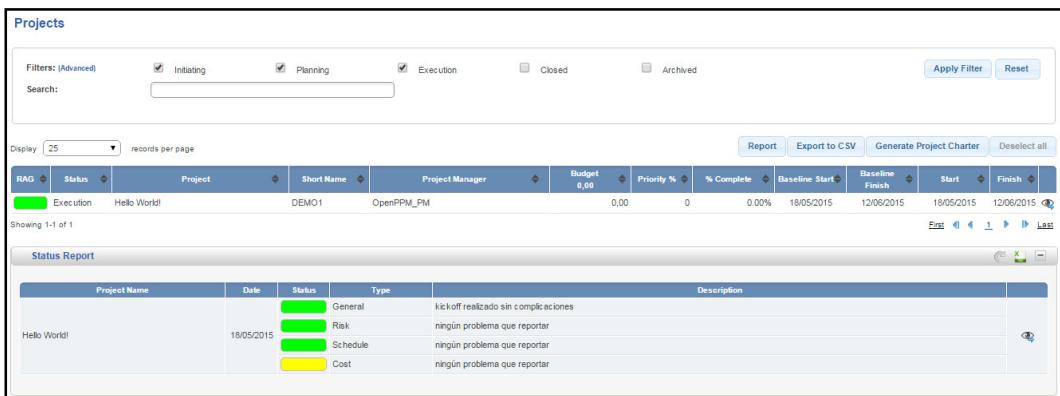
The screenshot shows a "Status Report" form with a date set to 18/05/2015. It has four main sections: General, Risk, Schedule, and Cost. Each section contains a status dropdown and a description text area. The status dropdowns are filled with green bars, indicating no issues. The descriptions are: "kickoff realizado sin complicaciones" for General, "ningún problema que reportar" for Risk, "ningún problema que reportar" for Schedule, and "ningún problema que reportar" for Cost. A "Save" button is at the bottom right.

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:**



The screenshot shows a "Login" page with "User *" and "Password *" fields, and a "Login" button.



The screenshot shows a "Projects" page with a search bar and filter options for Initiating, Planning, Execution, Closed, and Archived. It displays a table of projects with columns for RAD, Status, Project, Short Name, Project Manager, Budget, Priority %, % Complete, Baseline Start, Baseline Finish, Start, and Finish. One project, "Hello World!", is listed with its details. Below the table is a "Status Report" section showing the same status information as the PM's report, with green bars for all categories.

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:

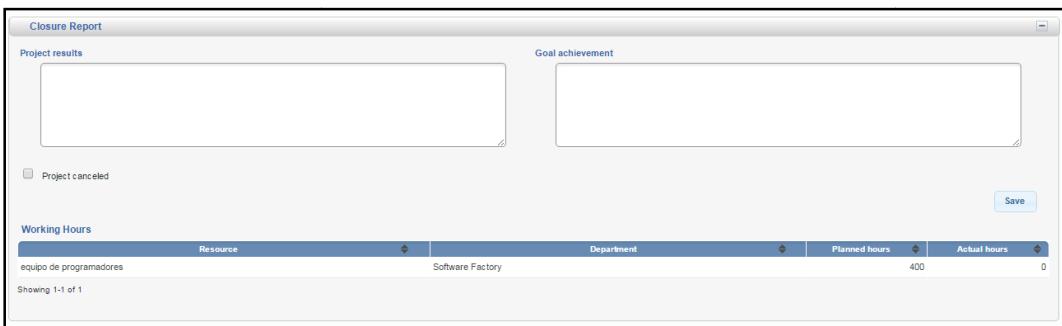
- **Login as PM:**



The login form consists of two text input fields: "User *" and "Password *". Below the fields is a blue "Login" button.

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

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



The Closure Report panel includes sections for "Project results" and "Goal achievement", both represented by large empty text boxes. Below these is a checkbox labeled "Project canceled". A "Save" button is located in the top right corner. At the bottom, there is a table titled "Working Hours" showing one entry: "equipo de programadores" under "Resource" and "Software Factory" under "Department", with "Planned hours" at 400 and "Actual hours" at 0. The message "Showing 1-1 of 1" is displayed below the table.

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



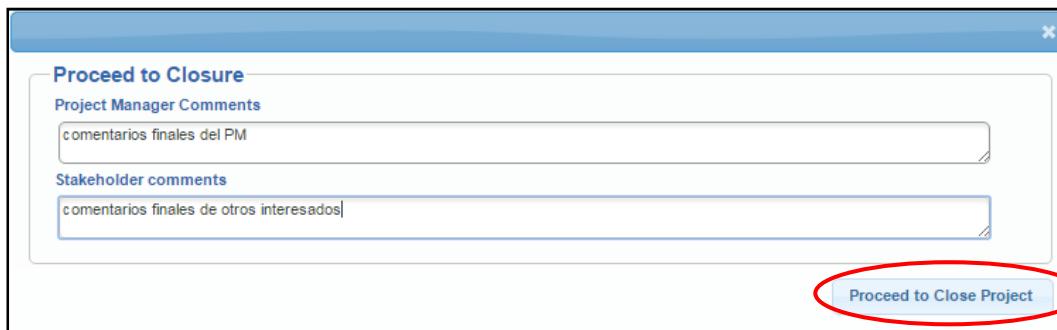
The Closing checklist panel displays a table with columns: Name, Description, Comments, Date, Completed (checkbox), and Owner. The table contains three rows: "Invoice", "Closing Report", and "Customer Project Delivery Approval". Each row has a "Completed" checkbox and a "Details" link icon. Navigation buttons for "First", "Previous", "Next", and "Last" are at the bottom right.

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



The Lessons learned panel displays a table with columns: Name and Description. It shows a single row: "Nothing found - sorry". A green plus sign icon is located in the top right corner of the table area.

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 performed by the role PMO.