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Homestead Project Migration Guide (OpenProject Setup)

Overview and Planning Structure

In this guide, we will migrate the **Homestead** project planning into OpenProject using a fresh setup (no templates or pre-existing projects). We'll organize all Homestead planning data into a single **Master Project** called **"Homestead"**, then create **Subprojects** for each major domain/component from the outline (Climate & Siting, Tech Stack, Security & Deterrence, Learning Tracks, Creative Projects, etc.). Within each subproject, we will define **Work Packages** (tasks) for specific subcomponents (e.g. *humidex modeling*, *greenhouse design specs*, *PV system layout*). We will also configure OpenProject to categorize and **group tasks by development phase** – the Homestead phases are *storage*, *workshop*, *housing*, *farming*, and *beekeeping* [1]. Throughout the guide, we'll leverage OpenProject features like custom fields, milestones, timelines (Gantt charts), and filtering to reflect this phased, hierarchical organization. The goal is a system that is easy to manage for a single user but structured enough to allow future expansion (additional users or projects) seamlessly.

1. Create the Master Project "Homestead"

Start by creating a new project in OpenProject for the overall Homestead plan. Log in to OpenProject and use the **"+ Project"** button (found on the start page or the project dropdown) to create a project named **Homestead** [2]. Since we are starting fresh, choose a blank project (no template). Enable the core modules you need – at minimum **Work Packages** (for task tracking) and **Gantt chart** (timeline) modules should be active (these are typically enabled by default in OpenProject). You may also enable **Wiki**, **Documents**, or **Calendar** if you plan to use those for notes or scheduling, but they are optional. Save the new project. This Homestead project will serve as the *master container* for all subprojects and provide an overarching view of the entire homesteading plan.

Tip: On the Homestead project's **Overview** page (dashboard), you can add widgets to summarize key info. For example, add the **"Subprojects"** widget so you can easily see and navigate to the domain subprojects [3]. You might also add a **Project description** widget to note the high-level goals (e.g. *"Personal off-grid homestead plan spanning climate analysis, construction, farming, etc., over 3–5 years"*), and a **Status** or **Work packages table** widget to get quick stats on progress.

2. Create Subprojects for Major Domains

Next, create subprojects under the Homestead master project for each major domain or component of the plan. OpenProject supports hierarchical projects: you can organize projects in a parent-child hierarchy (with parent as the master project and children as subprojects) [4]. We will use **Homestead** as the parent and create several subprojects beneath it.

Planned Subprojects (Domains):
- **Climate & Siting** – for climate preferences, site selection criteria, environmental modeling, and siting analysis (based on outline section A. *Homestead Core – Climate & Siting* [5] [6]).
- **Tech Stack** – for core technology infrastructure, servers, networking, and energy systems integration (outline section B. *Tech Stack* [7] [8]).
- **Security & Deterrence** – for perimeter security systems, deterrents, legal guardrails, and safety measures (outline A.4 *Security & Deterrence* [9] [10]).
- **Learning Tracks** – for personal education tracks relevant to the homestead (e.g. STEM foundations, field medicine, experimental greenhouse research – outline section C. *Learning Tracks* [11] [12]).
- **Creative Projects** – for creative or personal projects like media studies and hobbies to pursue on the homestead (outline section D. *Creative Projects* [13]).

To create each subproject, navigate to the Homestead project's **Settings → Projects** (or **Project hierarchy**) section. Use the **"+ Subproject"** option to add a new project underneath Homestead [4]. Alternatively, you can create a new project and specify its parent in the creation form. For example, if creating the *Climate & Siting* project via the new project form, select **Homestead** in the "Subproject of" field to nest it under the Homestead master [14].

Figure: Defining a parent project ("Homestead") when creating a new subproject (e.g. *Climate & Siting*). In OpenProject's project settings or creation dialog, you can assign a **Parent project** to organize projects in a hierarchy [4] [14].

Repeat this for each domain. Once finished, you will have a set of subprojects all listed under Homestead. In the OpenProject project dropdown menu, they will appear indented under the Homestead project to reflect the hierarchy [15]. For instance, you might see "Homestead" as a header, and beneath it "Homestead > Climate & Siting", "Homestead > Tech Stack", etc. This hierarchy makes it easy to navigate between different aspects of your homestead plan while keeping them under one umbrella.

Each subproject can have its own members, work packages, and settings, but initially as a single-user setup you will be the administrator and sole member for all. You may leave subprojects **public** or **private** depending on whether you plan to share any of this information (you can adjust project visibility in Settings if needed). For now, focus on structure and content.

3. Define Work Packages (Tasks) in Each Subproject

With the project structure in place, you can populate each subproject with Work Packages that represent the **discrete subcomponents** or tasks of that domain. In OpenProject, a "Work Package" can be any unit of work – a task, a deliverable, a requirement, etc., and they are the basis for project planning [16]. We will create work packages as tasks (and a few milestones) to capture all the actionable items from your Homestead outline.

It's best to break down larger goals into manageable tasks. For each subproject, consider the major sub-topics or deliverables and create tasks for them. Below are examples of work packages for each domain subproject:

- **Climate & Siting** – tasks might include:

- *Climate data analysis (Humidex Modeling)* – Gather regional climate data and run **CMIP6** model projections to evaluate humidex and temperature trends for the target area [17]. This satisfies the research requirement of prioritizing humidex in climate suitability.
- *Site Hazard Risk Assessment* – Analyze niche risk factors (earthquake, wildfire, flood, arctic storm, etc.) for prospective locations [17]. Develop a scoring system (using provided risk weights) to rank sites [18].
- *Greenhouse Design Specifications* – Draft design requirements for a homestead greenhouse (e.g. size constraints, vertical hydroponic systems to minimize footprint [19]). This will tie into the farming phase.

- *Permaculture Layout Plan* – Plan initial permaculture features (food forest, swales, ponds) to implement early in development [20], aligned with the farming phase.

- **Tech Stack** – tasks might include:

- *Core Server Rack Setup* – Design the 42U rack layout for servers and network gear [21]. Include relocating existing hardware (e.g. Dell R740xd, Precision T7820, network switches) to the homestead site [22] [23].
- *Network & VLAN Configuration* – Configure networking: define VLANs for management, servers, IoT, cameras, guest, voice as per the schema [24]. Set up the OPNsense router, Pi-hole DNS, and firewall rules [25] [26].
- *PV System Layout and Integration* – Plan the solar PV array and battery integration into the tech infrastructure. Determine placement of panels, inverters (target 10 kW AC continuous [27]), battery bank (40 kWh LiFePO4 [28]), and how it interfaces with house loads and backup generator. (This task relates to both energy and tech domains – you might choose to keep it here or in a separate "Energy Systems" subproject if desired. In this guide, we'll include it under Tech Stack for simplicity.)

- *Telecom & VoIP Setup* – Set up homestead telecom capabilities: e.g. configure the Cisco ISR 4321 for Direct Inward Dialing and a CUCM virtual machine for voice communications [29]. Ensure wireless IP phones connect and test the communication system.

- **Security & Deterrence** – tasks might include:

- *Perimeter Defense System Design* – Design a legally-defensible perimeter deterrence system. For example, plan placement and specs for **LRAD** acoustic devices and high-intensity strobes around the property [9]. Define escalation protocols (sound levels 85–120 dB in steps [30]).
- *Legal Deterrents Research* – Research legal chemical deterrents (such as skunk-derived area denial sprays) that can be used on the homestead [31]. Document any regulatory requirements and safe deployment methods (e.g. motion-activated dispersal with 30s latency and 50m range [32]).
- *Security Automation & Alerts* – Plan the integration of sensors, cameras, and automation for security. This includes motion sensors tied to alarms, automated **signage** or voice warnings ("No trespass..." messages [33]), and linking security alerts to your network (perhaps log events in the Tech Stack's monitoring system).

- *Pet Training for Security* – (If you want to include the **Pets & Wildlife** aspect under security.) Outline training for the homestead dogs and cat to respond to audio cues and integrate with security routines [34]. E.g. tasks to set up an automatic feeder or dog-door that can be remote controlled

(automation priority) [35]. This task links with homestead lifestyle but has security implications (guard dogs).

- **Learning Tracks** – tasks might include:

- *Curriculum: STEM Foundations* – Enroll in or design a self-study program to review general chemistry and physics fundamentals [36]. (Note: ensure materials avoid calculus initially, as specified.) Create a schedule or checklist for mastering these fundamentals.
- *Field Medicine Training* – Assemble a checklist of medications, first-aid tools, and enroll in a field medicine course [37]. The task would be to gather resources and then undergo the training (perhaps broken into sub-tasks: *Assemble medical kit*, *Complete wilderness first responder course*, etc.).
- *Martian Greenhouse Experiment Plan* – Design a small-scale experimental greenhouse to mimic Martian conditions [12]. Task steps might include configuring environmental controls (CO_2, UV, nutrient cycles), selecting plant species for resilience, and outlining experiment protocols for terraforming research [38].

- *Specialized Research Topics* – If there are specific research questions (e.g. study tardigrade radiation resistance or compile data for cold storage of media [39]), create tasks for each. For instance, *Research radiation adaptation in extremophiles* (gather papers on tardigrades) or *Curate digital library for homestead* (expand media collection by X items as listed in expansion targets). These tasks ensure continuous personal development alongside homestead building.

- **Creative Projects** – tasks might include:

- *Media Analysis Series: "Band of Brothers"* – Plan a structured re-watch of **Band of Brothers** with note-taking each episode [40]. Define the output (e.g. write a blog or journal focusing on themes, historical context, and autism-relevant observations as noted in the outline).
- *Reading Project: Dune Universe* – Create a reading schedule for the **Dune** series in in-universe chronological order [40]. Include all books from *The Butlerian Jihad* through *Chapterhouse: Dune* (avoiding spoilers for later-prequels as per your rule). This could be broken down into one work package per book or per trilogy, with notes or discussions as deliverables.
- *Homestead Creative Writing/Documentation* – (If applicable) Start a memoir, blog, or video series documenting the homesteading journey. For example, *"Homestead Blog Kickoff"* could be a task to set up a blog or YouTube channel to share progress, aligning with Creative Projects and personal outreach.

Feel free to adjust and add to these tasks based on the actual content of your outline and plans. The idea is to capture **all actionable items or research topics as work packages** in the relevant subproject. If some tasks span multiple domains (for example, *PV system layout* touches Tech and Homestead energy planning), place it where it fits best and know that we can link or reference it from other contexts if needed (OpenProject allows relating work packages across projects via references or "relates to" links).

Using Task Hierarchies: If a work package is complex, you can break it into smaller **child tasks**. OpenProject supports hierarchical work packages – a parent task can have subtasks indented beneath it [41]. For instance, *"Climate data analysis"* might be a parent with children like *"Gather historical climate data"*, *"Run CMIP6 model projections"*, *"Compute humidex metrics"*. To add a subtask, you can right-click a work package in the list and choose "Create new child" or indent it under another task [42]. This hierarchy is optional but useful for large deliverables. Make sure to switch the Work Package view to **Hierarchy mode**

(via the display settings) to see indented tasks in the list [43]. You can always collapse/expand these as needed. The hierarchy adds another layer of organization beneath the subproject level, ensuring nothing falls through the cracks.

As you create work packages, set basic attributes for each: a descriptive **Subject** (title), optionally a **Description** with more details or acceptance criteria, and other fields as needed. You might assign **Types** if you have different work package types (e.g. "Task", "Milestone", "Research", etc.), but by default all can be "Task" for simplicity. You as the sole user can assign all tasks to yourself (assignee), or leave them unassigned if that helps you view them objectively. Also consider setting initial **Status** (e.g. "New" or "Planning") and priorities (you can flag critical tasks as High priority). Don't worry about start/due dates yet – we will address scheduling in the timeline section. Focus first on capturing all tasks.

Tip: It's wise to incorporate any specific numeric targets or criteria from your outline into the task details. For example, in *Site Hazard Risk Assessment*, note the weightings (flood risk weight 5, etc. [44]) in the description so you remember them. In *Energy system planning*, note the target PV size (12 kW DC) and battery specs [45]. This ensures your work packages carry the context needed to complete them without constantly referring back to the outline document.

4. Organize Work Packages by Homestead Development Phase

One of the key organizational needs is to map each task to the **Homestead development phases**: **Storage**, **Workshop**, **Housing**, **Farming**, **Beekeeping** [1]. These phases represent the chronological stages of your homestead project (over ~3–5 years of development), and tasks can be grouped according to which phase they belong to. In OpenProject, there are a few ways to reflect this:

- **Use the built-in Project Phases feature**: OpenProject (as of recent versions) allows defining project phases and assigning work packages to a phase. You may need to enable the *Project phase* attribute in the administration settings for work packages. (As a system admin, go to *Administration → Custom fields/Work Package form configuration* and enable **Project Phase** for the Task work package type, then ensure it's active in the Homestead project [46].) Once enabled, you can define the phase values (Storage, Workshop, etc.) likely under *Project settings or via admin (Project Phase Definitions)*, then each task will have a **Phase** field you can set.

- **Use a custom field**: Alternatively, if the above is not available (or in community edition if phase is an Enterprise feature), create a **Custom Field** of type "List" for Work Packages called "Development Phase". Enter the five phase names as the list options. In the custom field settings, mark it **filterable** so you can filter and group by it in views [47]. Activate this custom field for all relevant projects (or set it global for all projects) and for the Task WP type. This custom field will then appear on each work package form, and you can select which phase a task falls under.

Once you have a Phase field (via either method), go through your tasks and **assign each work package to a phase**. For example: - Tasks like *Climate analysis* or *Site selection* might be part of the **Storage** phase (assuming phase 1 involves research and prepping storage of tools/materials while still in the city). - *Workshop construction tasks* (e.g. setting up the workshop structure or tools) go to **Workshop** phase. - Tasks related to building the primary living structure go under **Housing** phase. - Permaculture, greenhouse, and crop planning tasks belong to **Farming** phase. - Anything related to honey bees or later-stage

enhancements goes to **Beekeeping** phase (likely last). - Some tasks, especially under Learning or Creative projects, might run in parallel to all phases (for instance, you'll be learning continuously). You can still assign them to phases by when you want to focus on them. For example, *STEM Foundations* learning might be done during the early **Storage** phase, whereas the *Martian Greenhouse experiment* might coincide with the **Farming** phase. If a task truly spans multiple phases, assign it to the phase where the bulk of it will occur or complete; you could also split it into separate tasks per phase if necessary.

Viewing tasks by phase: OpenProject's Work Packages view can **filter and group** by this phase field. You can create a custom query or modify the default view to group tasks by the Phase attribute. In the Work Packages page, click **Configure view (three dots) → Display settings**, and choose **Group by** → *Project phase* (or the name of your custom field) [43] [48]. This will instantly segment the task list into five groups (one for each phase), making it very clear which tasks fall under which stage of development. You can collapse or expand these phase groups as needed [49].

Filtering by phase: Similarly, you can use the **Filter** menu to filter tasks by phase. For example, to focus only on upcoming *Workshop*-phase tasks, add a filter "Phase = Workshop" – the work package table will then show just those tasks [50]. This filtered view gives a clear snapshot of tasks in that stage of the project lifecycle. You can save these filters as custom views (e.g. a saved query for each phase) for quick access later.

OpenProject's documentation notes that using the project phase filter and grouping helps visualize how tasks are distributed across phases and identify any gaps or overlaps in your planning [51]. By grouping work packages by phase, you'll see if perhaps one phase has too many concurrent tasks (maybe needing re-scheduling) or if a phase is light on tasks (maybe needing more detail). It essentially aligns your task management with your strategic timeline of phases, which is exactly what we want.

Figure: Example of OpenProject work packages **grouped by project phase**. Each development phase (Initiating, Planning, Executing in this example) appears as a header with its associated tasks listed below [51]. In our case, you will see headers for **Storage**, **Workshop**, **Housing**, **Farming**, **Beekeeping**, each grouping the relevant tasks. This view makes it easy to manage progress per phase and ensure smooth transitions through phase gates.

Note: If you created a custom Phase field, grouping/filtering by it works the same way (just select your custom field name). If using the built-in Project Phase attribute, ensure you have defined the Homestead phases in the administration settings. The process might involve creating "Project Phase Definitions" for each of the five phases (as a one-time setup) and then assigning them to the Homestead project. Once set up, the usage in the work package view is identical.

By organizing tasks with these phase tags, you maintain a **matrix organization** of the project: tasks are vertically organized by domain (subprojects) and horizontally by phase. You, as the project owner, can easily traverse this matrix – e.g., focus on "Workshop phase" tasks across all domains, or focus on "Tech Stack" tasks across all phases – just by switching filters.

5. Use Milestones and Timelines for Phased Scheduling

With tasks grouped by phase, the next step is to lay out **when** these phases and tasks occur using OpenProject's timeline features. We will introduce **Milestones** to represent key phase transitions and use the **Gantt chart** (timeline) to schedule tasks and phases over time.

Create Phase Milestones: In each subproject or in the master project, create milestone work packages to mark the completion of each phase. For example, in the Homestead master project (or perhaps in a dedicated "Homestead Core" subproject if you prefer), create five milestones: **Storage Phase Complete**, **Workshop Phase Complete**, **Housing Phase Complete**, etc., with due dates corresponding to when you plan to finish each stage. Alternatively, you can mark the *start* of each phase – but since phases are sequential, marking the completion is usually sufficient. These milestones will act as **phase gates** in your plan. In OpenProject's Gantt chart, milestones display as diamond icons, whereas tasks display as bars [52], so it's easy to visually distinguish them.

Optionally, also create a milestone for **Project Completion** or major deliverables (e.g. *"Homestead fully operational"* as a final milestone after Beekeeping phase). If certain phases have mid-point goals, you could add those too, but don't overload with milestones – stick to the big markers.

Schedule tasks on the timeline: OpenProject's Gantt chart module allows you to assign **start and finish dates** to each work package and see them laid out chronologically [53]. For each task, estimate when it should occur or how long it will take within its phase. For instance: - Phase 1 (Storage) might span from *January–June 2024*. So tasks in Storage phase get scheduled in that window (some may be sequential, some overlapping). - Phase 2 (Workshop) maybe *July–Dec 2024*, and so on. Mark those phase date ranges on paper first if that helps, then input as task dates.

In the **Work Packages table**, you can set Start and Due dates for each task (add the columns if not visible). Alternatively, open the **Gantt chart** view (via the left menu "Gantt" or by enabling the timeline in the WP list). The Gantt chart will show a calendar timeline on the right. You can simply drag each task bar to the desired start/end dates on the timeline. For precision, you can also click a task and edit dates manually. OpenProject even lets you create tasks directly on the Gantt by clicking on the timeline area, but since we already have tasks, we'll just position them.

Schedule the Milestones: Place the phase completion milestones at the end of each phase's timeframe. E.g., *Storage Phase Complete* milestone on June 30, 2024, *Workshop Phase Complete* on Dec 31, 2024, etc. These will act as deadlines or checkpoints.

Link tasks and milestones with dependencies: To enforce logical sequencing, you can add **relationships** between tasks and milestones. For example, you might set all Storage-phase tasks as **predecessors** to the *Storage Phase Complete* milestone. This means the milestone can't be marked complete until those tasks are done. In OpenProject, you can create a **finish-to-start dependency** by editing a task's relations (or directly on the Gantt by drawing a link between tasks). If you specify that a work package *Blocks* another, the latter cannot be closed until the blocker is closed [54] [55]. For timeline scheduling, using **predecessor/successor** relations is ideal – it will ensure tasks move together if timelines change [56] [57].

For instance, link *"Build Workshop Structure"* task as a predecessor to the *Workshop Phase Complete* milestone. That way, on the Gantt, if the task extends, the milestone can be set to shift accordingly (if using automatic scheduling). This makes it clear which tasks must finish to achieve a given phase's completion [58]. You can also link phases in sequence: e.g. *Storage Phase Complete* milestone is a predecessor to starting any Workshop-phase tasks or to the *Workshop Phase Start* milestone (if you choose to have start milestones). This creates a **phase gate** – Storage phase must finish before Workshop tasks begin. OpenProject supports these dependencies and can even auto-adjust schedules if a predecessor shifts (depending on your scheduling mode) [59] [60].

Visualizing in Gantt Chart: Once dates and dependencies are set, use the Gantt chart to visualize the entire project timeline. The Homestead master project's Gantt can show all subprojects' tasks if configured. OpenProject allows **multi-project timelines** – within the Homestead project Gantt, use the **Filter** menu to **include subprojects** so that tasks from Climate & Siting, Tech Stack, etc., all appear together [61] [62]. You will then see a comprehensive timeline of everything. You might see parallel tracks (e.g. some Tech Stack tasks ongoing during Farming phase for automation setup) which is fine. The milestones will appear as diamond icons at phase boundaries. If it looks too crowded, you can also toggle **Group by project** on the timeline, which will cluster tasks under each subproject label [63] – this helps differentiate domains by color or grouping. Alternatively, group by phase on the timeline view (similar to the WP table grouping we did; OpenProject's grouping and filtering apply to Gantt as well [64] [65]). For example, group-by-phase on the Gantt will visually segment the timeline into phase swimlanes, which can be very insightful to see how each phase is timed.

Take advantage of the **zoom** controls on the Gantt to view by weeks, months, or years as appropriate. A long-term homestead plan may span multiple years, so a quarterly or yearly view might be useful for big picture, while a monthly view is useful when detailing near-term tasks.

At this stage, your Homestead project is time-phased. You can easily answer "What's happening in X phase?" by filtering or looking at the timeline section for that phase. You can also see if any phase is overstuffed or too sparse. For instance, if Farming phase looks overwhelmingly packed on the timeline, perhaps some tasks should be started earlier (overlap with Housing) or deferred. If Workshop phase shows a long gap, maybe you can move some tasks from Housing earlier into that gap. **Adjust task schedules** by dragging them on the Gantt until you have a realistic, balanced plan.

Don't forget to **save the timeline view** once you have it configured (use the Save view option to preserve your filters/grouping settings as a named view) [66] [67]. You might save one view that is grouped by project (showing each domain separately on the timeline) and another grouped by phase (showing all domains interleaved but phase-focused). Both perspectives can be valuable.

6. Leverage OpenProject Features for Manageability and Expansion

Now that the Homestead plan is structured by domain (subprojects), tasks, and phases, you should configure a few more things to keep the system easy for personal use and ready for potential collaboration:

- **Custom Fields and Tags:** We already used a custom field for Phase. You can create other custom fields if needed to track information unique to your project. For example, a custom field for "Estimated Cost" on tasks if you want to budget each item, or "Location" if some tasks pertain to specific sites. Custom fields can be made filterable and will appear in the work package forms [47].

Only add what you find useful; as a single user you don't want to overwhelm yourself with data entry.

- **Milestone and Progress Tracking:** Use task **status** and **percent done** fields to track progress. For each task, mark it *Closed* or 100% when done. Milestones can serve as checkpoints – when all tasks in a phase are done, you can close the phase milestone. You can even set up a **Roadmap** view (if you enable the Roadmap module) which will show milestones and related tasks grouped by version or phase, giving a high-level progress view per phase. This is optional but can be motivating to see phase completion bars.

- **Filtering and Views for Focus:** Create saved filters for different needs. For example, a filter for "Status = Open AND Phase = Housing" could give you *all pending housing-phase tasks* across all subprojects – very useful when you reach that stage to ensure nothing is missed. Another filter could show only tasks in a specific subproject and phase, etc. These views help focus on what's relevant at the moment. You can quickly toggle between domain-centric work and phase-centric work with saved queries.

- **Timelines and Automatic Scheduling:** OpenProject has both manual and automatic scheduling modes [68]. For simplicity, manual scheduling is fine (you set dates yourself). If you enable automatic scheduling for a project, tasks will move based on predecessor links. This can be handy if, say, a task gets delayed – all dependent tasks could shift. If you prefer to manually adjust, that's okay too. Keep your Gantt chart updated as things change.

- **Hierarchy and Summaries:** We touched on task hierarchies. If you use parent tasks as summaries, note that OpenProject can roll up progress. For example, if "Greenhouse Setup" is a parent and you complete all its subtasks, you can close the parent. Consider using parent tasks as phase grouping within each subproject if that suits you – e.g., a parent task "Storage Phase Tasks (Tech)" containing all Tech Stack tasks for Storage phase. This is an alternative or complementary to the global phase field. However, since we have the phase field, using both might be redundant. Choose one primary method to avoid confusion. The simpler approach is what we've done: one flat list in each subproject tagged by phase, and using filtering/grouping for views.

- **OpenProject Wiki/Docs:** You have a lot of data in the outline (like numeric defaults, formulas for humidex, etc. in the Homestead Core section [69] [70]). Not all of that needs to be a task. For reference information (like formulae, design standards, checklists), consider using the **Wiki** module in the Homestead project or respective subproject. For example, the Climate & Siting subproject could have a wiki page capturing the climate model formula and risk scoring methodology. The Tech Stack project could have a wiki page inventorying your hardware specs (those listed servers and gear [22]). This keeps reference info at hand without cluttering the task list. Documents module can store files like schematics or legal guidelines PDFs.

- **Maintaining Simplicity:** As a single-user system, you have the freedom to tailor it entirely to your workflow. Use just enough process to help you, but not so much that it becomes a burden. For instance, you might not need to frequently update "Estimated Time" or "Spent Time" fields on tasks – unless you want to track time, you can ignore those. You also might not need complex workflows for status; a simple Open/Closed or a few states (e.g. "Planned", "In Progress", "Done") might suffice. You can configure statuses and workflows in admin if desired, but the default should do for now.

- **Personal Notifications:** If this is a personal system, you can disable unnecessary email notifications (or keep them if you like getting an email when you change a task – though that might be overkill when you are both reporter and assignee!). Under *My account* settings, adjust notification preferences to suit your solo use.

- **Scalability for Expansion:** The way we structured the project – one master with clearly defined subprojects – will make it **easy to onboard others** if needed. For example, if in the future you involve a friend or a hired specialist for a part (say an electrician for solar install), you can simply add them as a member to the relevant subproject (e.g. Tech Stack or a specific "Solar Install" subproject if you make one). They will then see only that part of the plan unless you give them access to more. You can assign tasks to them and use OpenProject's built-in **member roles** to control what they can do. As admin, you manage this under Project *Members* settings. OpenProject even allows creating custom **groups or roles** (like a "Homestead Partner" role with limited permissions) if needed [71] [72], but for a small collaboration the built-in roles (Manager, Member, Viewer) are fine.

- **Progress Reporting:** If you ever need to present or review progress at a high level, the Homestead master project can serve as a portfolio view. On the Homestead overview or the *Project list*, you'll see an aggregated status of subprojects [73]. Each subproject could have its own percentage done (if you update progress), latest activity, etc., so you get a birds-eye view of how each domain is proceeding. This is useful if, say, Tech Stack is 80% done but Security is 20% – it tells you where more effort is needed.

- **Timeline Reviews:** Periodically, revisit the timeline and phase groupings to adjust plans. Real-life projects evolve; tasks might take longer or get split. OpenProject makes it easy to drag tasks to new dates or change their phase assignment if your strategy changes (e.g. you might realize a particular Security task should happen earlier in the Workshop phase, not later in Housing phase – you can just edit its Phase field and dates).

- **Backups and Exports:** Since this is your personal system, ensure you keep backups. OpenProject allows exporting work packages to Excel or CSV [74]. It might be wise to export your task list periodically or before making major changes, so you have a snapshot of your plan. Also, if you prefer offline access or analysis, that export can feed into your personal notes.

By following this guide, you will have a comprehensive OpenProject setup for **Project Homestead** that mirrors your master outline: a Homestead project containing all key domains as subprojects, each filled with actionable tasks, all woven together by the timeline of development phases. You can now manage and monitor the homestead planning in one place – checking off tasks as you complete them and always knowing what's coming next in each phase. This structured approach ensures that as the sole planner you don't lose track of any aspect (from climate research to creative pursuits), and as a potential team leader in the future you can easily share relevant slices of the plan with others. OpenProject's flexibility and features like filtering, custom fields, milestones, and Gantt charts will support you in turning the Homestead vision into reality, step by step and phase by phase. Good luck with your homesteading project!

References: The setup and recommendations above were aligned with official OpenProject documentation for accuracy – including project hierarchies [4], work package organization and filtering [50] [51], and Gantt chart usage for multi-project timelines [61]. For further details, consult the [OpenProject User Guide] [75] which offers extensive information on project management features used in this guide.

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