

# IT-Project Management Solution Implementation Instructions

## 1.1. Introduction

This document contains implementation instructions for IT-Project Management Solution. Here you will find a step by step guide for necessary actions and checks for correct settings.

Note! This solution was built and tested in ESM version 2023.4.1

## 1.2. Pre-import actions

Create folder for Project template in your preferred module.

Create folder for Task template in the same module as project.

Set premissions to the folder according to your organisations practices.

## 1.3. Import templates

Import the project and task templates.

Set permissions to the templates according to your organisations practices.

Go set the imported templates as allowed to the previously created folders.

#### 1.4. Check imported templates

On the project template there should be a transformation to task template that should look like this:

Source template #Project	Target template #Task
Reference to source card (use with reference attribute of target template)	
ID	🔴 Name
Name	↳ Description
Description	🔴 Status
Status	↳ Assigned to
Project manager	↳ Related project
Project team	:SOURCE:
Project phases	↳ Start date
General tasks	↳ Due date
Initiation tasks	↳ Actual completed date
Planning tasks	🔴 Approximated person days
Design tasks	↳ Used person days
Development tasks	↳ Documents
Execution tasks	↳ Efecte ID
Testing tasks	↳ Created
Monitoring tasks	↳ Updated
Update tasks	↳ Creator
Deployment tasks	↳ Last update by
Integration tasks	
Closure tasks	
Open tasks	
Due date	
Start date	
Total PD budget	
Total approximated person days in tasks	
Total approximated PD / total PD budget	
Used person days in tasks	
Approximated PD from completed tasks	
Used person days in completed tasks	
Approximated PD - Used person days from completed tasks	
Person day price	

Check that these reference attributes reference the task template:

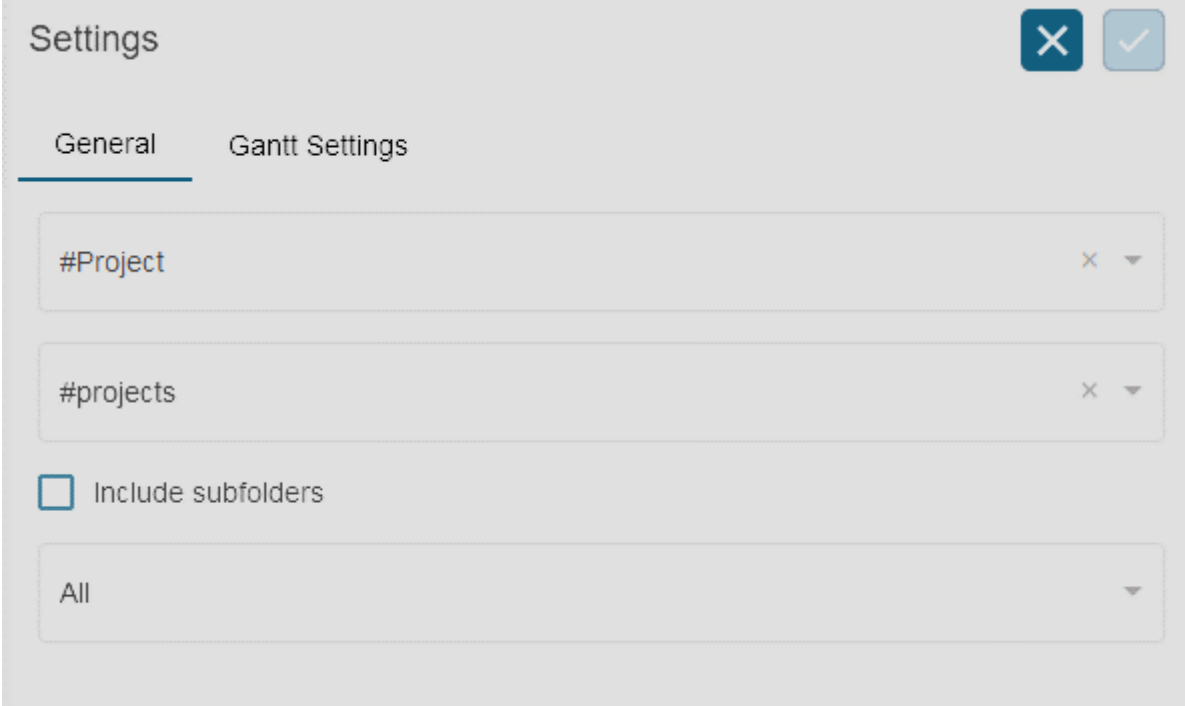
Task information	Project phases	<input type="radio"/>	String	phases	Yes	No	Yes	Yes	
	General tasks	<input type="radio"/>	Reference	tasks	No	No	No	Yes	
	Initiation tasks	<input type="radio"/>	Reference	initiation_tasks	No	No	No	Yes	
	Planning tasks	<input type="radio"/>	Reference	planning_tasks	No	No	No	Yes	
	Design tasks	<input type="radio"/>	Reference	design_tasks	No	No	No	Yes	
	Development tasks	<input type="radio"/>	Reference	development_tasks	No	No	No	Yes	
	Execution tasks	<input type="radio"/>	Reference	execution_tasks	No	No	No	Yes	
	Testing tasks	<input type="radio"/>	Reference	testing_tasks	No	No	No	Yes	
	Monitoring tasks	<input type="radio"/>	Reference	monitoring_tasks	No	No	No	Yes	
	Update tasks	<input type="radio"/>	Reference	update_tasks	No	No	No	Yes	
	Deployment tasks	<input type="radio"/>	Reference	deployment_tasks	No	No	No	Yes	
	Integration tasks	<input type="radio"/>	Reference	integration_tasks	No	No	No	Yes	
	Closure tasks	<input type="radio"/>	Reference	closure_tasks	No	No	No	Yes	
	Open tasks	<input type="radio"/>	Number	open_tasks	No	No	No	No	ReferrerCounter

Check that project manager and project team reference attributes refer to the person template.

## 1.5. Reports

### 1.5.1. Gantt chart

For the project gantt-chart apply these settings



Settings

General Gantt Settings

#Project x ▾

#projects x ▾

☐ Include subfolders

All ▾

Settings

✕

✓

General

Gantt Settings

Level 1

Name

✕ ▼

Start date

✕ ▼

Due date

✕ ▼

Project tasks

✕ ▼

Level 2

✕

Name

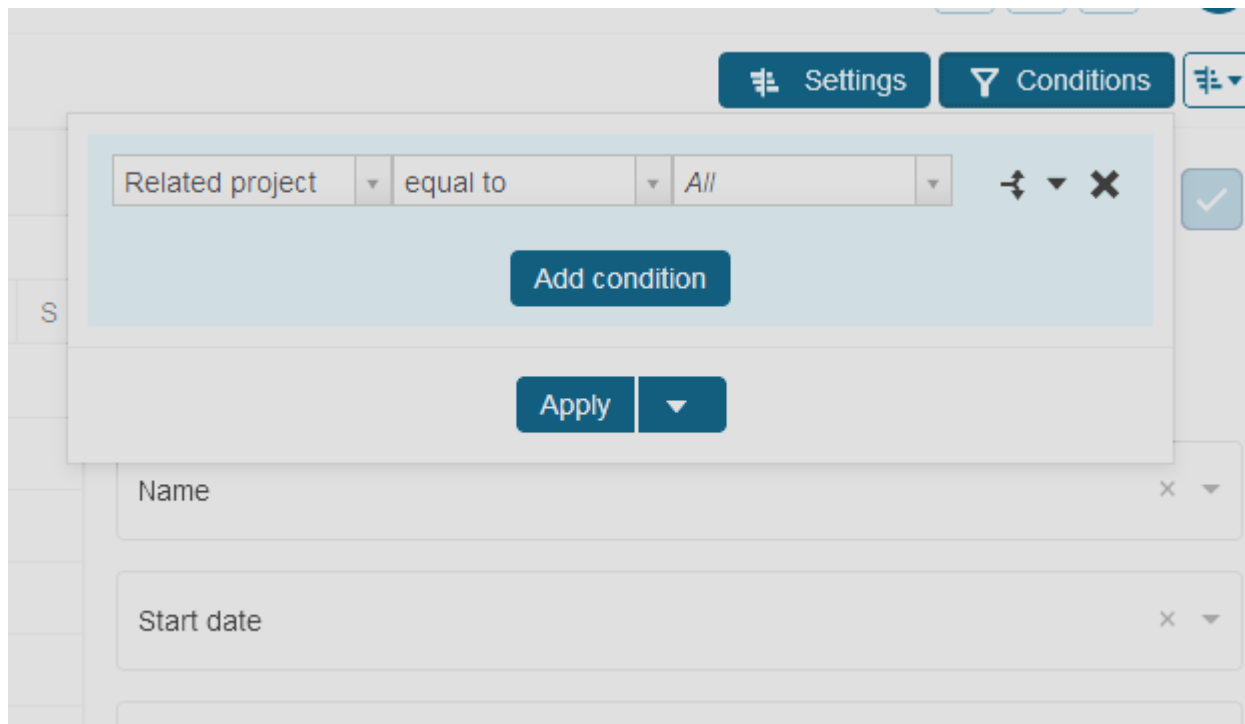
✕ ▼

Start date

✕ ▼

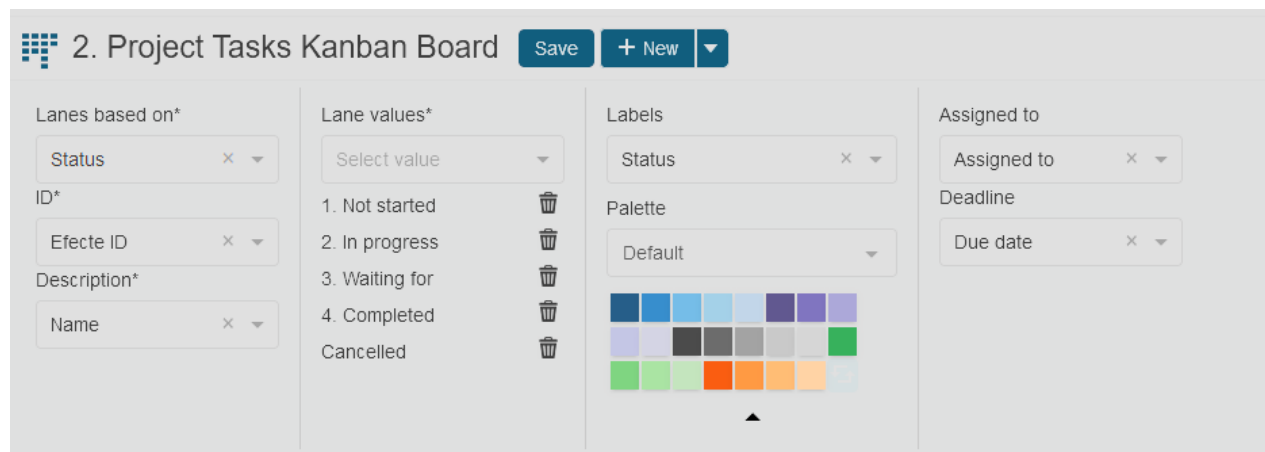
Due date

✕ ▼



### 1.5.2. Kanban board

For the kanban board view configure these settings



Related project ▼ equal to ▼ All ▼ ↕ ▼ ✕

Add condition

Apply ▼

⚙ Settings

All modules ▼

✕ #Task

Select folder ▼

☐ Include subfolders

All ▼

Select refresh interval ▼

Apply