Planisware

Get innovation to market

Level 1 Configuration - Own your data model

About the presenter

Anh-Thy Le
Consultant, Planisware
Anhthy.le@planisware.com

Based in San Francisco, CA

Planisware

Introductions

Companies represented today

Pharmaceutical / Biotech

Oil and Gas

Safety

Telecommunications

Introductions

Name 1 Cool fact about your company

- Planisware was spun out of Arianespace

Introductions

Name 1 Cool fact about your company

- Planisware was spun out of Arianespace

Introductions

Name 1 Cool fact about your company

Pharmaceutical

- Rynita Julien, Biogen
- Chris Roenfeldt, Halozyme
- Deepthi Kotamraju, Johnson & Johnson

Oil and Gas

- Faisal Alshemaimry, Saudi Aramco

Safety

- Brian Fisher, MSA Safety

Telecommunications

- Shuangjian Yang, Huawei
- Wei Ping, Huawei

Agenda (9:00am – 10.30am)

- Welcome/Introductions/Check server access
- Level 1 Intro
- Configuration Page/Tools
- User Attributes:
- Simple
- Possible Values
- Relations
- Named Formulas
- Hyperdoc
- Settings

Introduction

What is Level 1 configuration ?

What is Level 1 configuration ?

With V6 release, Planisware has improved full customization using only Intranet

Pros

- Done on intranet (not in Pro anymore) in simple administration menus
- Do not requires extensive Planisware expertise
- Large number of objects now available in 6.2 : simple data-model extension (attributes, list of values, ring attributes), attribute settings, alerts, locks, symbolic fields, data management rules, customization of entry screens, code generator, iterative formula, workflows, indicators…

Cons

- No access to script
- No access to all environment objects, specially advanced ones
- No heavy data model extension

Planisware

Exercise

Open your browser and surf to the L1 training server:

URL: https://l1training.planisware.com/
Usernames:

Attendee	Login User Name
Brian Fischer	BRIAN_FISCHER
Chris Roenfeldt	CHRIS_ROENFELDT
Deepthi Kotamraju	DEEPTHI_KOTAMRAJU
Faisal Alshemaimry	FAISAL_ALSHEMAIMRY
Rynita Julien	RYNITA_JULIEN
Shuangjian Yang	SHUANGJIAN_YANG
Wei Ping	WEI_PING

Password = username+”1”

The configuration page

Managing configuration tools

User attributes

Attribute settings

Data management rules

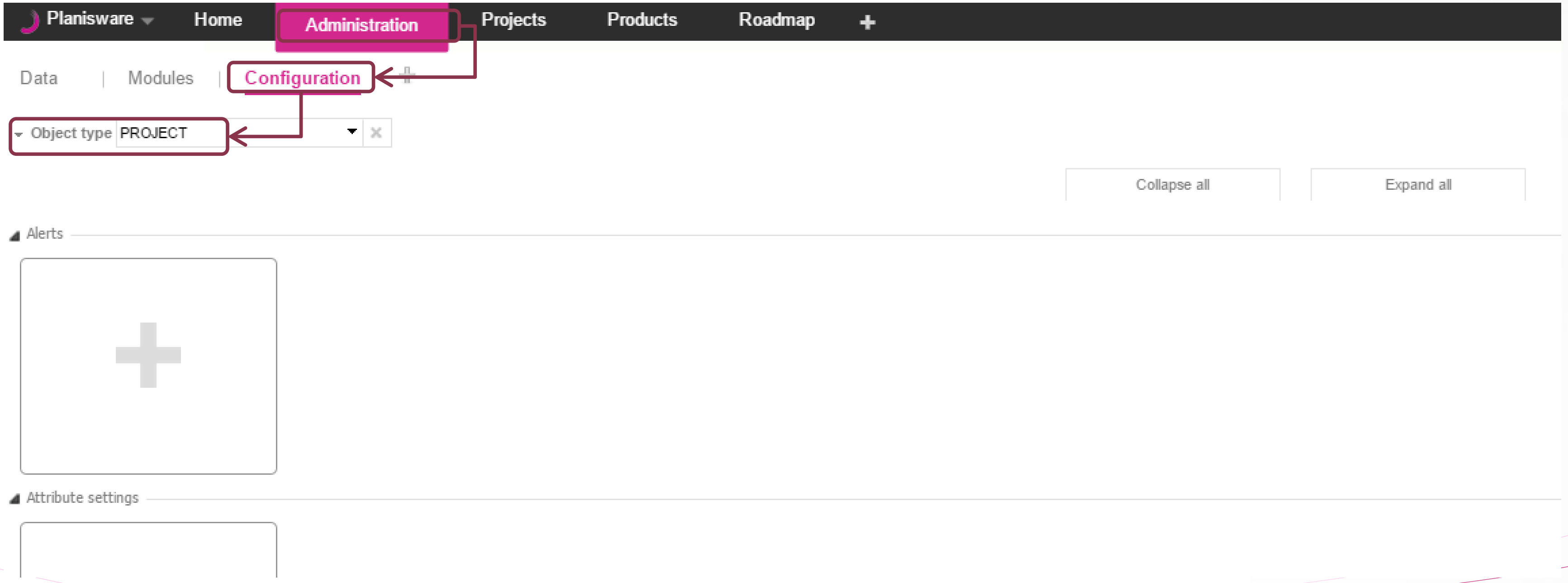
Indicator bars

About the configuration page

In Planisware V6, it is possible to configure each object type by creating alerts, attribute settings, customizable reports, data management rules, locks and user attributes. For the projects, it is also possible to configure the Indicator bars.

To configure object types:

- Go to the **Administration** module.
- Add the **Configuration** page.
- Select an **Object type**.



About the configuration page

It is mandatory to select an object type. If Object type has not been selected, a warning message is displayed.
Once an object type has been selected, all the objects of a same class are displayed on a same page.

Objects are saved in the dedicated common dataset initialized when restoring a dpe: CONFIG_L1_COMMON_FILE (ADM > Settings)
That file is not overwritten when importing a dpe.

Exercise

- Add the Administration module tab and the Data and Configuration tabs

Managing configuration tools

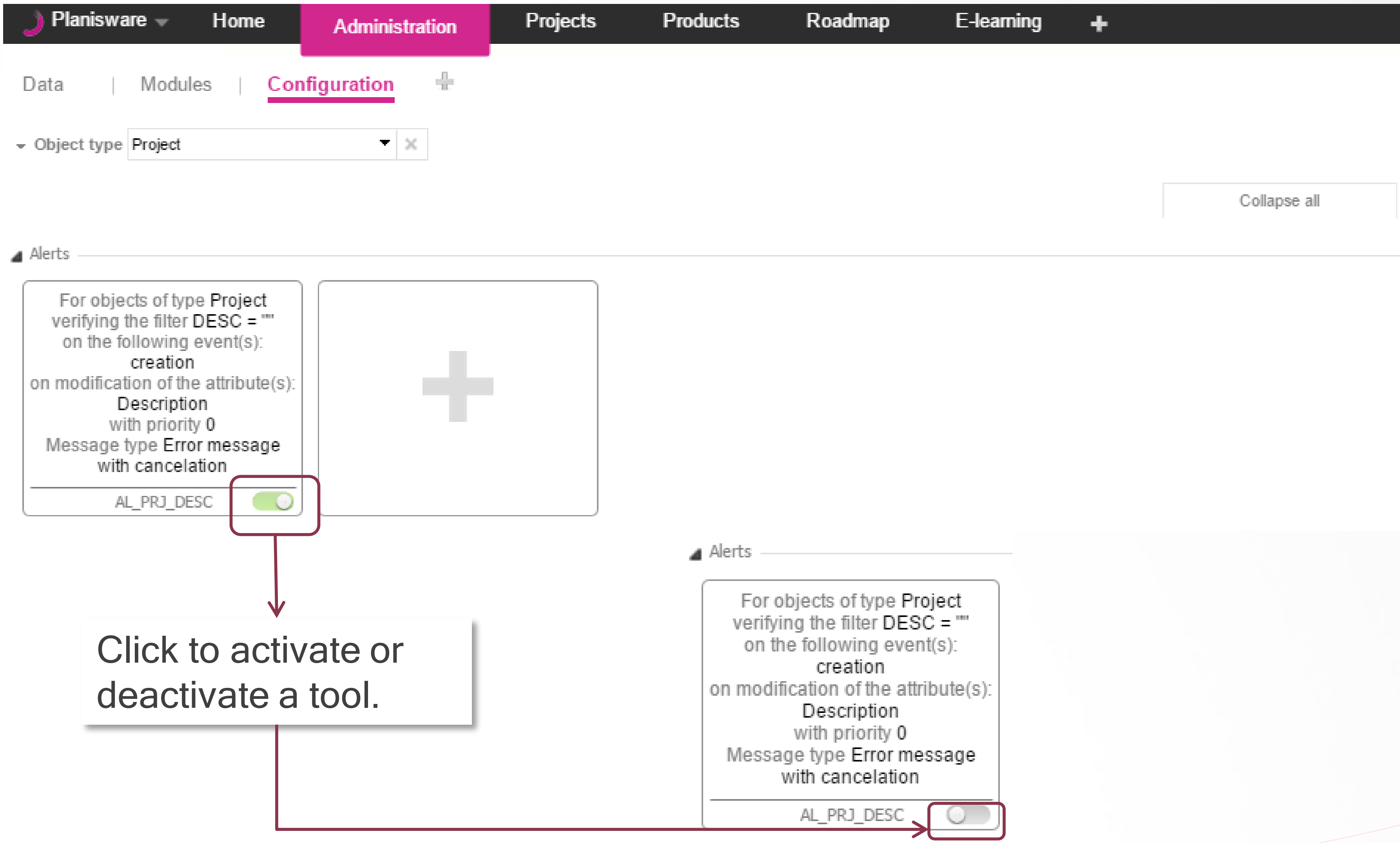
(De)activating configuration tools

Modifying configuration tools

Deleting configuration tools

Planisware

(De)activating configuration tools

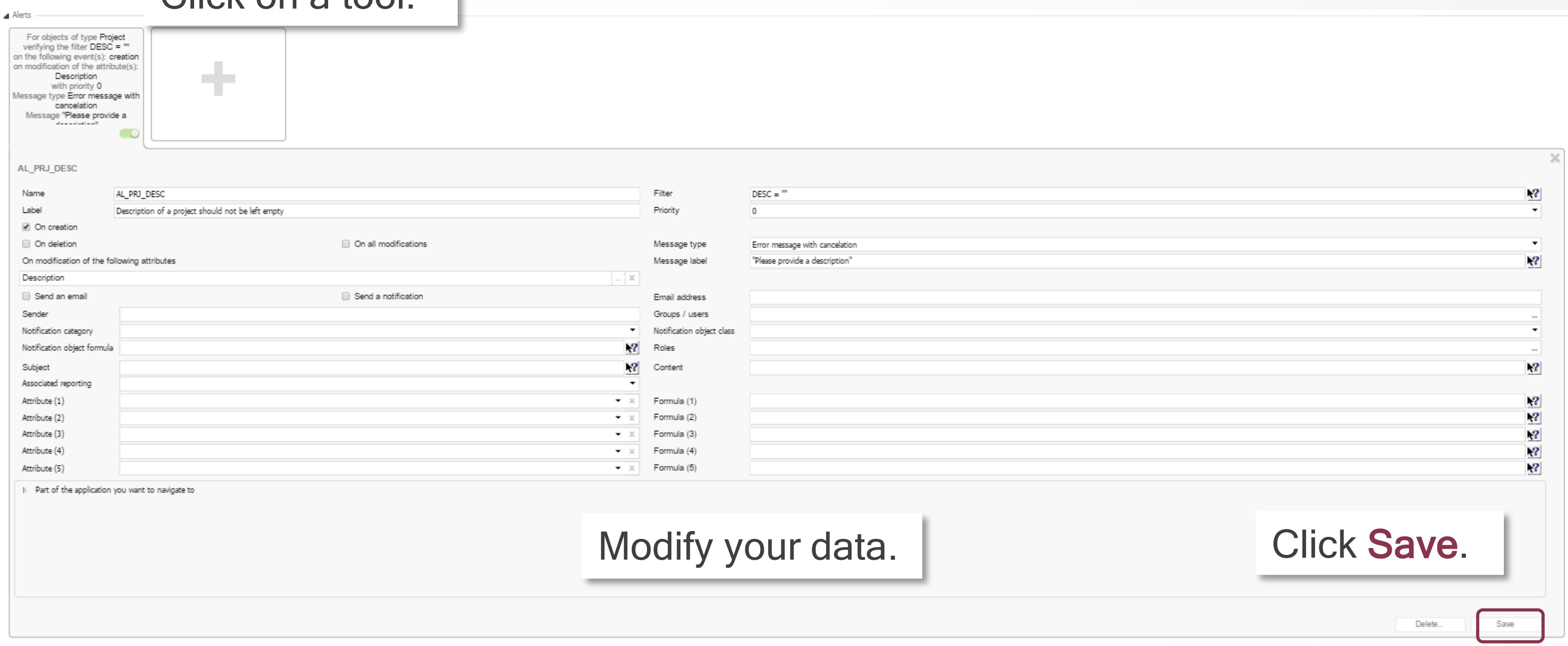


Click to activate or deactivate a tool.

Modifying configuration tools

To modify a configuration tool:

Click on a tool.

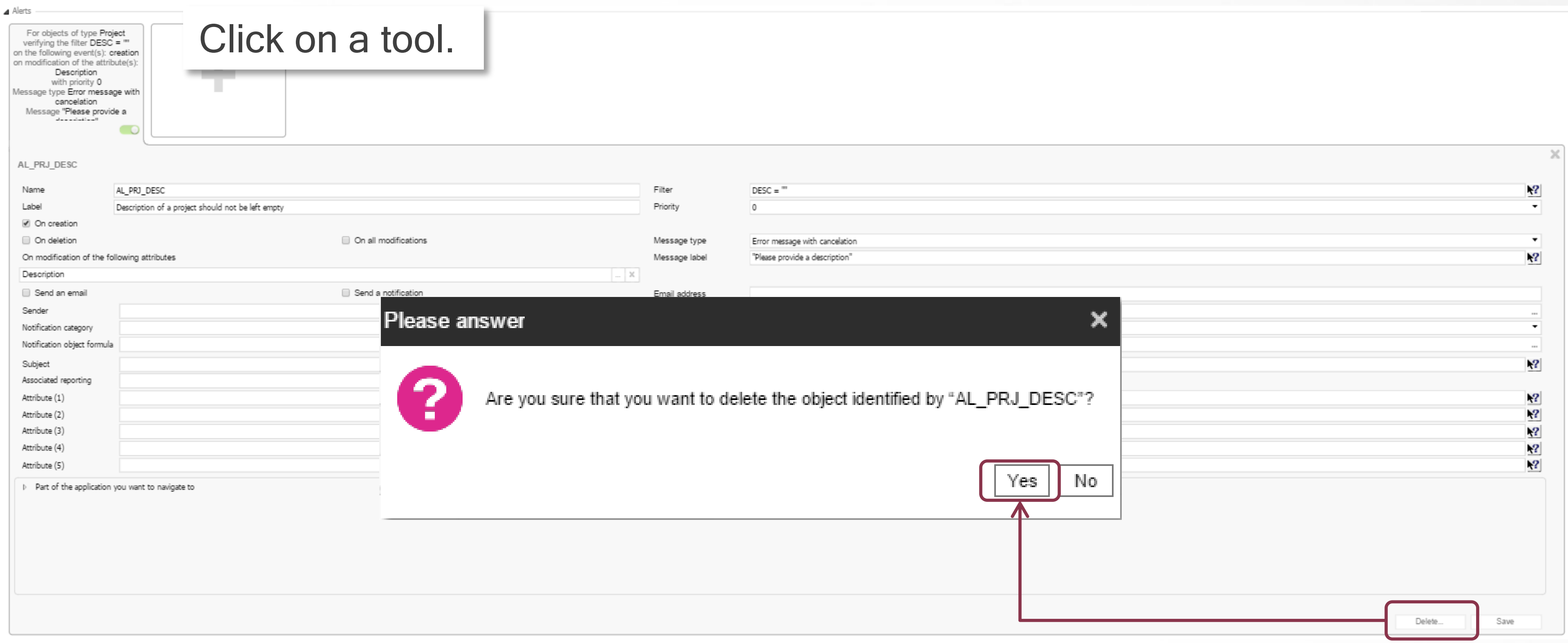


Modify your data.

Click **Save**.

Deleting configuration tools

To delete a configuration tool:



Meet your PM Head

Meet Pam, the Head of Project Management

Our data model and KPIs are always changing! We need a system that is as robust as our organization!

I want the system to perform simple calculations so I do NOT have to!

There are so many attributes to keep track of, and we need end users to understand the purpose of each one!

We need more control over extending our data model!

User Attributes - Scenario

Scenario

We need a new character code for **projects** to describe the risk level. We should also have a difficulty level number for each **activity** within the project!

User Attributes - Scenario

Scenario

We need a new **character code** for **projects** to describe the risk level. We should also have a difficulty level **number** for each **activity** within the project!

Analysis

User attributes allow you to create additional attributes on a given class which is perfect for when your manager wants to track more and more information within Planisware.

How to break down the situation:

1 Figure out relevant classes - **Project, Activity**

User Attributes - Scenario

Scenario

We need a new **character code** for **projects** to describe the risk level. We should also have a difficulty level **number** for each **activity** within the project!

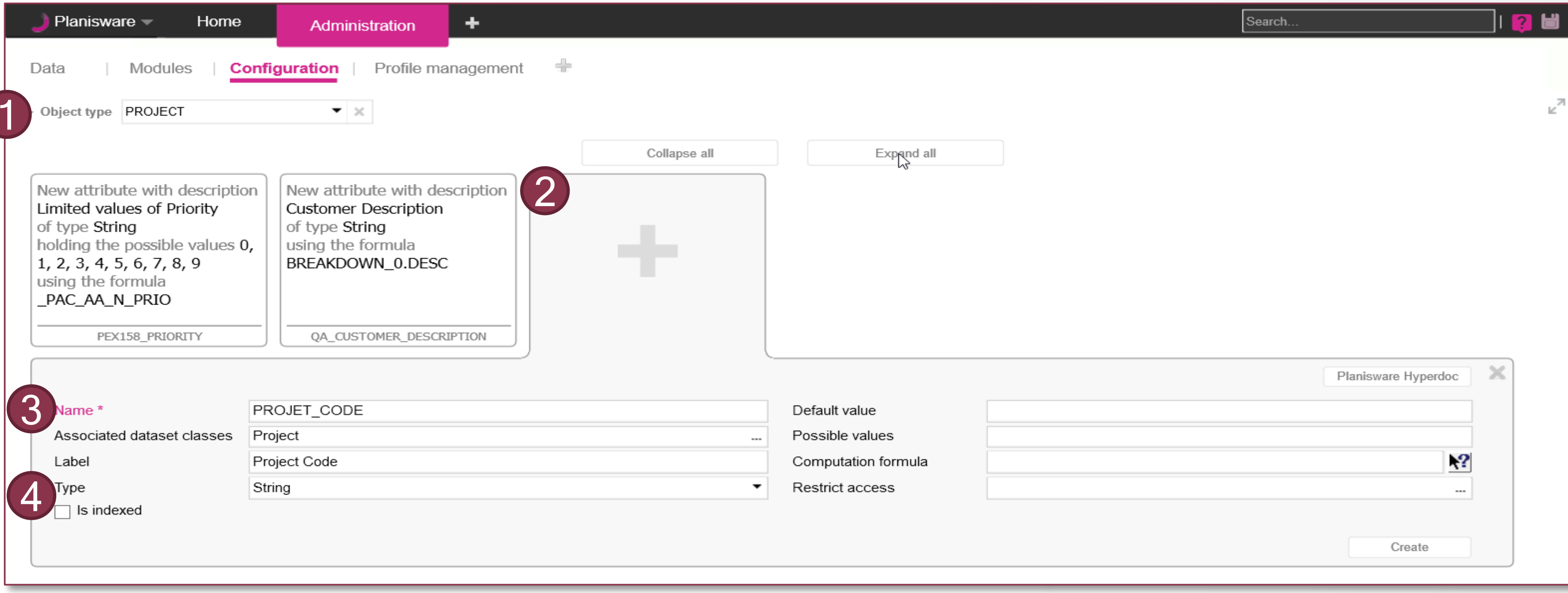
Analysis

User attributes allow you to create additional attributes on a given class which is perfect for when your manager wants to track more and more information within Plansiware.

How to break down the situation:

1. Figure out relevant objects - **Project, Activity**
2. Determine the type of data needed - **Character, Number**

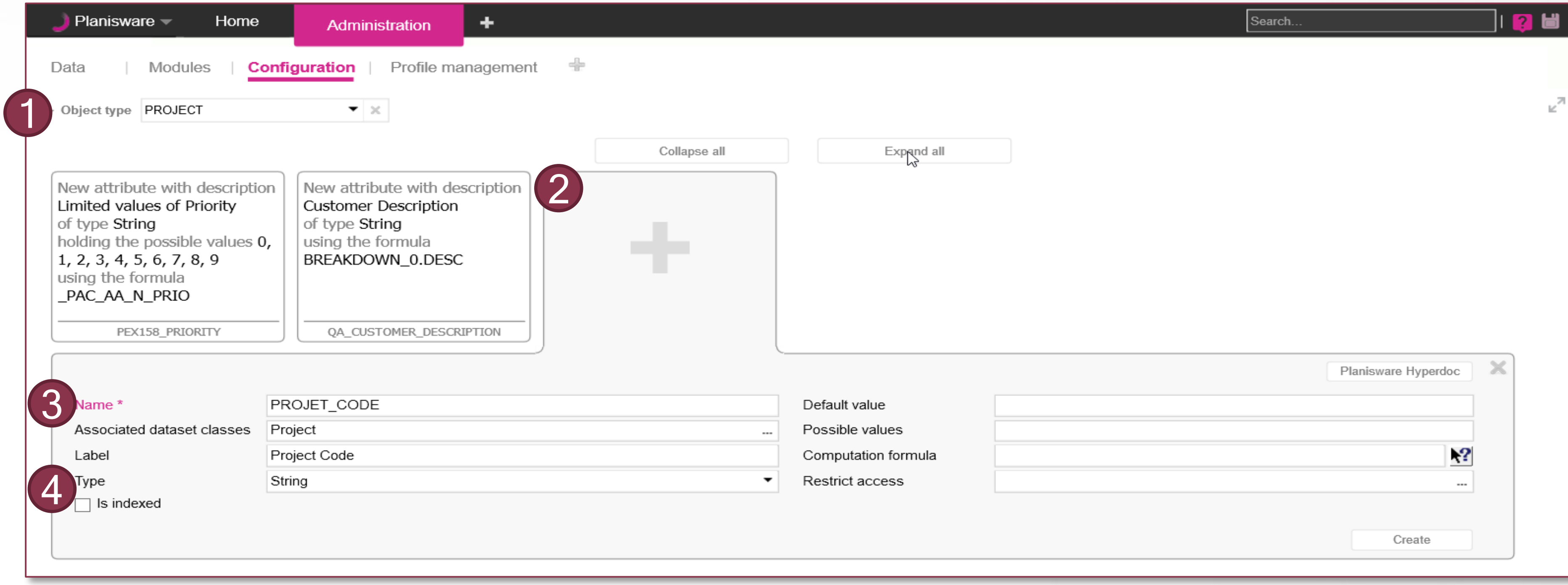
User Attribute Creation



1. Select the relevant object from the analysis
2. Click on the + button of the user attribute section to create a new user attribute
3. Give your attribute an appropriate Name and Level
   Name – Check with your admin to see if you have a naming convention to use
   Label - Use a description that makes it easy for end users to understand
4. Select the correct Data Type from the analysis
5. Default value of attribute when an object is created

Planisware

User Attribute Creation - Project Code



1. Select the relevant object from the analysis
2. Click on the + button of the user attribute section to create a new user attribute
3. Give your attribute an appropriate Name and Level
   - **Name** – Check with your admin to see if you have a naming convention to use
   - **Label** - Use a description that makes it easy for end users to understand
4. Select the correct Data Type from the analysis
5. Default value of attribute when an object is created

Exercise

Create your own Project code user attribute:

- Name = XX_UA_S_PROJECT_CODE (where XX are your initials)
  Convention: 3 Letters of your company
- Label = XX Project code
- Type = String

Go to the Project module and insert your attribute in the Projects table
Fill out the attribute for a few projects

User Attributes - Scenario

Scenario

Thank you for adding the attribute to the project! Don’t forget that I also needed a difficulty level **number** for each **activity** within the project!

Analysis

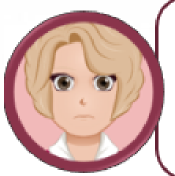
User attributes allow you to create additional attributes on a given class which is perfect for when your manager wants to track more and more information within Planisware.

How to break down the situation:

1. Figure out relevant objects - **Project, Activity**
2. Determine the type of data needed - **Character, Number**

Exercise

Scenario



Thank you for adding the attribute to the project! Don't forget that I also needed a difficulty level **number** for each **activity** within the project!

Create your own user attribute based on the above scenario:

Remember the following – Naming convention
Class
Type

User Attributes - Scenario

Scenario

The new project code works great! The difficulty level for activities needs improvement, though. Too many users are entering different values and it is confusing all the PMs. Can we have 1 dropdown selection for difficulty levels between 1-5 and only ha 2 PMs be able to view and edit this attribute?

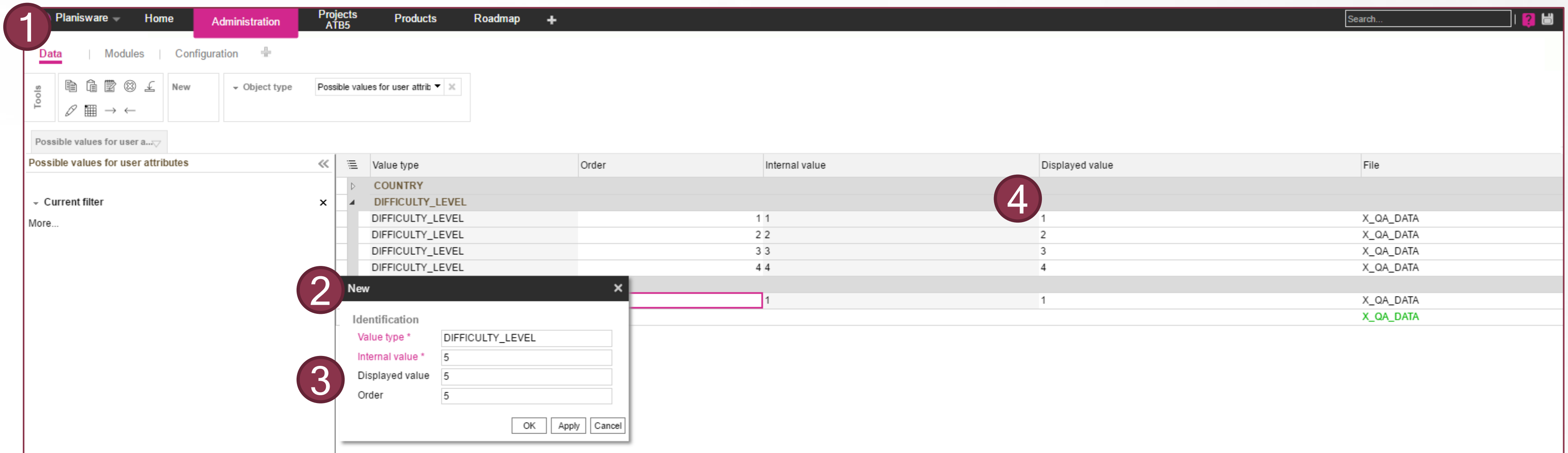
Analysis

How to break down the situation:

1 Using **Possible Attribute Values** will limit user input to a set of specified values. There are 2 ways of implementing this feature.

2 Setting the **restrict access** value of a user attribute lets admins control which users or which user groups can view the user attribute within the system

Possible attribute values table



1 Planisware has an OOB Administration Table that maintains lists of possible values. First go to the Administration Module -> Data Page and select Possible values for user attributes as the object type

2 Clicking on the “New” tool allows admins to create a new “Possible Value” entry. Value choices are grouped into **value types**.

3 Possible Value lines can have the following attributes defined:

Internal value	- The value stored in the database
Displayed Value	- The value displayed in a table or in reports
Order	- The order the possible value is displayed

4 All of the Possible values for Difficulty Level can be seen in the table

Planisware

Exercise

Create a dropdown list for your own user attribute:

- Go to administration -> Data and select ‘Possible values for user attributes’ object type
- Create three values:
  - Value type = XX_DIFFICULTY_LEVEL
  - Internal value = Low, Medium and High
  - Displayed value = Low, Medium and High

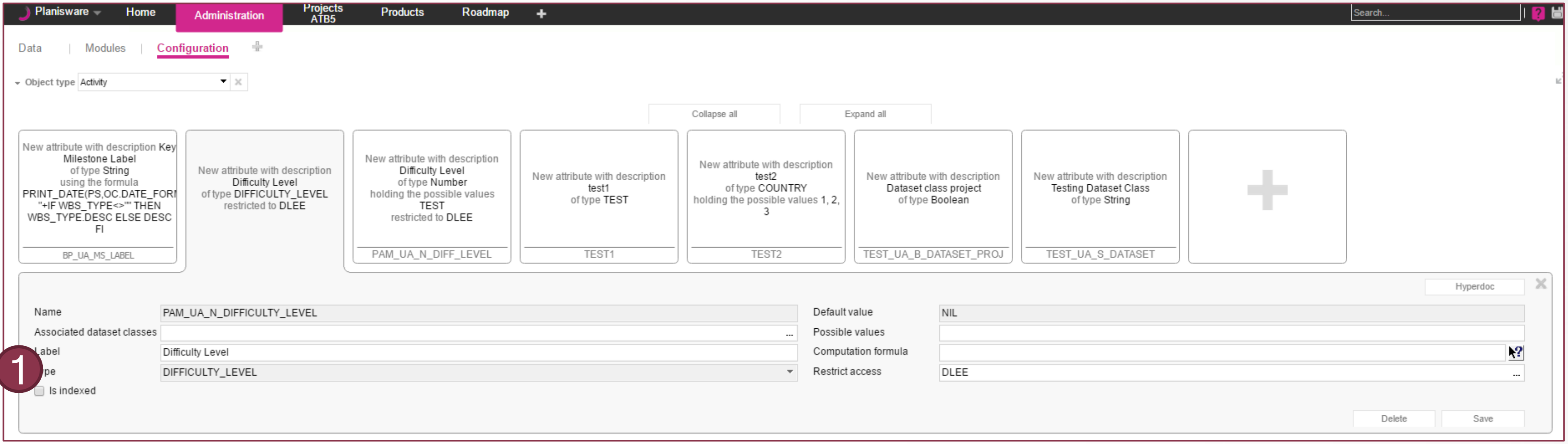
- Assign the possible values type to a new project user attribute:
  - Name = XX_UA_S_DIFFICULTY_LEVEL
  - Label = XX Difficulty level
  - Type = XX_DIFFICULTY_LEVEL

Test the attribute and possible values dropdown from the Project module

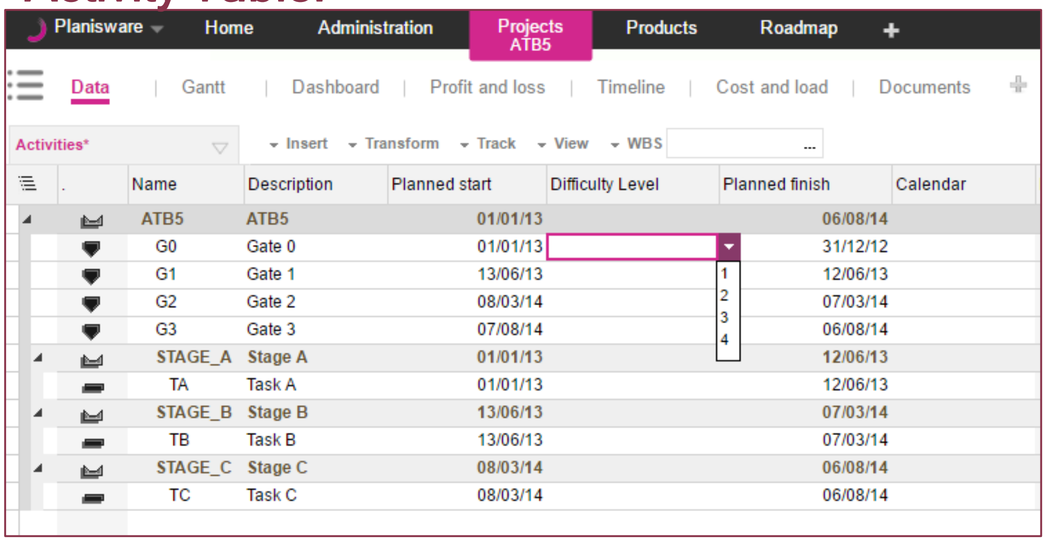
Planisware

User Attributes - Possible Values

Administration:



Activity Table:



1. A new user attribute's type can be set to an existing **value type**
2. The dropdown choices display all possible values of the value type in the right order

User Attributes - Relations

Scenario

Wow this is great! I can add a lot of different data types to our model now! What if we want to link two existing classes? We have a situation! We already associate resources with skills, but there is no relationship between activities and skills. To make things more complicated, some activities need to be associated to multiple skills!

User Attributes - Relations

Scenario

Wow this is great! I can add a lot of different data types to our model now! What if we want to link two existing classes? We have a situation! We already associate resources with skills, but there is no relationship between activities and skills. To make things more complicated, some activities need to be associated to multiple skills!

Analysis

When you need to add attributes that represent more than simple data types such as strings, numbers, and dates, but classes, this is called a **relation**. **Relational Attributes** define a relation between 1 object to another. If there is a need to map to multiple objects in a given attribute, this is called a **ring attribute.**

User Attributes - Relations

Scenario

1 Wow this is great! I can add a lot of different data types to our model now! What if we want to link two existing classes? We have a situation! We already associate resources with skills, but there is no relationship between **activities** and **skills**. To make things more complicated, some activities need to be associated 3 multiple skills!

Analysis

When you need to add attributes that represent more than simple data types such as strings, numbers, and dates, but classes, this is called a **relation**. **Relational Attributes** define a relation between 1 object to another. If there is a need to map to multiple objects in a given attribute, this is called a **ring attribute.**

How to break down the situation:

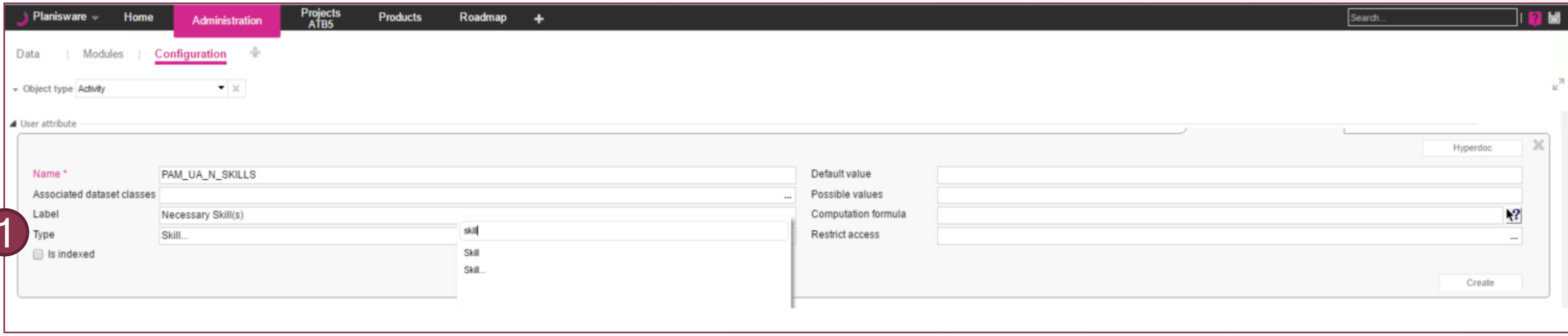
1 Determine which objects define the relation: activities and skills

2 Determine the relation direction. This will decide which object type should be configured: an **Activity** should list **skills** so the activity object should have an attribute to skills

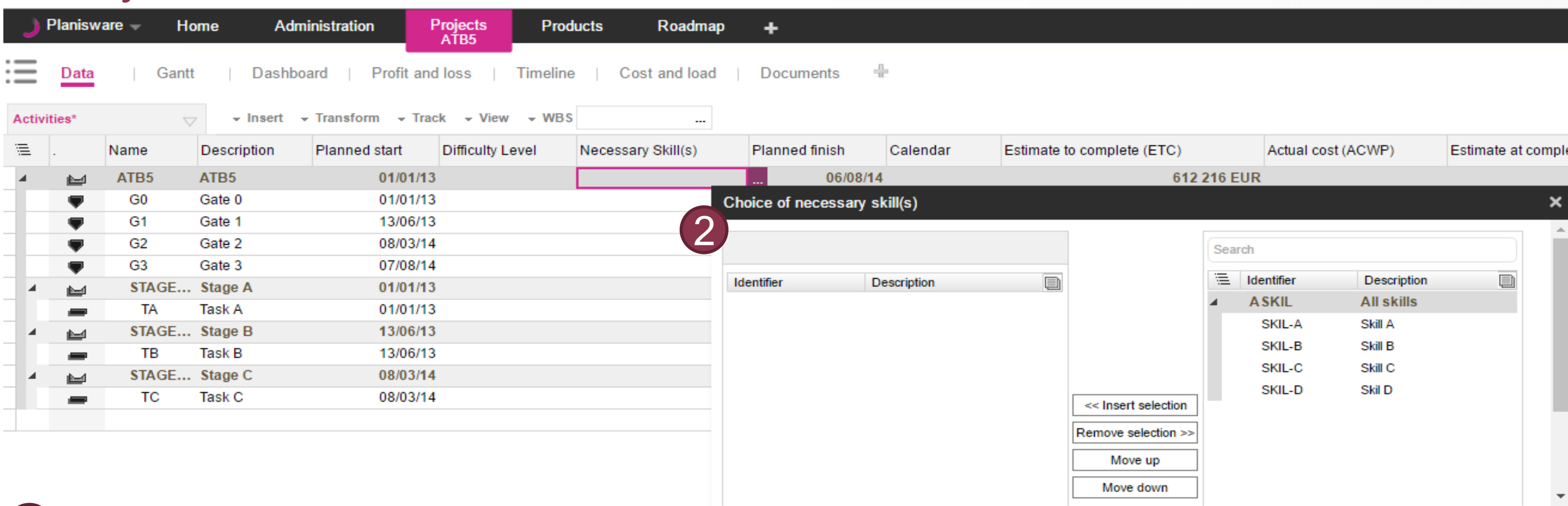
3 Determine if we need a **relation** or a **ring attribute : ring attribute**

User Attributes - Relations

Administration:



Activity Table:



1 The Type of an administration can be set to a different class. Note that classes might have the "…" after. The "…" determines if the relation should be a **ring attribute**

2 The choices display all possible values of the value type in the right order

Exercise

Scenario

We need to know the primary skill associated with an activity. Also we need to know all other skills that are associated with an activity. Can we extend the data model to meet this?

- Create the appropriate data model extensions
  - Name = XXX + ”UA_PRIMARY_SKILL”
  - Name = XXX + “UA_SKILLS”

    XXX = name of company + initials

Test the attribute and possible values dropdown from the Project module

User Attributes – Named Formulas

Scenario

Its nice to know that we can extend our data model to include everything from simple data to all types of relational data! What if we need to perform some calculations? We want to have a simple project prioritization based on multiplying a project’s Difficulty level, Importance, Cost, and Leverage

User Attributes – Named Formulas

Scenario

Its nice to know that we can extend our data model to include everything from simple data to all types of relational data! What if we need to perform some calculations? We want to have a sim 1 **project** prioritization based on multiplying a project 2 **Difficulty level, Importance, Cost, and Leverage** 3

Analysis

Named formulas can be used to perform a wide range of calculations and data transformations. The things to look for in a named formula are

Class: Project

Type : Since we are multiplying several digits we expect our type to be a number

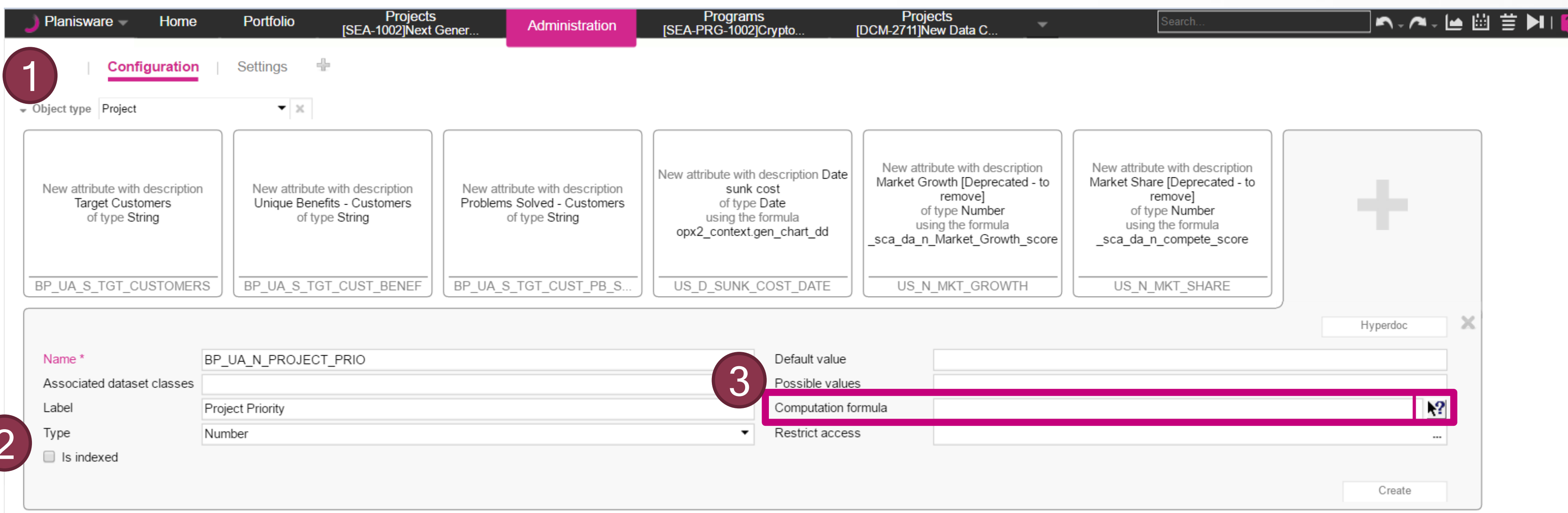
Evaluation Formula: We will be multiplying the values of Difficulty Level, Importance, Cost, and Leverage

.

Note: Named Formulas can perform a wide variety of calculations that are out of scope of this class. If you would like to learn more, please inform the trainer asking about in depth training on formulas and what they can do

Data model extension: named formula

1. Select the Object Class of the Named Formula
2. Select the name, Label, and return Type of the Named Formula
3. Click on the icon next to the computation formula to open up the formula builder form



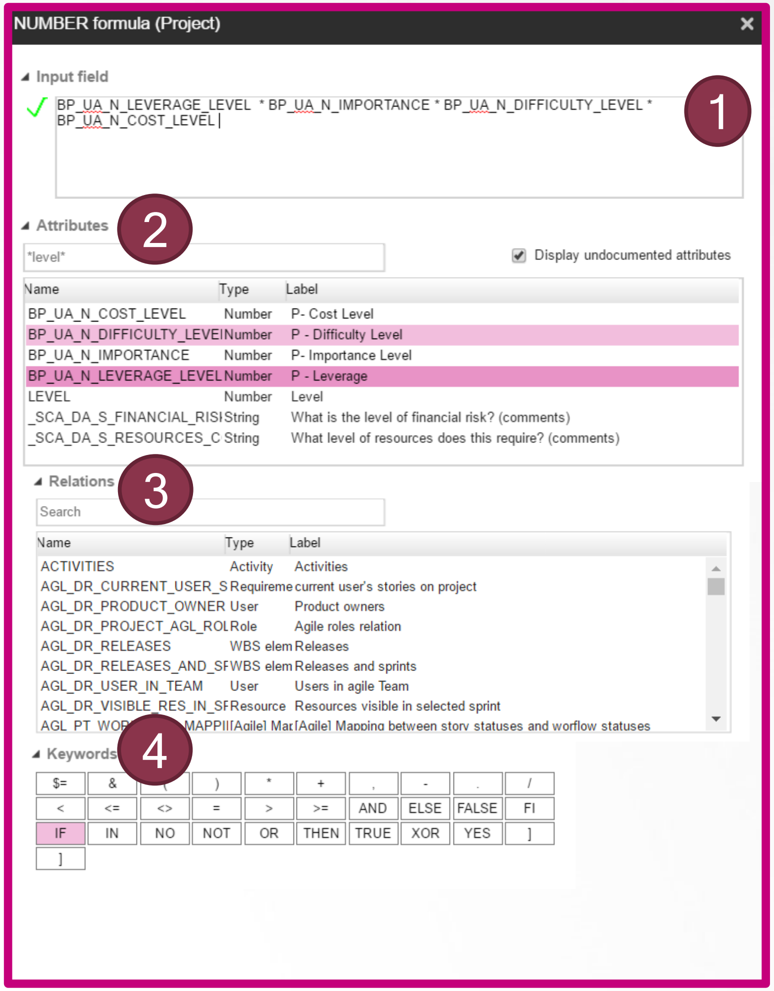
Data model extension: named formula

1 The Input field specifies the actual named Formula calculation

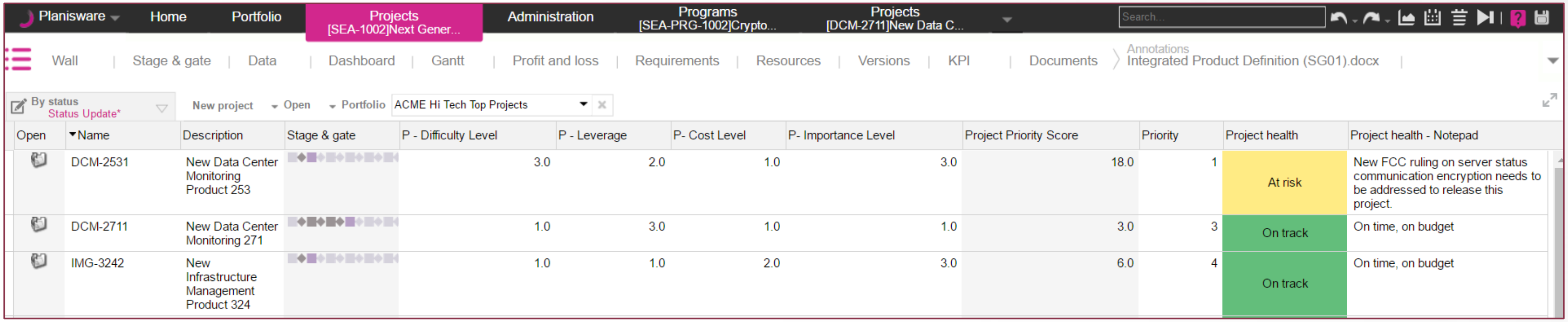
2 Use the attributes section to search for all attributes available on your selected class. Note that is is best practice to use the search feature

3 Use the relations section to search for all other classes the current class is connected to

4 The keywords section lists available syntax offered by Named Formulas



Data model extension: named formula



Open	Name	Description	Stage & gate	P - Difficulty Level	P - Leverage	P- Cost Level	P- Importance Level	Project Priority Score	Priority	Project health	Project health - Notepad
	DCM-2531	New Data Center Monitoring Product 253		3.0	2.0	1.0	3.0	18.0	1	At risk	New FCC ruling on server status communication encryption needs to be addressed to release this project.
	DCM-2711	New Data Center Monitoring 271		1.0	3.0	1.0	1.0	3.0	3	On track	On time, on budget
	IMG-3242	New Infrastructure Management Product 324		1.0	1.0	2.0	3.0	6.0	4	On track	On time, on budget

Exercise

Create a new user attribute and use a named formula to calculate its value:

- Name = XX_UA_S_DIFFICULTY_FACTOR
- Label = XX Difficulty factor
- Type = XX_DIFFICULTY_LEVEL
- Computation formula =

IF XX_DIFFICULTY_LEVEL = "Low" THEN 1 ELSE IF XX_DIFFICULTY_LEVEL = "Medium" THEN 2 ELSE 3 FI FI

Test the attribute and possible values dropdown from the Project module

Planisware

Demo

name formula common tasks

- equality
- non equality <>

- concat string (+)
- .
- from("")
- AND , OR
- >, <
- DATE_OF_THE_DAY
- using the relations part of the builder

User Attributes - Hyperdoc

Scenario

Our Data Model is expanding so much! How are end users expected to know details about each of our attributes? Is there any way to help guide and teach end user about user attributes we create? Lets take the last Project Priority Score for example. Can we explain to end users how it is calculated?

User Attributes - Hyperdoc

Scenario

Our Data Model is expanding so much! How are end users expected to know details about each of our attributes? Is there any way to help guide and teach end user about user attributes we create? Lets take the last 1 **Project Priority** Score for example. 2 **Can we explain to end users how it is calculated**?

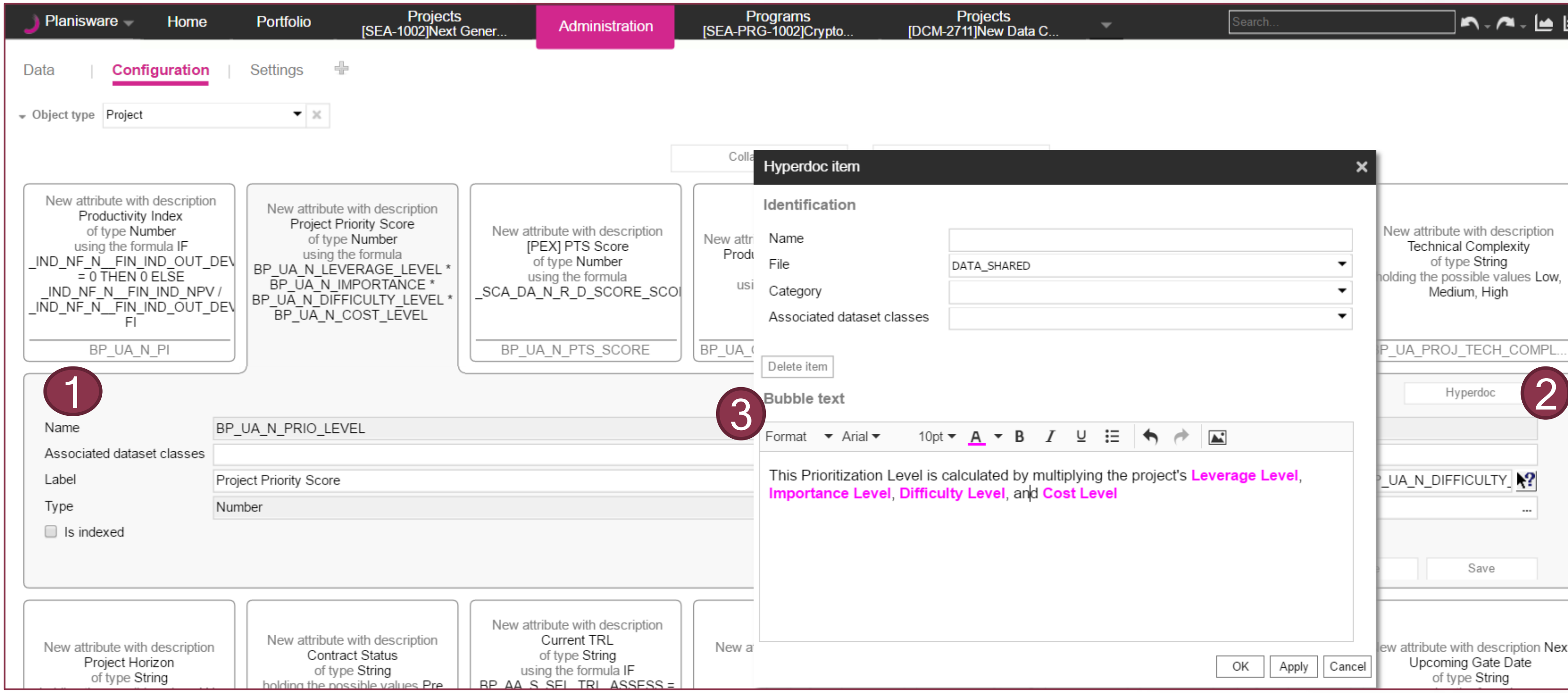
Analysis

Hyperdoc is a new feature within Planisware to allow admins help end users know more about their data. This new feature allows end users hover over attributes to get more insight on attributes as determined by the system admin.

First you need to know:

1. The Attribute you wish to document
2. What information you want to convey

Data model markup - Hyperdoc

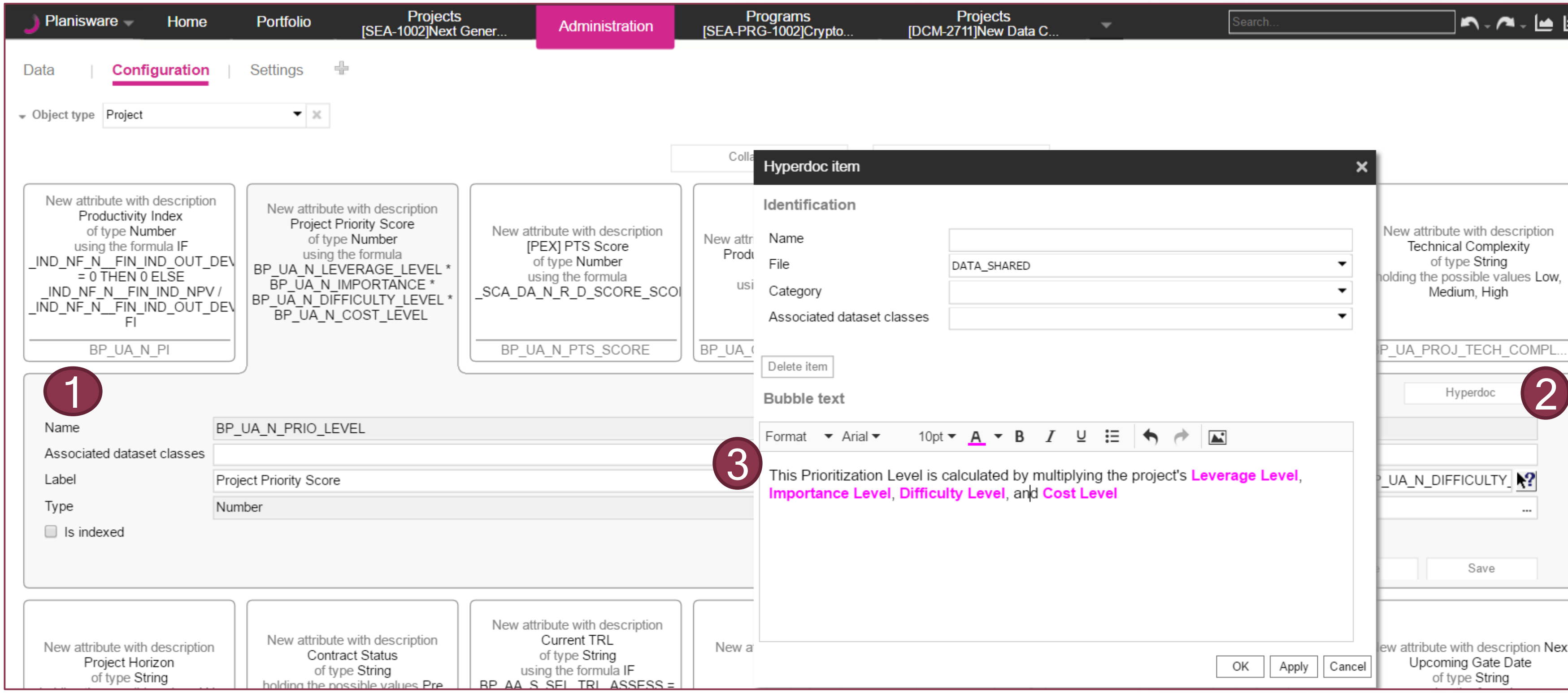


1 Find the attribute you wish to document

2 Click on the Hyperdoc button associated to the attribute

3 Add in the bubble text any rich text information you would like to convey to end users

Data model markup - Hyperdoc

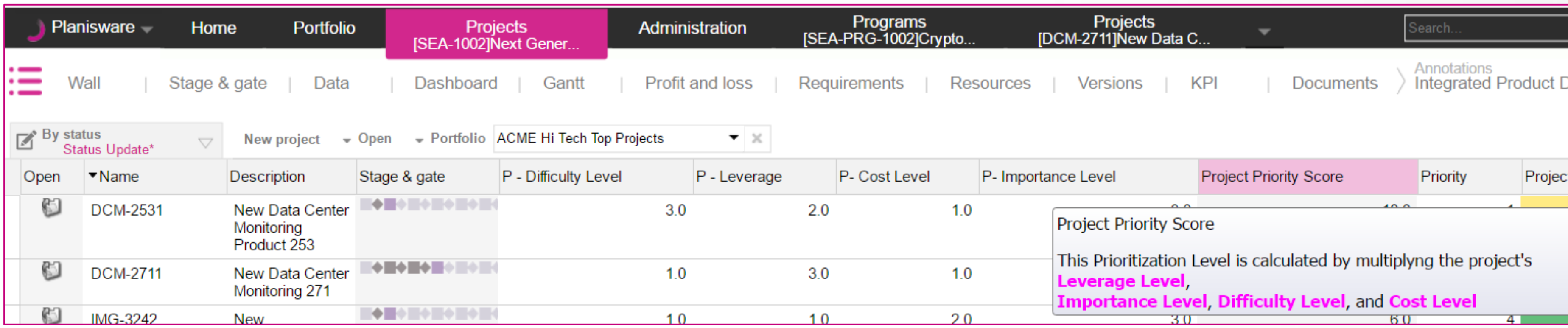


1 Find the attribute you wish to document

2 Click on the Hyperdoc button associated to the attribute

3 Add in the bubble text any rich text information you would like to convey to end users

Hyperdoc


Planisware
Home
Portfolio
Projects
[SEA-1002]Next Gener...
Administration
Programs
[SEA-PRG-1002]Crypto...
Projects
[DCM-2711]New Data C...
Search...
Wall
Stage & gate
Data
Dashboard
Gantt
Profit and loss
Requirements
Resources
Versions
KPI
Documents
Annotations
Integrated Product De
By status
Status Update*
New project
Open
Portfolio
ACME Hi Tech Top Projects
Open
Name
Description
Stage & gate
P - Difficulty Level
P - Leverage
P- Cost Level
P- Importance Level
Project Priority Score
Priority
DCM-2531
New Data Center Monitoring Product 253
3.0
2.0
1.0
DCM-2711
New Data Center Monitoring 271
1.0
3.0
1.0
IMG-3242
New
1.0
1.0
2.0
Project Priority Score
This Prioritization Level is calculated by multiplyng the project's
Leverage Level,
Importance Level, Difficulty Level, and Cost Level

Attribute Settings

Scenario

Can we have more control over attributes? For example we do not want end users to be able to add sales information to their project tables. Also, our European counterparts are fed up with seeing some European milestone dates in the American Format. Lastly, we need to be able to set default values. For example a project's default description should be "Please fill me out" so users do not forget to provide a description

Analysis

Attribute Settings

Scenario

Can we have more control over attributes? For example we do not want end users to be able to ad 1 **sales** information to their project tables. Also, our European counterparts are fed up with seeing som 1 **European Start** dates in the American Format. Lastly, we need to be able to set default values. For example a project's defau 1 **description** should be "Please fill me out" so users do not forget to provide a description

Analysis

Attribute Settings allow admins to hide attributes from table insertion, set default formats, and set default values.

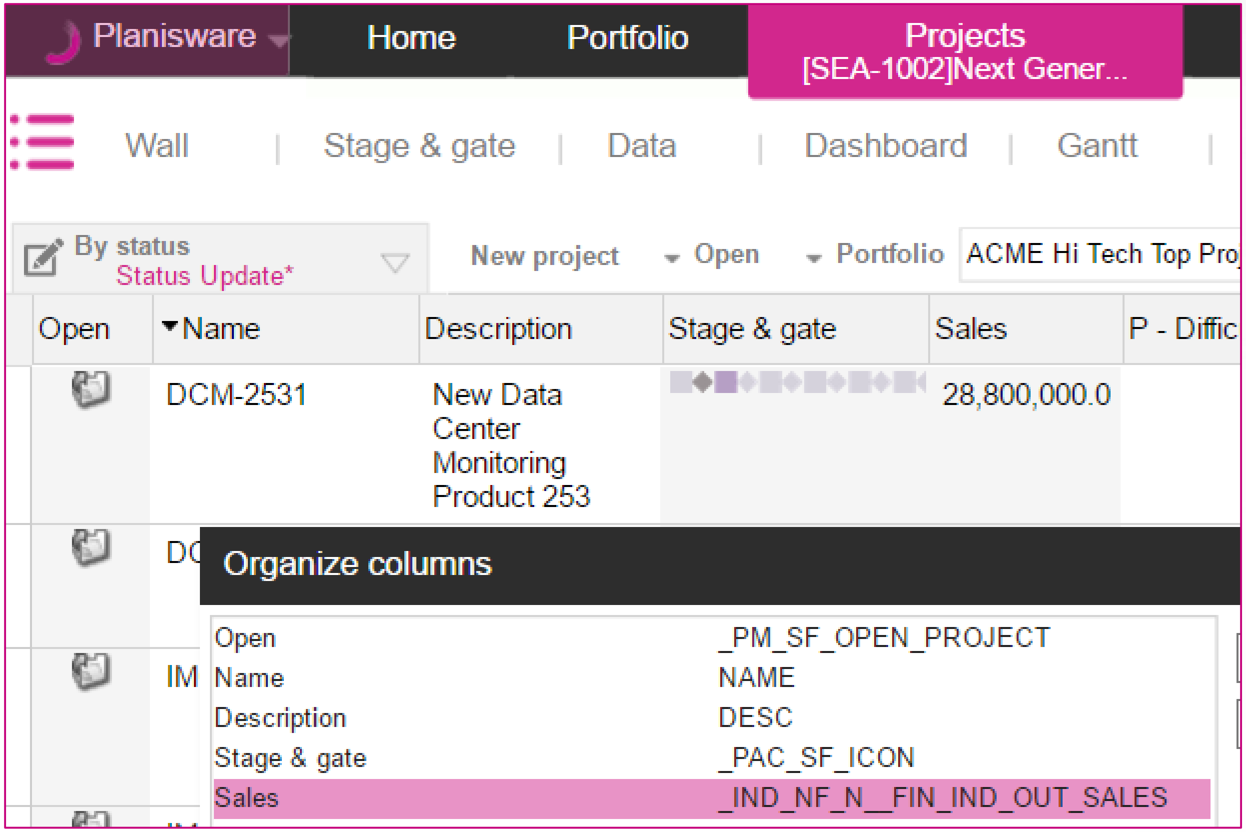
For this configuration an admin needs to know:

1 The Attributes they wish to control : Sales, European Start, Description

2 Control Definitions:

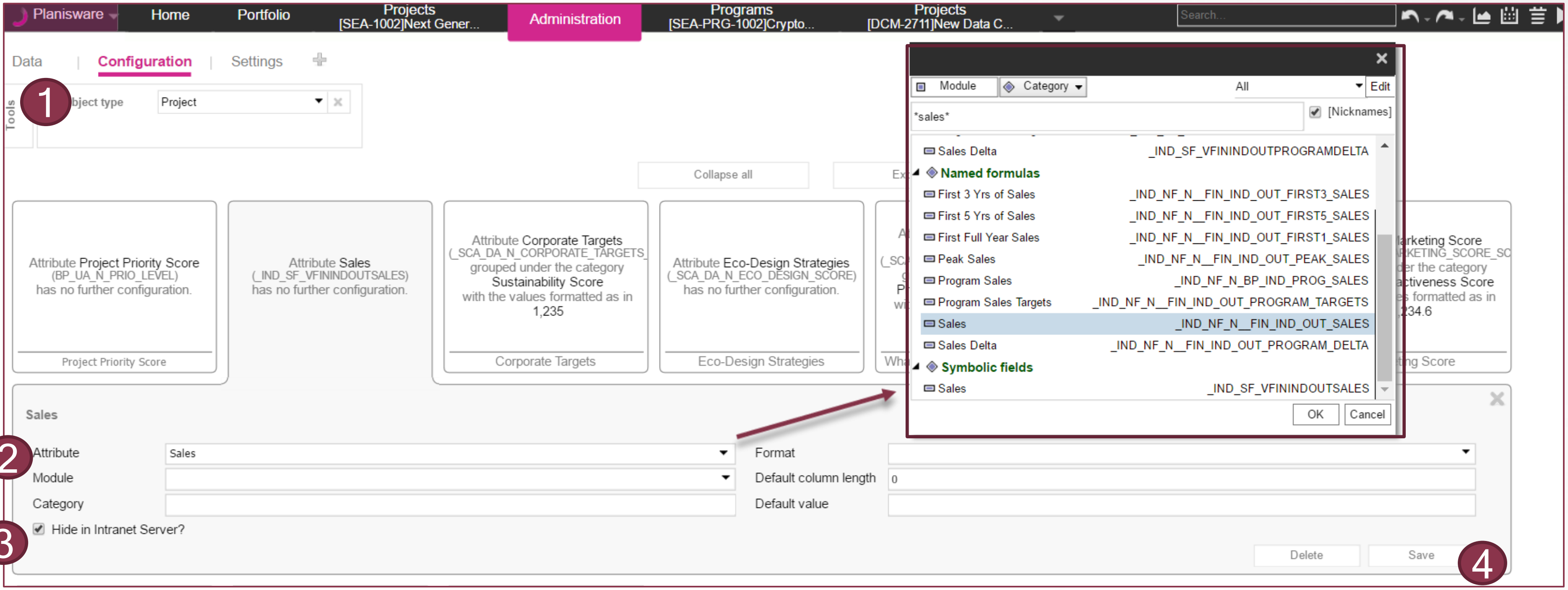
- Sales – Should be hidden
- European Start - Should be in format DD-MM-YYYY
- Project Description – Should default to "Please fill me out"

Attribute Settings - Hiding in Intranet Server



1. Find the attribute on which you want to limit information. It will help to take note of the internal nickname

Attribute Settings

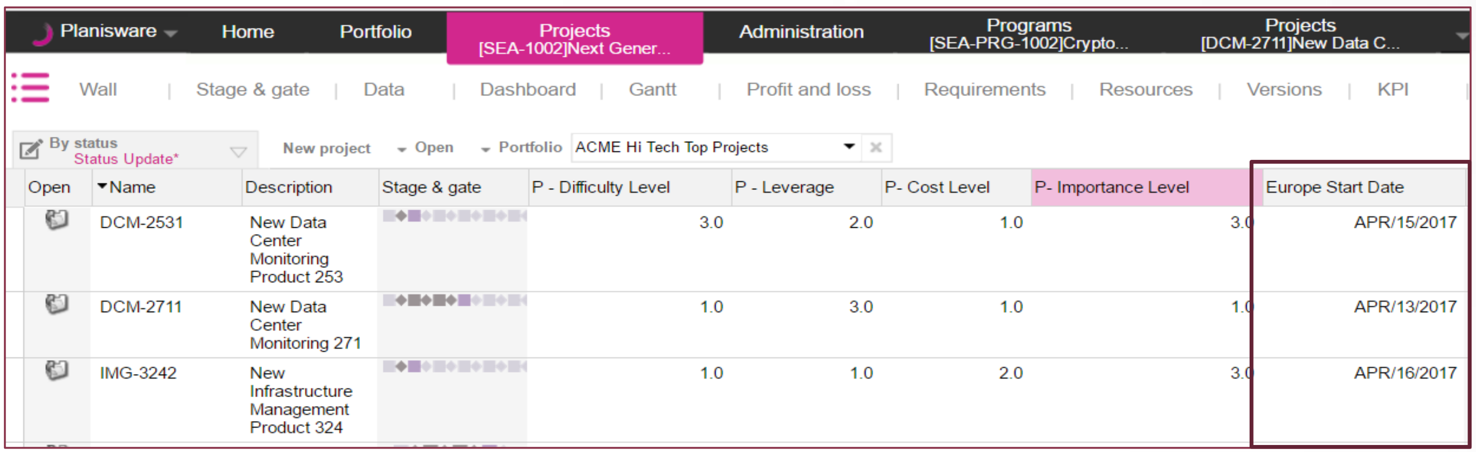


1. Select the correct class of the attribute you wish to limit
2. Find the exact Attribute for the attribute setting using the nickname
3. Mark hide in intranet Server
4. After clicking Save, this attribute will no longer be available for insertion, however if the attribute is already on a table, this flag will not remove the attribute from the style

Exercise

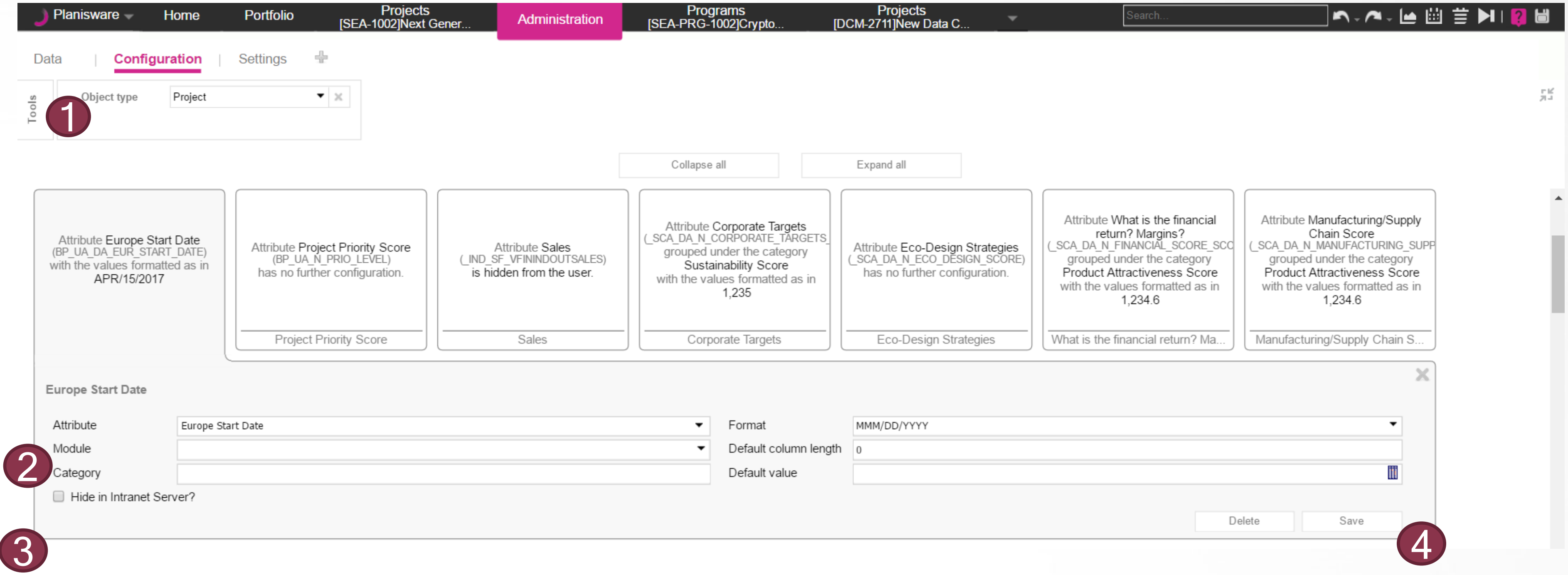
1. Choose a user attribute you created
2. Verify that you can insert the attribute to a table
3. If the attribute it on the table, remove the attribute from the table
4. Hide the attribute
5. Verify that the attribute is no longer available for selection

Attribute Settings - Default Date Format



1. Find the attribute on which you want to limit information. It will help to take note of the internal nickname

Attribute Settings



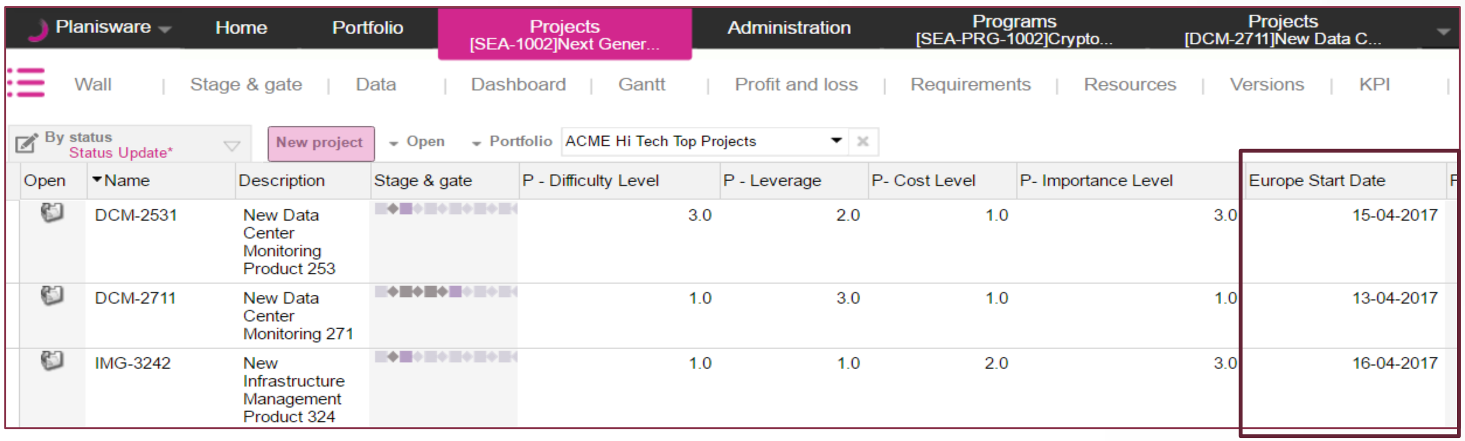
1 Select the correct class of the attribute you wish to limit

2 Find the exact Attribute for the attribute setting using the nickname

3 Set the Format (this picklist is dynamic based on the type of attribute)

4 After clicking Save, this attribute will by default display in the attribute setting format

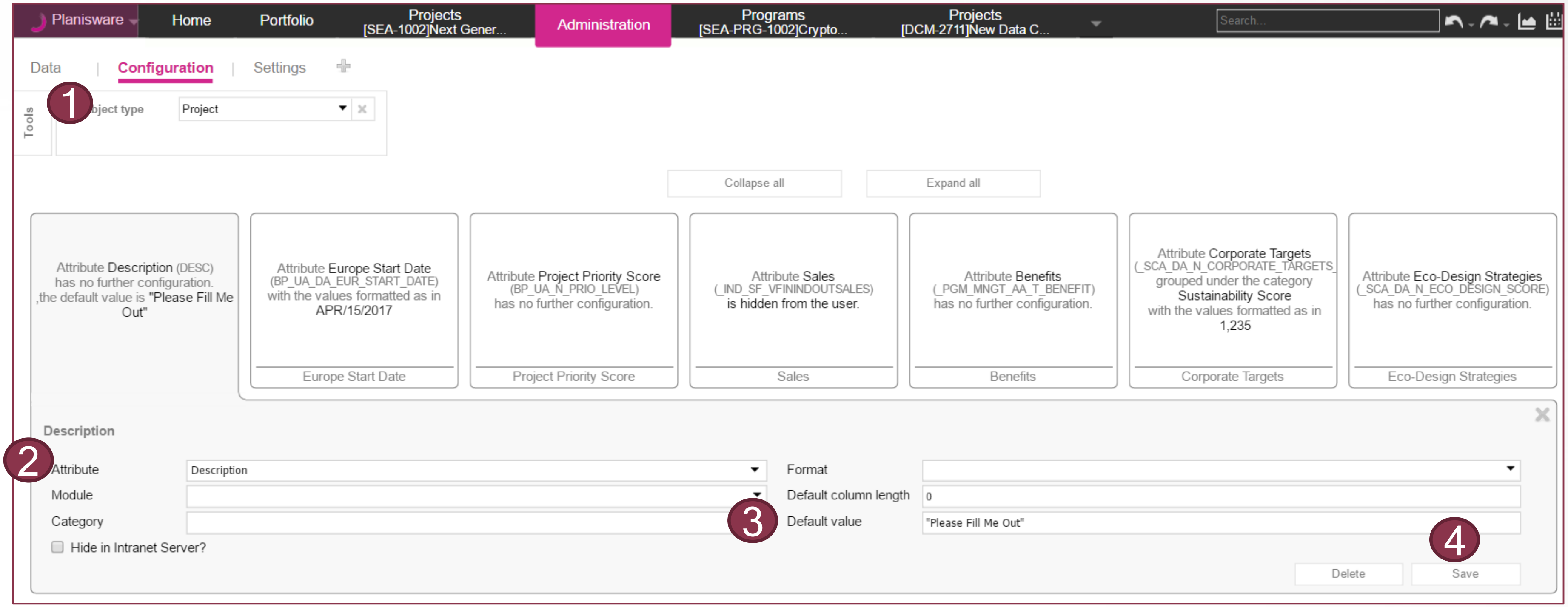
Attribute Settings - Default Date Format



Exercise

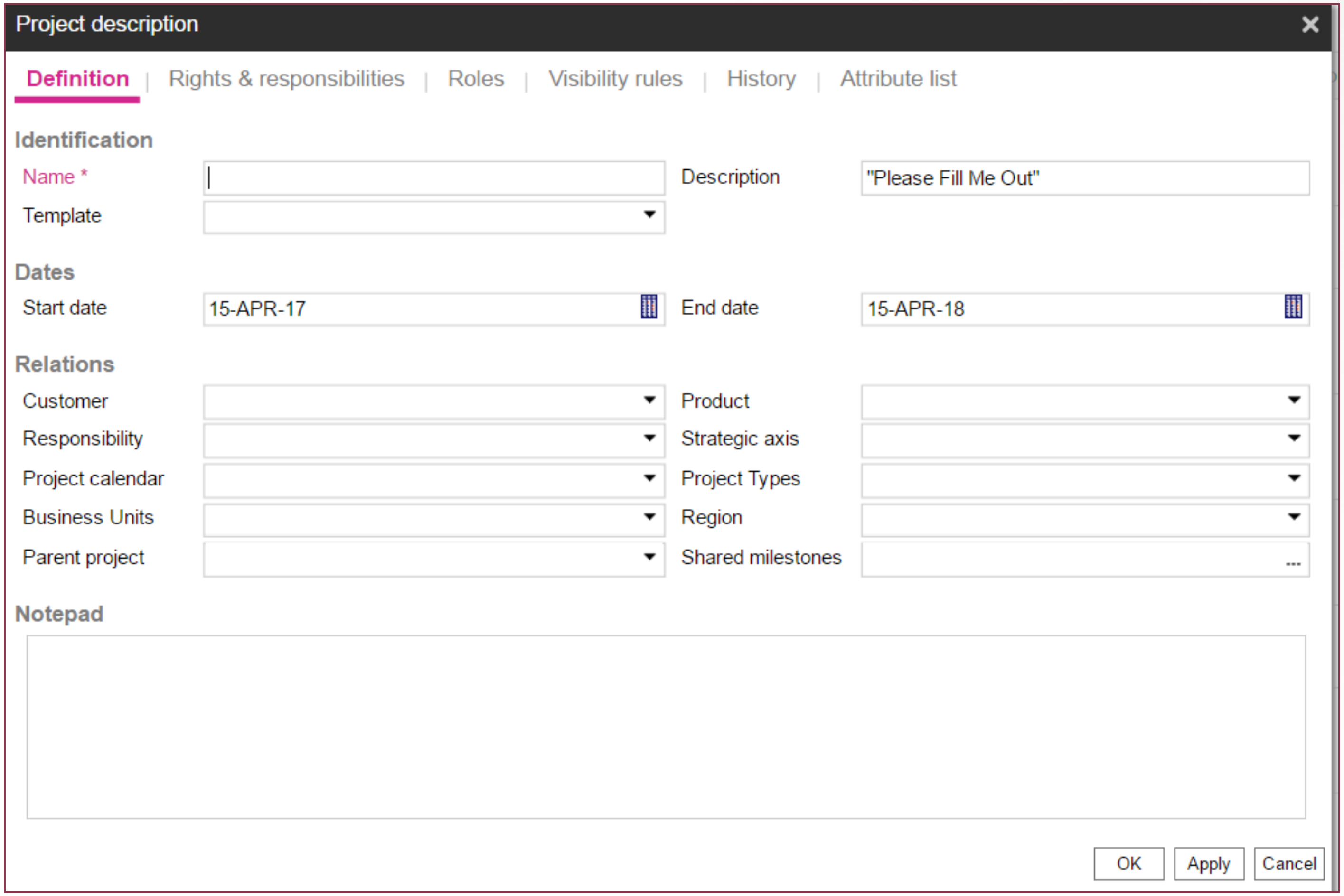
1. Create a new Date Type User attribute on Project
2. Set the default Date format of this attribute to “MM-DD-YYYY”
3. Verify that the Date format is enforced

Attribute Settings



1 Select the correct class of the attribute you wish to limit
2 Find the exact Attribute for the attribute setting using the nickname
3 Set the Default Value
4 After clicking Save, this attribute will by default display in the attribute setting format

Attribute Settings - Default Value on Project Creation Popup



Exercise

1. Create a new String User Attribute with a default value of “Please change me” on class activity
2. Create a new activity on a project
3. Verify the default value of the new attribute

Meet Pam, the Head of Project Management

User Attributes

Our data model and KPIs are always changing! We need a system that is as robust as our organization!

Named Formulas

I want the system to perform simple calculations so I do NOT have to!

Hyperdoc

There are so many attributes to keep track of, and we need end users to understand the purpose of each one!

Attribute Settings

We need more control over extending our data model!

Questions

Planisware

Get innovation to market

Level 1 Configuration - Usability

Agenda (10:30am – 12:00pm)

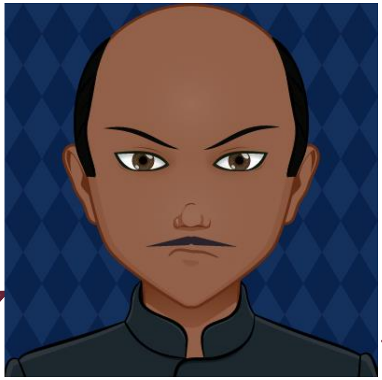
- Color Management
- Image Management
- Indicators
- Attribute Chooser Style
- Working Lunch (noon-1pm)
- Styles
- Text Keys
- Toolbar Editor
- E-learning

Meet your Usability Lead

Meet Ajay, the Head of Usability

With so much data coming in, we need to make it more presentable and meaningful!

We need thorough methods to highlight important information!



The number of attributes is overwhelming and I don't want to see them all the time!

We need to make it easier for our users to navigate the application!

Color management- Scenario

Scenario

Our company likes to color code specific activities. Is there a way to categorize activities visually, so that some **activity types** that have the **description** "Testing" can stand out in the **Gantt chart**?

Color management- Scenario

Scenario

Our company likes to color code specific activities. Is there a way to categorize activities visually, so that some **activity types** (1) that have the (2) **description** “Testing” can stand out in the **Gantt chart**?

Analysis

Leverage color management to set specific graphical properties on Gantt elements that apply to all projects.

How to break down the situation:

1. Break down activity types and choose a color or symbol to represent them
2. Create a new color rule with an icon or symbol and color that can be viewed on the Gantt screen

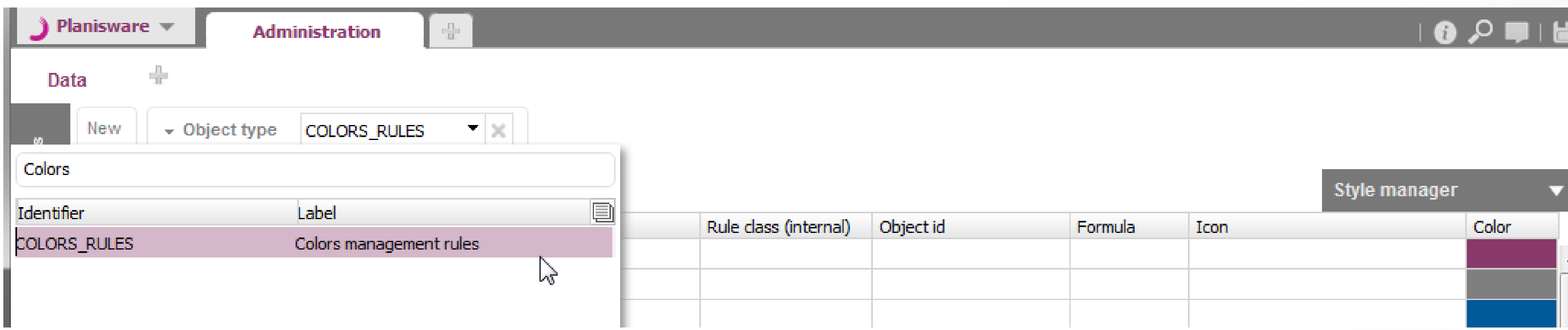
Color Management

Creating new colors rules

Colors in Gantt rendering

Creating new colors rules

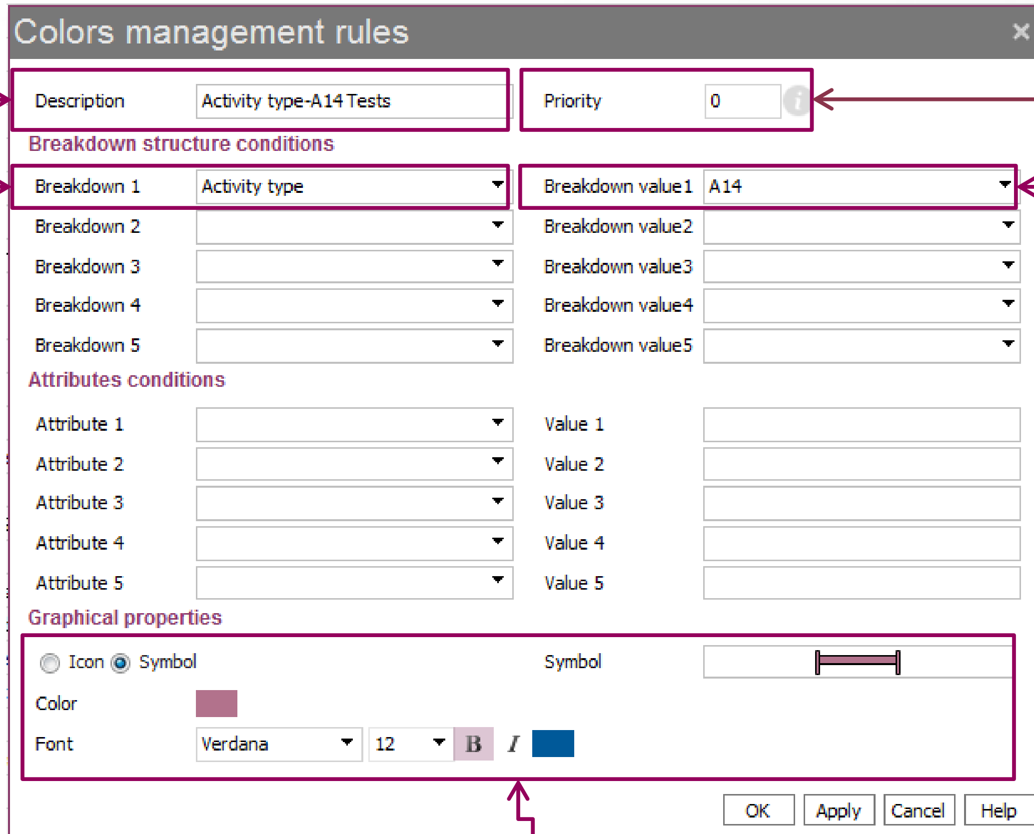
- To create a new color rule navigate to the **Administration > Data** page.
- In the **Object type** field select **Colors rules** to display the Colors management rules table.
- Click the **New** button to display the **Colors management rules** creation dialog.



Creating new colors rules

1. Enter a **Description**.
Name is automatically created and corresponds to the object **ONB.**

2. The rule with the lowest **priority** will be applied first.



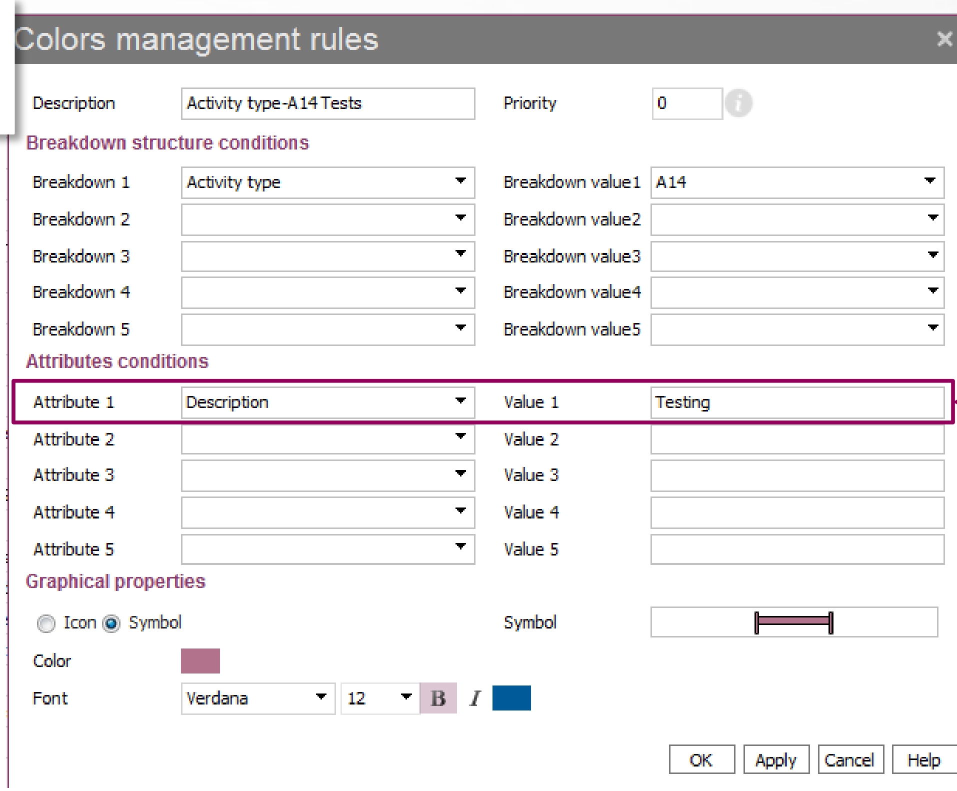
3. Select the **Breakdown structure** on which you want to apply the rule.
Here, the rule will be applied on an activity type.

4. Select the **Breakdown structure value** on which you want to apply the rule (e.g. activity type A14)

5. Select a **Shape** and a **Color** for the element of the Gantt representing this activity.
The defined **Font** will be applied in the table.

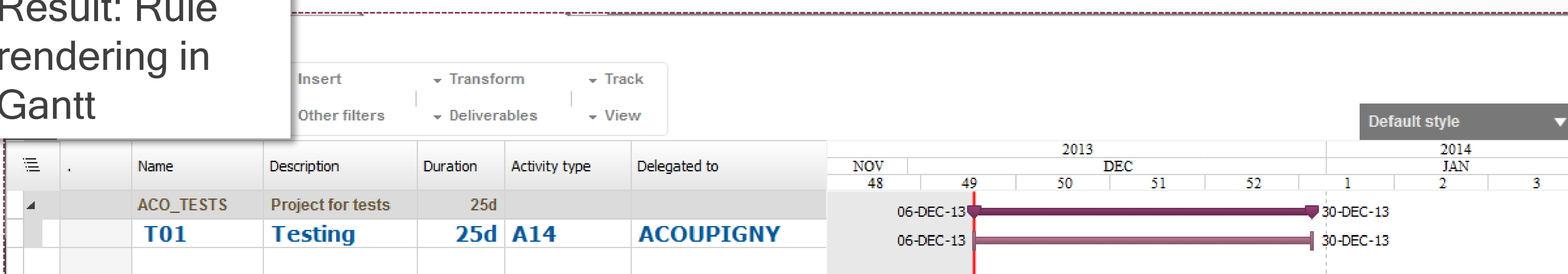
View in Gantt

Rule definition
Ex. With symbol



The rule is only applied on activity of **type** A14 which **Description** is Testing.

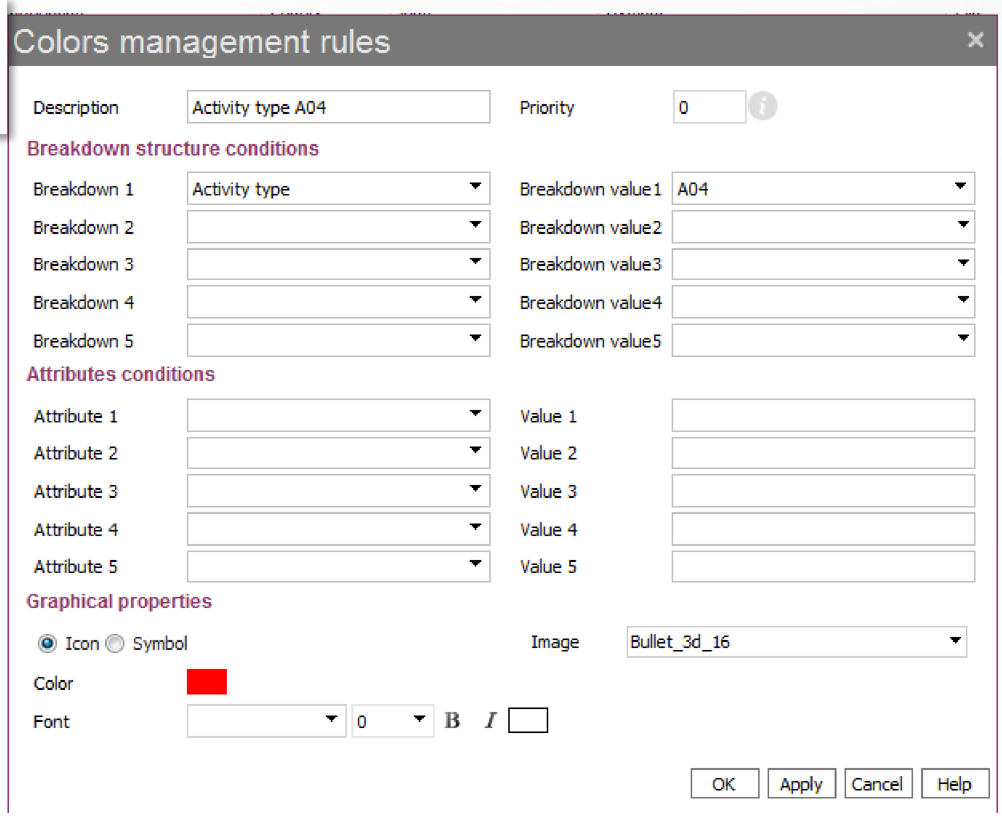
Result: Rule rendering in Gantt



Planisware

View in Gantt

Rule definition
Ex. with Icon



The rule is only applied on activity of **type** A04.

Rule rendering in Gantt

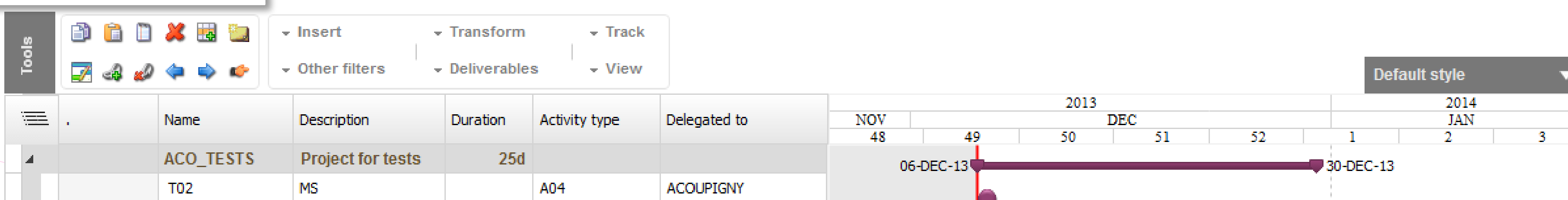


Image management - Scenario

Scenario

While the colors are working great for the activities, is there a way to add more visual elements on the list of projects or even **status reports**? Can we include more meaningful **symbols** for projects displaying **project health** to show projects meeting targets and those that need attention (i.e. comparing EAC vs. BAC values)?

Image management - Scenario

Scenario

While the colors are working great for the activities, is there a way to add more visual elements on the list of projects or even **status reports**? Can we display more meaningful **symbols** for **project health** to show projects meeting targets and those that are not in the right direction (i.e. comparing EAC vs. BAC values)?

Analysis

Utilize new image management features to add a column on the Projects table.

How to break down the situation:

1. Import images into the image bank
2. Add a new symbolic field "Project Health" using these images
3. Display status reports for each project

Image bank

- Go **to Administration > Data** > Image bank to import images
- These images can be used in symbolic fields or status reports

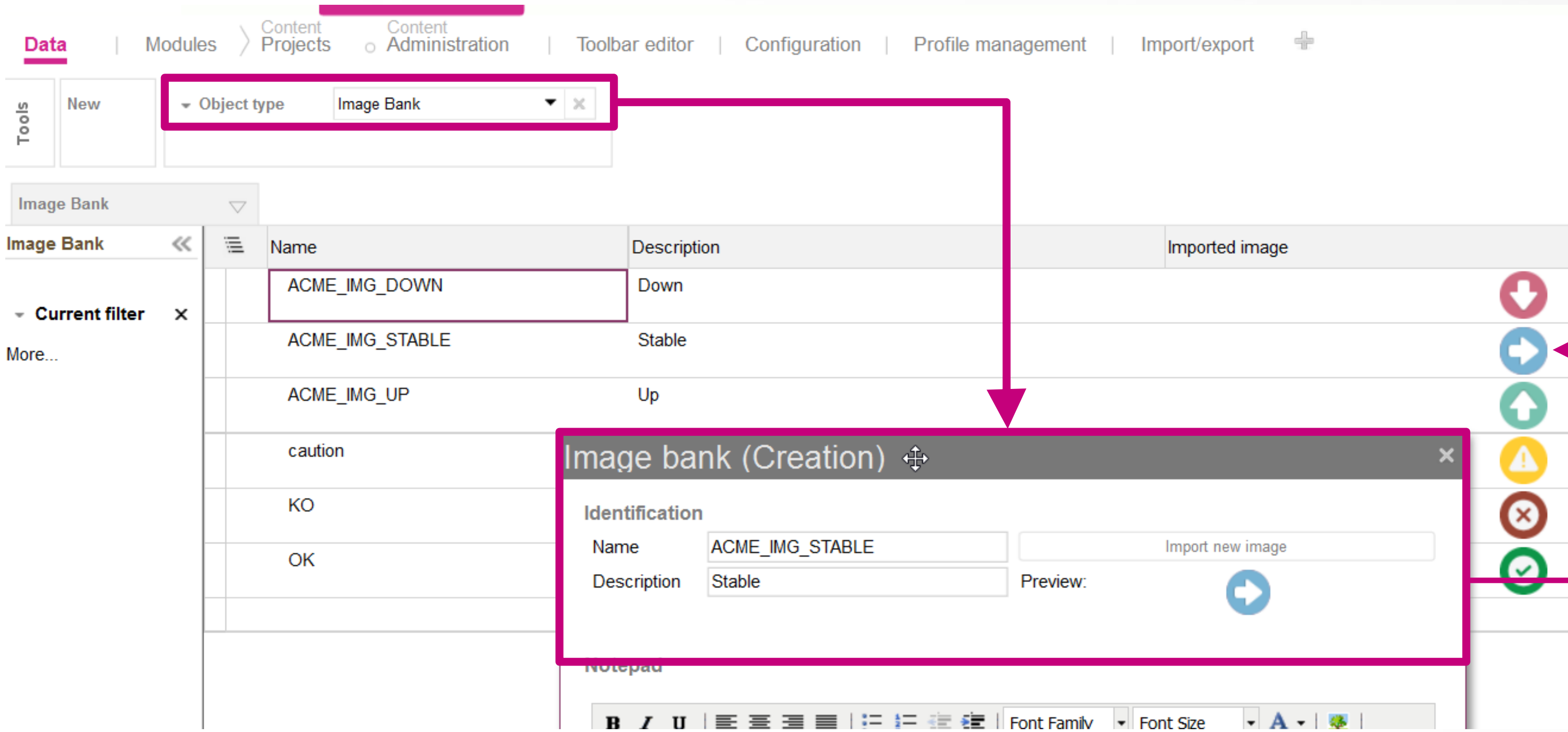
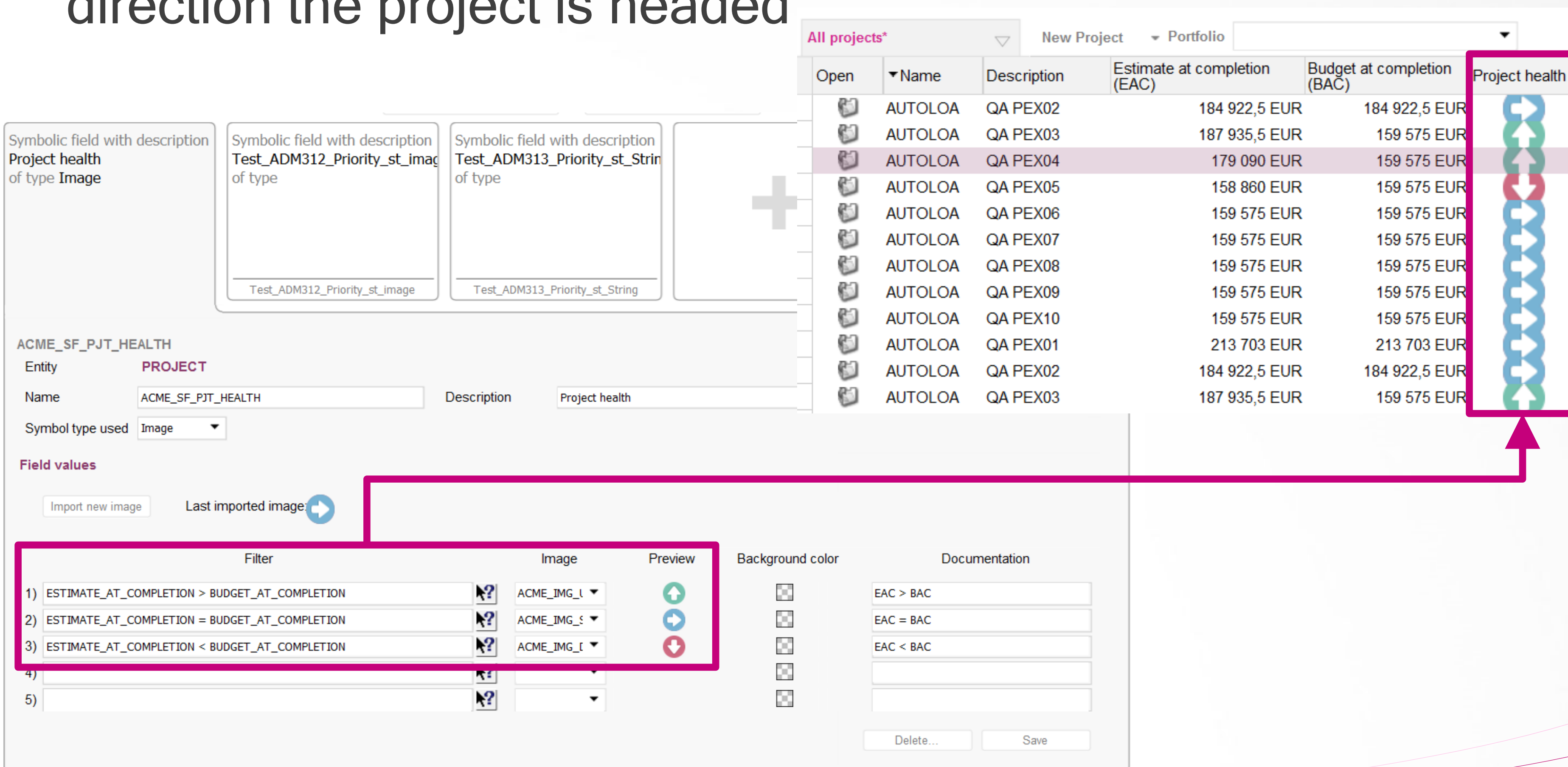


Image size should preferably be 32 x 32

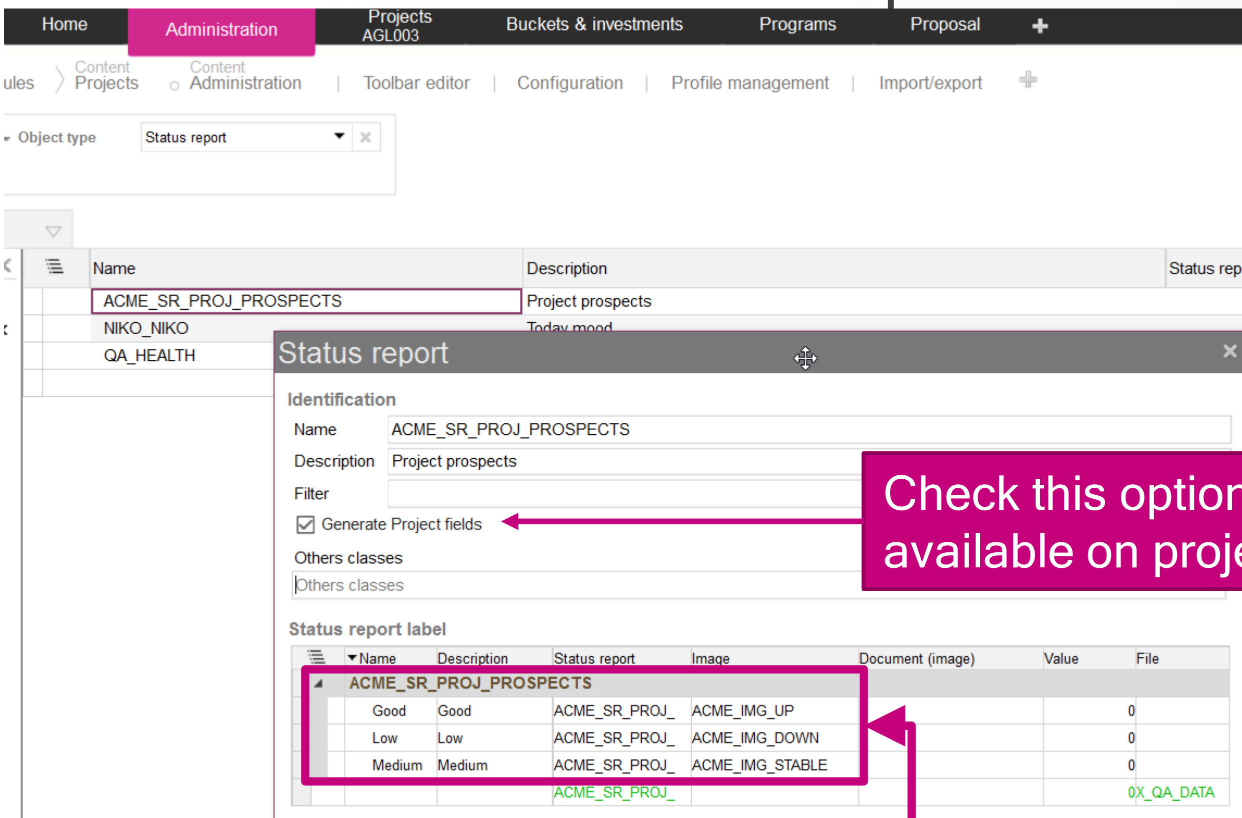
Symbolic fields

- You can create symbolic fields and insert them in tables
- Choose arrows to represent project health to indicate which direction the project is headed



Status report

- Can also use the images from the image bank on status reports
- Go to Administration > Data > Status report

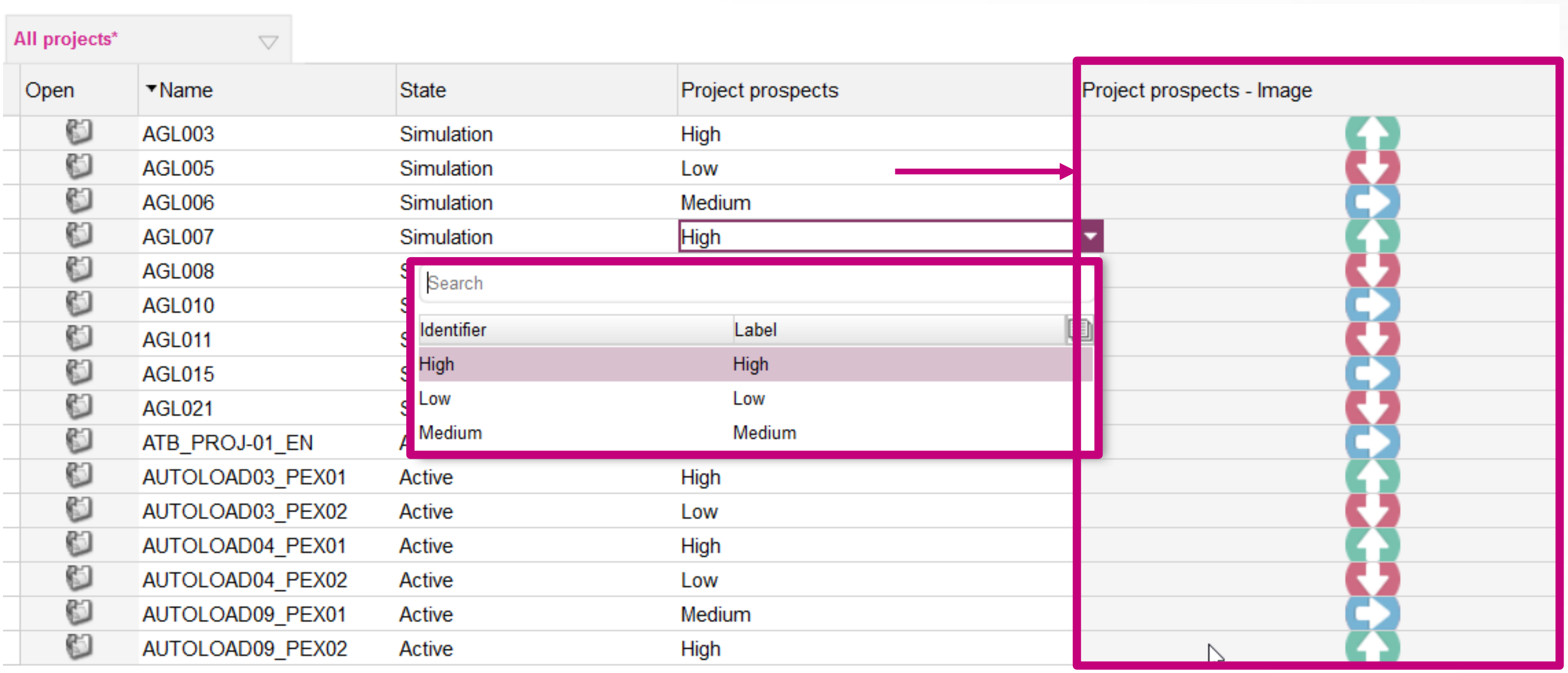


Check this option to make fields available on projects

Create a status report, define possible values and link images

Status reports

- 2 fields are generated for each status report: one entry field, one display field
- Pick a value in the list, the image is updated accordingly



Indicators - Scenario

Scenario

For visual purposes, the image management works perfectly! I would, however, like to see more **quantitative metrics** (ie. Net Present Value, Payback Period etc) – either using the ones defined by Planisware or by creating **custom** ones.

Indicators - Scenario

Scenario

For visual purposes, the image management works perfectly! I would, however, like to see more **quantitative metrics** (ie. Net Present Value, Payback Period etc) – either using the ones defined by Planisware or by creating **custom** ones.

Analysis

Manage indicators to view cost metrics at a glance on the dashboard.

How to break down the situation:

1. Planisware delivers with a set of predefined indicators based on frequently used metrics.
2. Using the pre-defined indicators, you may create new custom indicators.

Planisware

Indicators

Introduction

Classic indicators

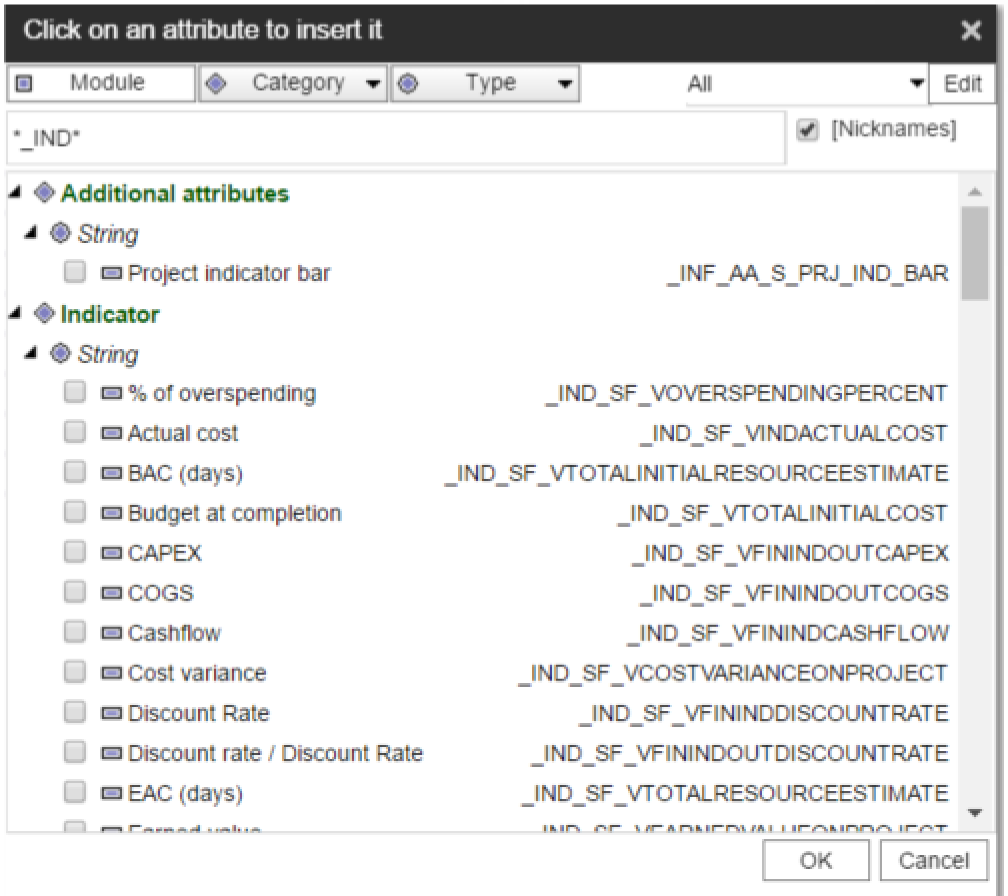
Managing indicators

Introduction

- 3 main types of indicators are delivered by default when restoring a Planisware Processes dpe:
  - A set of classic indicators based on popular metrics
    - All those indicators are delivered within an indicator bar
  - A set of indicators generated during the start of the intranet and based on a limited list of financial KPI
    - When a new P&L equation recall an output linked to those KPI it is automatically linked to those indicators
  - A set of indicators generated during the start of the intranet and based on profit and loss outputs
    - All equations of the profit and loss with an output automatically trigger the creation of an indicator

Classic Indicators

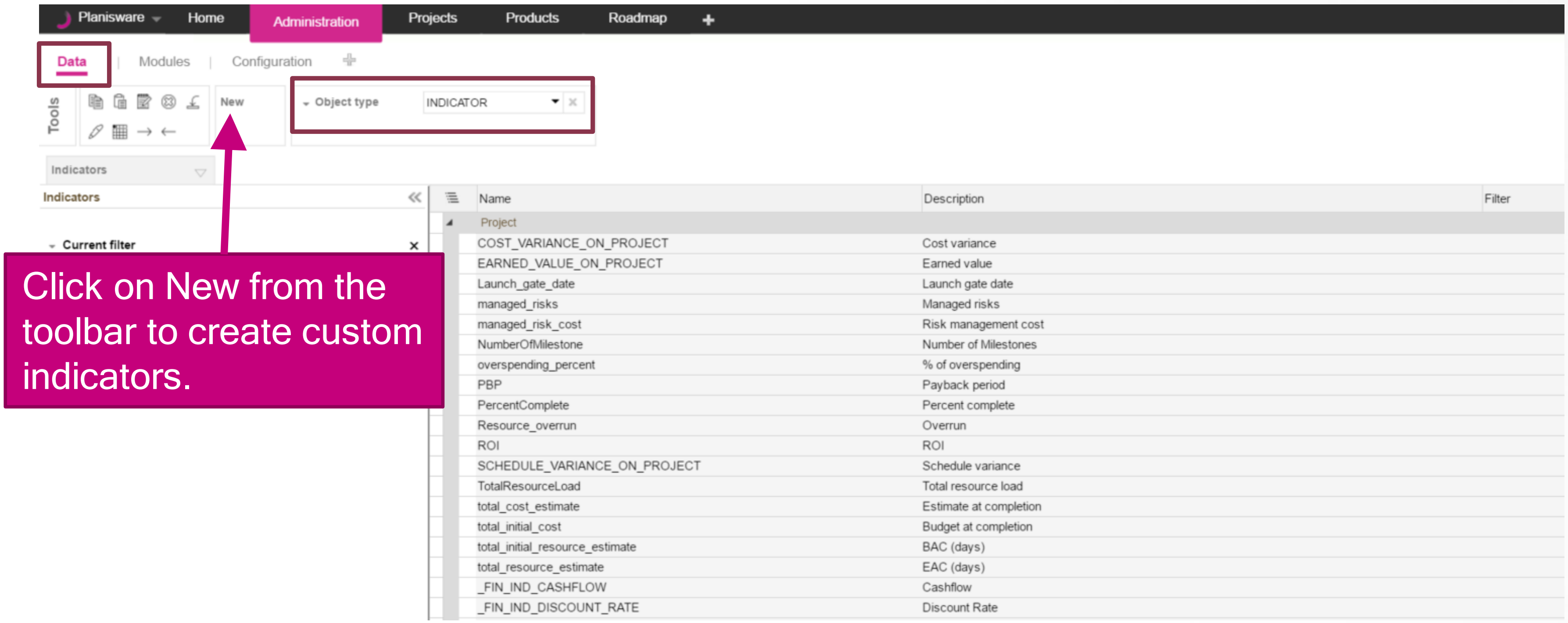
- Classic indicators may be found on the project level with the keyword in the technical name "_IND".



- These may include budget at completion, discount rate, net present value, payback period, total investment etc

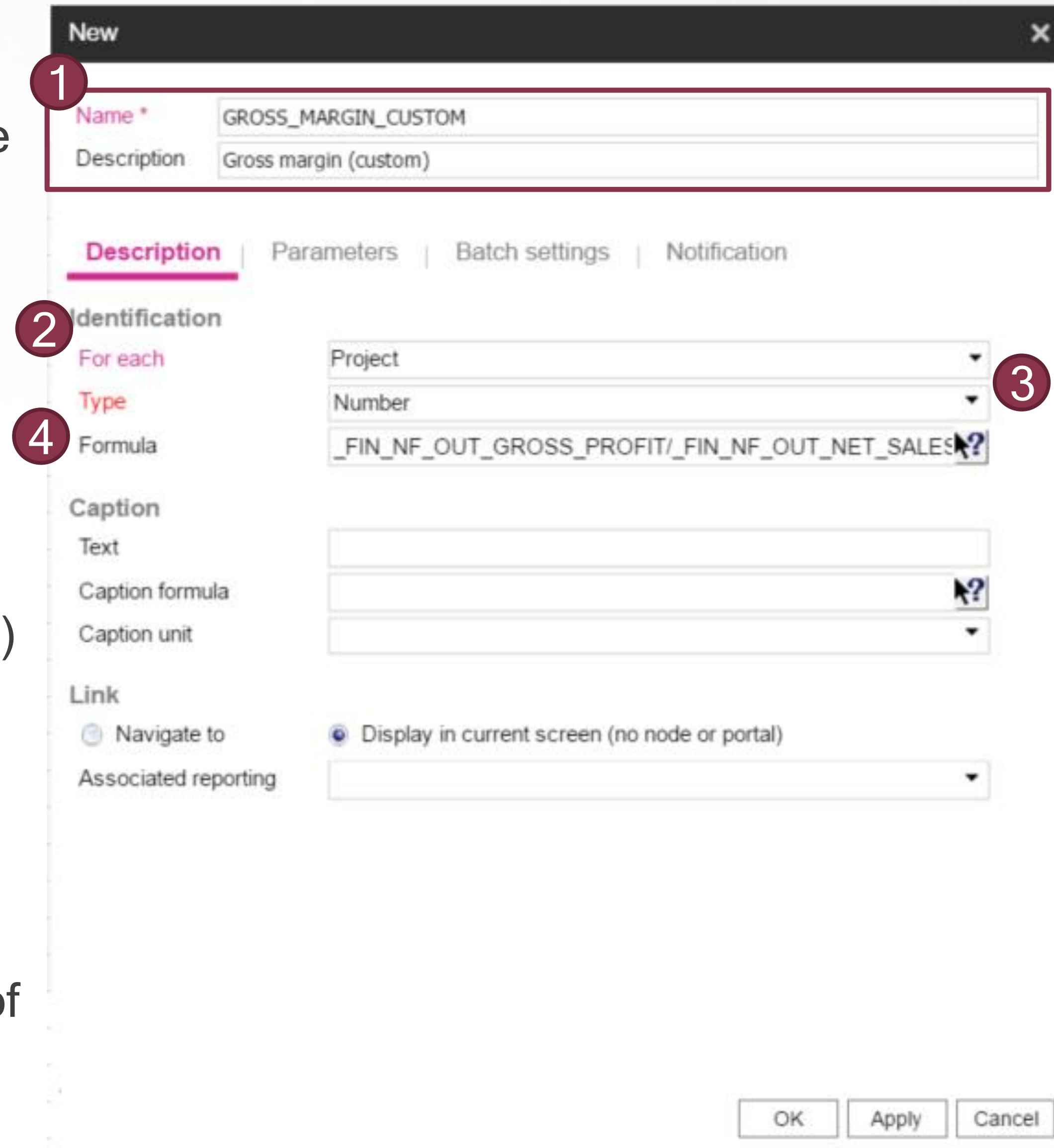
Manage Indicators

- Indicators are listed in the Administration module, page Data. Select object type Indicators



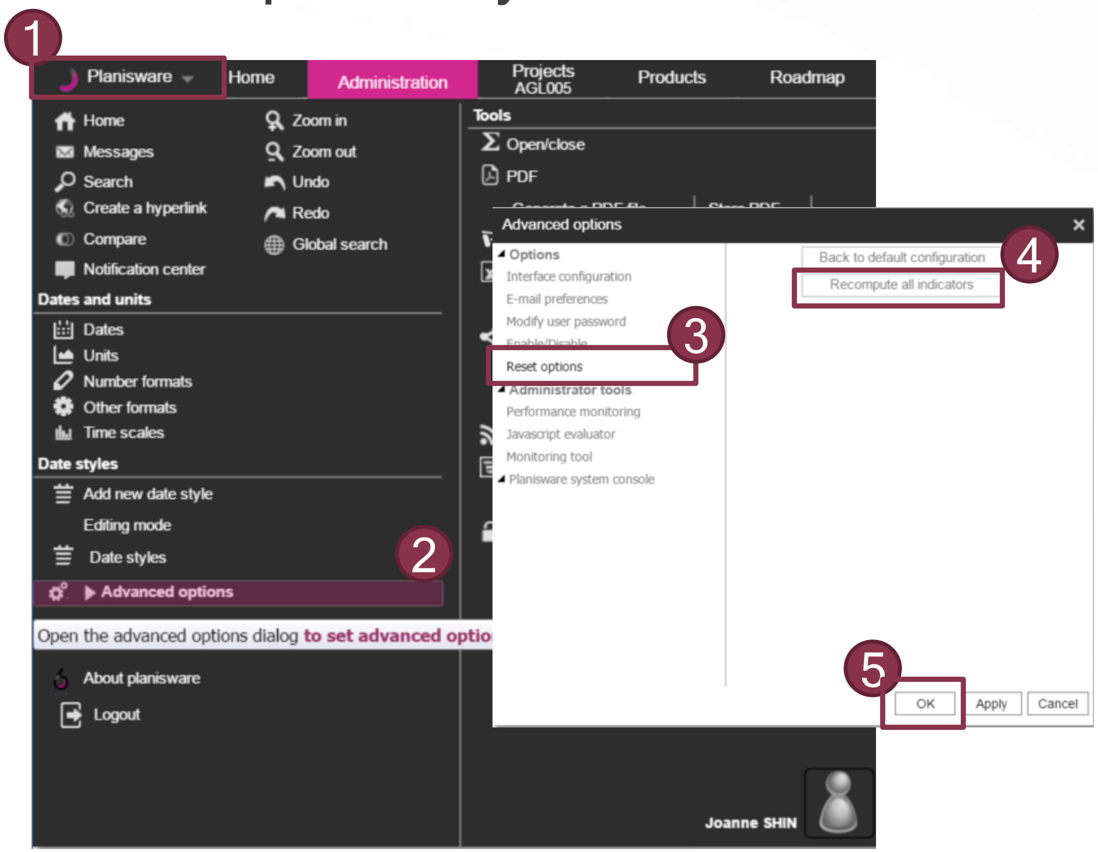
New Indicators

1. Give your indicator an appropriate Name and Description
   - Name – Check with your admin to see if you have a naming convention to use
   - Description - Use a description that makes it easy for end users to understand
2. Define the iteration on the indicator (eg. Project, Activity, Resource, User defined portfolios)
3. Select the correct type of the indicator (eg. Number, string, date, cost etc.)
4. If you would like to define a custom indicator, you may define the formula using a combination of Planisware indicators (eg. Gross profit, net sales, budget at completion etc.)



Recomputing Indicators

- Indicators are not refreshed automatically - you will need to recompute for your new data to show.



1. Click on the Planisware main menu.
2. Click on Advanced options
3. From the new popup, click on Reset options.
4. Click on Recompute all indicators.
5. Click on Ok to close the popup.

Indicator bars - Scenario

Scenario

Great! We’ve got some indicators we can work with. Rather than adding them individually on the project list though, can I view them **nicely grouped** somewhere within a report?

Indicator bars - Scenario

Scenario

Great! We've got some indicators we can work with. Rather than adding them individually on the project list though, can I view them nicely grouped somewhere within a report?

Analysis

By default, Planisware is delivered with a set of predefined indicator bars that can be deactivated. Indicators bars are designed to be displayed on dashboards based on Portal model and on Profit & Loss spreadsheets.

Indicator bars

Creating indicator bar

Defining default indicator bar

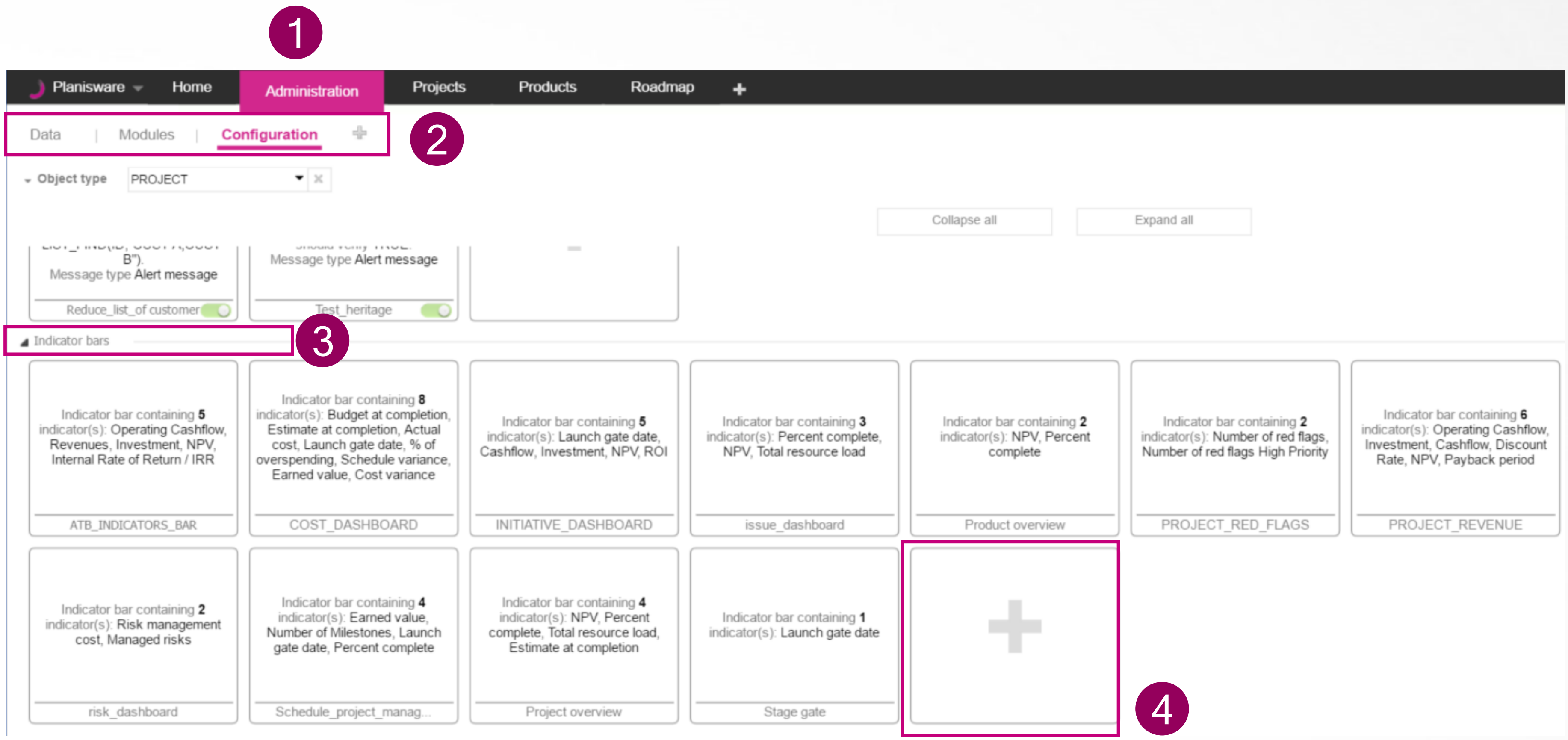
Deactivating indicator bar

Creating a new indicator bar

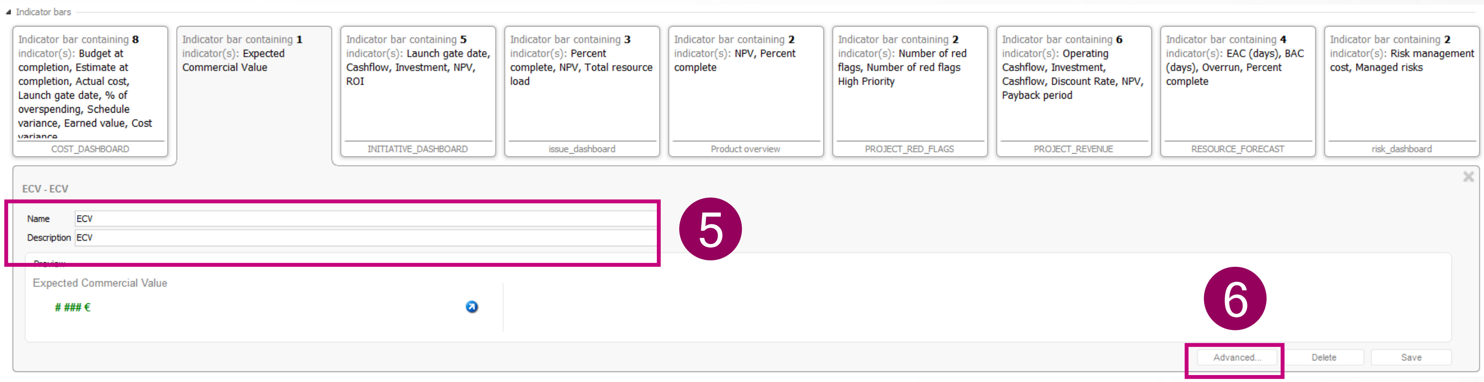
- To create a new indicator bar:
  1. Navigate to Administration Module, page configuration
  2. Select for which object class indicator bar is created
  3. Open section Indicator bar
  4. Click on + to create a new indicator bar
  5. Create a new indicator bar by setting its name
  6. Define its content by going to its advanced properties
  7. Select indicator on the right and click Insert

Planisware

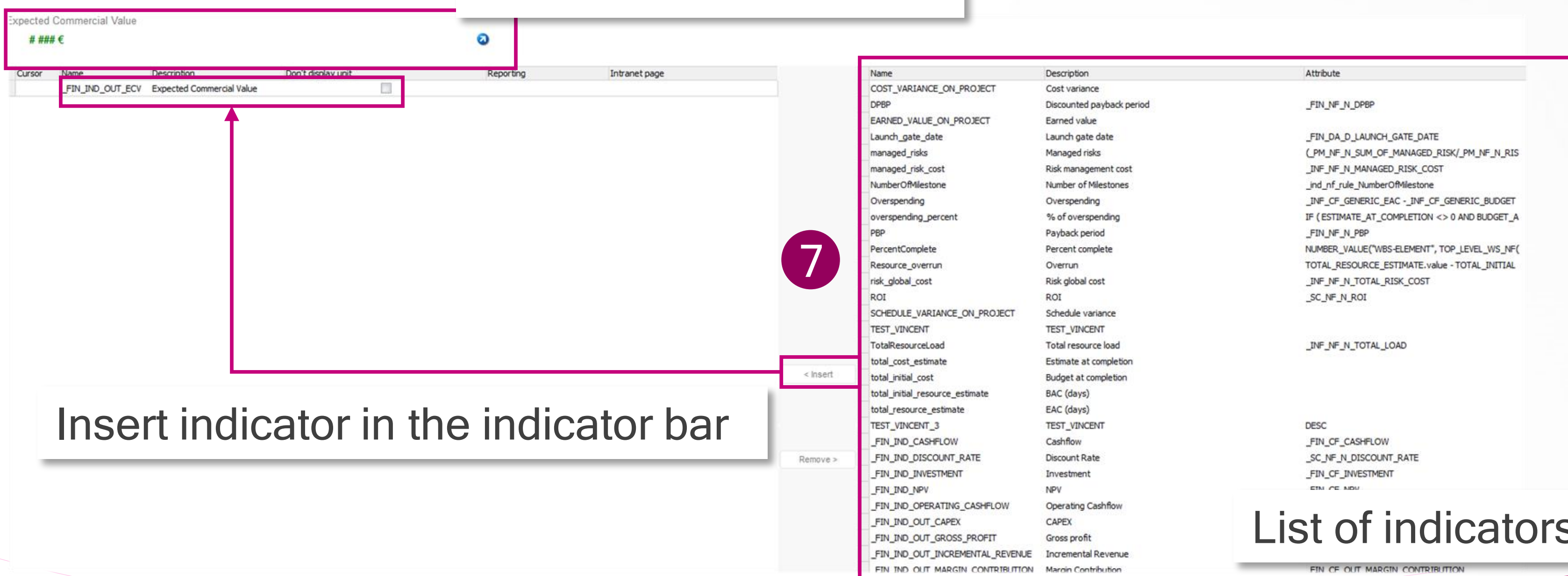
Creating a new indicator bar



Creating a new indicator bar



Indicator bar overview



Insert indicator in the indicator bar

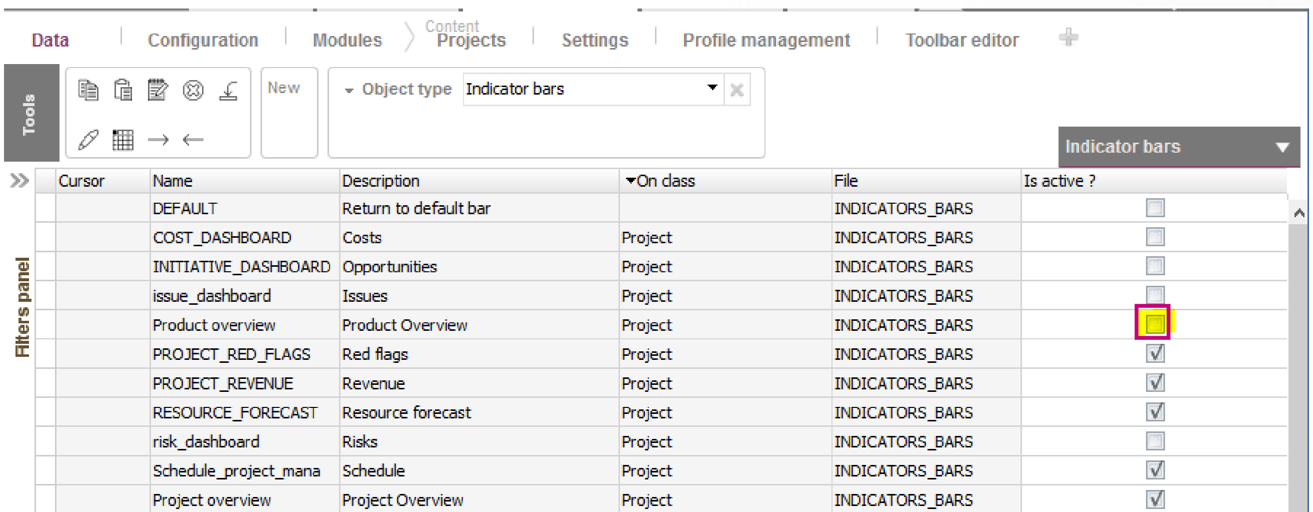
List of indicators

Defining default bar

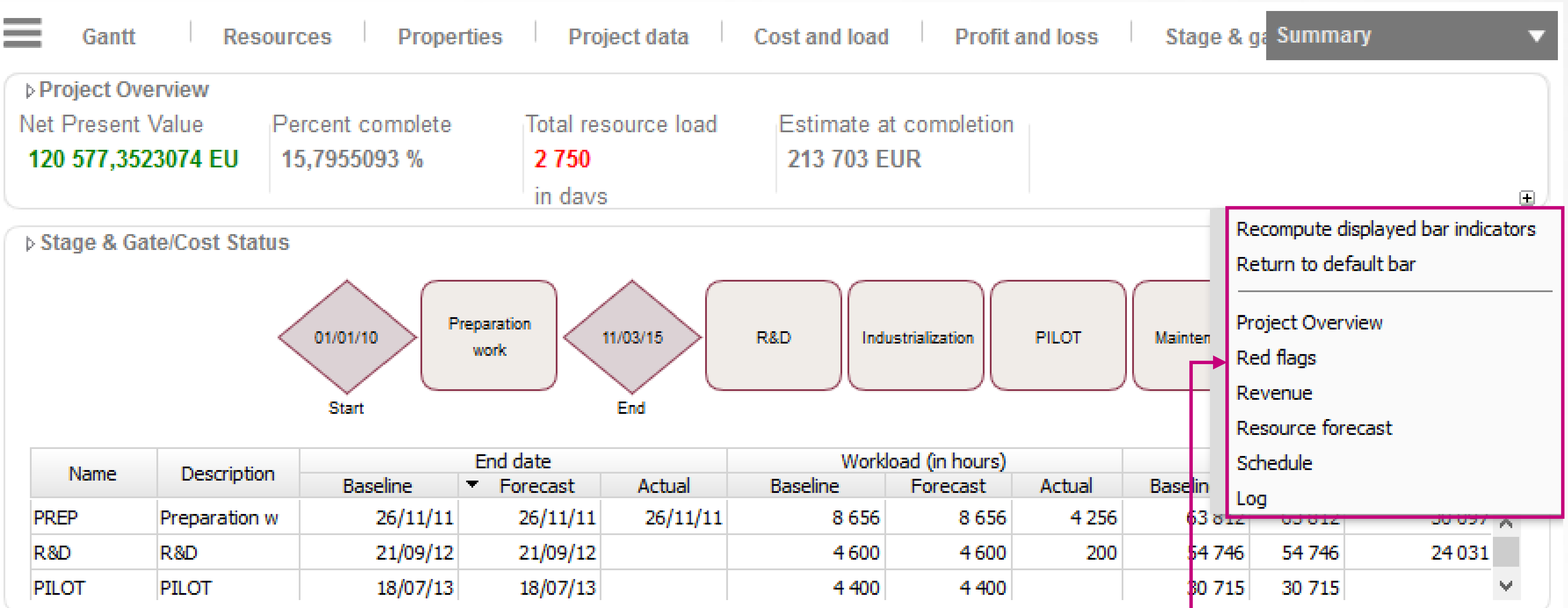
- To define default bar on the page Dashboard of project management module:
  - Navigate to Administration module
  - Page Modules
  - Click thumbnail of Project management module
  - Click on button Content
  - Open the thumbnail of the page Dashboard Summary
  - Set a default indicator bar

Deactivating indicator bar

- Indicator bars delivered by Planisware can be hidden to the final user :
  - Navigate to Administration > Data. Select object type Indicator bar.
  - Unselect **Is active ?** attribute on the indicator bar to be hidden



Deactivating indicator bar (2/2)



The deactivated indicator bars can no longer be selected in the dashboards

Attribute chooser style - Scenario

Scenario

Users who perform basic actions in the project module are complaining that the number of options they see is overwhelming. Can we find a way to restrict what attributes they see?

Attribute chooser style - Scenario

Scenario

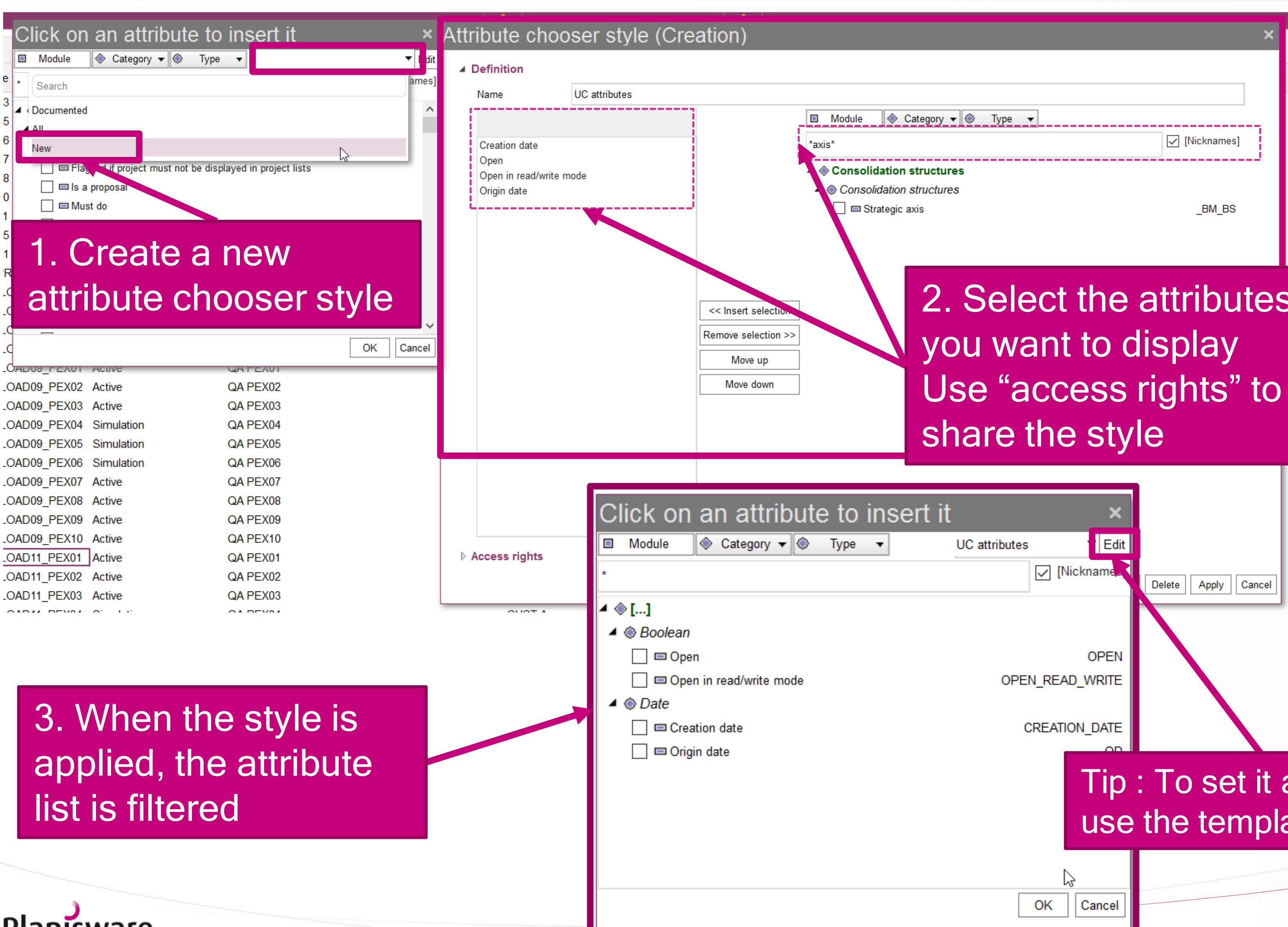
Users who perform basic actions in the project module are complaining that the number of options they see is overwhelming. Can we find a way to restrict what attributes they see?

Analysis

By default, the list of attributes to insert on a class can be overwhelming. For example, users may want to simply know when a project was created and items related to their job function. To limit this list to only the relevant attributes, you can define a style in the attribute chooser.

Attribute Chooser Style

Attribute chooser style



1. Create a new attribute chooser style

2. Select the attributes you want to display
Use “access rights” to share the style

3. When the style is applied, the attribute list is filtered

Tip : To set it as default use the template user

Exercise

Create a new personal style for the project attributes:

Name = XX project attributes
Add your XX_UA_S_DIFFICULTY_LEVEL
Export the style to some other users
Verify from the Project page that when picking your style, only that attribute shows

L1 style - Scenario

Scenario

I want to be able to save the changes that I made to the view of the projects, and share this style with other users.

Analysis

L1 style - Scenario

Scenario

I want to be able to save the changes that I made to the view of the projects, and share this style with other users.

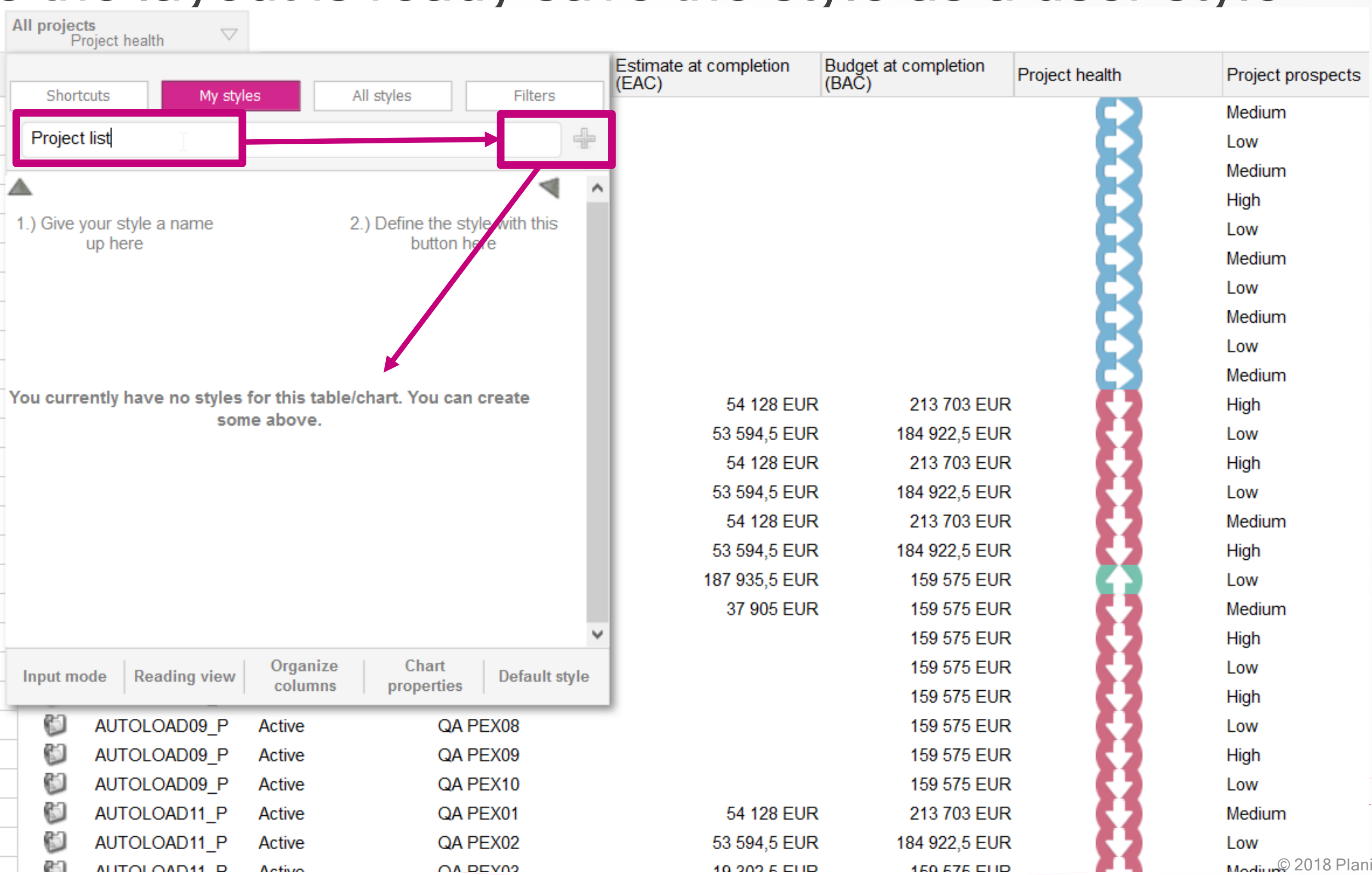
Analysis

By default the list of attributes you see on your screen may not align with your preferences. We discussed adding different attributes and fields according to your needs. To save this list of only relevant attributes, along with additional fields and filters, you can define a L1 style.

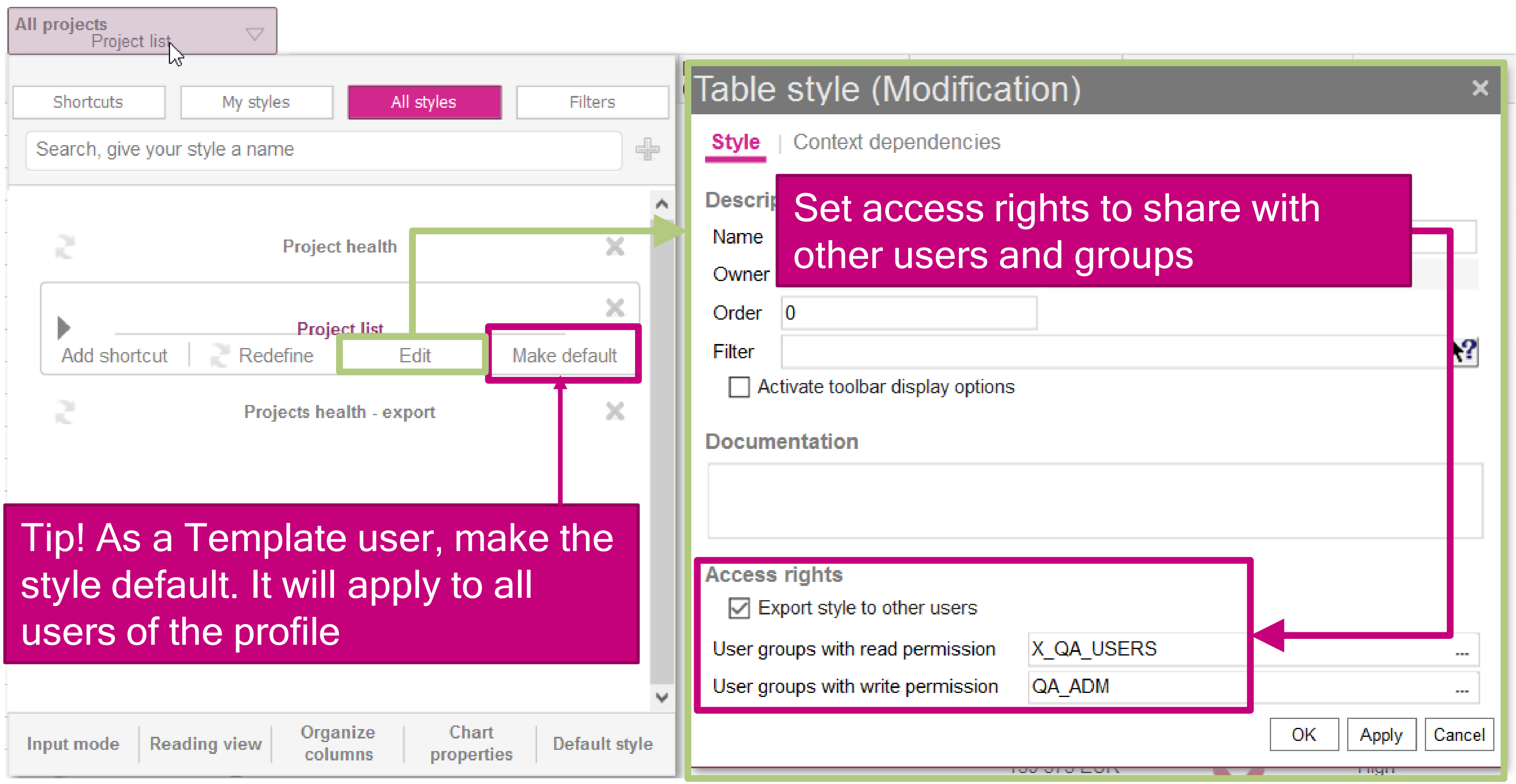
L1 Style

Define a L1 style

- On the homepage of projects, return to the default style
- Insert or remove columns
- Once the layout is ready save the style as a user style

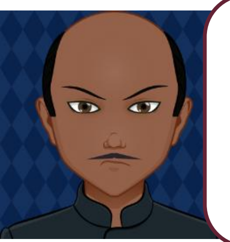


Apply and share a L1 style



Text Keys - Scenario

Scenario

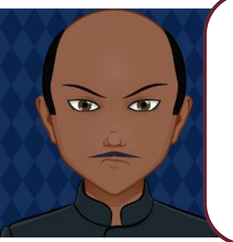


Nicely done! I also want to change titles of modules and some attributes to make the terminology seen on the screen more user friendly. Can this be done?

Analysis

Text Keys - Scenario

Scenario



Nicely done! I also want to change titles of modules and some attributes to make the terminology seen on the screen more user friendly. Can this be done?

Analysis

You can modify what labels the end-users will see in the interface, by applying modifications to the standard text keys. If a label needs to be modified, it can be modified centrally, in the corresponding text key, and all the labels using that text key are modified accordingly.

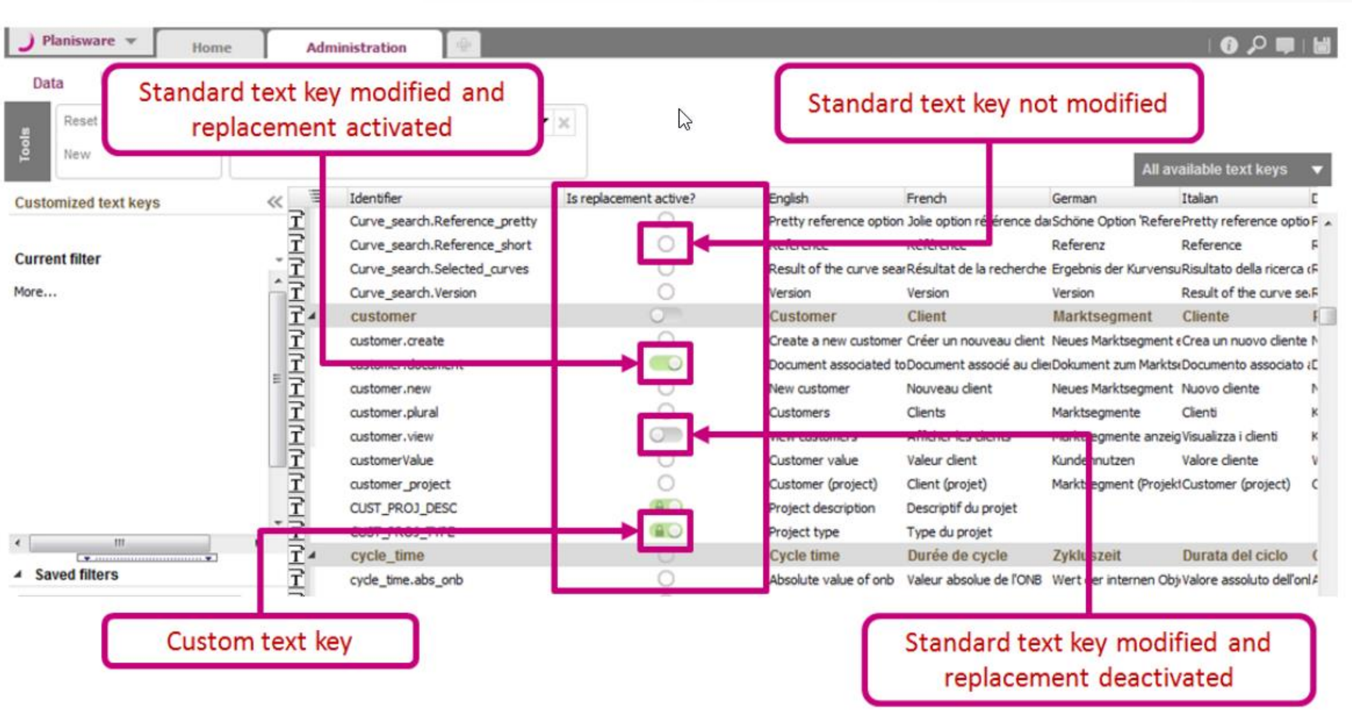
Text Keys

Introduction

- Used to modify what labels the end-users will see in the interface
  - Modify existing Standard text keys for standard labels delivered by Planisware
  - Or create customized text keys for company specific labels
- Recommended to use text keys for description of objects

Text Keys

- **Is replacement active?**
  - Column indicates if text key is replacing a standard text key and if the replacement is activated or not

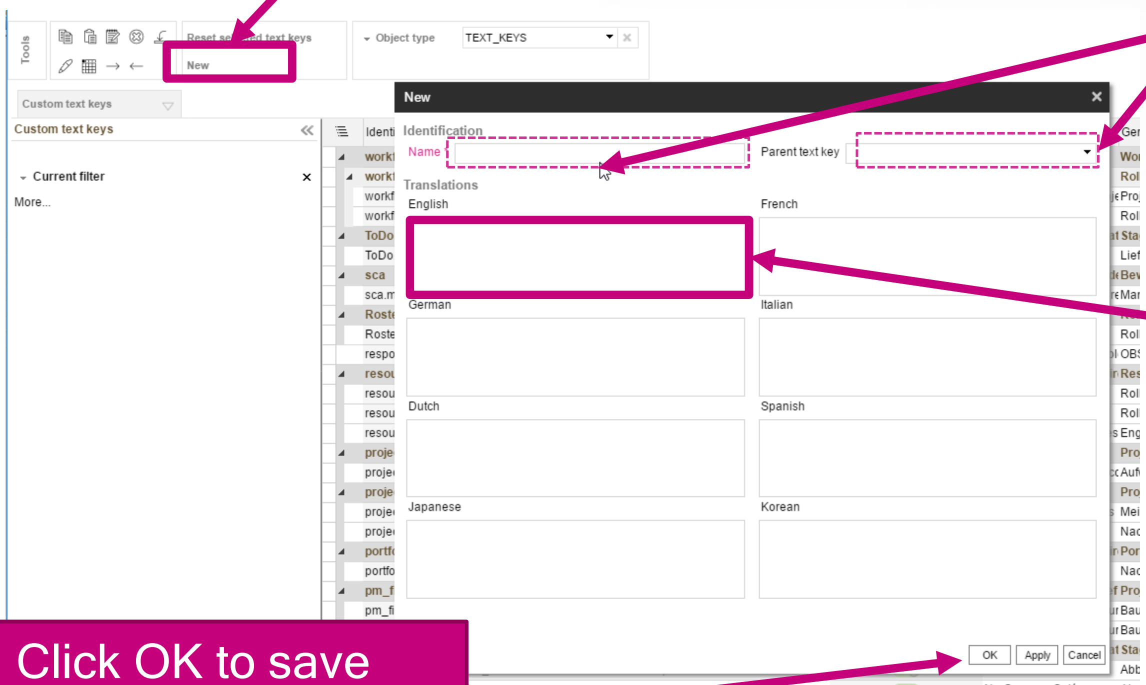


Creating Text Keys

- Navigate to Administration > Data > TEXT_KEYS

1. Create a new text key

2. Name is mandatory and should not contain spaces. Select a parent key, if necessary



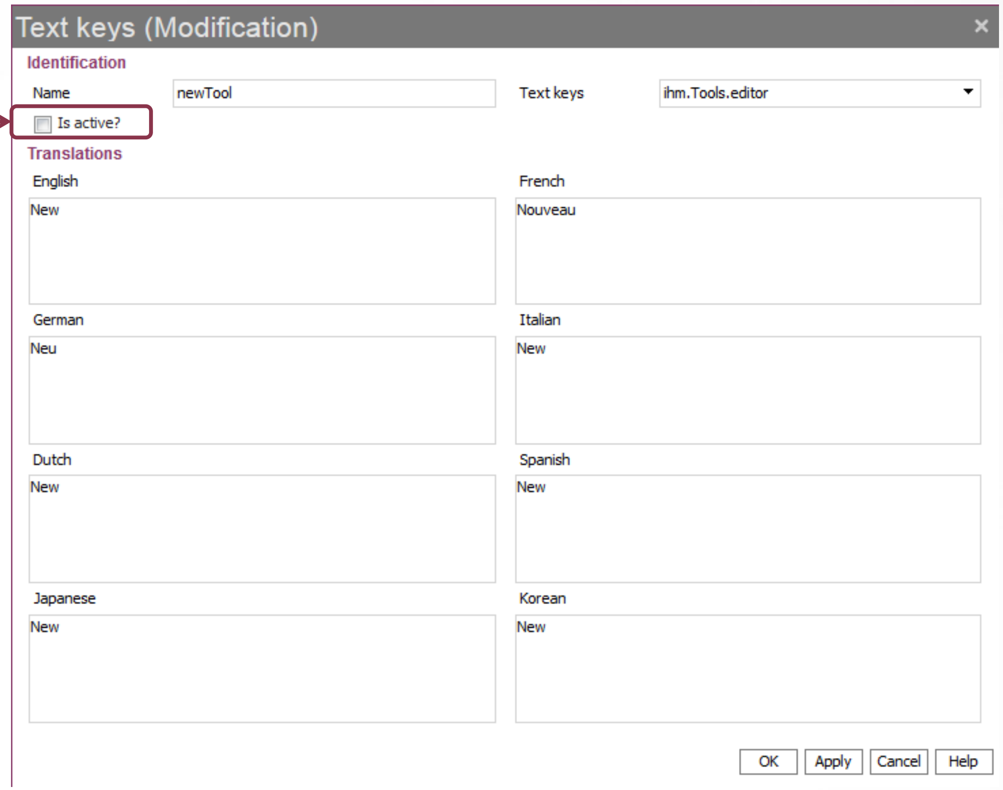
3. Enter the label for each language used in your system, in the appropriate zones; e.g. English label in the English zone

4. Click OK to save creation and close the dialog

Modifying Text Keys

To modify text keys:

- Double-click on the line of a text key. The **Text Keys (Modification)** dialog is displayed.
- Modify your data.

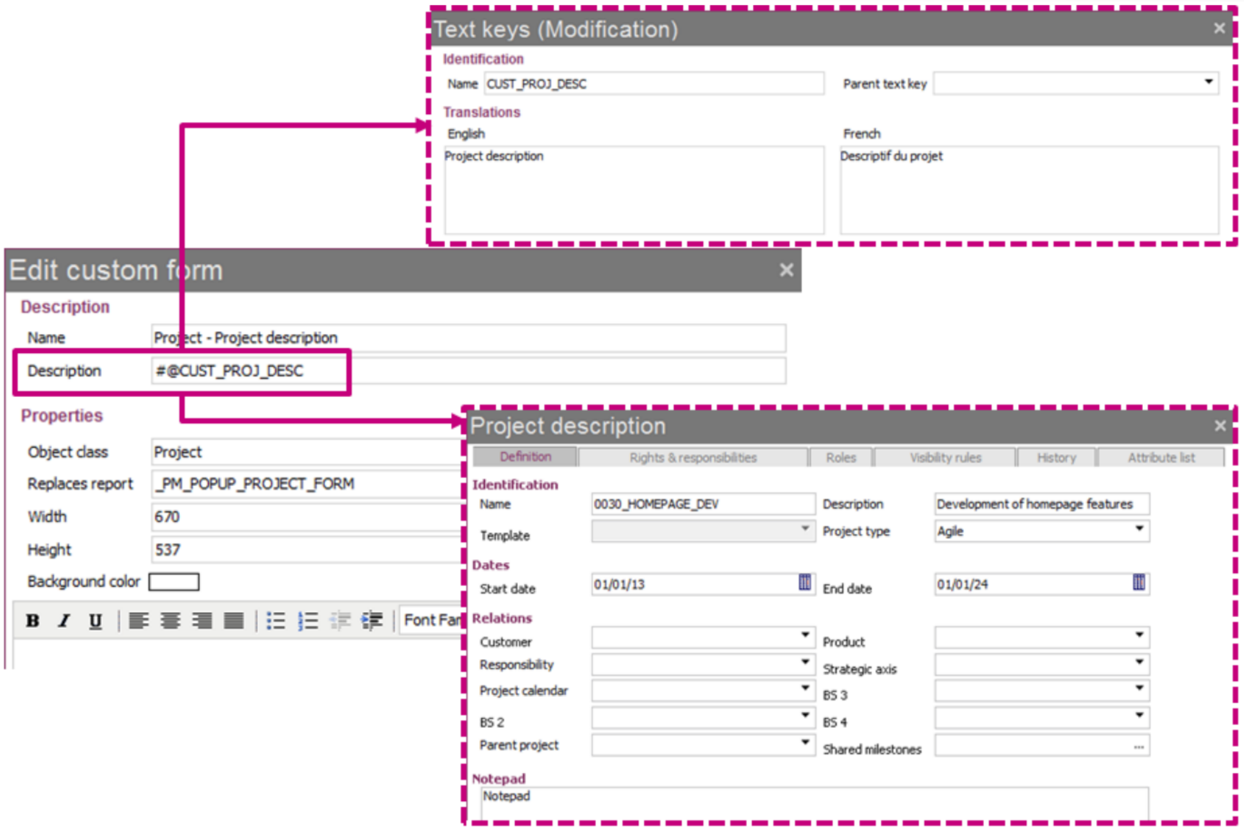


Check the **Is active?** box to activate the modification.

If you do not check the **Is replacement active?** box, it is deactivated by default. To activate it, double-click on the icon in the "Is replacement active?" column. The icon becomes green.

Using Text Keys

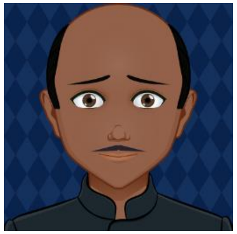
- By default descriptions are used for labels in the interface
- Can be entered in most **Description** fields
  - Syntax: #@<text_key_identifier>, or “Name” column of text key



Toolbar editor

Toolbar editor - Scenario

Scenario



All these toolbars on Planisware seem helpful but some users see unnecessary tools that they don't use or they would like to

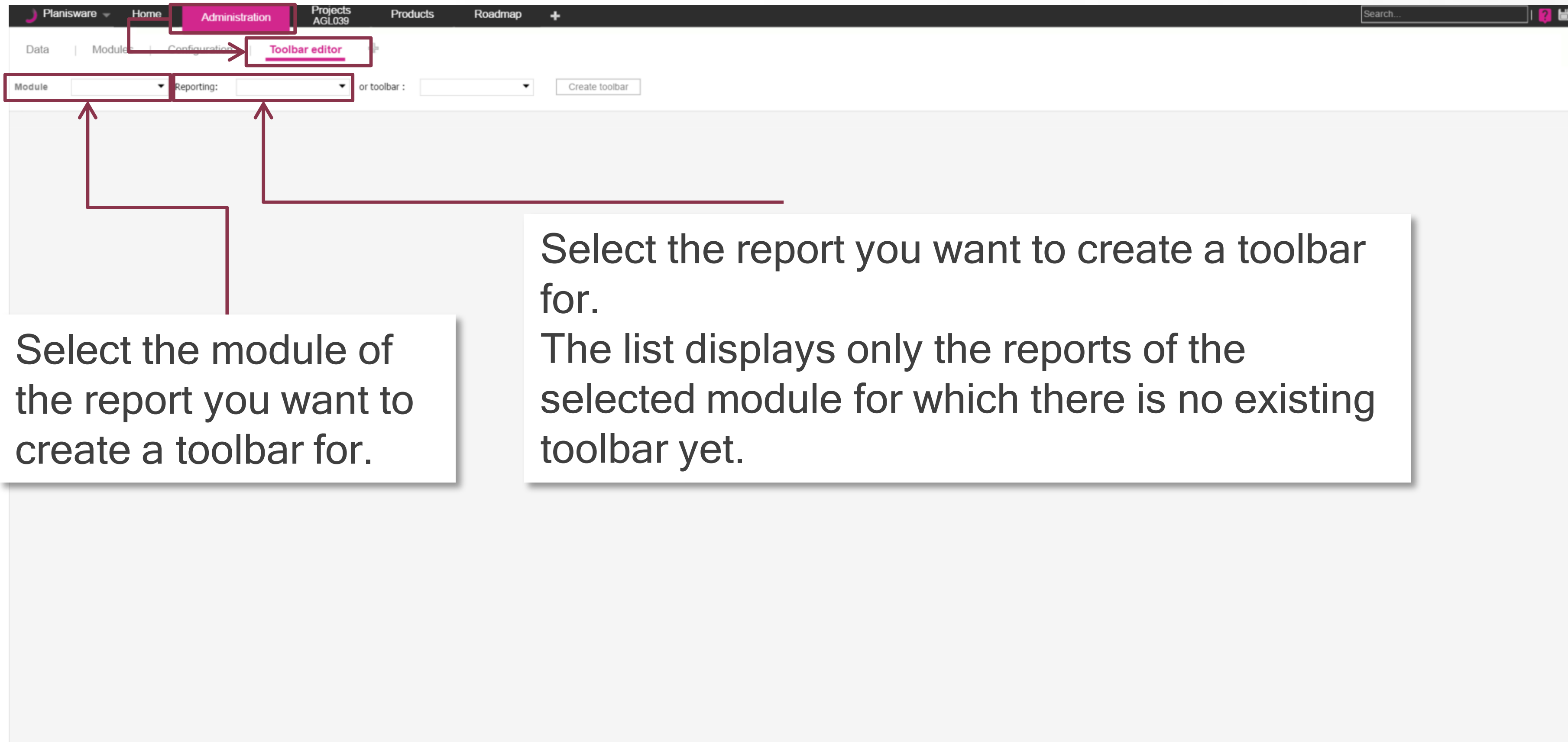
Analysis

You can do this easily using the toolbar editor to hide buttons directly on the toolbar.

Accessing the Feature

To create a new toolbar:

- Open the **Administration** module.
- Add the **Toolbar Editor** page.

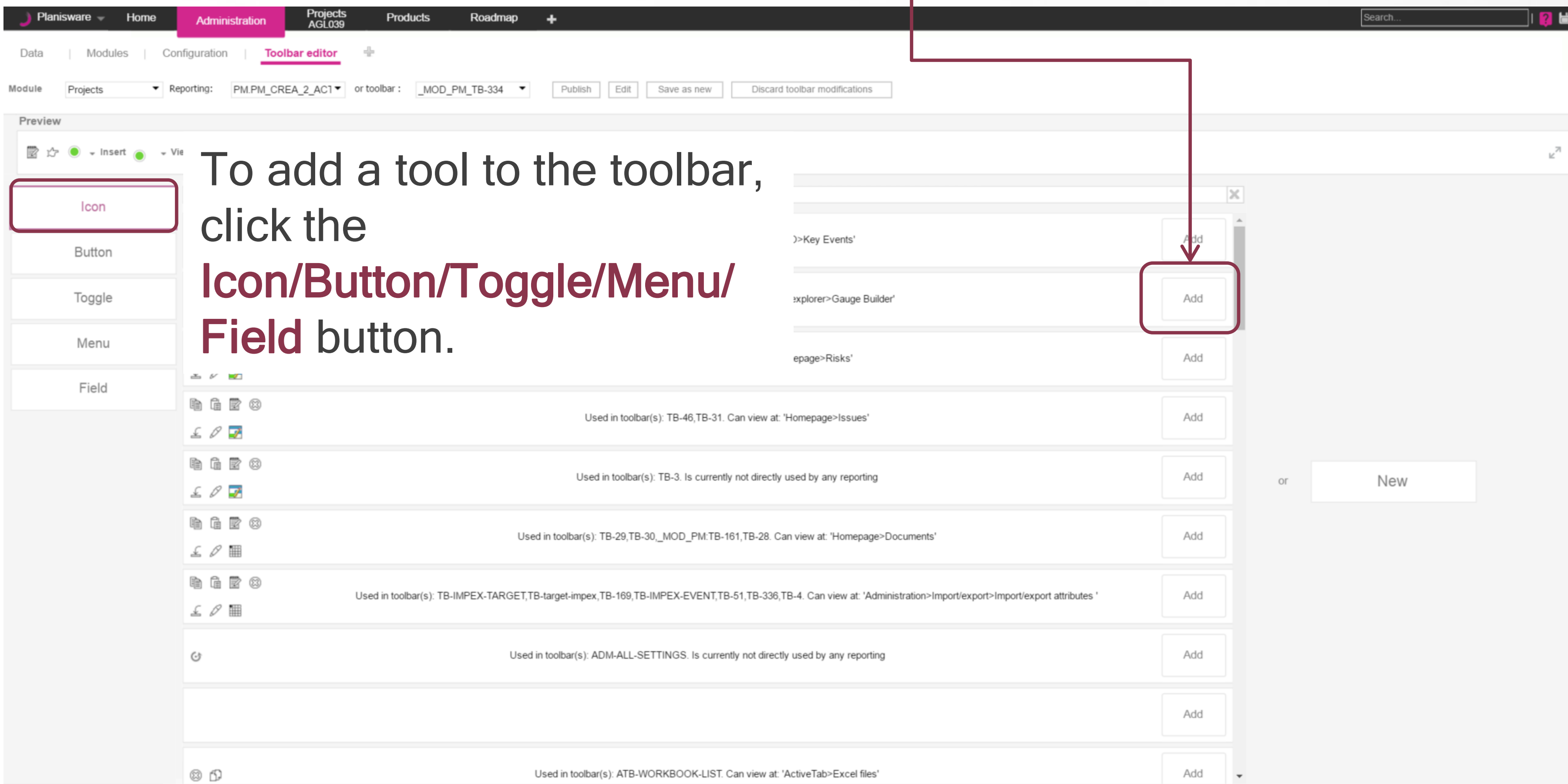


Select the module of the report you want to create a toolbar for.

Select the report you want to create a toolbar for.
The list displays only the reports of the selected module for which there is no existing toolbar yet.

Adding Existing Tools

To add an already existing button, click the **Add** button corresponding to this button.

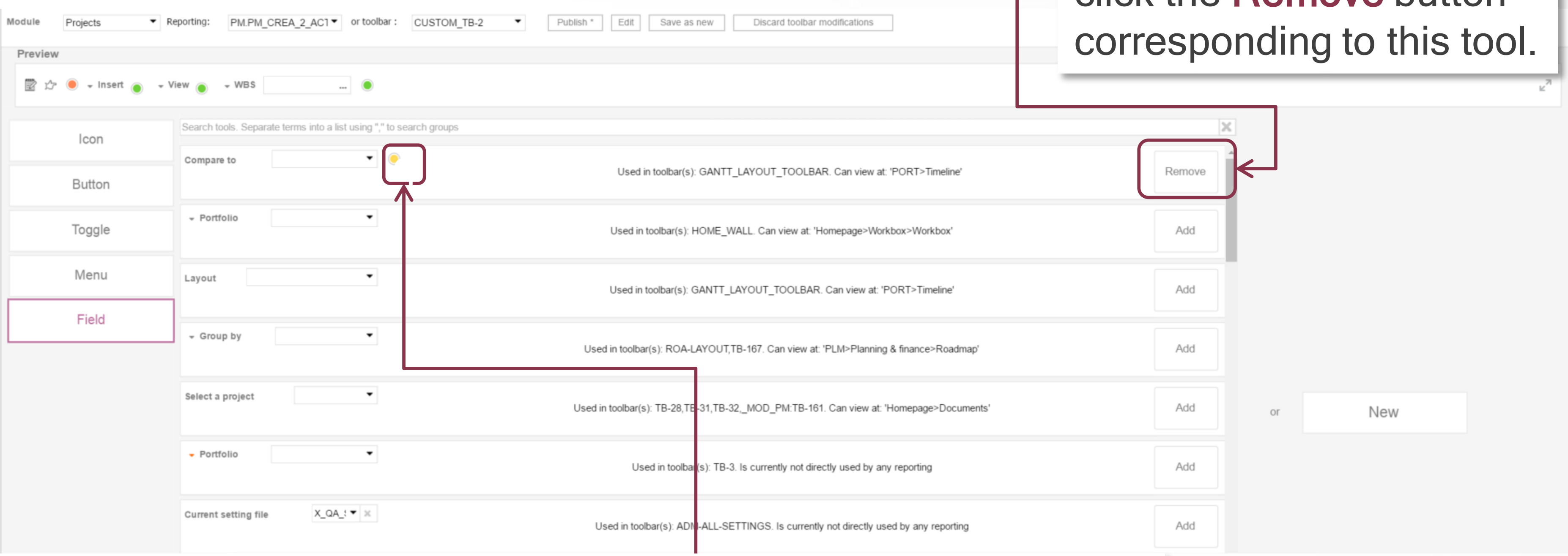


To add a tool to the toolbar, click the **Icon/Button/Toggle/Menu/ Field** button.

Adding Existing Tools

The tool is added to the toolbar.
A yellow dot is displayed next to the added tool. It indicates that the toolbar has not been saved yet.

To cancel adding a tool, click the **Remove** button corresponding to this tool.

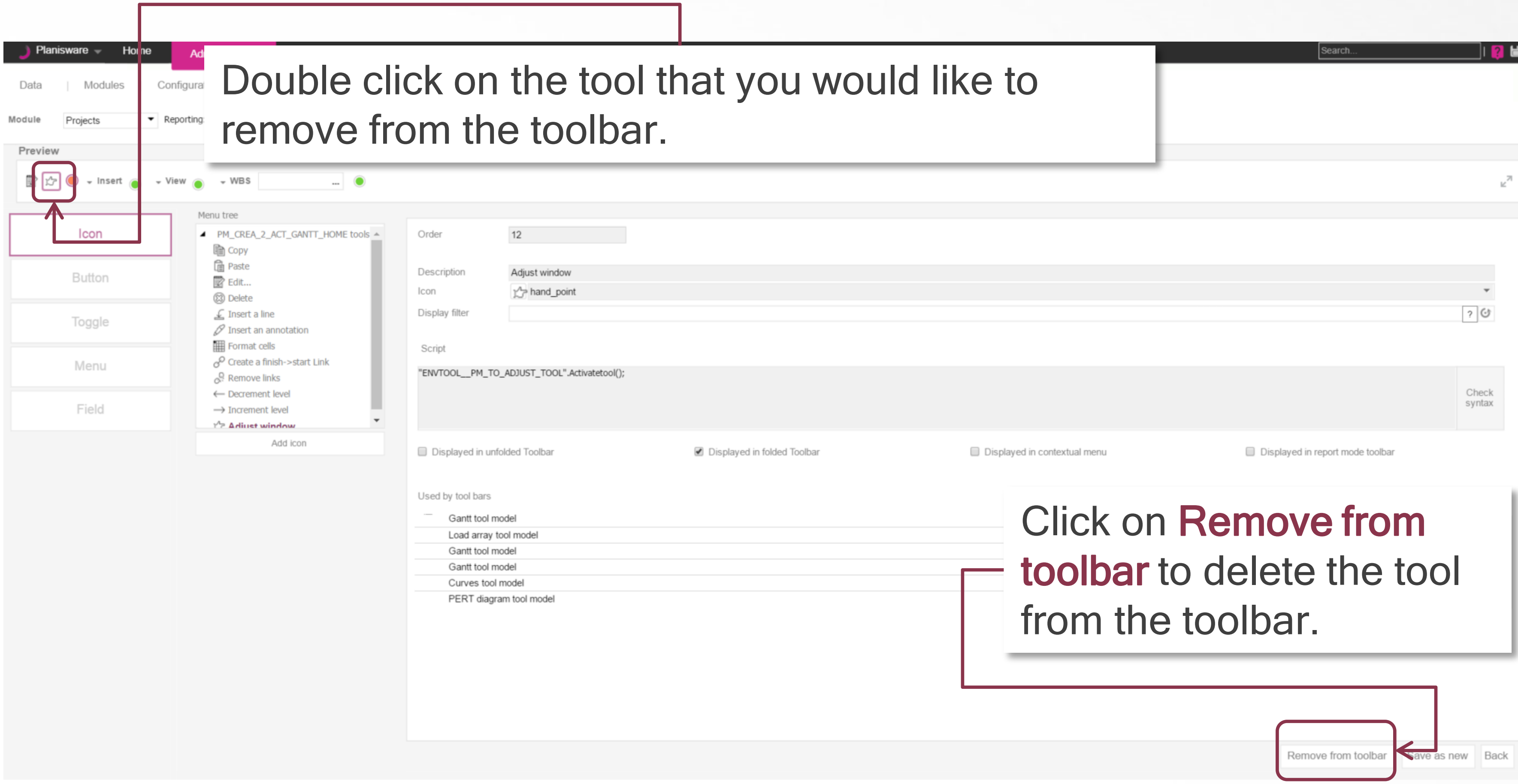


A dot is also displayed in the list to indicate the tool that has been added to the toolbar.

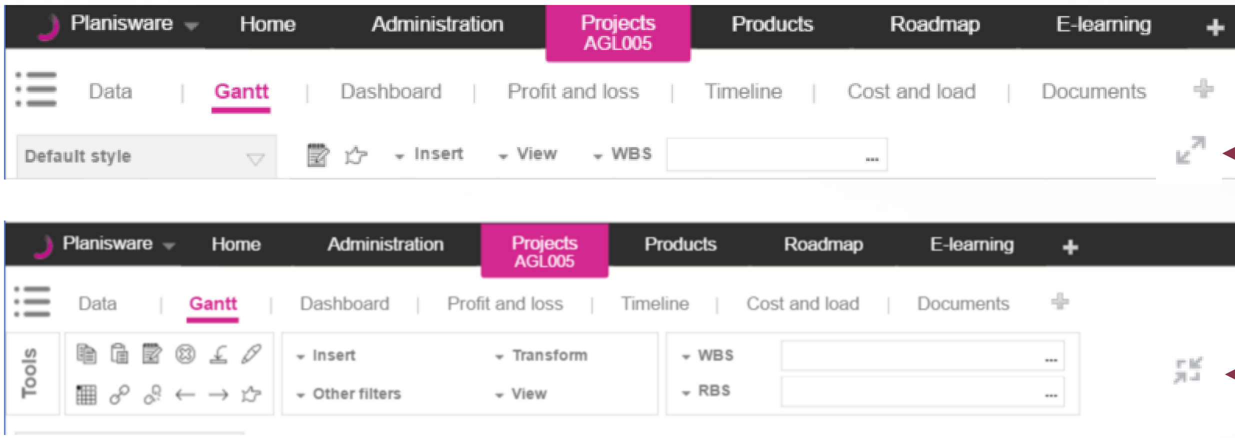
Removing Tools from Toolbar

Double click on the tool that you would like to remove from the toolbar.

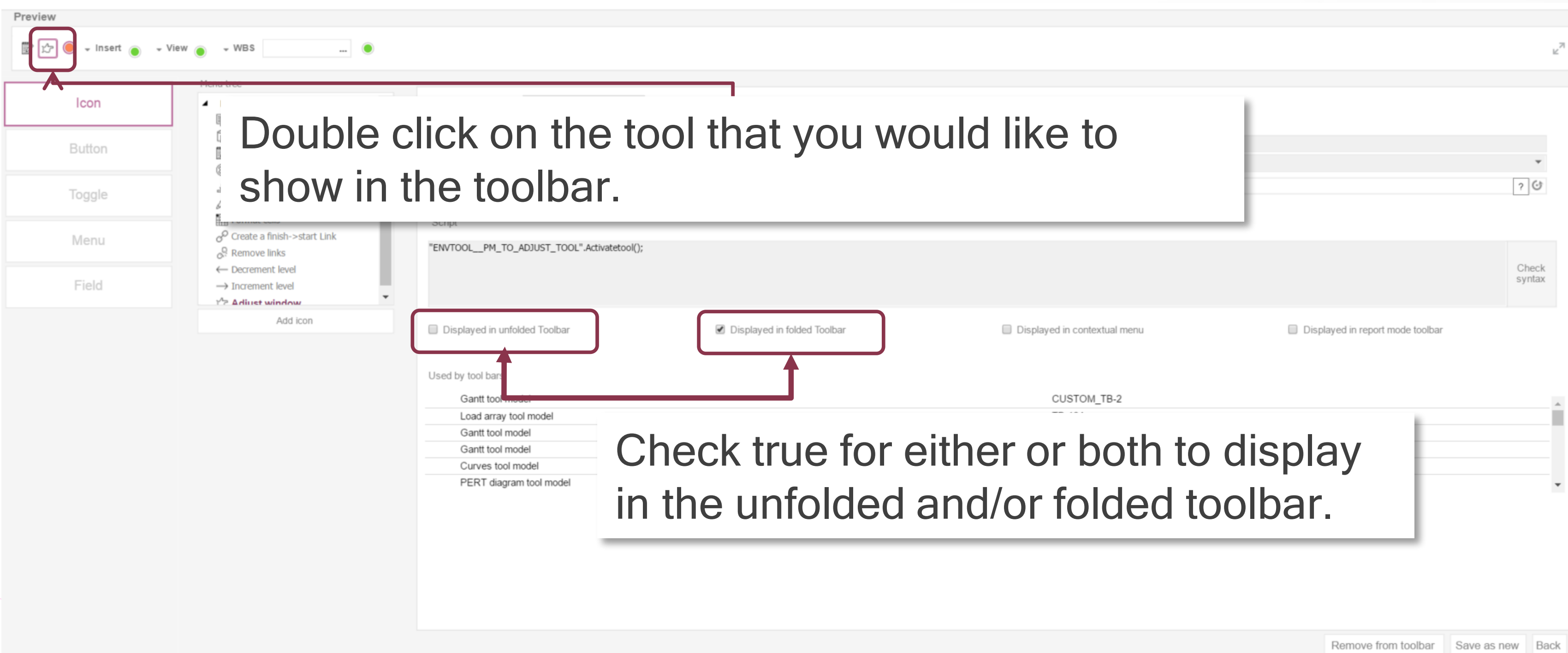
Click on **Remove from toolbar** to delete the tool from the toolbar.



Unfolded/folded toolbar (V6.2)



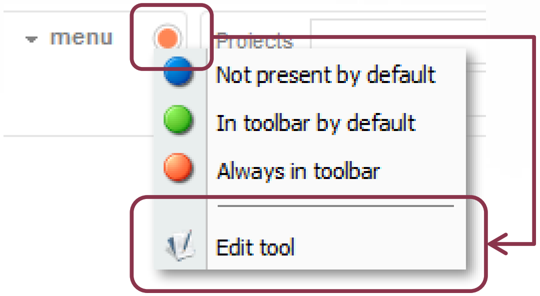
With V6.2, same toolbars may be unfolded or folded.



Double click on the tool that you would like to show in the toolbar.

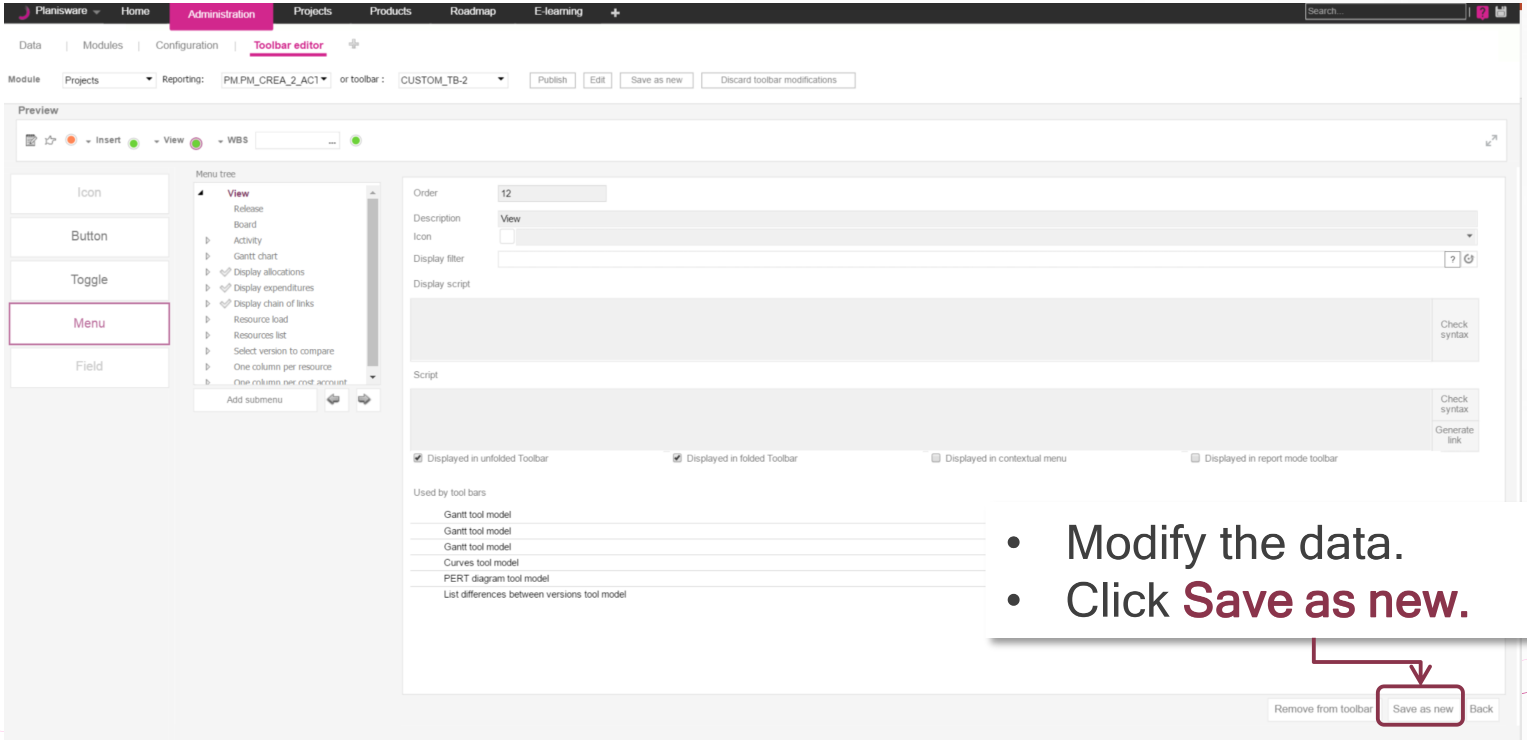
Check true for either or both to display in the unfolded and/or folded toolbar.

Editing Items of the Toolbar



To edit items:

- Open the **Administration** module.
- Add the **IHM Toolbar GUI** page.
- Select the module and the report of the toolbar that you want to modify.
- Click the dot next to the item that you want to modify.
- Click the **Edit tool** menu entry. The item attribute sheet is displayed.



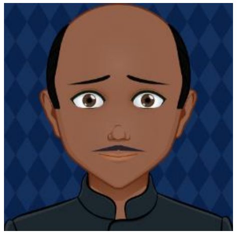
- Modify the data.
- Click **Save as new.**

Planisware

E-learning

E-Learning - Scenario

Scenario



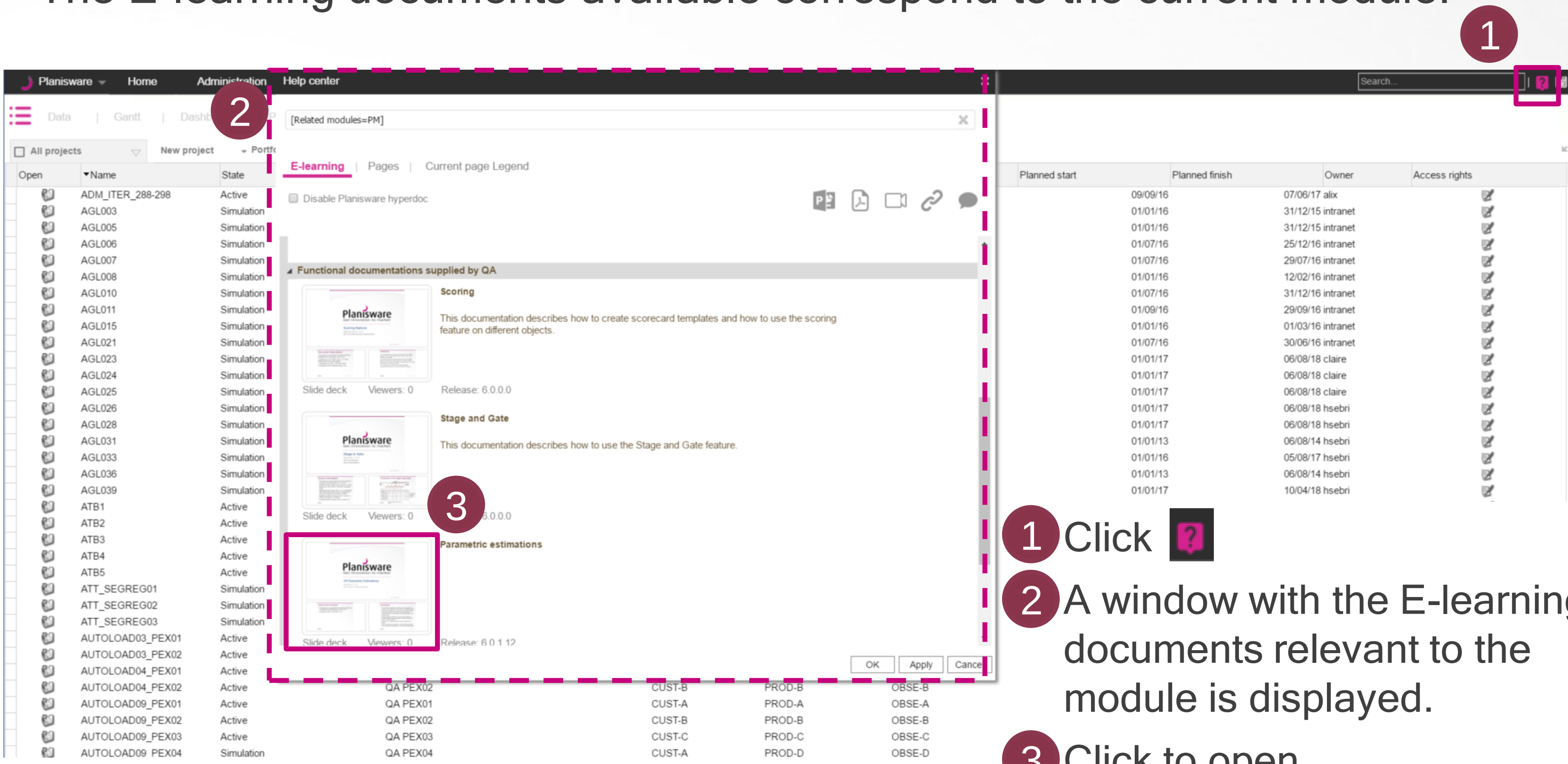
I can’t handle all the questions that my end users are sending over to me. Do you have any relevant documentation that can be easily searchable?

Analysis

Training materials and relevant documentation to Planisware are accessed via the E-Learning. Documents are presented via slide decks, videos, and white papers. Company specific E-learning material can be added on top of the standard E-learning material provided by Planisware.

E-learning for a Module 1/2

On each page of Planisware Processes, you have access to the E-learning.
The E-learning documents available correspond to the current module.

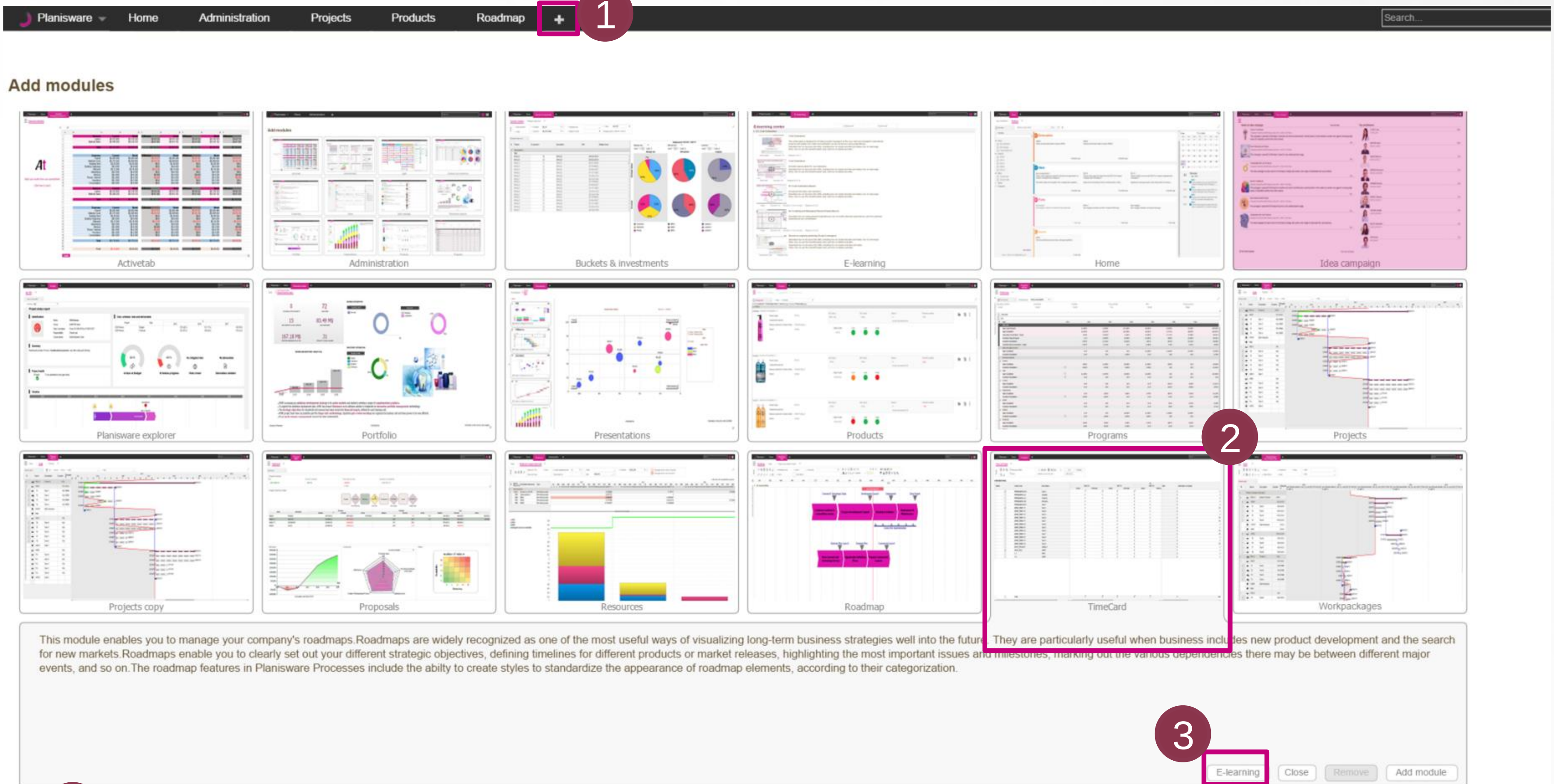


1 Click

2 A window with the E-learning documents relevant to the module is displayed.

3 Click to open.

E-learning for a Module 2/2



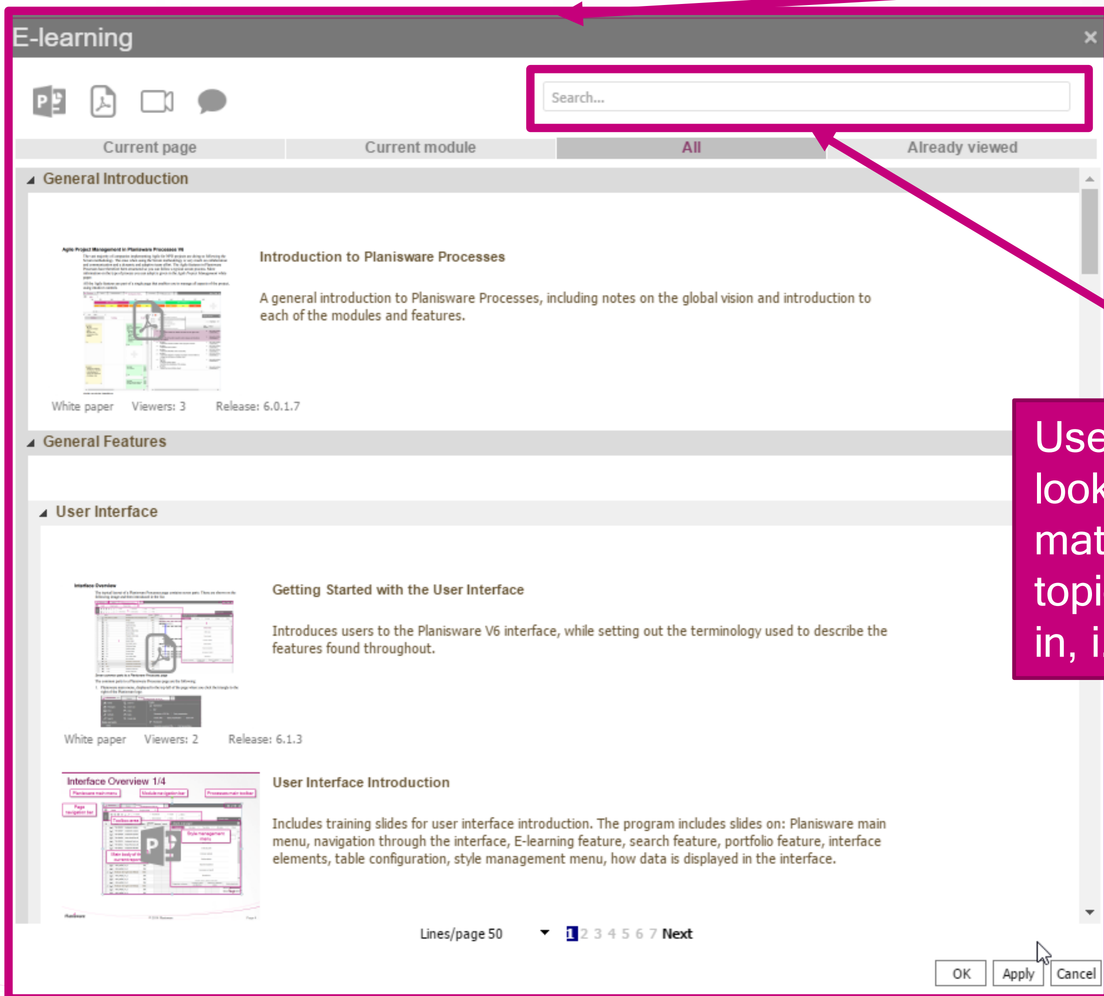
1 Click the **Add module** button.

2 Click thumbnail.

3 Click on E-learning to open.

Access E-learning

- Quickly learn about more features using easily accessible training documents and videos

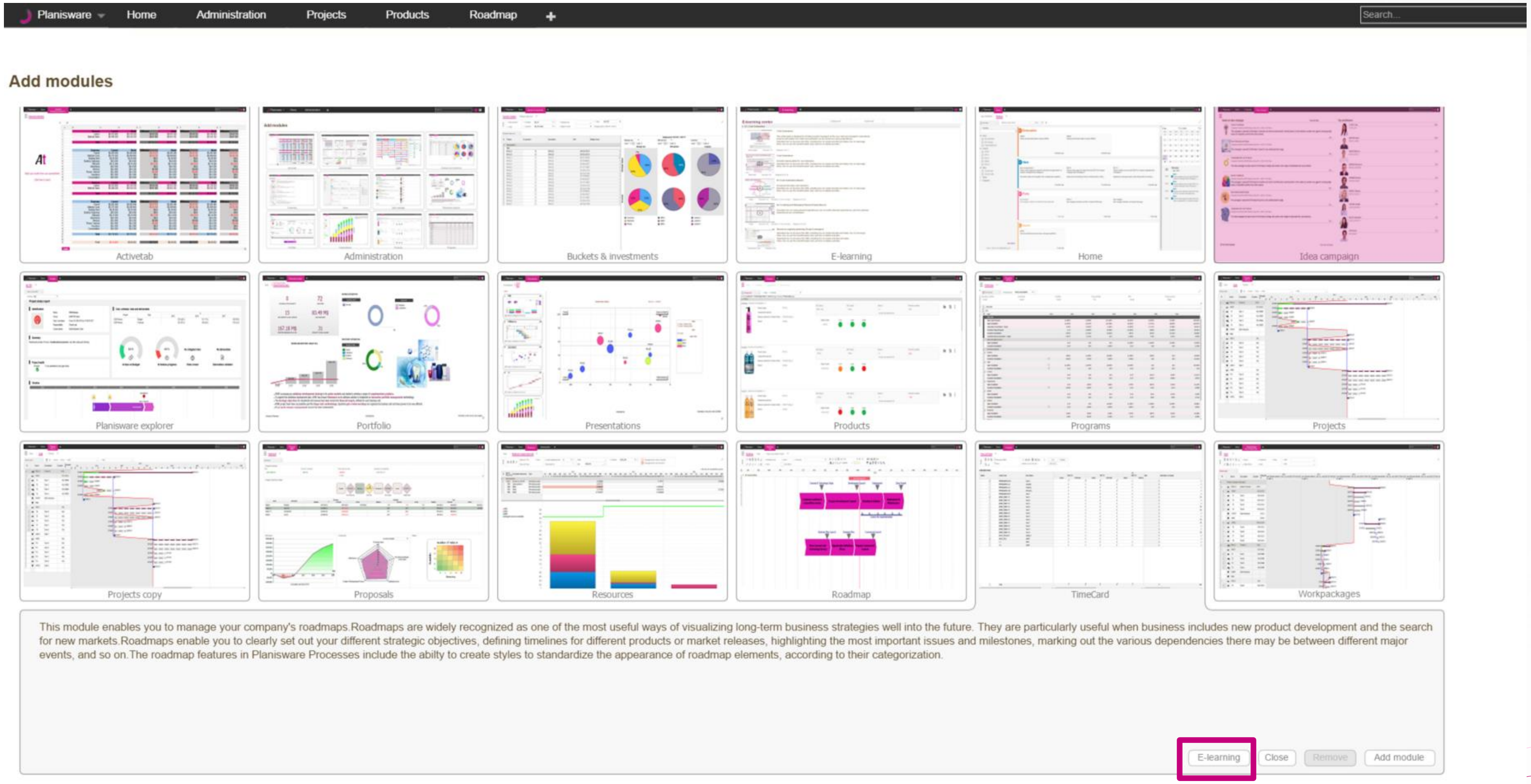


Use the search bar to look up training materials relevant to the topic you are interested in, i.e. tool bar

Adding a Document to the E-learning

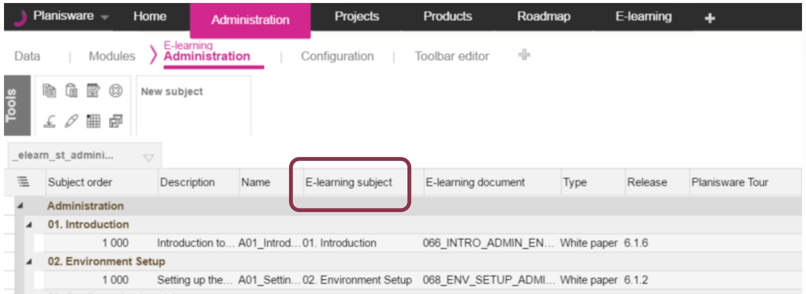
To add a document to the E-learning:

- Open to the **Administration** module.
- Add the **Modules** page.
- Click the thumbnail of a module.
- Click the **E-learning** button.



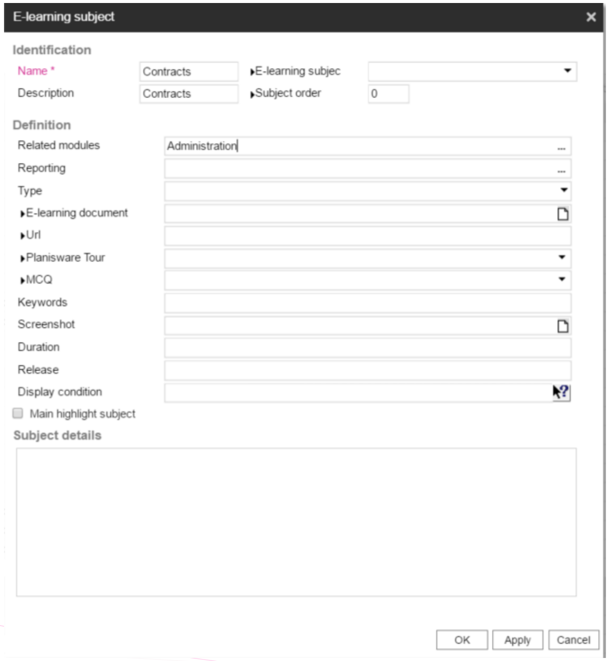
Adding a Document to the E-learning

The list of the **E-learning** subjects for the selected module is displayed.



If there is no e-learning subject yet, create a new one (level 1):

- Click **New Subject**.

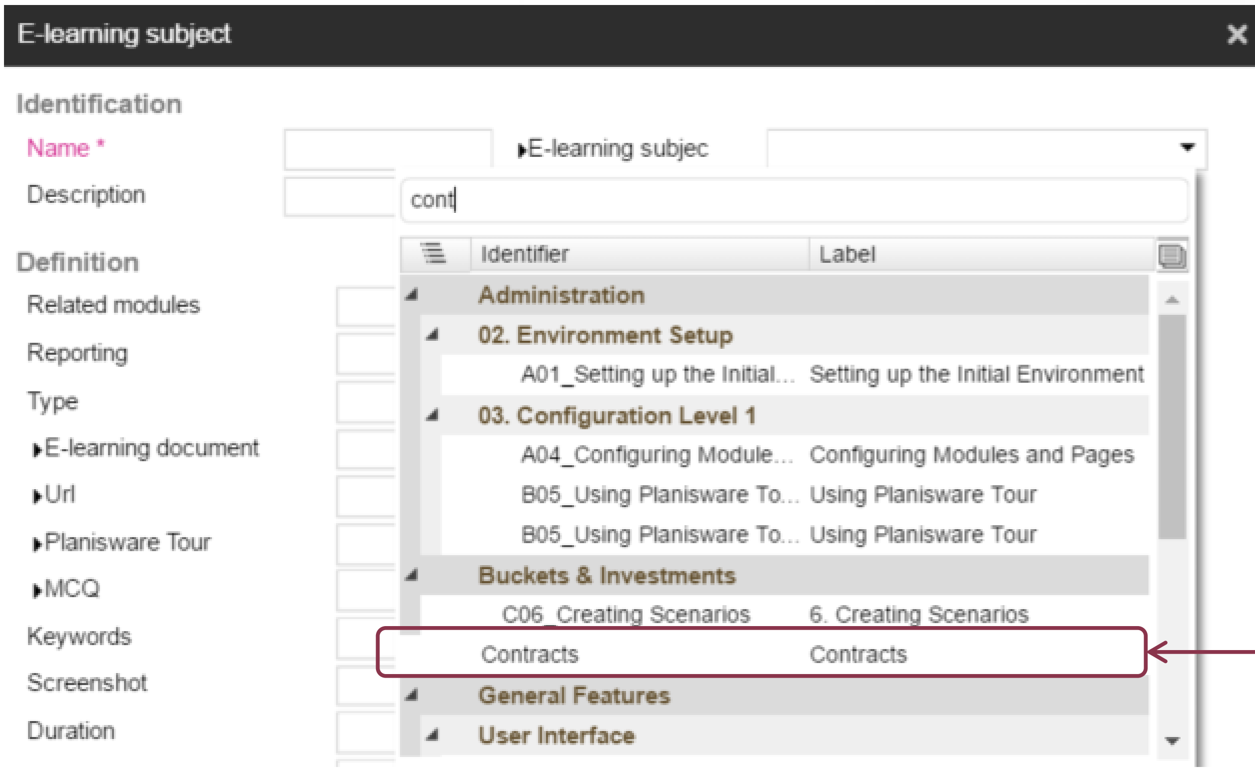


- Enter only a **Name**, a **Description** and select **related modules**.
- Click **OK**. A new E-learning subject is created.

Adding a Document to the E-learning

To add a document belonging to the new e-learning subject (level 2):

- Click **New Subject**. The E-learning subject dialog is displayed.



The newly created e-learning subject is displayed in the list. No level is defined yet.

Adding a Document to the E-learning

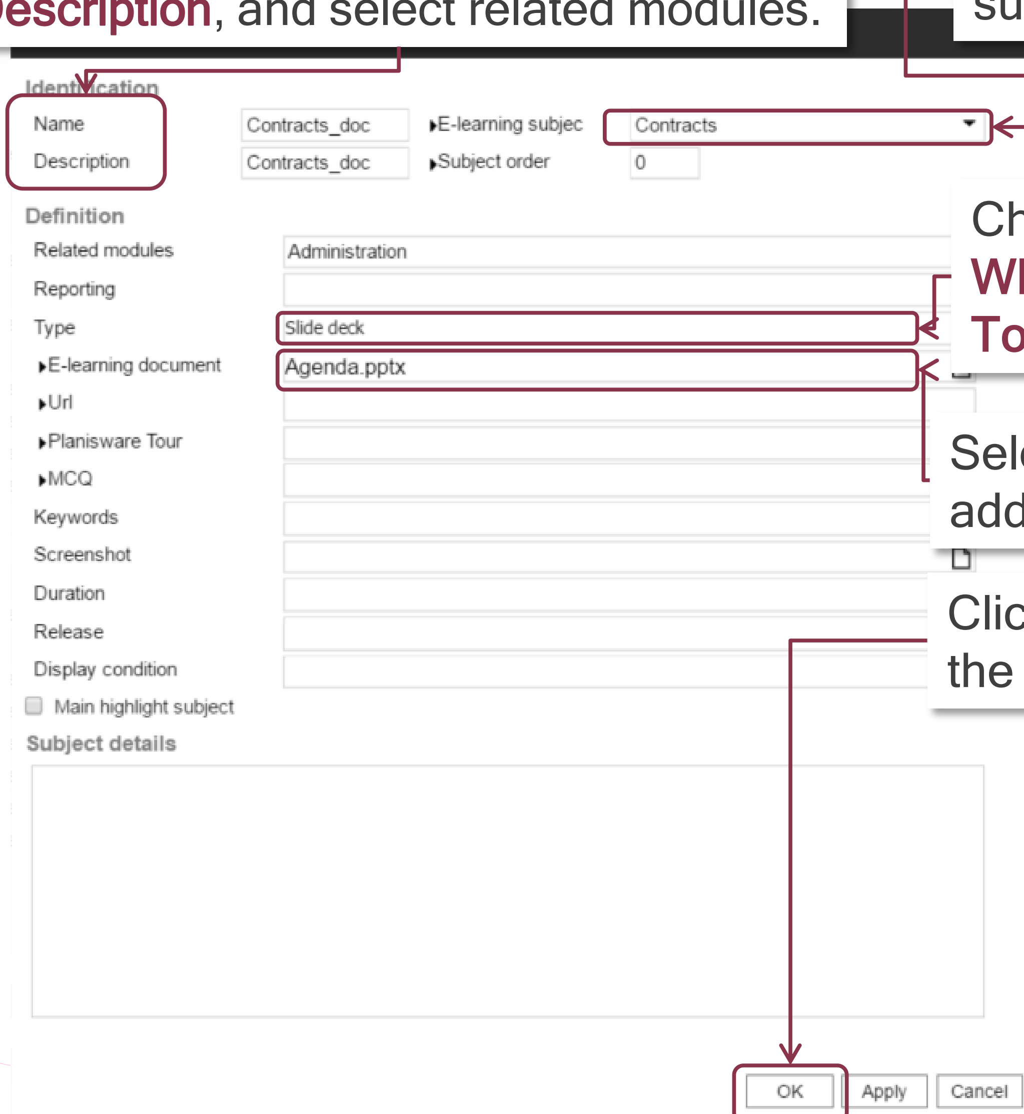
Enter a **Name** (mandatory) and a **Description**, and select related modules.

Select the created E-learning subject.

Choose between **Slide deck**, **Video**, **White paper**, **URL**, **and Planisware Tour**.

Select the document that you want to add.

Click **OK**. The document is added to the e-learning.



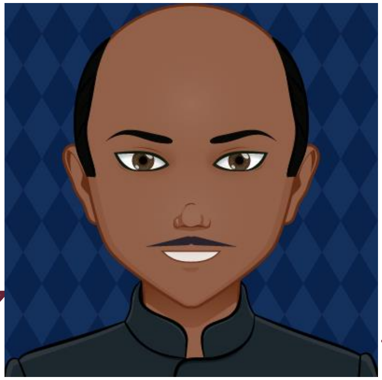
Meet Ajay, the Head of Usability

Styles

With so much data coming in, we need to make it more presentable and meaningful!

Colors and Images

We need thorough methods to highlight important information!



The number of attributes is overwhelming and I don't want to see them all the time!

Attribute Chooser Style

We need to make it easier for our users to navigate the application!

Text keys, toolbar, E-learning

Questions

Planisware
Get innovation to market

Level 1 Configuration - Protect your data

Security

Agenda (1:30pm – 3:00pm)

- Locks
- Alerts
- User Trace
- Data Management Rules
- User Profiles
- Access Rights

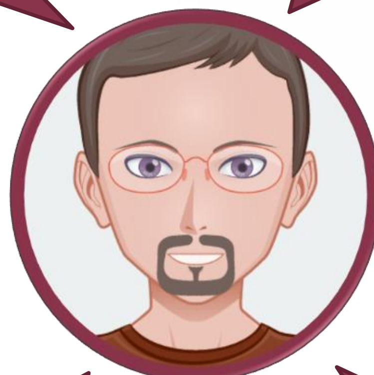
Meet your IT Security Officer

Meet Ivan, the IT Security Officer

Our data is too accessible by every user. This could cause major data management issues.

We would like users to be alerted when making changes to critical data.

We need to force users to use the data we need them to use.



The financial team would like access to projects and reports.

Every users can create projects. We need to restrict the creation to Project Managers.

We would like to have more visibility into changes of certain attributes.

Planisware

Locks

Introduction

Creating locks

Ivan’s first problem…

Our data is too accessible by every user. This could cause major data management issues.

Locks - Scenario

Scenario

Our users are changing the project state after the project has been set to active!! We need to restrict data changes on this attribute so that only Admins can change the value after a project has activated.

Locks - Scenario

Scenario

Our users are changing the project state after the project has been set to active!! We need to restrict data changes on this attribute so that only Admins can change the value after project has activated.

Analysis

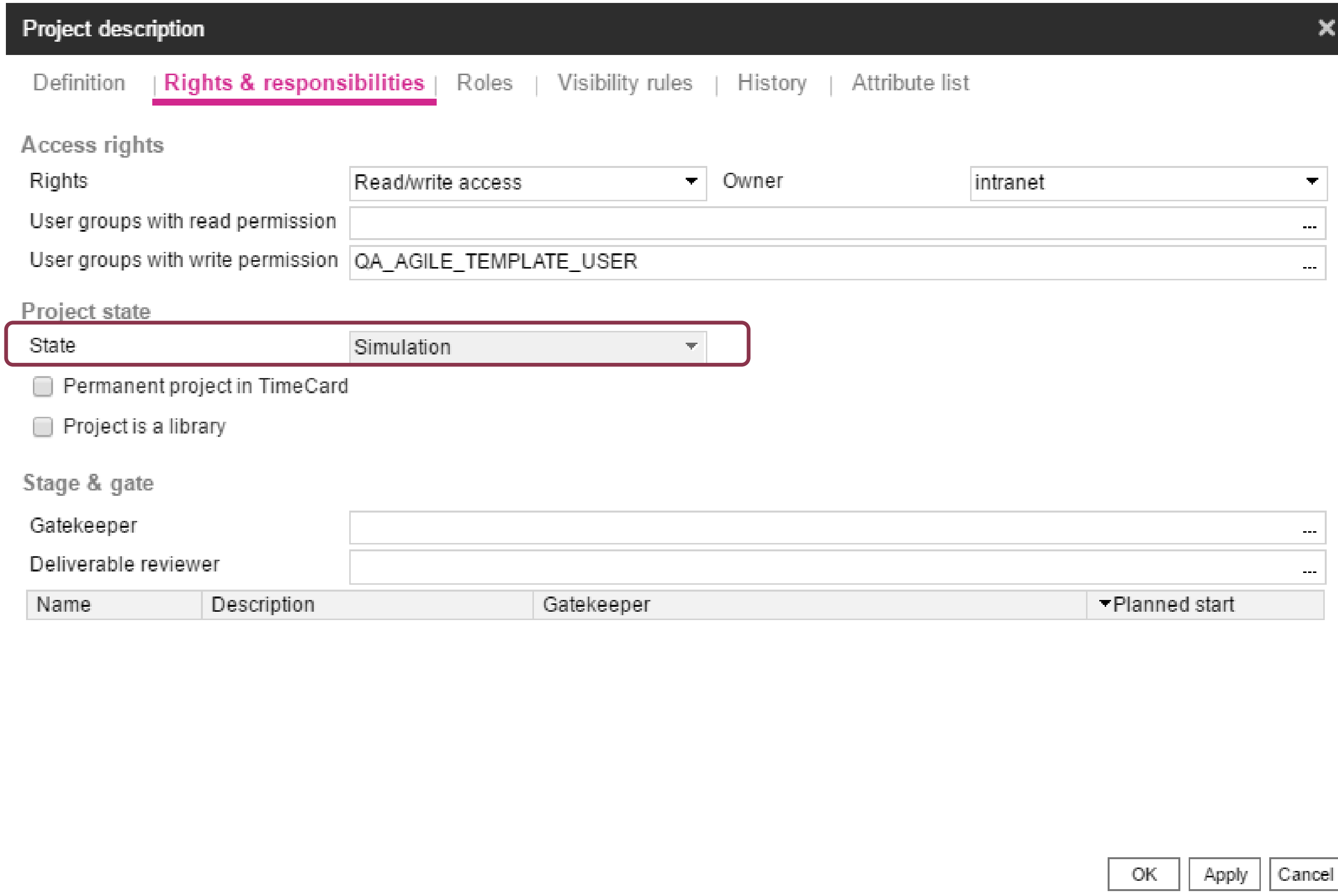
Locks allow you to lock specific attributes to specific users or in specific situations.

How to break down the situation:

1. Figure out relevant classes and attributes - **Project:** state
2. Figure out lock conditions :
   - When is the lock activated?
     - Locked when Active for Non Admin
   - When is the lock deactivated?
     - Unlocked when state is not Active

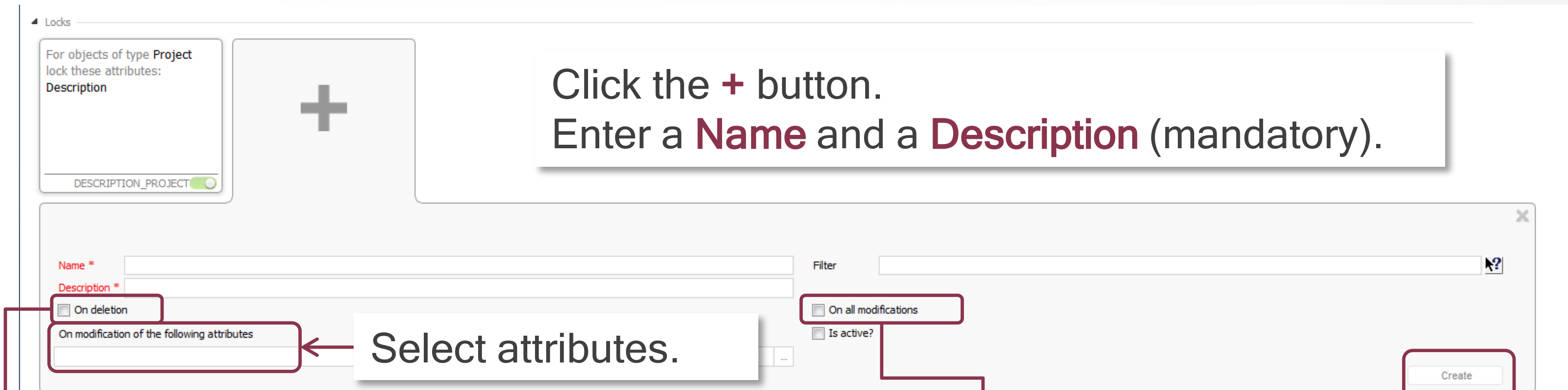
Introduction

A lock prevents attributes from modification or deletion.
In this example, the project **State** has been locked and put into read-only mode. The field is highlighted in grey and cannot be modified by a user.



Creating locks

To create a lock:



Click the **+** button.
Enter a **Name** and a **Description** (mandatory).

Select attributes.

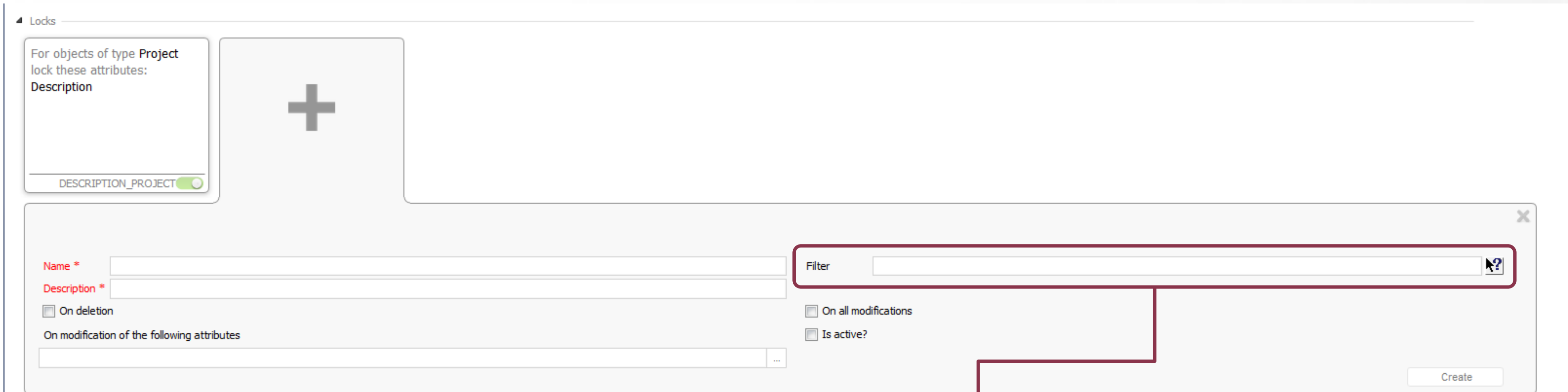
Check **On deletion** to prevent the attribute from deletion.

Check **On all modifications** to put the attribute into read-only mode. **Warning**: This flag prevents all objects matching the Filter from being modified at all. This means that no attributes can be modified. It is best to not use this option for performance reasons.

Click **Create**.

Creating locks for certain users/groups

To lock a field to only certain users or groups:



The **Filter** will cause this lock to only apply to certain situations.

The formula **USER_IN_GROUP(user,group)** will return true if the user is in the specified group.

In this case, if we want to lock a field to everyone *but* administrators, the filter would be:

NOT USER_IN_GROUP($CURRENT_USER,"ADMIN")

Exercise

Create a lock on your XX_UA_S_DIFFICULTY_LEVEL project attribute and only allow modifications if the current user is listed as the owner of the project.

Name = XX_LO_ DIFFICULTY_LEVEL
Description = XX Difficulty level lock
On modification of the following attributes = XX Difficulty level
Filter = $CURRENT_USER <> OWNER

Test the lock to make sure you can only change the difficulty level on project where you are listed as the owner.

Alerts

Introduction

Creating alerts

Ivan’s second problem…

We would like users to be alerted when making changes to critical data.

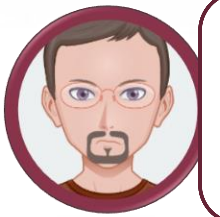
Alert - Scenario

Scenario

That lock on the project state is great! We have another attribute, the project description, that we don't want to lock, but rather ensure it is populated at all times!

Alert - Scenario

Scenario



That lock on the project state is great! We have another attribute, the project description, that we don't want to lock, but rather ensure it is populated at all times!

1 2

Analysis

Alerts can do so many things! In this example, we will use an alert to tell the current user they need to have a description if they attempt to delete a description. But we can also alert other users, either through emailing or through notifications.

How to break down the situation:

1 Figure out relevant classes and attributes - **Project:** description

Alert - Scenario

Scenario

That lock on the project state is great! We have another attribute, the project description, that we don't want to lock, but rather ensure it is populated at all times!

1 2

Analysis

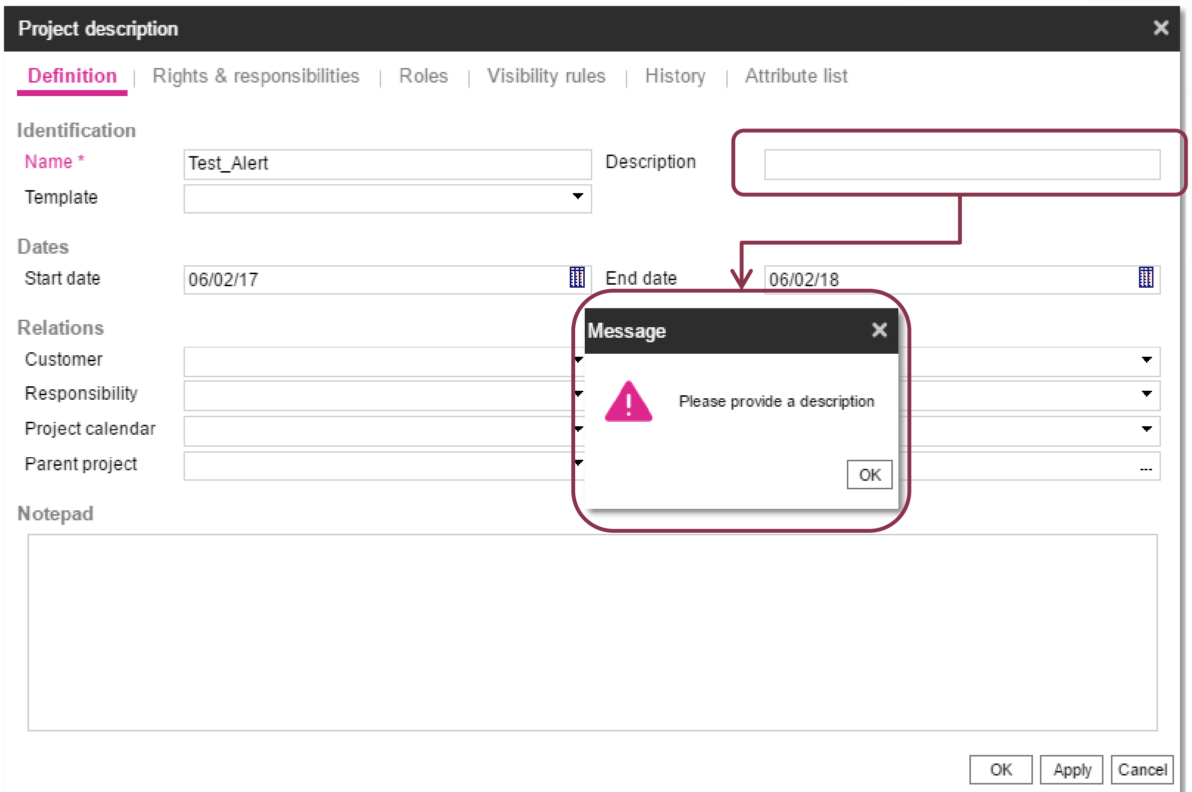
Alerts can do so many things! In this example, we will use an alert to tell the current user they need to have a description if they attempt to delete a description. But we can also alert other users, either through emailing or through notifications.

How to break down the situation:

1. Figure out relevant classes and attributes - **Project:** description
2. Determine what needs to be done - **description never blank**

Introduction

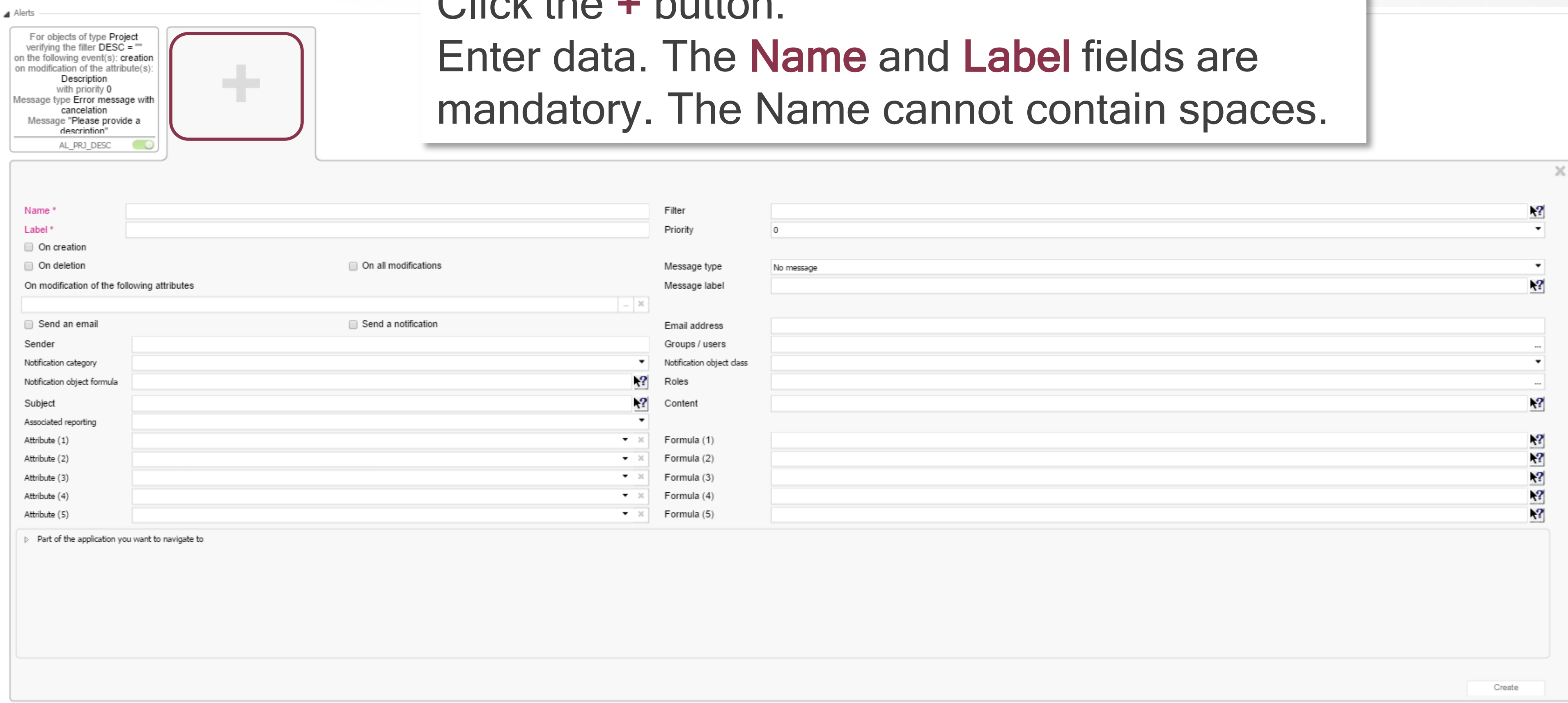
With an alert, it is possible, for example, to request the user to fill the **Description** field of a project when creating it.
When creating a project, a message is displayed if the user has not entered a description.



Creating alerts

To create an alert:

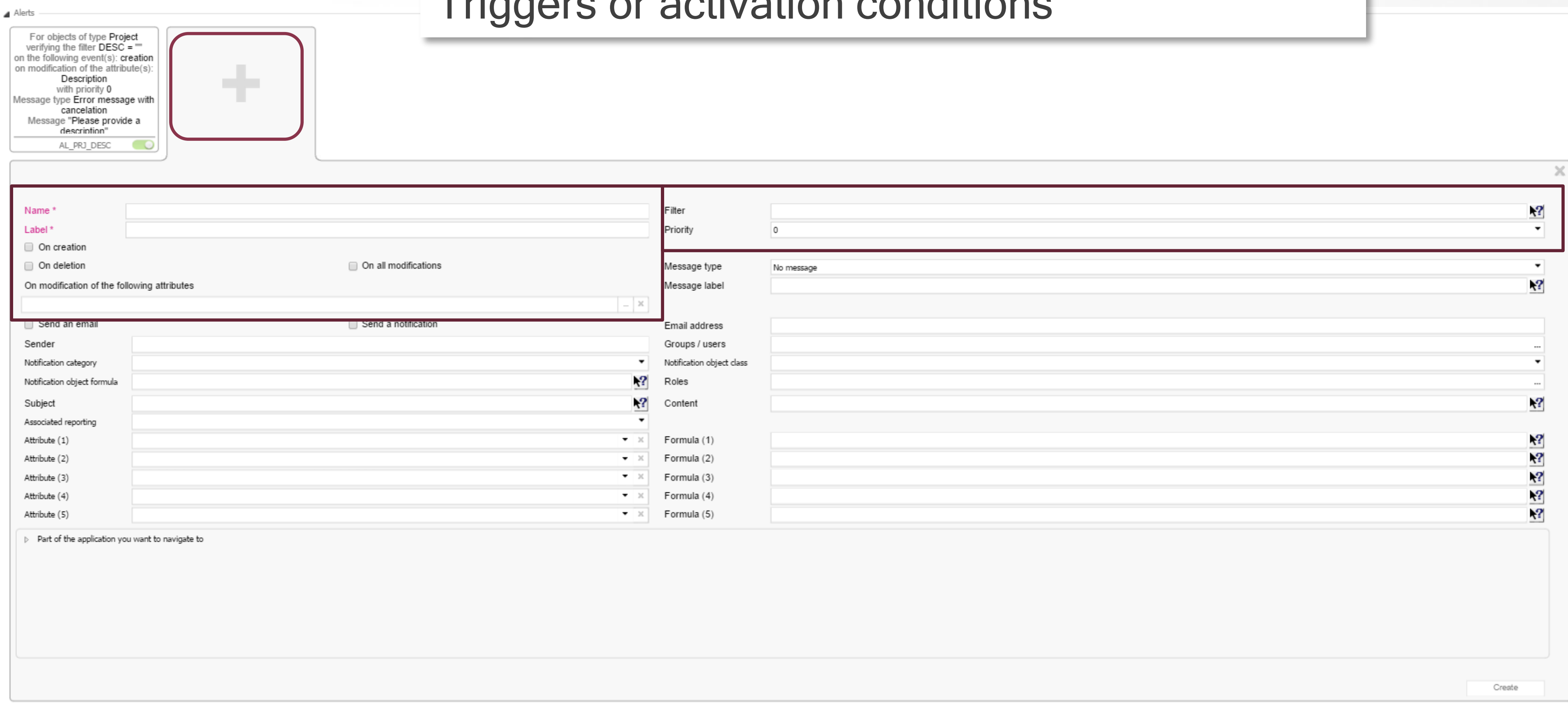
Click the **+** button.
Enter data. The **Name** and **Label** fields are mandatory. The Name cannot contain spaces.



Creating alerts

To create an alert:

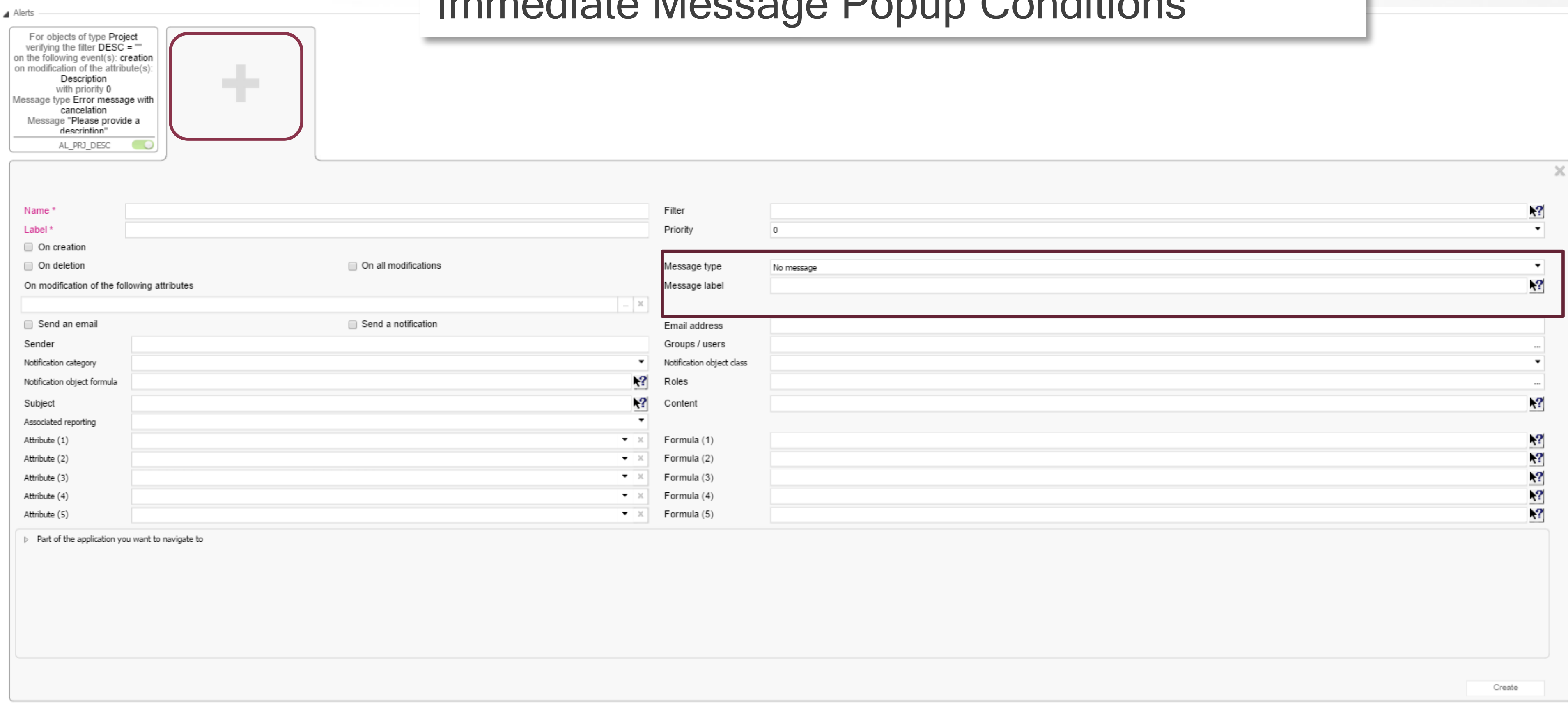
Triggers or activation conditions



Creating alerts

To create an alert:

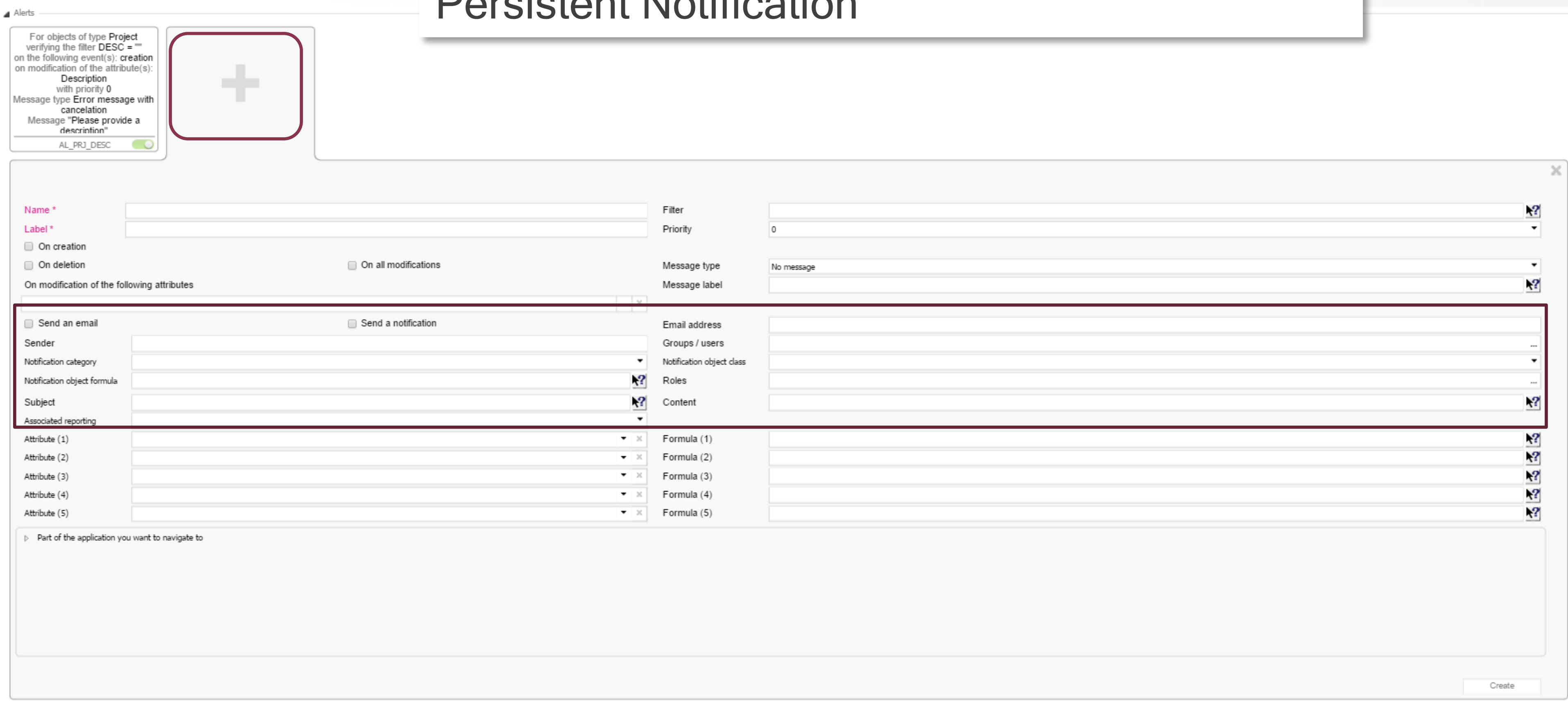
Immediate Message Popup Conditions



Creating alerts

To create an alert:

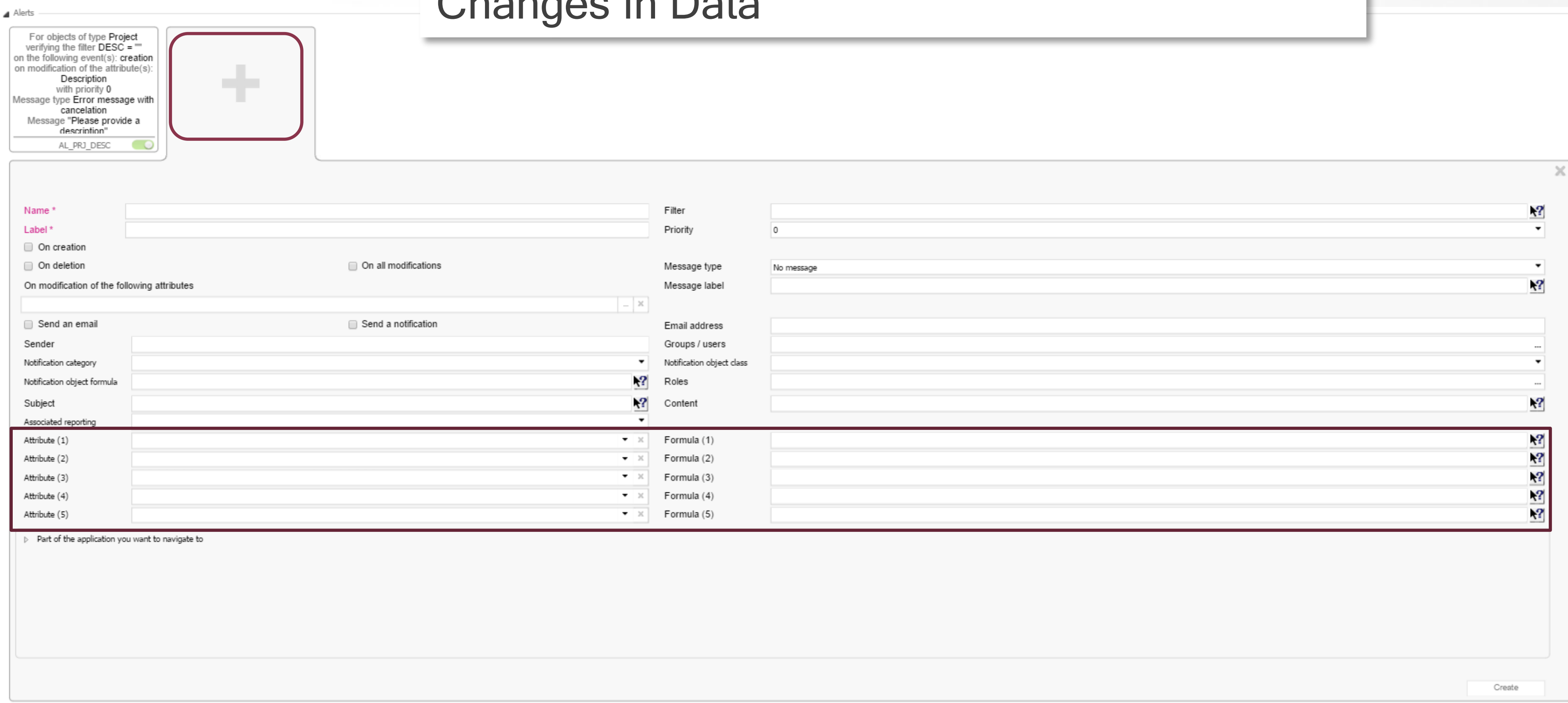
Persistent Notification



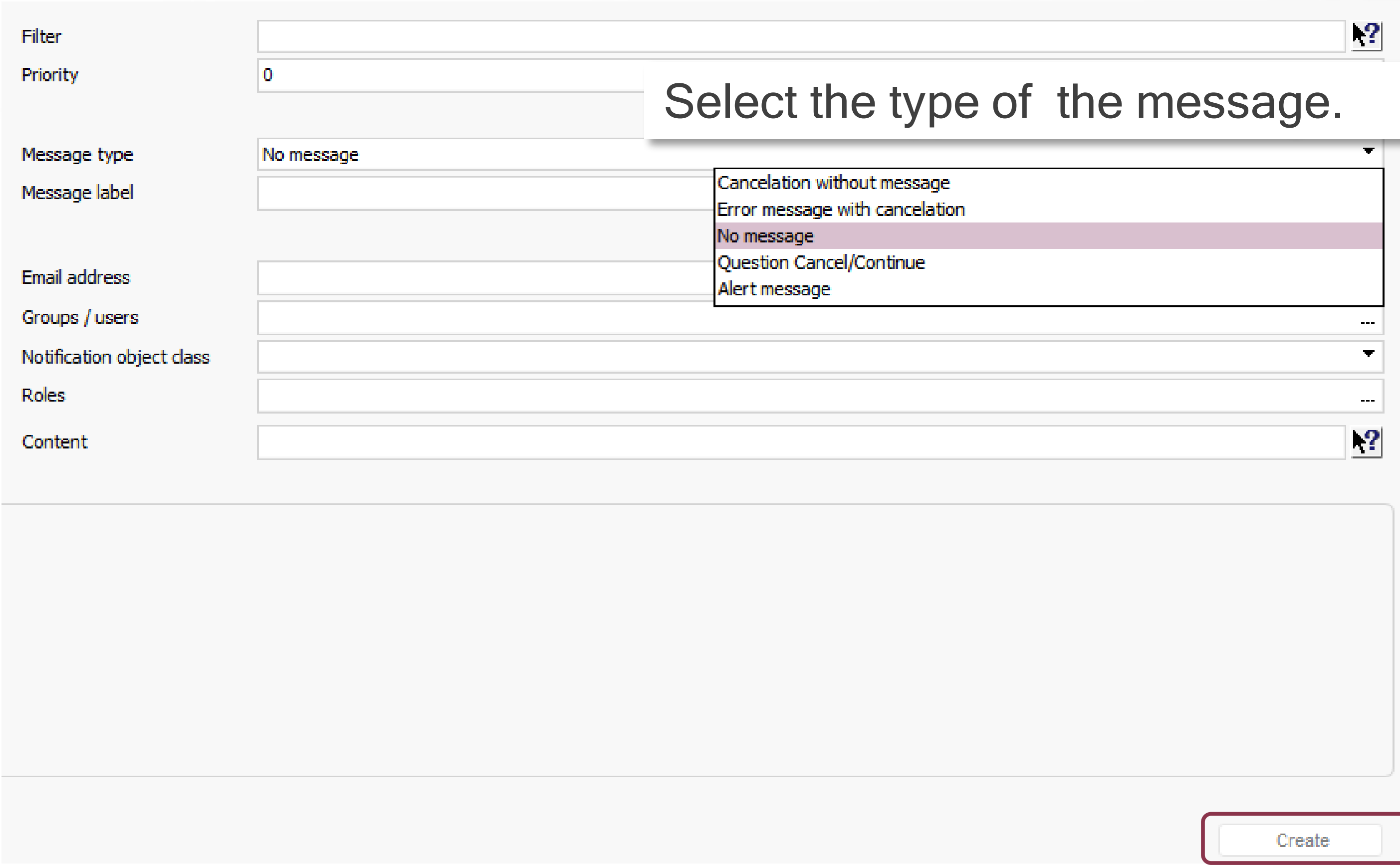
Creating alerts

To create an alert:

Changes in Data



Creating alerts



Select the type of the message.

Click **Create**.

Exercise

Testing activation Conditions:

Alert on project creation the popup message

"Project created" (Use Naming convention XX_PRJ_CREATE)

Alert and prevent on Active State projects the popup message

"Can not delete an active project" (XX_PRJ_DELETE)

Exercise

Testing activation Conditions:

Alert on project creation the popup message

“Project created” (Use Naming convention XX_PRJ_CREATE)

Alert and prevent on Active State projects the popup message

“Can not delete an active project” (XX_PRJ_DELETE)

Testing default Value:

Create 2 date attributes on the project with your 2 initials on the front appended with

1) XX_PROJECT_CREATION_DATE

2) XX_LAST_PRJ_DEL_ATTEMPT

Create 1 String attribute on project with your 2 initials on the front appended with

1) XX_ LAST_PRJ_DEL_ATTEMPT_USER

On your project created alert, set XX_PROJECT_CREATION_DATE to $DATE_OF_THE_DAY

On your Deletion set XX_LAST_PRJ_DEL_ATTEMPT to today and set XX_ LAST_PRJ_DEL_ATTEMPT_USER to the current user

User trace

Introduction

Creating user traces

Ivan’s third problem…

We would like to have more visibility into changes of certain attributes.

User trace - Scenario

Scenario

We have a project whose description field was changed, but we don't know when or by whom. Is there a way to monitor changes to this field over time?

User trace - Scenario

Scenario

1 We have a project whose description field was changed, but we don't know when or by whom. Is there a way to monitor changes to this field over time? 2

Analysis

A user trace gives administrators the ability to see a record of user actions, such as attribute modification. In addition, user traces can be used to monitor object creation and deletion.

How to break down the situation:

1 Figure out relevant classes - **Project:** description

User trace - Scenario

Scenario

① We have a project whose description field was changed, but we don't know when or by whom. Is there a way to monitor changes to this field over time? ②

Analysis

A user trace gives administrators the ability to see a record of user actions, such as attribute modification. In addition, user traces can be used to monitor object creation and deletion.

How to break down the situation:

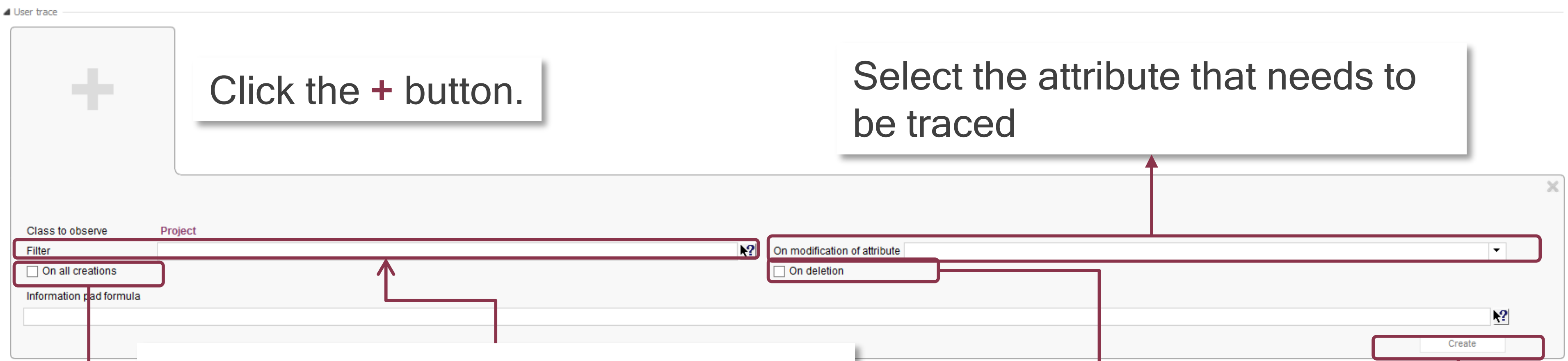
1. Figure out relevant classes - **Project:** description
2. Determine what needs to be done - user trace on modification

Introduction

User trace enables managers and administrators to track changes on a selected Object type. User traces allow you to define what kind of change concerning the selected object class you want to trace: the creation, the deletion, or the modification of a specific attribute. You can display the user trace log in the **Data** page, by selecting **User traces logs** in the Object type filter

Creating user traces

To create an user trace:



Click the + button.

Select the attribute that needs to be traced

Enter a filter on the Class to observe

Click **Create**.

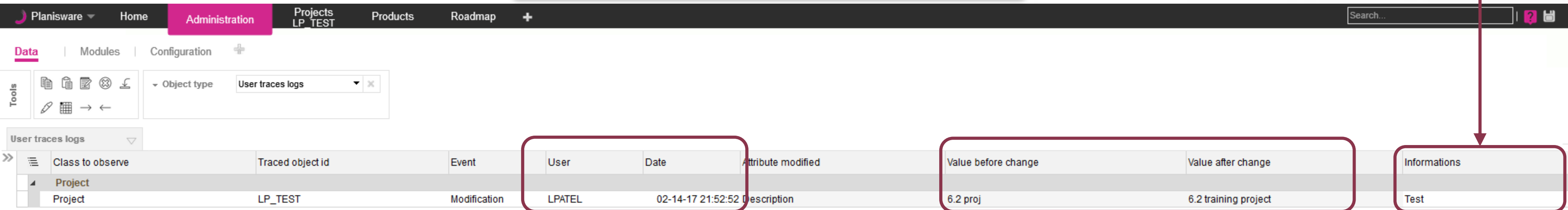
Check to log all creations of objects in the class

Check to create log entry upon deletion of object

Creating user traces

To create an user trace:

The Information column is filled by the Information pad formula.



The User and Modification Date are logged.

The attribute value before and after the change is logged

Exercise

Create a user trace on your XX_DIFFICULTY_LEVEL project attribute.

Test the trace by modifying the attribute and checking the log in the User traces logs on Administration->Data page.

Data management rules

Introduction

Message type

Creating data management rules

Ivan’s fourth problem…

We need to force users to use the data we need them to use.

Data Management Rule - Scenario

Scenario

Our users are selecting the wrong responsibility on projects. We want them to select only level 2 responsibilities!

Data Management Rule - Scenario

Scenario

1

Our users are selecting the wrong responsibility on projects. We want them to select only level 2 responsibilities!

2

Analysis

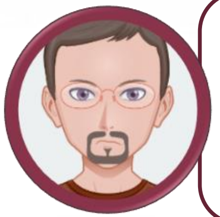
Data management rules (DMR) allows you to filter the values available in a list.

How to break down the situation:

1 1. Figure out relevant classes — **Project:** Responsibility

Data Management Rule - Scenario

Scenario



1

Our users are selecting the wrong responsibility on projects. We want them to select only level 2 responsibilities!

2

Analysis

Data management rules (DMR) allows you to filter the values available in a list.

How to break down the situation:

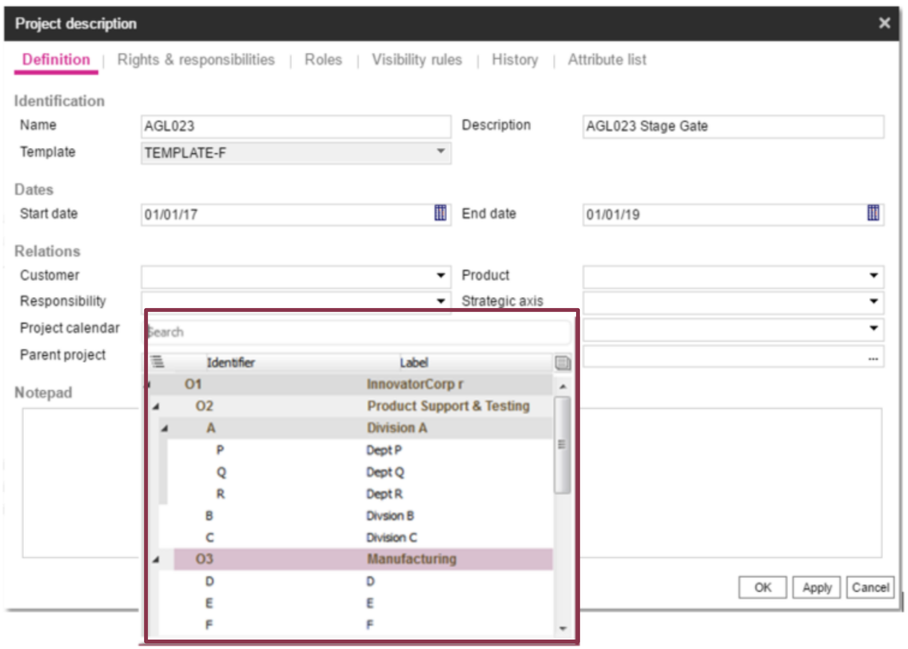
1 1. Figure out relevant classes — - **Project:** Responsibility

2 2. Determine what needs to be done — - DMR on project to filter Responsibility

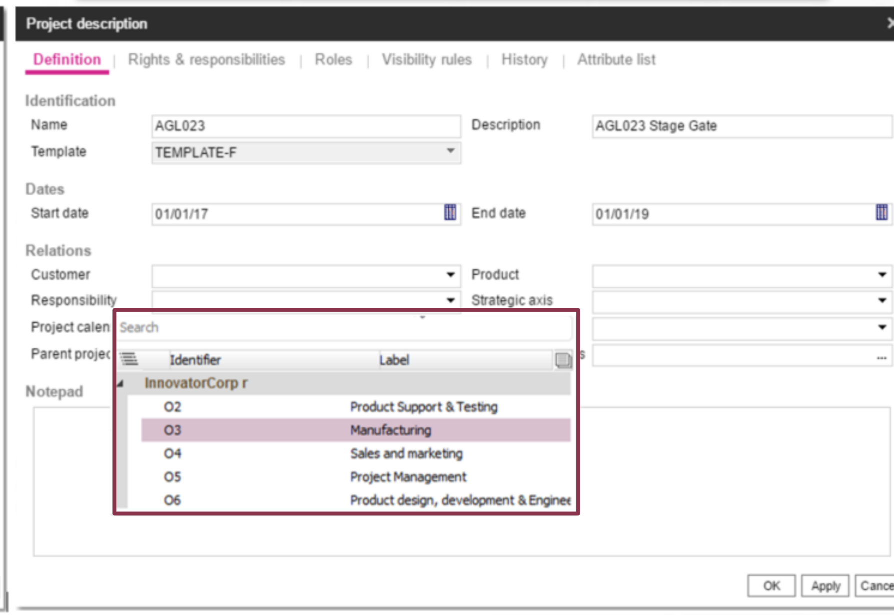
Introduction

Data management rules (DMR), or data consistency rules, allow the administrator to filter the values available in a list. The list of possible values is filtered on all pages (gantt, tables, reports etc…).

Without a Data Management Rule

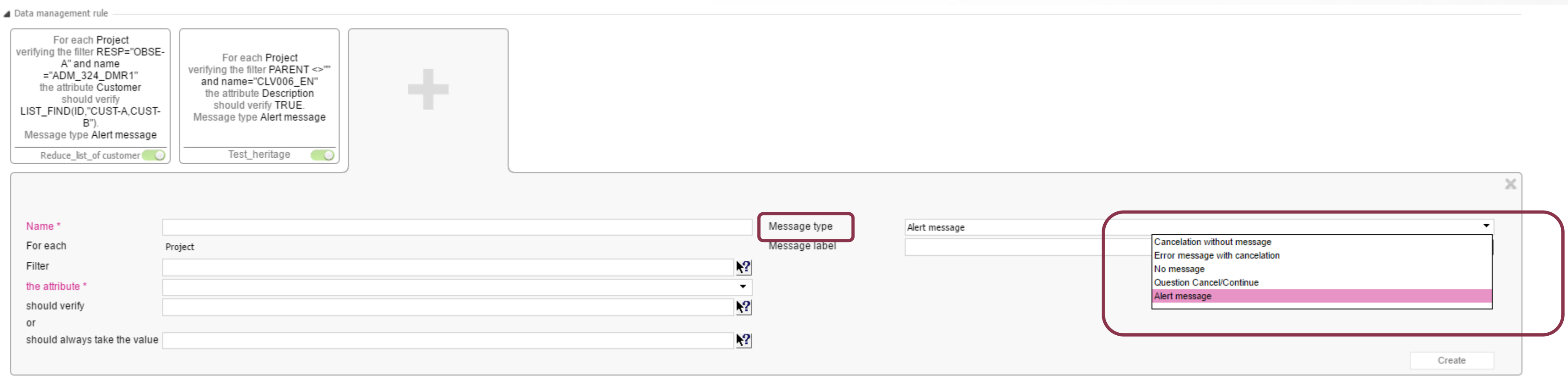


With a Data Management Rule restricting at level 2 of OBS



Message type

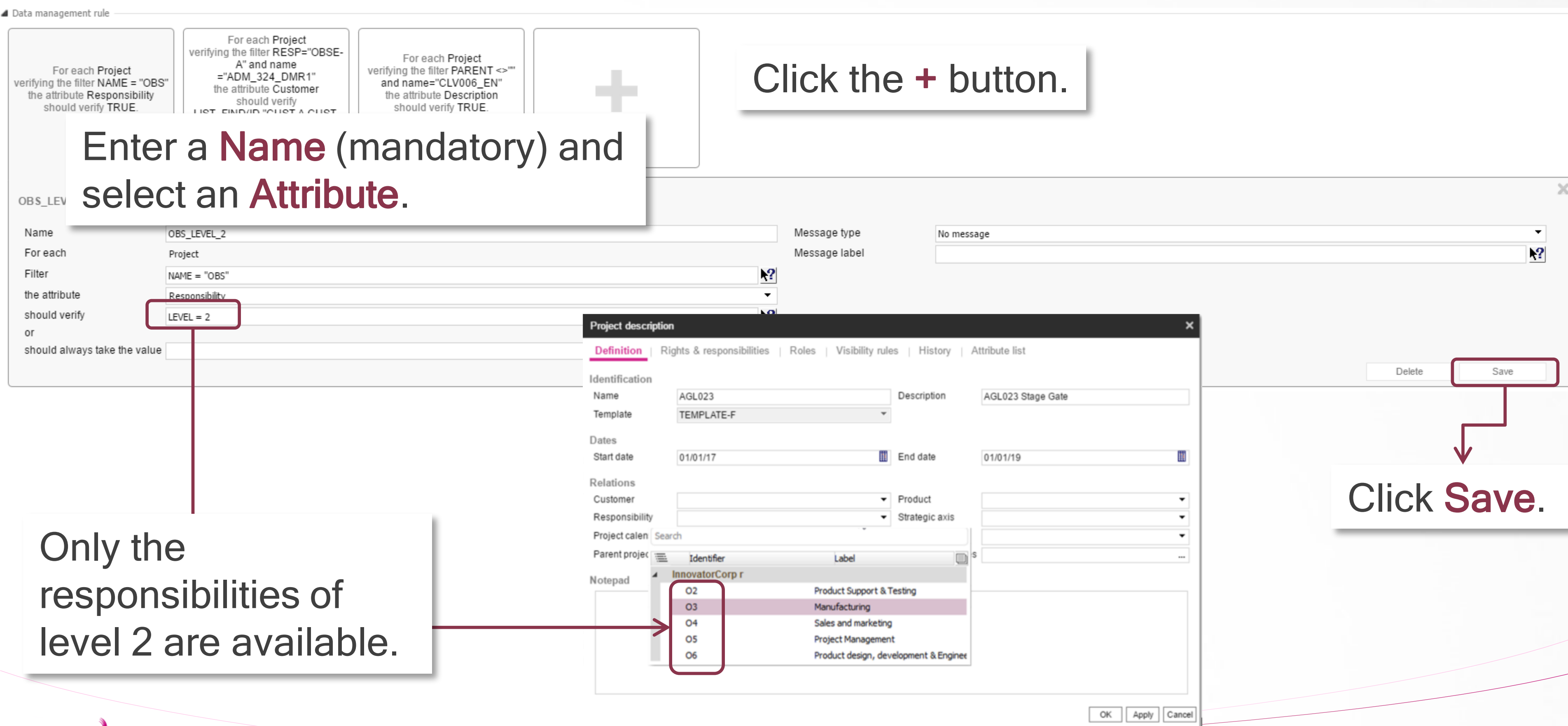
A DMR can also verify the input of a field according to certain rules, to optionally warn the user and even to cancel the input if required.
To do so, select a **Message type** from the drop-down list.



Creating data management rules

Example 1: Displaying only responsibility level 2 on projects.

- Select **Projects** as **Object Type**.
- To create a DMR:



Examples

Data Autofill

DMR that autopopulates desc based on STATE + NAME

User Profiles

Introduction

Ivan’s fifth problem…

The financial team would like access to projects and reports.

User Profile - Scenario

Scenario

The financial team would like access to projects and reports.

User Profile - Scenario

Scenario

1

The financial team would like access to projects and reports.

2

Analysis

User profiles are designed to grant access to modules and functionalities for several users. Profiles are also used to define the default pages and tabs that should be displayed when first connecting to the application.

How to break down the situation:

1. Determine what needs to be done **- New user profile**
2. Granting Access to Modules and Functionalities

Introduction

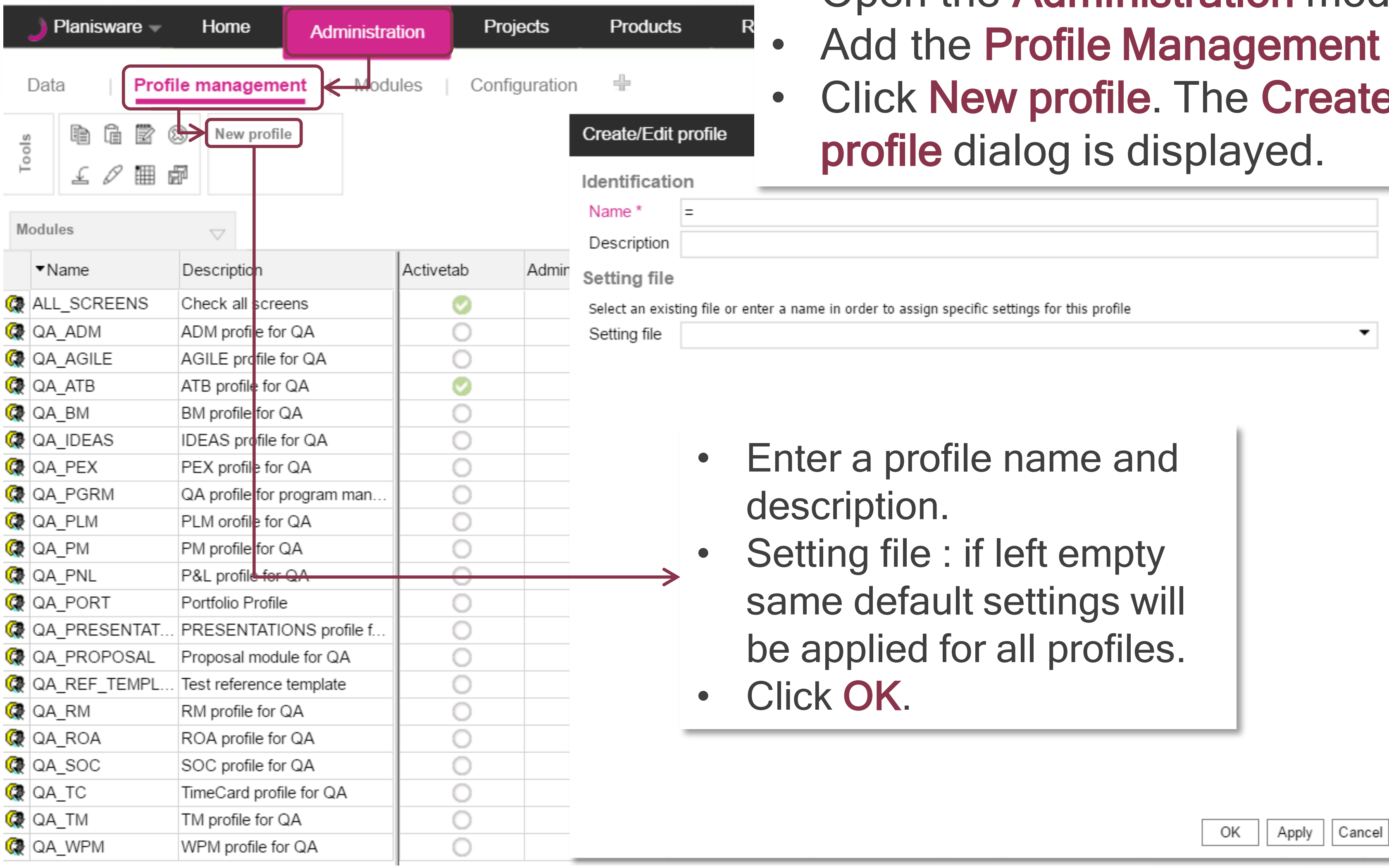
A profile is a user group marked as a profile. A standard user group can still be used to manage access to data.

Name	Is a profile?	Description
ADM	✓	Administration
ADVANCED_PM		Advanced PM
AGILE	✓	Agile module
BM		Budget Manager
CONF		
DEV_IT		OPX2 IT development team
DM		Idea/Demand management
ER_VALIDATORS		Expense reports validators
ES		Estimations
GEN	✓	General
GEN_US		US Configuration
HELP_DESK		Workpackages user groups
HOME_ONLY	✓	Profile with only the home page
HR		Workpackages user groups
ICM		Idea campaign managers
IM	✓	Opportunities
INV		Invoicing
MARKETING		Workpackages user groups
MN_DETAIL		Detailed Planning members for Multi Level purposes
MN_MACRO		Macro Planning members for Multi Level purposes
MODULES		Modules
MSP		Opx2 Server Users

Creating Profiles

To create a new profile:

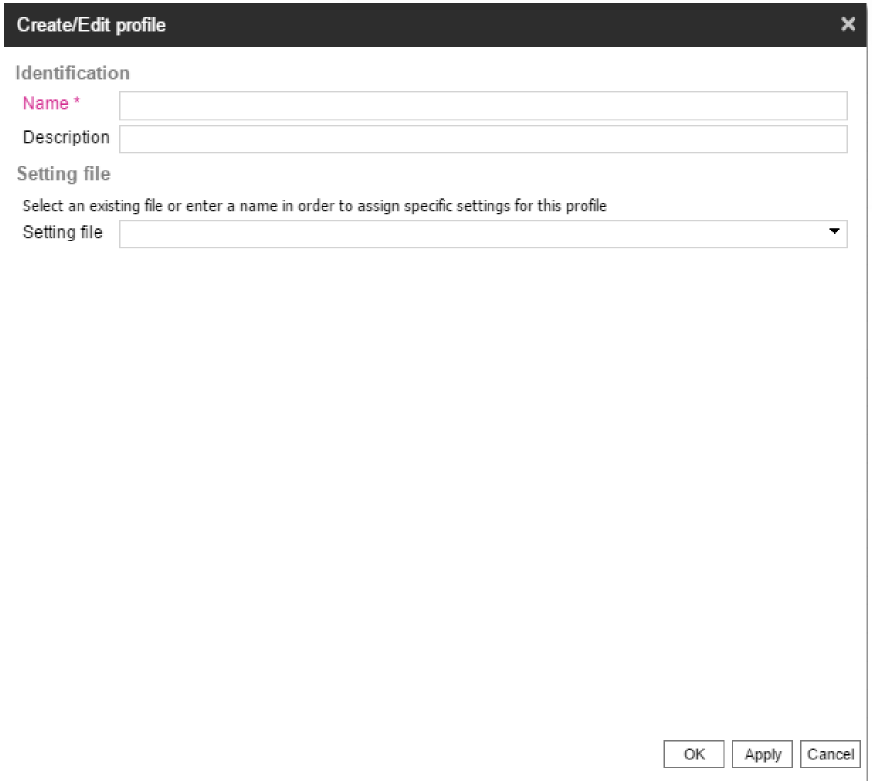
- Open the **Administration** module.
- Add the **Profile Management** page.
- Click **New profile**. The **Create/Edit profile** dialog is displayed.



- Enter a profile name and description.
- Setting file : if left empty same default settings will be applied for all profiles.
- Click **OK**.

Creating Setting File

- Setting files are used to store different set of settings values (for example € as default currency for users in Europe and $ for users in US).



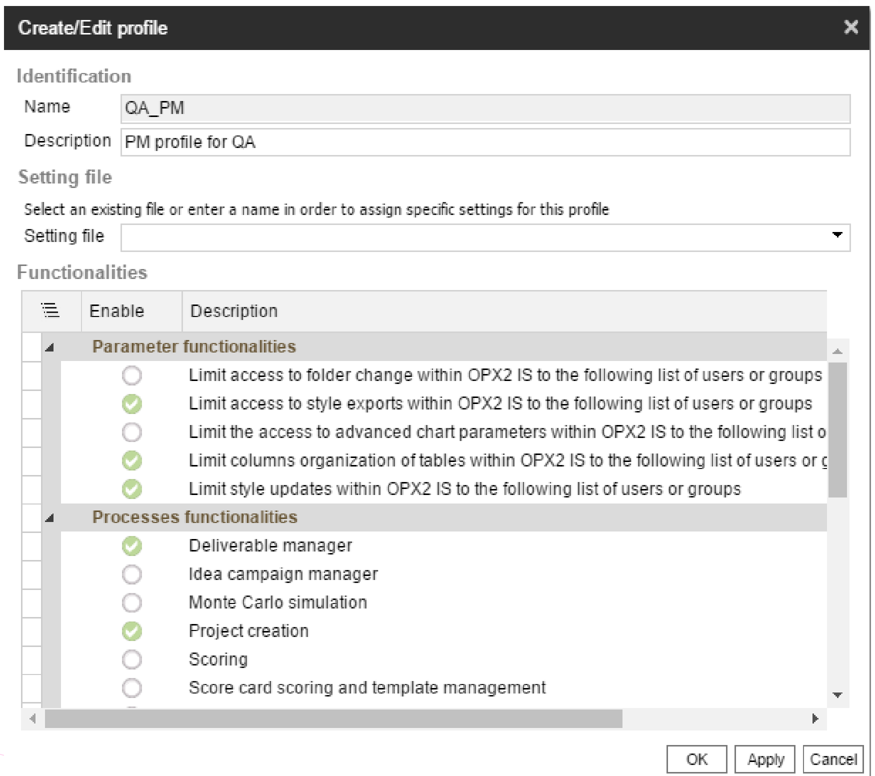
To assign a Setting file:
Enter a name in the **Setting file** field.
The system checks if the common file exists and creates it if necessary. It also creates a global setting file object if necessary (Object type GLOBALSETTING_FILE in Administration > Data).

Note: To delete the global setting file object, clear the Setting file field. The global setting file object is deleted but the linked common file is not deleted.

Updating Profiles

To update a profile:

- Open the **Administration** module.
- Add the **Profile management** page.
- In the table, click on the name of the profile you want to update. The **Create/Edit profile** dialog is displayed.



- Update your data.
- Click **OK**. The profile is updated.

Parameters and functionalities granted to the profile.

Access Rights

Introduction

Ivan’s final problem…

Every users can create projects. We need to restrict the creation to Project Managers.

Access Right - Scenario

Scenario

Every users can create projects. We need to restrict the creation to Project Managers.

Access Rights - Scenario

Scenario

Every users can create projects. We need to 2 restrict the creation to 1 Project Managers.

Analysis

Once a profile has been created, the administrator can define the modules and functionalities to which the profile has access.

How to break down the situation:

1 1. Figure out relevant profiles -**Profile**: Every profiles besides PM

2 2. Determine what needs to be done -Revert **Project Creation** functionality

Planisware

Access Rights - Scenario

Scenario

Every users can create projects. We need to restrict the creation to Project Managers.

Analysis

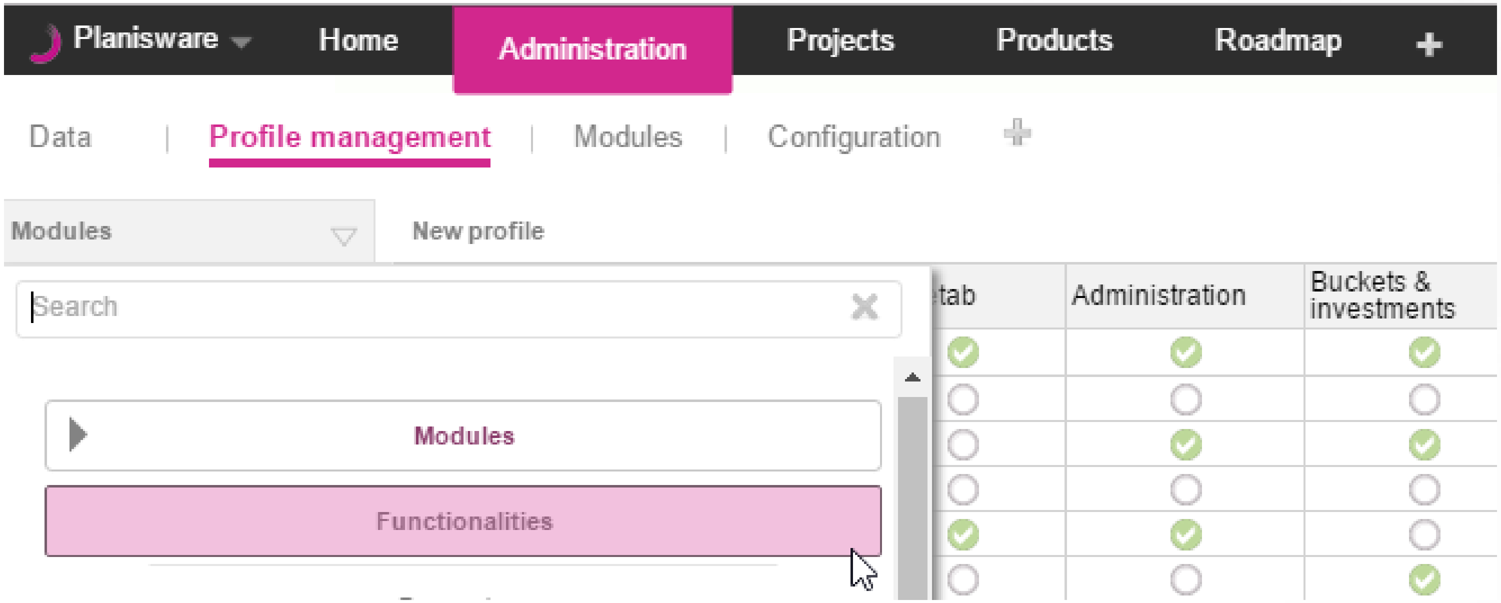
Once a profile has been created, the administrator can define the modules and functionalities to which the profile has access.

How to break down the situation:

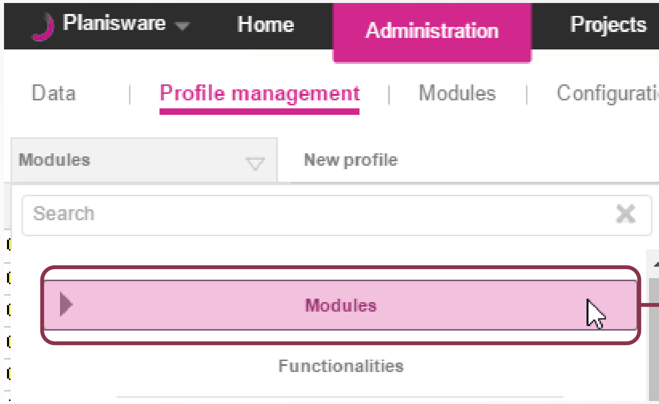
1. Figure out relevant profiles -**Profile**: Every profiles besides PM
2. Determine what needs to be done -Revert **Project Creation** functionality

Introduction

Access to Modules and Functionalities can easily be managed through the Profile Management page.



Granting Access to Modules



To grant access to modules:

- In the **Administration** module, on the **Profile management** page, click the **Modules** shortcut. The matrix of profiles and modules is displayed.

Modules | New profile

Name	Description	Activetab	Administration	Buckets & investments	E-learning	Home	Idea campaign
ALL_SCREENS	Check all screens	✓	✓	✓	✓	✓	✓
NB-TEST	Test NB	○	○	○	○	✓	○
QA_ADM	ADM profile for QA	○	✓	✓	✓	✓	✓
QA_AGILE	AGILE profile for QA	○	○	○	○	✓	○
QA_ATB	ATB profile for QA	✓	✓	○	○	✓	○
QA_BM	BM profile for QA	○	○	✓	○	✓	○
QA_IDEAS	IDEAS profile for QA	○	✓	○	○	✓	✓
QA_PEX	PEX profile for QA	○	✓	○	○	✓	○
QA_PGRM	QA profile for program management	○	○	○	○	✓	○
QA_PLM	PLM orofile for QA	○	✓	○	○	✓	✓
QA_PM	PM profile for QA	○	✓	○	○	✓	○
QA_PNL	P&L profile for QA	○	✓	○	○	✓	○
QA_PORT	Portfolio Profile	○	○	○	○	✓	○
QA_PRESENTATIONS	PRESENTATIONS profile for QA	○	○	○	○	✓	○

The module is selected. ✓

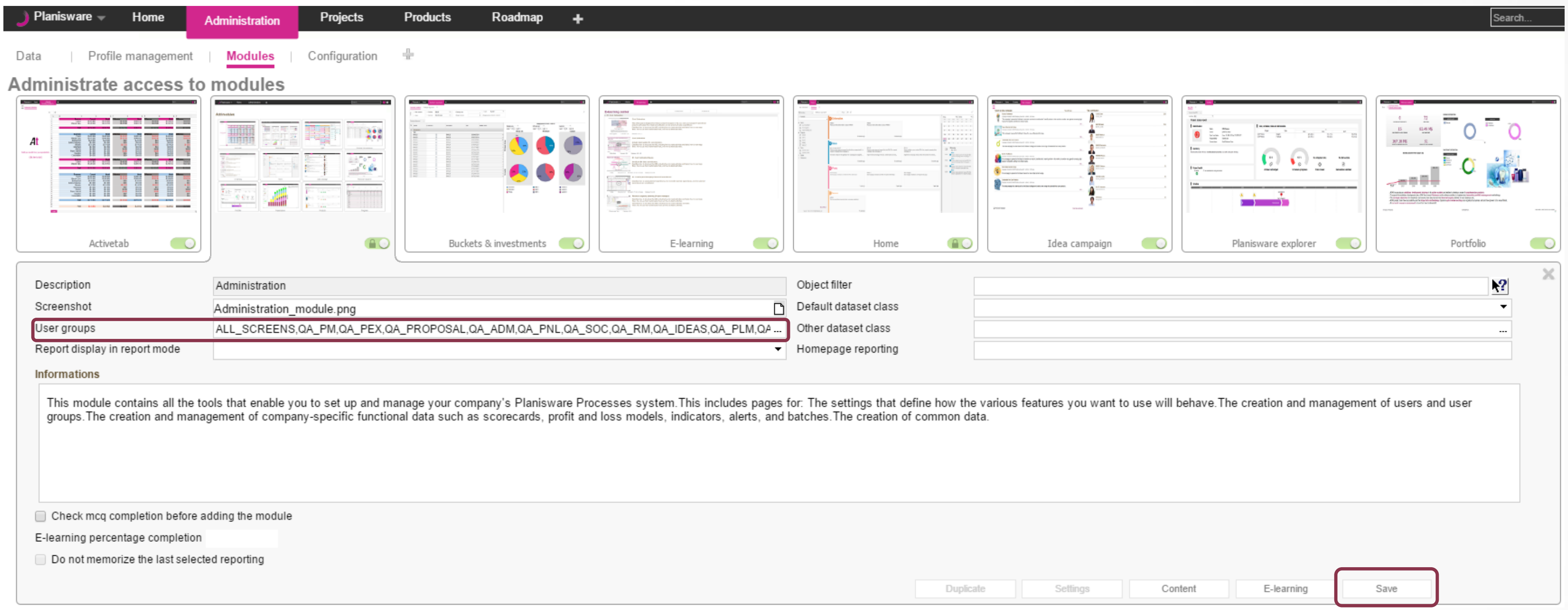
The module is deselected. ○

Note: By default, the **Home** module is always selected and displayed for each profile.

Granting Access to Modules

It is also possible to grant access to modules in the **Administration** module, on the **Modules** page:

- Click on the thumbnail of a module.
- In the **User group** field, update the list of the user groups.

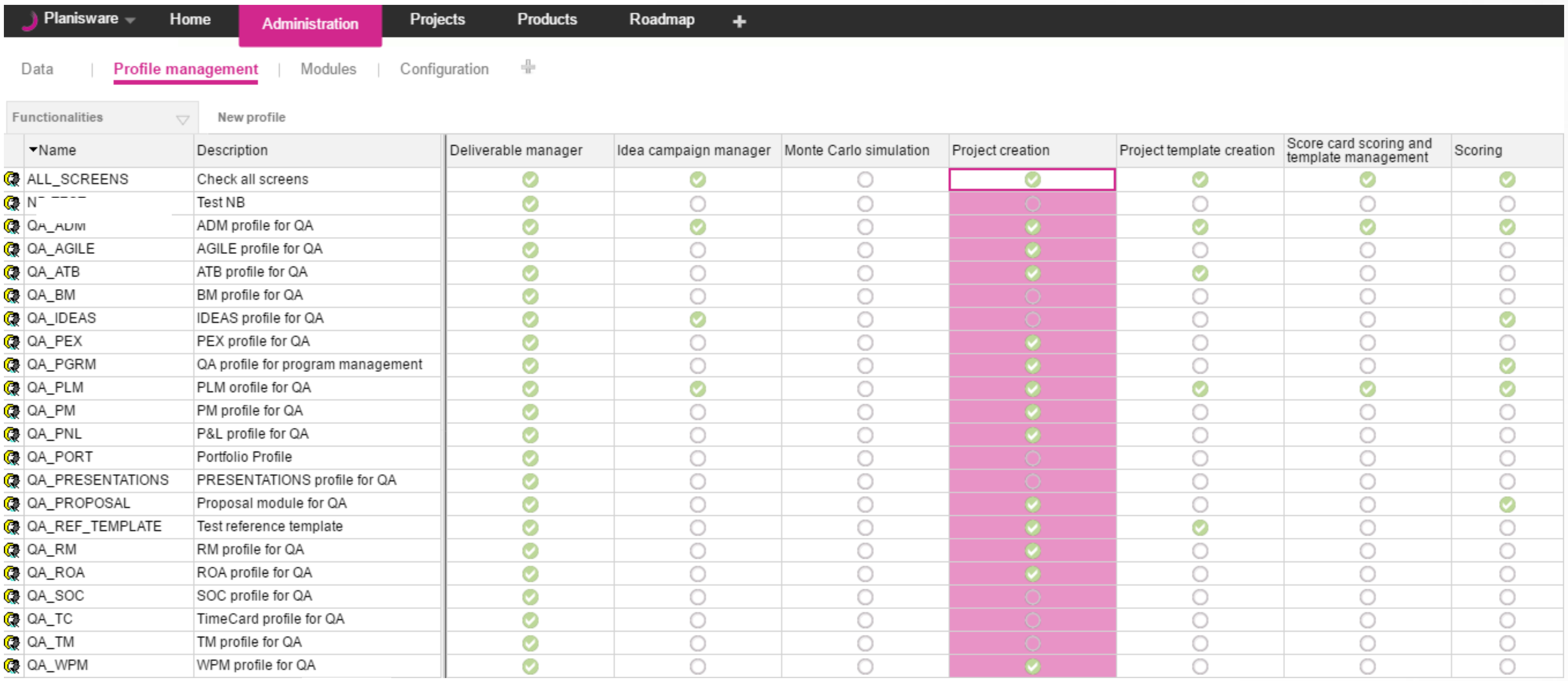


Click **Save**.

Granting Access to Functionalities

To grant access to functionalities such as project creation or shortcuts management :

- In the **Administration** module, on the **Profile management** page, click the **Functionalities** shortcut. The list of the profiles and functionalities is displayed.



Name	Description	Deliverable manager	Idea campaign manager	Monte Carlo simulation	Project creation	Project template creation	Score card scoring and template management	Scoring
ALL_SCREENS	Check all screens	✓	✓	○	✓	✓	✓	✓
N[illegible]	Test NB	✓	○	○	○	○	○	○
QA_ADM	ADM profile for QA	✓	✓	○	✓	✓	✓	✓
QA_AGILE	AGILE profile for QA	✓	○	○	✓	○	○	○
QA_ATB	ATB profile for QA	✓	○	○	✓	✓	○	○
QA_BM	BM profile for QA	✓	○	○	○	○	○	○
QA_IDEAS	IDEAS profile for QA	✓	✓	○	○	○	○	✓
QA_PEX	PEX profile for QA	✓	○	○	✓	○	○	○
QA_PGRM	QA profile for program management	✓	○	○	✓	○	○	✓
QA_PLM	PLM orofile for QA	✓	✓	○	✓	✓	✓	✓
QA_PM	PM profile for QA	✓	○	○	✓	○	○	○
QA_PNL	P&L profile for QA	✓	○	○	✓	○	○	○
QA_PORT	Portfolio Profile	✓	○	○	○	○	○	○
QA_PRESENTATIONS	PRESENTATIONS profile for QA	✓	○	○	○	○	○	○
QA_PROPOSAL	Proposal module for QA	✓	○	○	✓	○	○	✓
QA_REF_TEMPLATE	Test reference template	✓	○	○	✓	✓	○	○
QA_RM	RM profile for QA	✓	○	○	✓	○	○	○
QA_ROA	ROA profile for QA	✓	○	○	✓	○	○	○
QA_SOC	SOC profile for QA	✓	○	○	○	○	○	○
QA_TC	TimeCard profile for QA	✓	○	○	○	○	○	○
QA_TM	TM profile for QA	✓	○	○	○	○	○	○
QA_WPM	WPM profile for QA	✓	○	○	✓	○	○	○

✓ The functionality is selected.

○ The functionality is deselected.

Granting Access to Functionalities

Functionality	
Idea campaign manager	Allows users to create idea campaigns.
Monte-Carlo-Simulation	Allows users to access to the Monte-Carlo simulation
Project creation	Allows users to create new projects.
Project template creation	Allows users to create new project templates.
Scorecard scoring and template management	Allows users to define scorecards
Scoring	Allows users to enter score on scorecards
Shortcuts management	Allows users to edit the shortcuts in the Style Manager menu.
Stage & Gate	Gives users access to the Stage & Gate page in the Project management module.
TimeCard	Gives users access to the TimeCard pages in the Team member module.
Tools for simulations	Allows users to create a portfolio simulation in the Projects module.

Granting Access to Parameters

To grant access to parameters:

- In the **Administration** module, on the **Profile management** page, click the **Parameters** shortcut. The list of the profiles and parameters is displayed.

Planisware | Home | Administration | Projects | Products | Roadmap | +

Data | Profile management | Modules | Configuration

Parameters | New profile

Name	Description	Limit access to folder change within OPX2 IS to the following list of users or groups	Limit access to style exports within OPX2 IS to the following list of users or groups	Limit columns organization of tables within OPX2 IS to the following list of users or groups
ALL_SCREENS	Check all screens	○	○	○
NB-TEST	Test NB	○	○	○
QA_ADM	ADM profile for QA	○	○	✓
QA_AGILE	AGILE profile for QA	○	○	✓
QA_ATB	ATB profile for QA	○	○	○
QA_BM	BM profile for QA	○	○	✓
QA_IDEAS	IDEAS profile for QA	○	○	✓
QA_PEX	PEX profile for QA	○	○	✓
QA_PGRM	QA profile for program management	○	○	✓
QA_PLM	PLM orofile for QA	○	○	✓
QA_PM	PM profile for QA	○	✓	✓
QA_PNL	P&L profile for QA	○	○	✓
QA_PORT	Portfolio Profile	○	○	✓

✓ The parameter is selected.

○ The parameter is deselected.

Granting Access to Parameters

Parameter	If the parameter is allowed in the Style Manager menu, the user can
Hide attribute profile tools	Not use the 'New' and the 'Edit' buttons in the Attribute chooser dialog
Limit access to folder changes within OPX2 IS to the following list of users or groups	Add styles as shortcuts
Limit access to style export within OPX2 IS to the following list of users or groups	Export styles
Limit columns organization of tables within OPX2 IS to the following list of users or groups	Use the **Organize Columns** button
Limit style updates within OPX2 IS to the following list of users or groups	Update styles
Limit the access to advanced chart parameters within OPX2 IS to the following list of users or groups	Use the **Change chart properties** button

Defining Default User Flags

When creating a new user or assigning a user to profile, the user will inherit from the values defined here.

To define the default user flags:

- In the **Administration** module, on the **Profile management** page, click the **User flags** shortcut. The list of the profiles and parameters is displayed.

Planisware | Home | Administration | Projects | Products | Roadmap | +

Data | Profile management | Modules | Configuration

User flags | New profile

Name	Description	Advanced user	Planisware explorer	Planisware Pro	Planisware TimeCard	Planisware Tour	Read only access for Intranet Server	Replay allowed
ALL_SCREENS	Check all screens	✔	✔	✔	✔	○	○	✔
NB-TEST	Test NB	✔	✔	✔	✔	○	○	✔
QA_ADM	ADM profile for QA	✔	✔	○	○	○	○	✔
QA_AGILE	AGILE profile for QA	✔	○	○	○	○	○	✔
QA_ATB	ATB profile for QA	✔	✔	○	○	○	○	✔

The flag is activated for the users having this profile.

The flag is deactivated for the users having this profile.

The flag is not relevant for the profile.

Note: It is possible to change the flags for a particular user.

Note: It is still possible to manually modify the user flags after the creation of the user or after assigning a profile. This will not update existing user rights.

ANNEX

Introduction

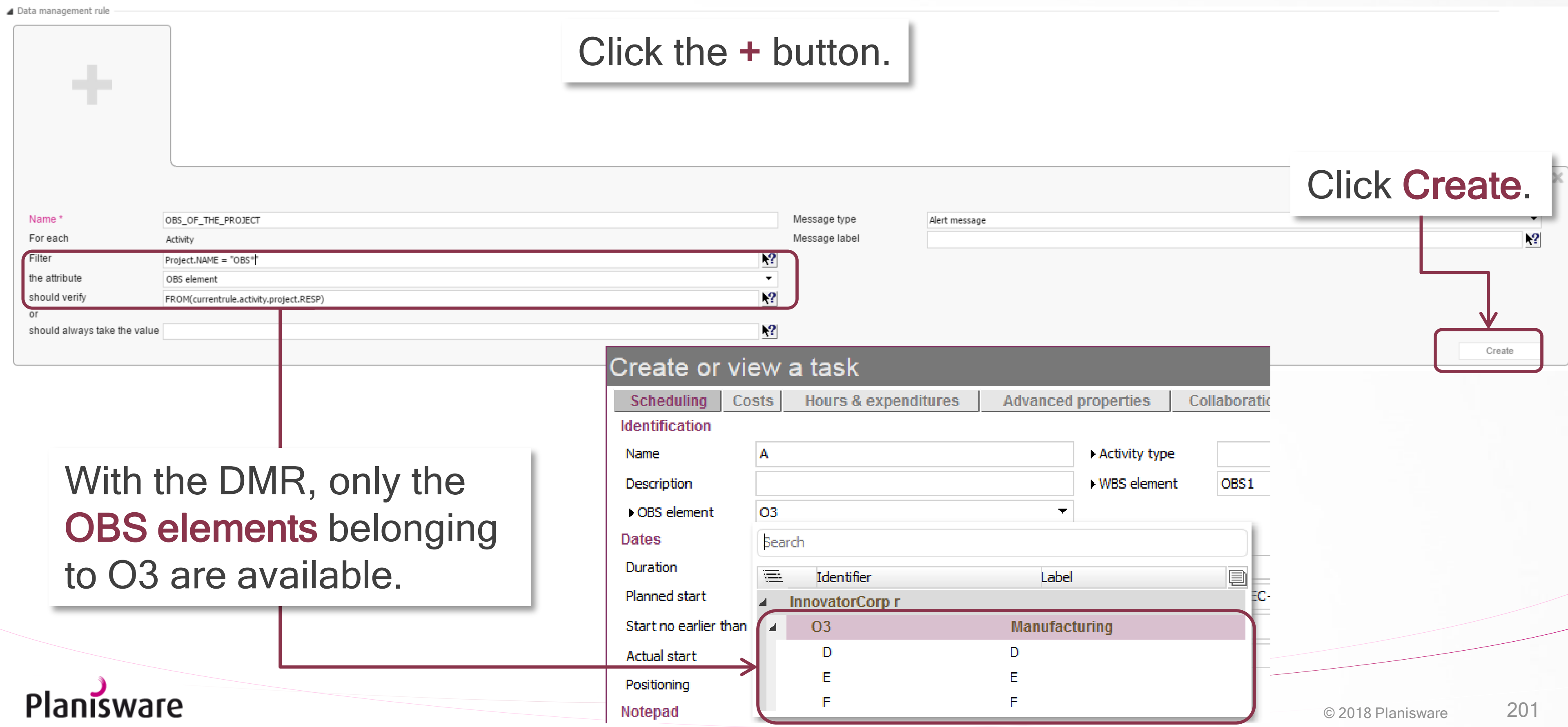
Creating data management rules

Example 2: Displaying only the OBS elements belonging to the selected responsibility (in this example, O3).

- Select **Activity** as **Object Type**.
- To create a DMR:

Click the **+** button.

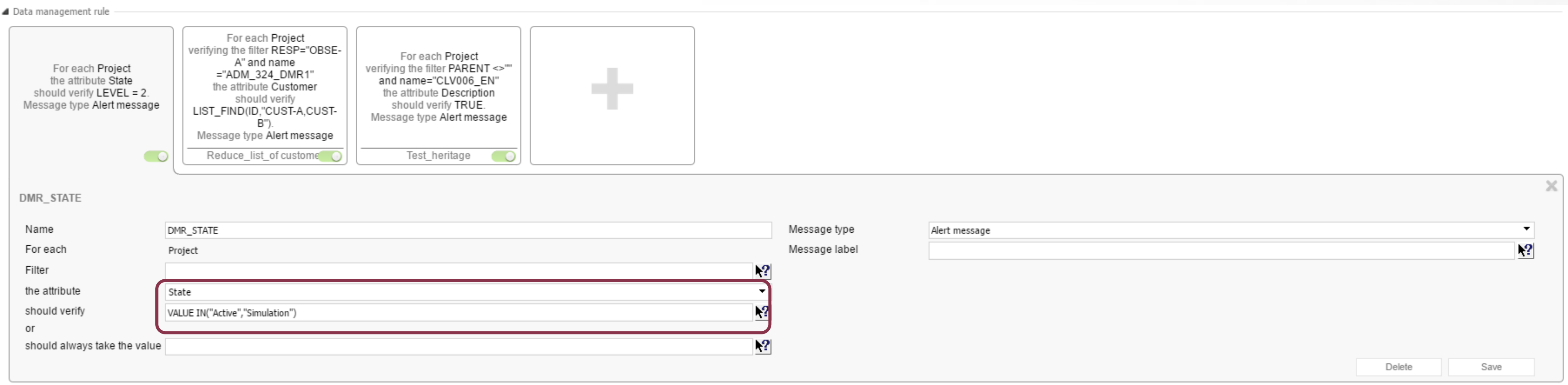
Click **Create**.



With the DMR, only the **OBS elements** belonging to O3 are available.

Creating data management rules

If you create a DMR on a plain string attribute, to turn a field into a drop-down list in pop-ups, use the formula VALUE IN().



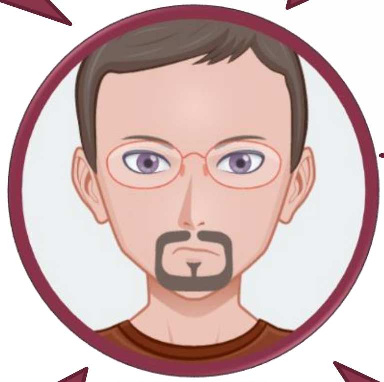
Meet Ivan, the IT Security Officer

Locks

Our data is too accessible by every user. This could cause major data management issues.

Alerts

We would like users to be alerted when making changes to critical data.



Data management rules

We need to force users to use the data we need them to use.

Access rights

The financial team would like access to projects and reports.

User profiles

Every users can create projects. We need to restrict the creation to Project Managers.

User Trace

We would like to have more visibility into changes of certain attributes.

Questions

Planisware

Get innovation to market

Level 1 Configuration - Process and tools

Agenda (3:00pm – 5:00pm)

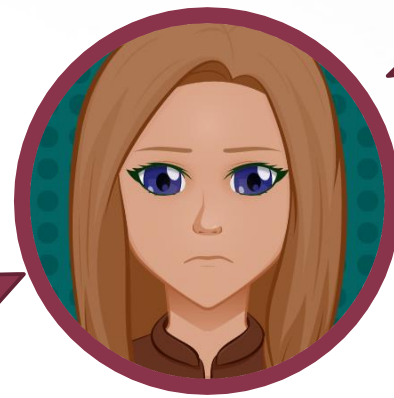
- Configurable Reports
- Status Reports
- Workflows
- Import Export
- Code Generator

Management

Meet your manager, Silvia

We need a traceable process to assign responsibility for a sequence of different activities in a project!

Our team has a variety of projects to keep track of and we lack effective ways to manage their different statuses!



We need to find ways to make data entry more automated and efficient!

The layout of our forms need to be updated!

We need an easy way to import data from/export data to Excel!

Planisware

Configurable reports

Configurable reports

Scenario

As our company is expanding globally, we need to keep track of more attributes. Some of our reports will need updating, like the adding the field "Country" to the Project form. What is the easiest way to do this?

Configurable reports

Scenario

As our company is expanding globally, we need to keep track of more attributes. Some of our reports will need updating, like the adding the field “Country” to the Project form. What is the easiest way to do this?

Analysis

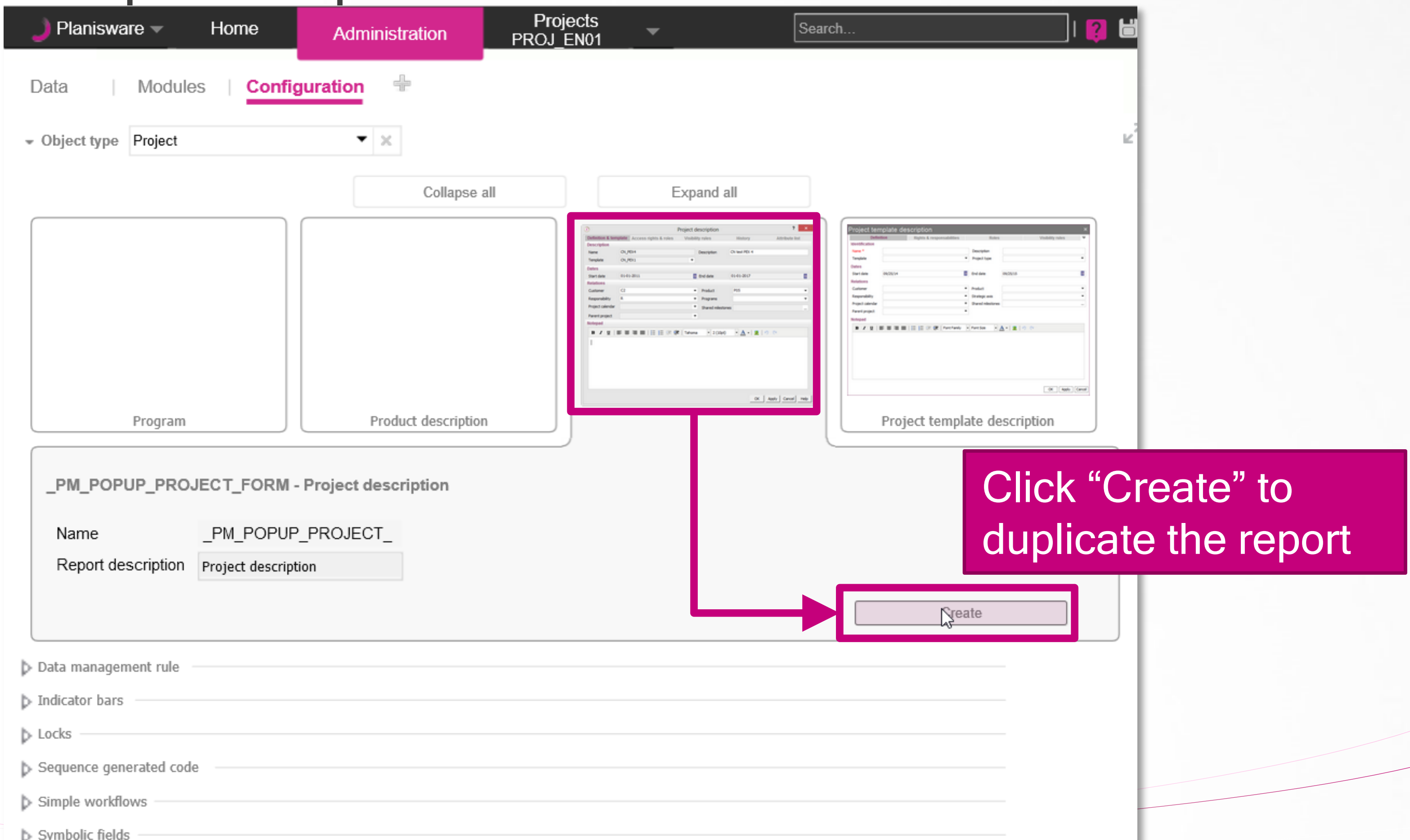
Use the form builder to get the desired layout and fields by updating an existing report.

How to break down the situation:

1. Copy the project form by creating a configurable report.
2. Create a new color rule with an icon or symbol and color that can be viewed on the Gantt screen

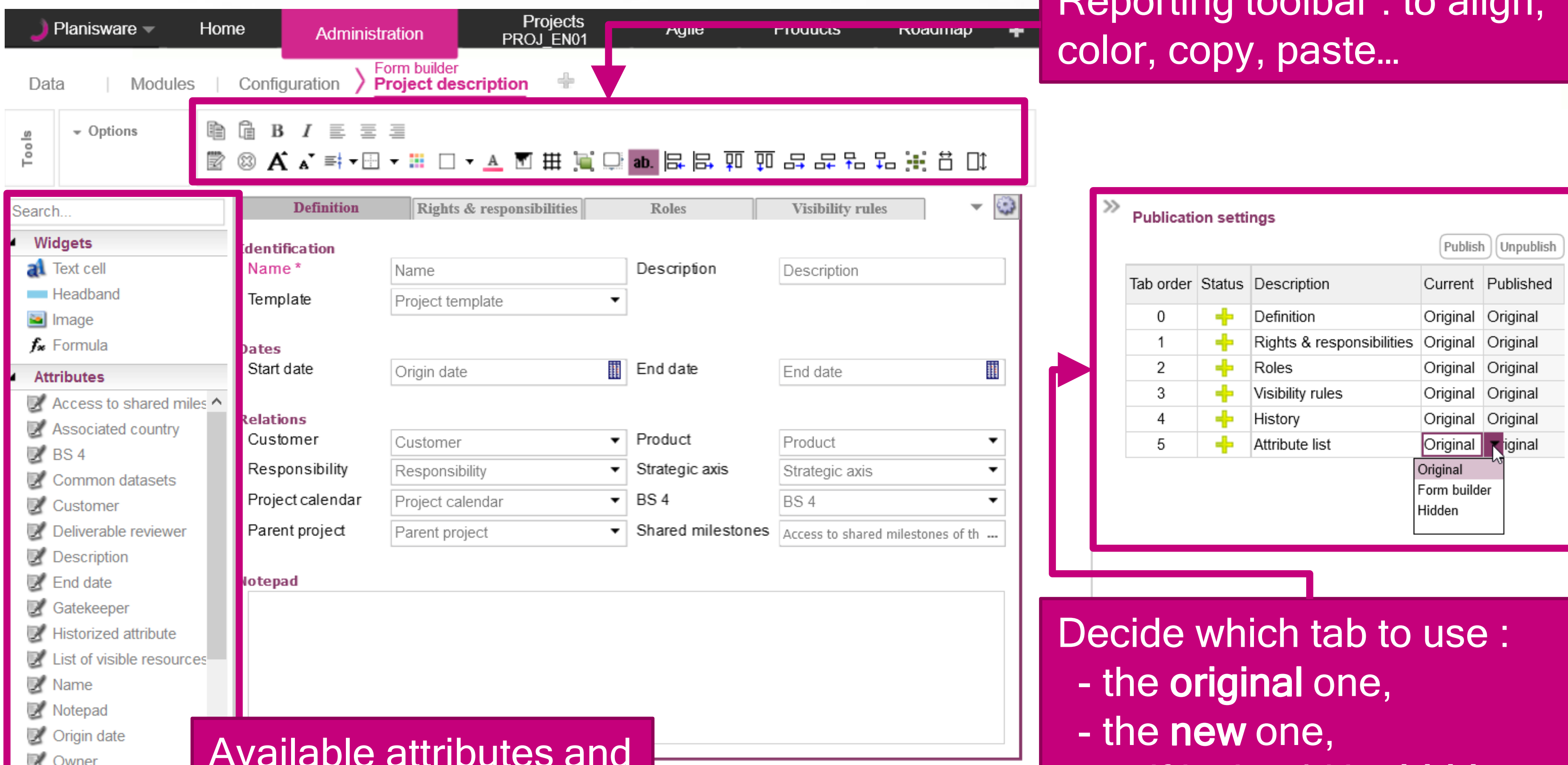
Create the Configurable report

- To insert the new attribute in the project properties form, go to Administration > Configuration > Configurable report
- Select the report to update and click “Create”



Create the Configurable report

A copy of the form is generated, ready to be modified



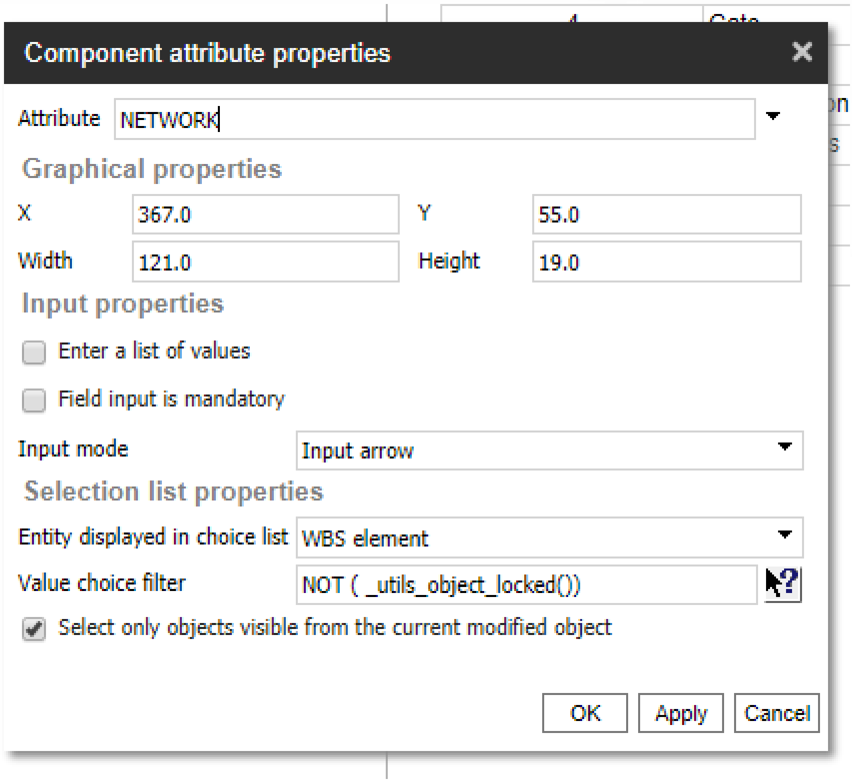
Reporting toolbar : to align, color, copy, paste…

Available attributes and widgets : drag & drop to add them to the form

Decide which tab to use :
- the **original** one,
- the **new** one,
- or if it should be **hidden**

Then publish it

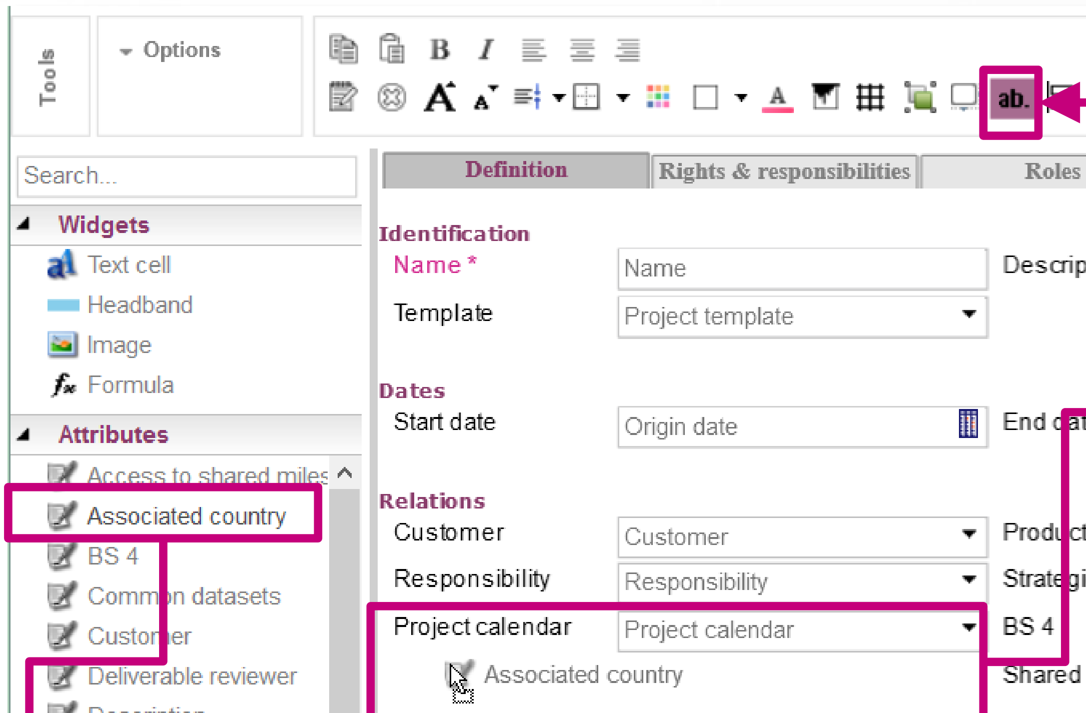
Attribute Properties



- Attribute Selector
- Positioning
- Enter a list of values - Multi Selection enabled
- Field input is mandatory
- Input mode -> not often changed
- Entity Displayed
- Value choice filter -> Filters on the entities displayed

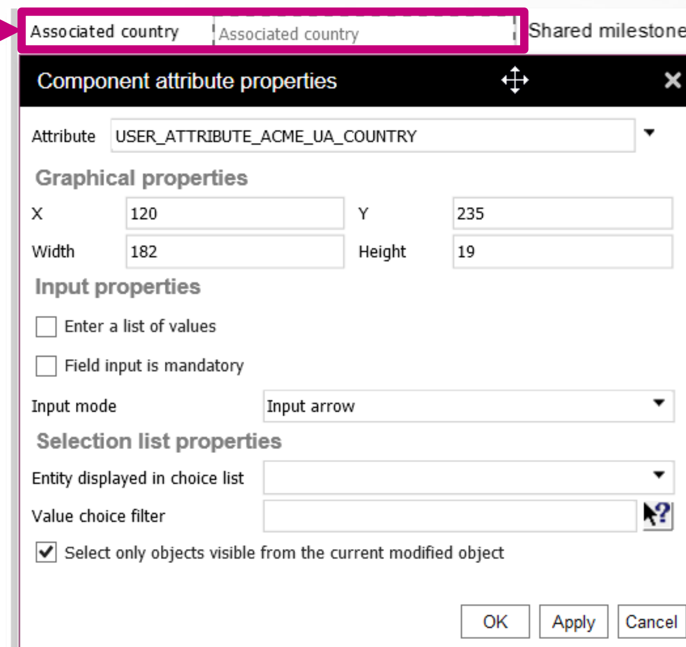
Update project properties form

Drag & drop your field



Click this tool to insert : field label + field itself

Result : dropped field can be adjusted like input arrow, simple input…



Drag & drop field "Associated country" to the form

Update project properties form

Final result after publishing it

Original: no "Associated country"

Publication settings

Published on 07/11/16 [BOUBEN] Publish Unpublish

Tab order	Status	Description	Current	Published
0		Definition	Original	Original
1		Rights & responsibilities	Original	Original
2		Roles	Original	Original
3		Visibility rules	Original	Original
4		History	Original	Original
5		Attribute list	Original	Original

Relations

Customer	CUST-A
Responsibility	OBSE-B
Project calendar	CAL5D
Parent project	

Form builder: "Associated country" is now displayed

Publication settings

Published on 07/11/16 [BOUBEN] Publish Unpublish

Tab order	Status	Description	Current	Published
0		Definition	Form builder	Form builder
1		Rights & responsibilities	Original	Original
2		Roles	Original	Original
3		Visibility rules	Original	Original
4		History	Original	Original
5		Attribute list	Original	Original

Relations

Customer	CUST-A
Responsibility	OBSE-B
Project calendar	CAL5D
Associated country	

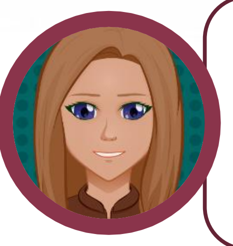
Czech Republic
Austria
Belgium
Bulgaria
Croatia
Cyprus
Denmark
Estonia
Finland
France
Germany

Notepad

Status Reports

Status Reports

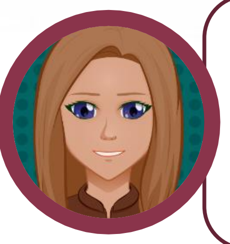
Scenario



We need a quick view of the status on different project that can be changed by different users. Can we have meaningful symbols so users can get the best information

Status reports

Scenario



We need a universal method of defining the status on different projects that can be changed by different users. Can we have meaningful symbols to along with this status information as well?

Analysis

It is possible to define some common report values on projects. Those report statuses allow users to share a common list of statuses on their projects.

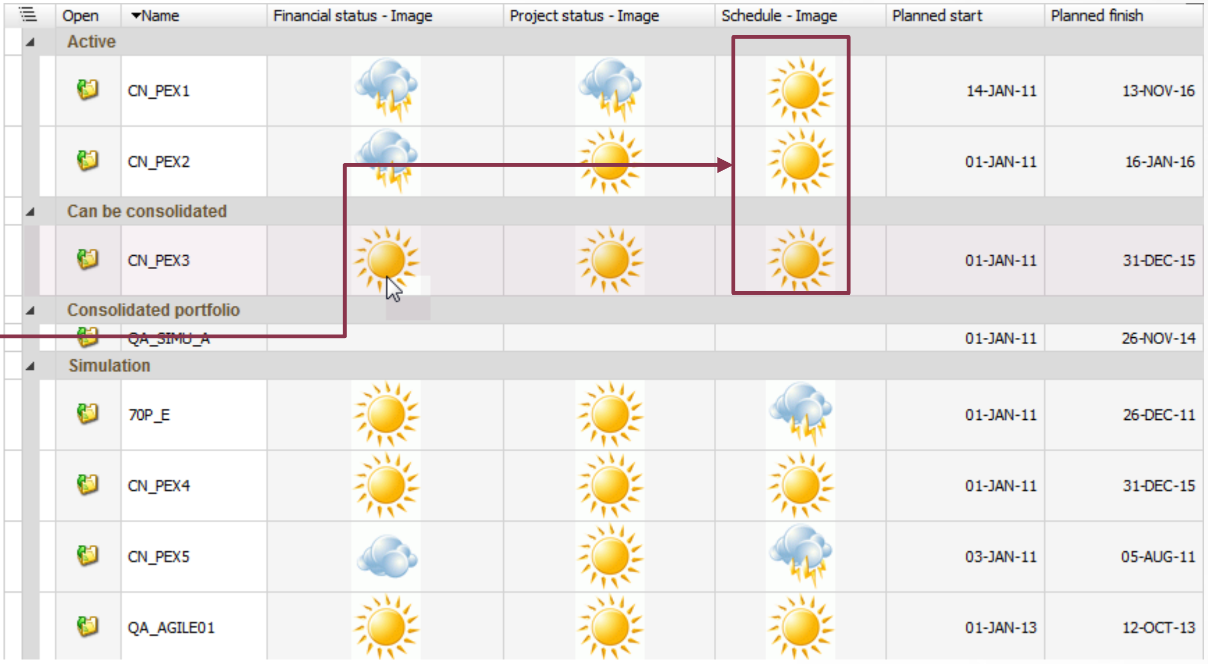
How to break down the situation:

1. Create a status report
2. Create a corresponding status report label to use on Walls.
3. Select images or documents to link on these reports.

Introduction

- These statuses can be displayed on the project wall, on the project list or on the user wall.

On the project list, images that are linked to the latest labels of the status report can be displayed.

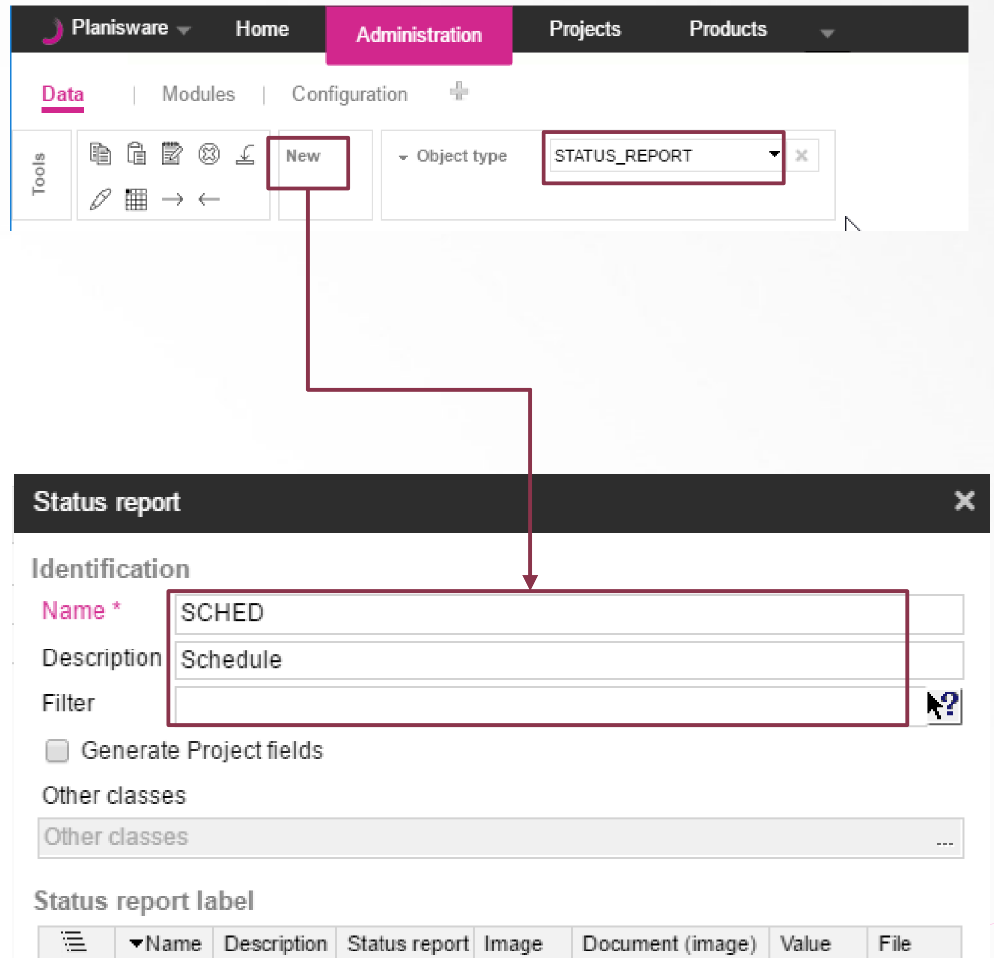


Open	Name	Financial status - Image	Project status - Image	Schedule - Image	Planned start	Planned finish
Active						
	CN_PEX1				14-JAN-11	13-NOV-16
	CN_PEX2				01-JAN-11	16-JAN-16
Can be consolidated						
	CN_PEX3				01-JAN-11	31-DEC-15
Consolidated portfolio						
	QA_SIMU_A				01-JAN-11	26-NOV-14
Simulation						
	70P_E				01-JAN-11	26-DEC-11
	CN_PEX4				01-JAN-11	31-DEC-15
	CN_PEX5				03-JAN-11	05-AUG-11
	QA_AGILE01				01-JAN-13	12-OCT-13

Creating Status Reports and Labels

- To create a status report:
- Open the **Administration** module.
- Add the **Data** page.
- In the **Object type** field, select **Status report**.
- Click the **New** button. The **Status report** dialog is displayed.
- Enter the identification of the status report.

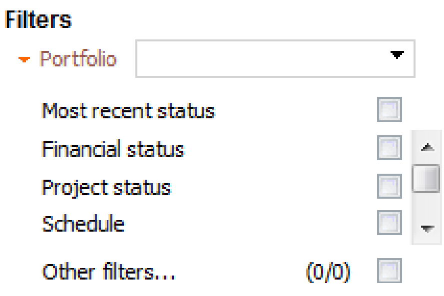
Note: In the Filter box, if you enter $CURRENT_PAGE_OBJECT_ID=ID, this status report is created only from the user wall.



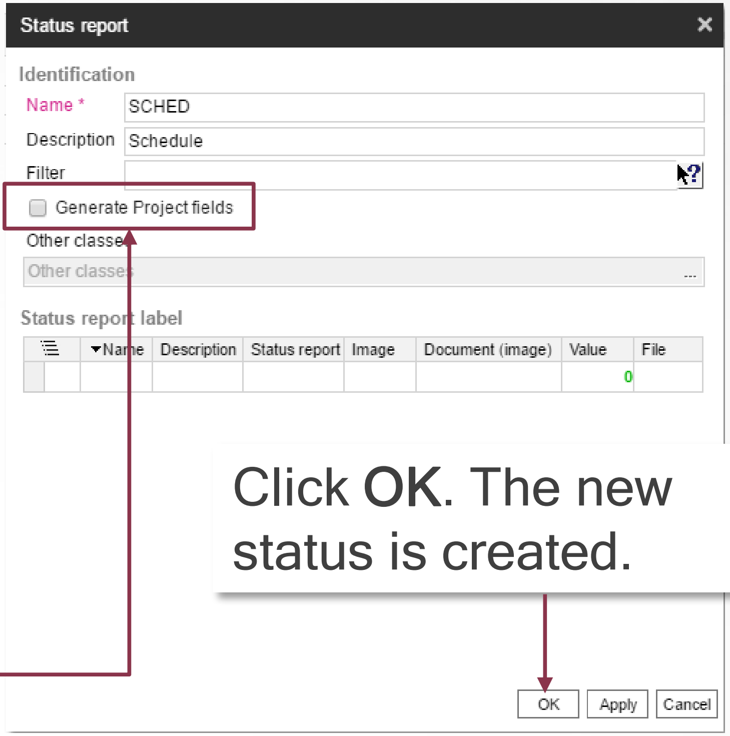
Creating Status Reports and Labels

If you check **Generate Project fields**:

- The created status report appears in the filters on the Project Wall and on the user wall.



Check this option to make fields available on the projects list



Click **OK**. The new status is created.

- Once intranet has been restarted, columns can be inserted in the table on the **Project list** to display the latest update of the status. Users can modify the text and select another status.

Creating Status Reports and Labels

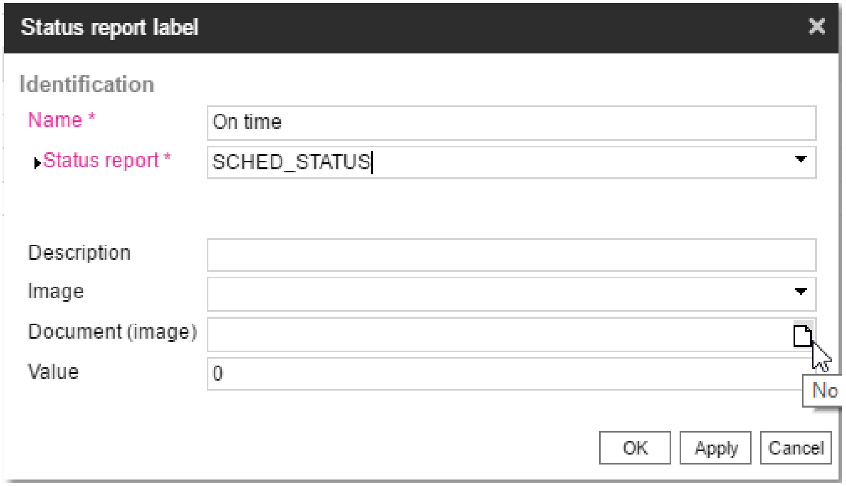
- Upon status creation, Planisware automatically generates:
- Filters in the different walls
  - Wall in Project module and User Wall in Home
- Indicators at the project level:
  - Current and last value
  - Trend
  - Last user who updated the status
  - Last update date

Creating Status Reports and Labels

- In a project table :
  - If you modify the status less than 24 hours after its creation, the last status is updated.
  - If someone other than the creator of the status updates the status, this creates a new status.

Creating Status Reports and Labels

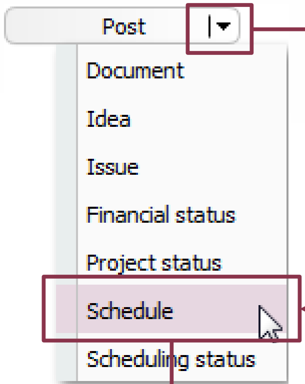
- To create labels linked to the status report, open the **Administration** module.
- Add the **Data** page.
- In the **Object type** field, select **Status report label**.
- Click the **New** button. The **Status report** dialog is displayed.



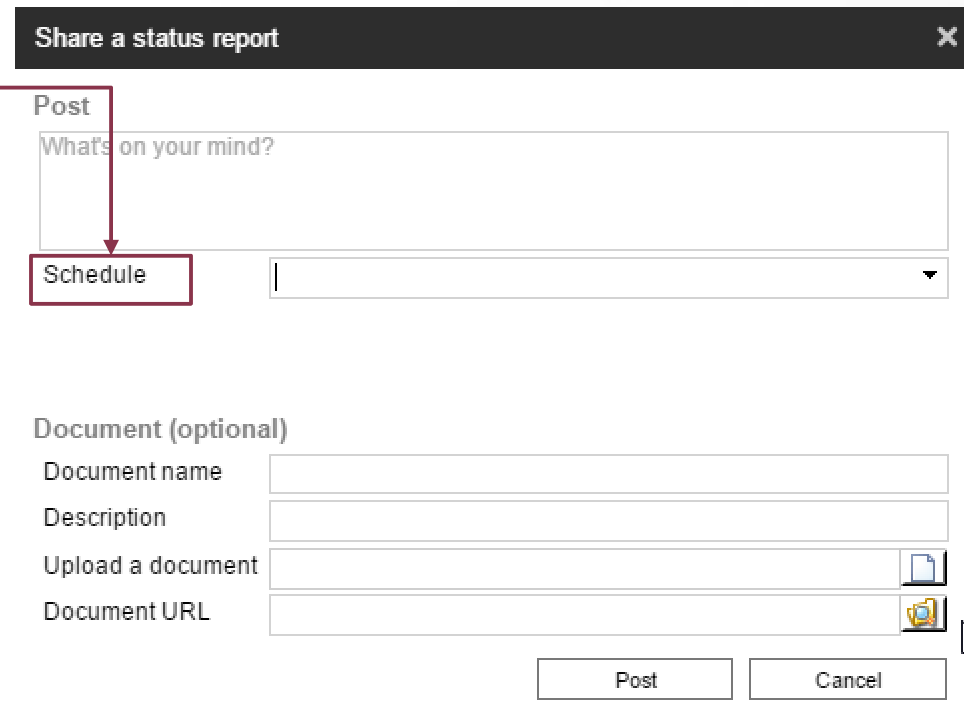
- Enter a name.
- Select the status report, you want this label to be linked to.
- Select an image or a Document (image).

- Click **OK**. A line is created for this label in the table.

Posting a Status on the Project Wall



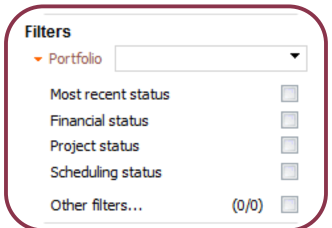
- Open a project.
- Add the **Project Wall** page.
- Click the arrow next to the **Post** button. A drop-down menu is displayed.
- Select the Status report that you want to use. The **Share a status report** dialog is displayed.



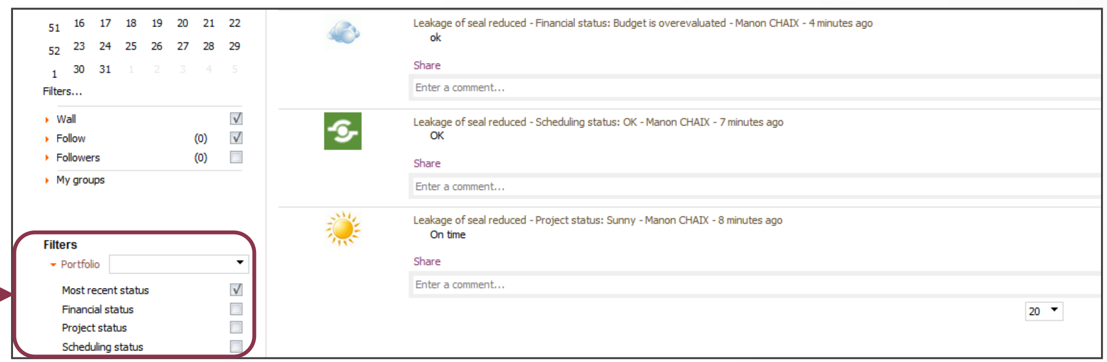
- Enter a post content (mandatory).
- Select a label linked to the selected status report.
- You can add a document.
- Click **Post**.

Displaying Status on the User Wall

- The status report displayed on the **User wall**.



On the user wall: successive status of different projects are displayed.



Possible to display only the most recent statuses.

Displaying Status Trend

- The status report displayed on the **User wall**.

Name	Description	Status report	Image	Document (image)	Value	File
HS_PROJECT_HEALTH_TEST						
AT RISK		HS_PROJECT_HEALTH_TEST			0.0	PROCESSES_COMMON_FI...
ON TRACK		HS_PROJECT_HEALTH_TEST			0.0	PROCESSES_COMMON_FI...
TROUBLE		HS_PROJECT_HEALTH_TEST			0.0	PROCESSES_COMMON_FI...
MM_PROJECT_HEALTH_TEST						
not on track	not on track	MM_PROJECT_HEALTH_TEST		PROCESSES_COMMON_FILE:donotenter.png	0.0	PROCESSES_COMMON_FI...
Not on track		MM_PROJECT_HEALTH_TEST			0.0	PROCESSES_COMMON_FI...
on track	on track	MM_PROJECT_HEALTH_TEST			0.0	PROCESSES_COMMON_FI...
MRL_PROJECT_HEALTH_TEST						
Not on track	Not on track	MRL_PROJECT_HEALTH_TEST		down.png	0.0	PROCESSES_COMMON_FI...
on track	project on track	MRL_PROJECT_HEALTH_TEST		up.png	0.0	PROCESSES_COMMON_FI...
NIKO_NIKO						
Happy_Niko	Happy	NIKO_NIKO	happy_big		0.0	_MOD_AGILE
Neutral_Niko	Neutral	NIKO_NIKO	neutral_big		0.0	_MOD_AGILE
Unhappy_Niko	Unhappy	NIKO_NIKO	bad_mood_big		0.0	_MOD_AGILE
PROJECT_HEALTH						
At risk	At risk	PROJECT_HEALTH		caution-16x16-v2.png	0.0	PLW_TOUR_DATA_SHARED
On track	On track	PROJECT_HEALTH		ok-16x16.png	0.0	PLW_TOUR_DATA_SHARED
Trouble	Trouble	PROJECT_HEALTH		ko-16x16.png	0.0	PLW_TOUR_DATA_SHARED
					0.0	PROCESSES_COMMON_FI...

Exercise

Create a new project status:

Name = XX_PROJECT_STATUS
Description = XX Project status
Generate the project fields
Labels are: Green, Yellow, Red

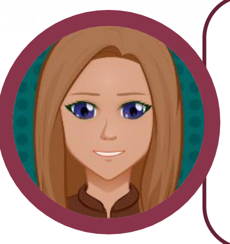
Verify you can post a new status on your project wall.
Verify the status fields for the project are set according to the status you created

Verify that the trend indicator works

Creating workflows

Workflows

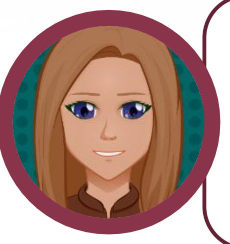
Scenario



We need a traceable process to assign responsibility for a sequence of different activities in a project.

Workflows

Scenario



Simple workflows allow you to quickly set up a process in which different responsible parties can be assigned to each step.

Analysis

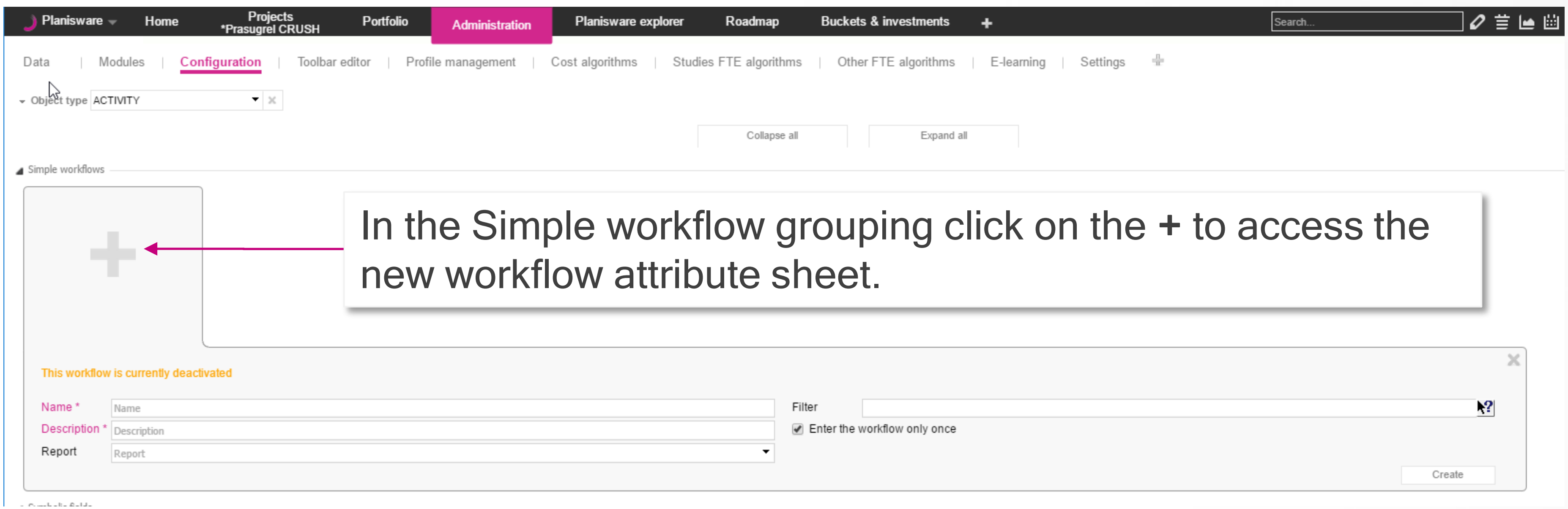
Simple workflows allow you to quickly set up a process in which different responsible parties can be assigned to each step.

How to break down the situation:

1. depends on the workflow!

How to create new workflows

- Navigate to Administration > Configuration. In the object type, select the object type you want to create the new workflows on
- For our example, choose Activity

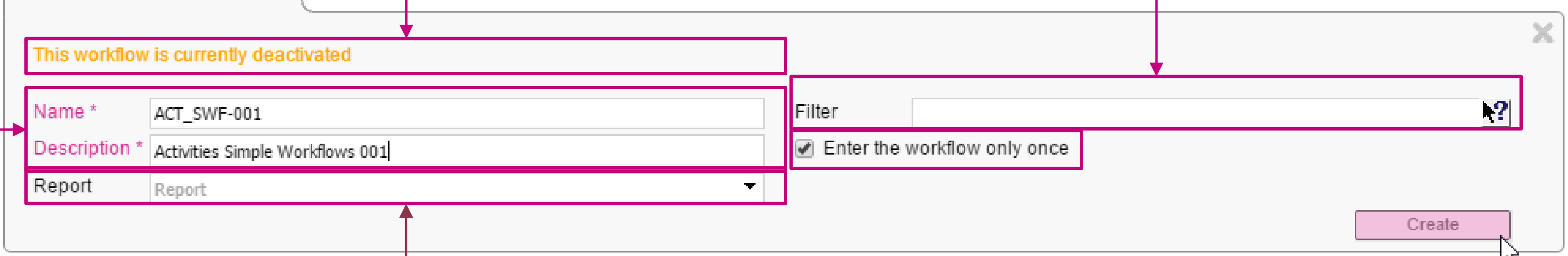


Workflow attribute sheet

Enter a **Name** and a **Description** for the workflow.

By default newly created workflows are deactivated.
It is possible to activate them once they are built with all steps.

It is possible to enter a **Filter** so the workflow is available only on object types matching the filter condition.

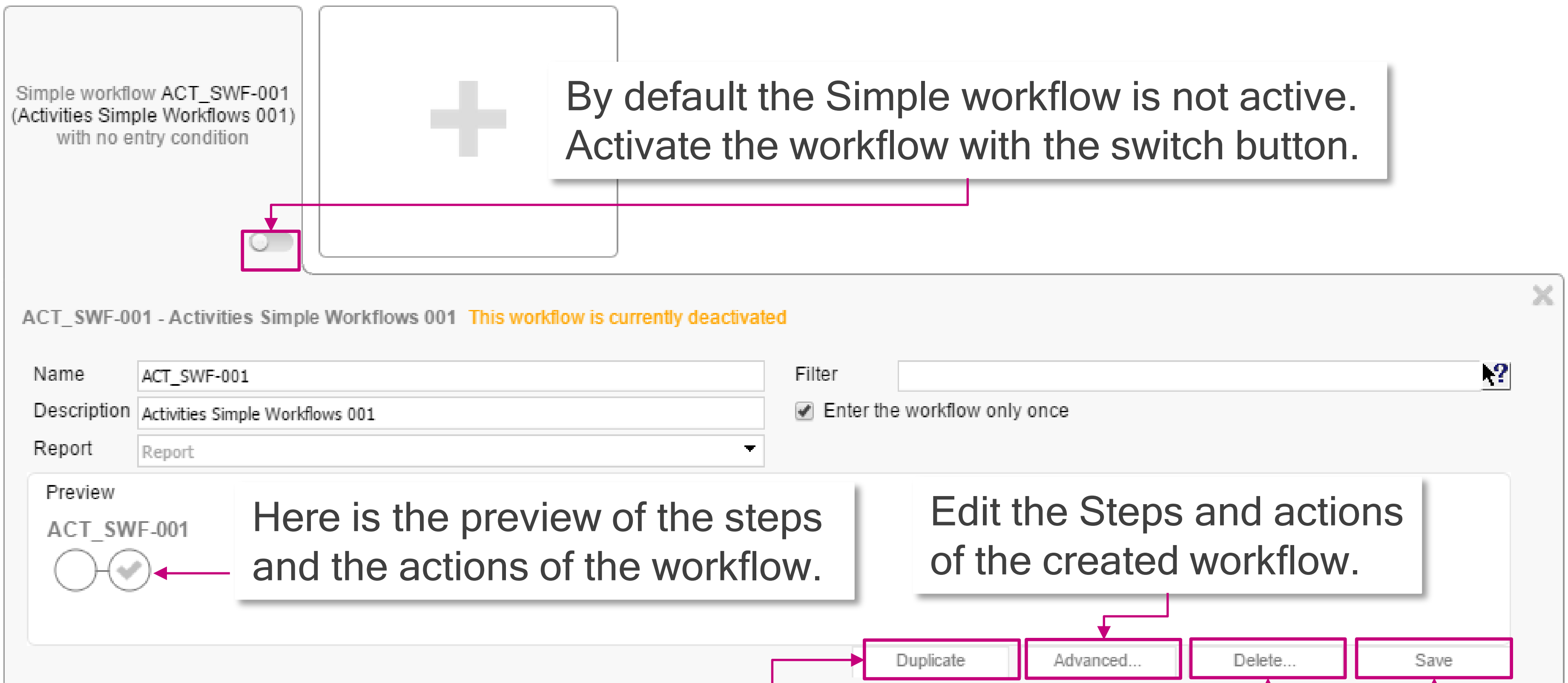


It is possible to select a **Report**.
The link available in the ‘Responsible’ and/or ‘Informed’ user e-mail or message will point at a popup with the report set and its corresponding actions.

The **Enter the workflow only once** option means that once last action has been executed then workflow will not be available anymore for the object.
If this option is unchecked then object will reenter the workflow endlessly.

Workflow attribute sheet

- Once created, you can access more options on the Workflow attribute sheet



It is possible to copy an existing simple workflow by clicking on **Duplicate**.

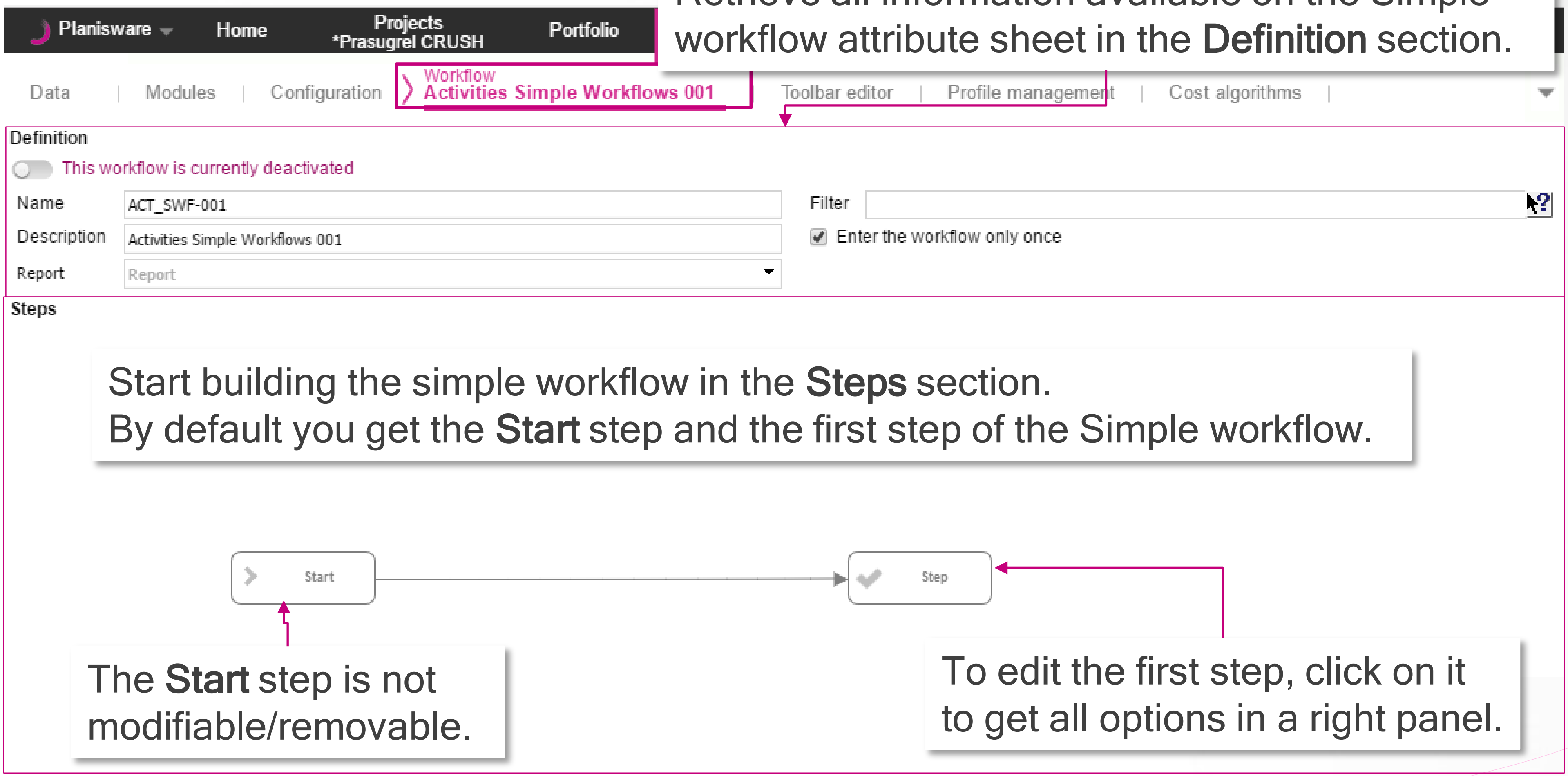
Delete the current Simple workflow

Save modifications applied on the attribute sheet.

Build your workflow

- Click on Advanced to open the simple workflow in an instance

Retrieve all information available on the Simple workflow attribute sheet in the **Definition** section.



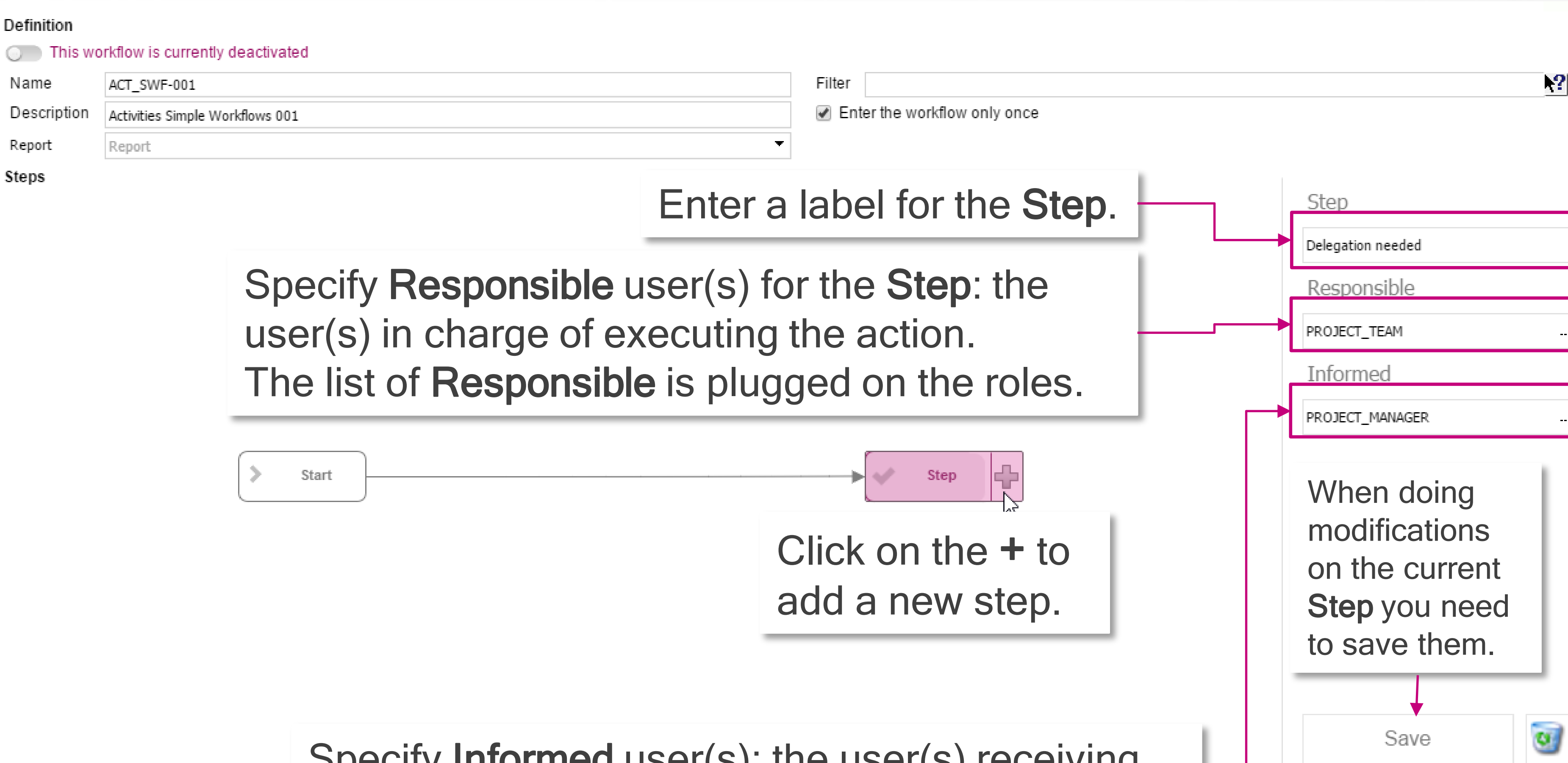
Start building the simple workflow in the **Steps** section.
By default you get the **Start** step and the first step of the Simple workflow.

The **Start** step is not modifiable/removable.

To edit the first step, click on it to get all options in a right panel.

Build your workflow

- Create the first step



Enter a label for the **Step**.

Specify **Responsible** user(s) for the **Step**: the user(s) in charge of executing the action.
The list of **Responsible** is plugged on the roles.

Click on the **+** to add a new step.

When doing modifications on the current **Step** you need to save them.

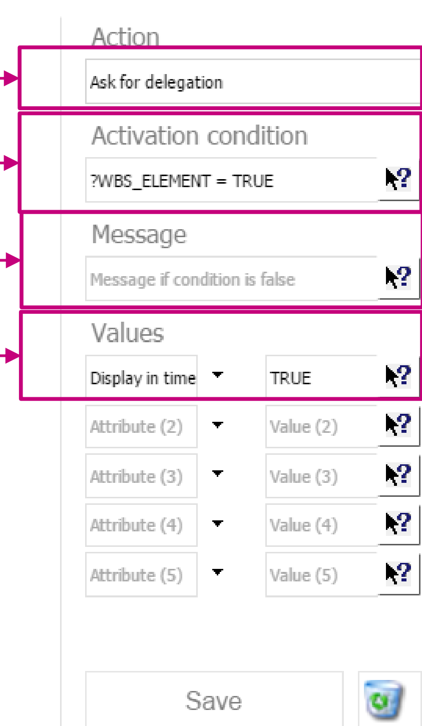
Specify **Informed** user(s): the user(s) receiving emails when action is executed.
The list of **Informed** is plugged on the roles.

Build your workflow

- Create action linked to the step by clicking the ◇ shape

Modify the label of the action. This will be the label of the workflow button.

Define an activation condition so the action will be executable only if the object on which the workflow is defined matches the condition.



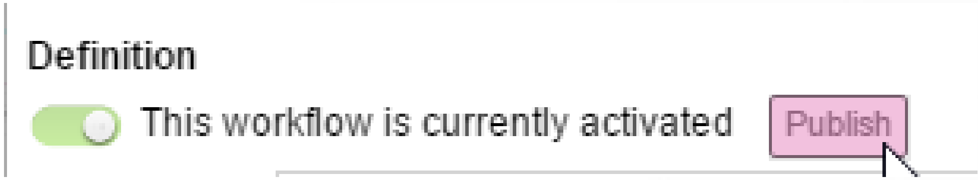
Enter a message when action is executed on an object that does not match the condition.

It is possible to set a value on an attribute as soon as the action is executed.

Do not forget to save all modifications.

Activate and Publish

- Once the complete workflow has been built, it must be activated and published to work

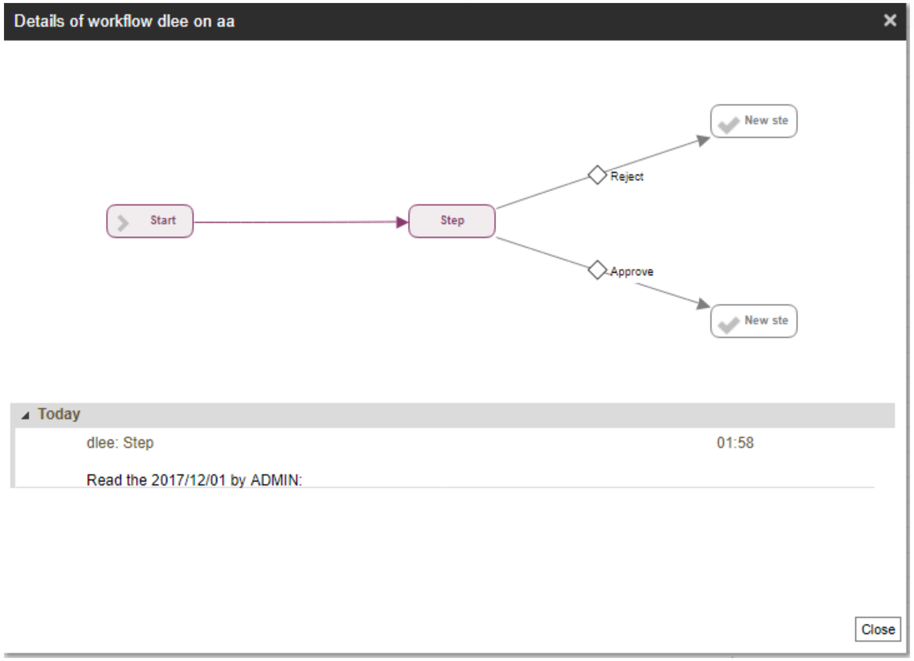


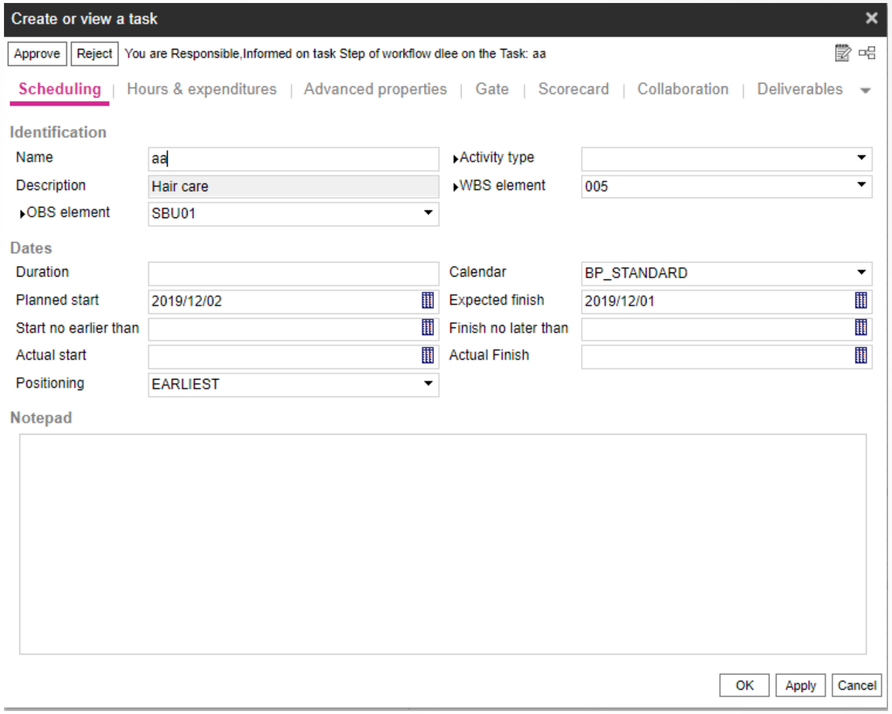
- Any **modification** requires save and publish again
- Workflow will not be applied on objects created before activation and publication of the workflow
- All active workflows are automatically published on startup of the Intranet server
- It is not possible to publish an inactive workflow

More about workflows

- Drag a step and drop it over another to create new nodes
- Cannot create cycles
- Once you've entered the first step of the workflow a **Back to** button will be available to get the object back to a previous step of the workflow
- Reports can be set on the workflow

Workflow Example

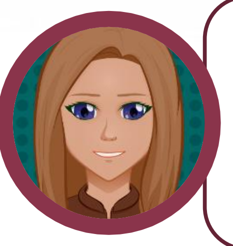




Import Export

Import Export

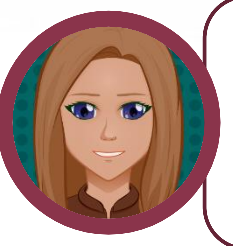
Scenario



Our team has many excel spreadsheets with information like project lists but I don’t want to have to enter all this information manually in Planisware all over again. Can we have an efficient way to do this, especially if we have to do this multiple times in the future?

Import Export

Scenario



Our team has information about the I don't want to have to enter all this information manually in excel all over again. Can we have an efficient way to do this, especially if we have to do this multiple times in the future?

Analysis

Import-export feature is available in configuration level 1. This interface has been designed to facilitate the import and the export of data from/to an external file (.csv or json file) from/to a Planisware table.

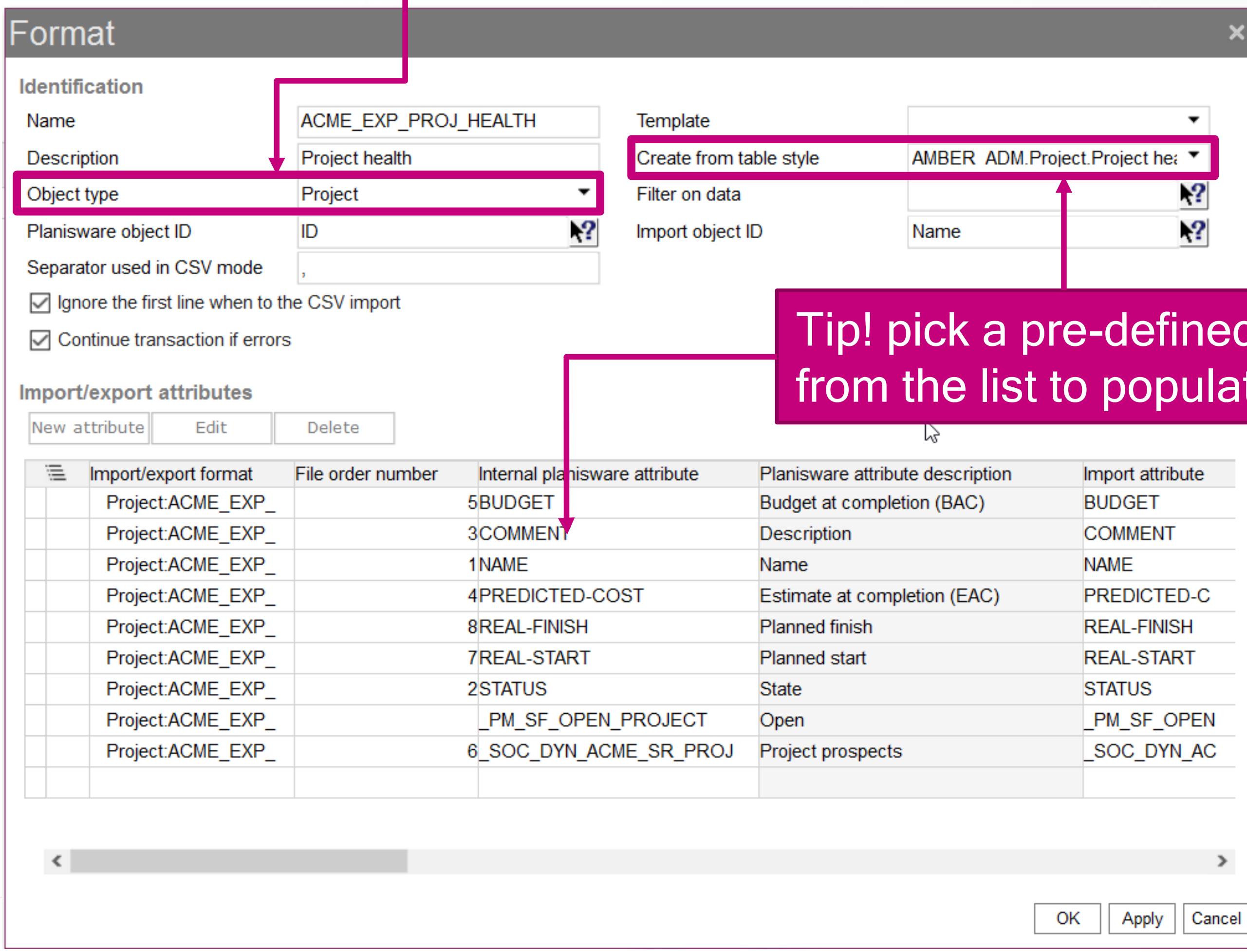
How to break down the situation:

1. Define a mapping for the columns that need to be exported using an import/export format
2. Define a new import/export target which allows the system to export the data from a Planisware table to the target .csv file

Define import export format

- Go to Administration > Import-export format to define a new export format

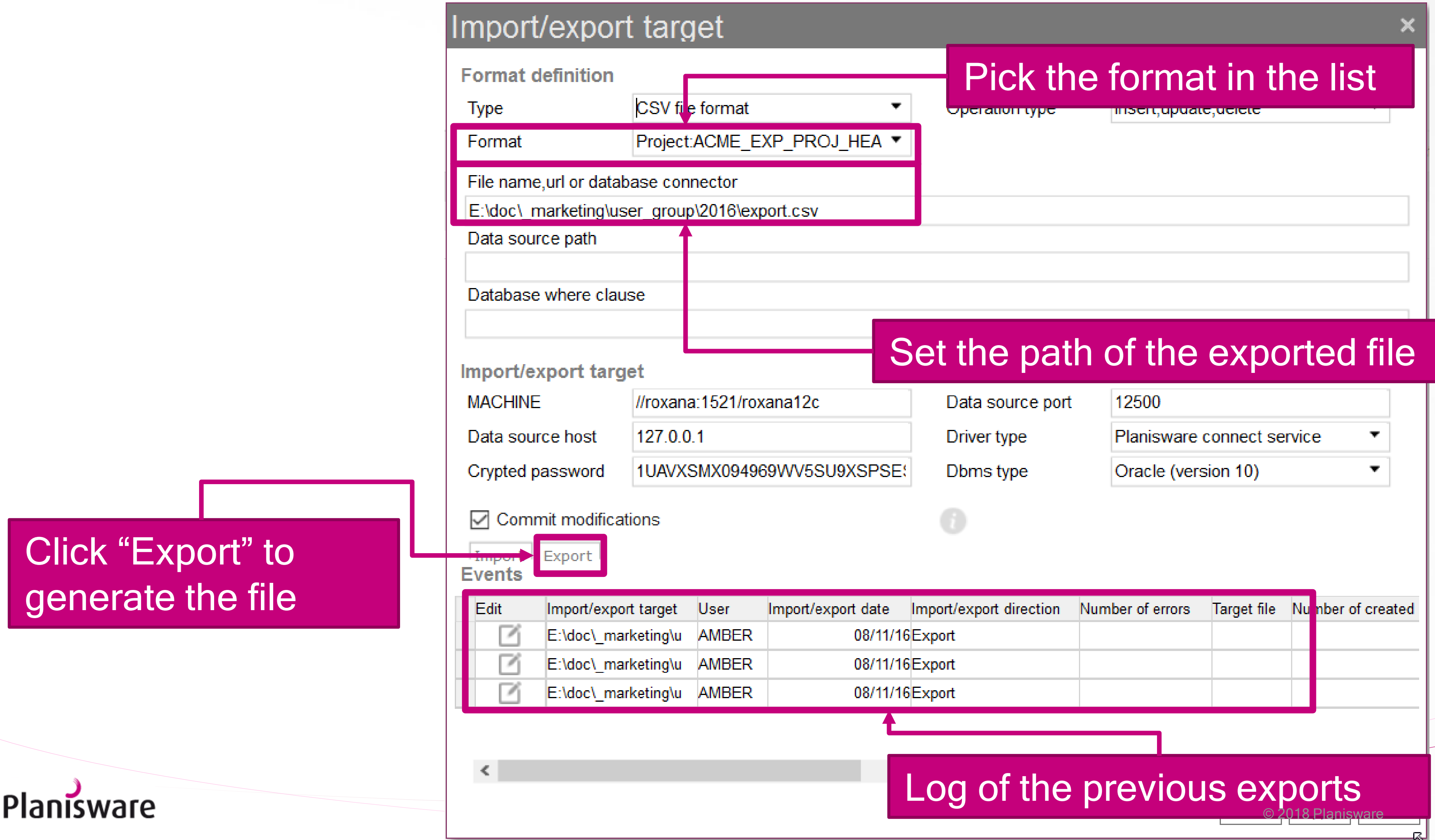
Select the object class to export



Tip! pick a pre-defined user style from the list to populate the format

Define target and export data

- Define a new import/export target, then click “Export” to generate the csv file in the specified folder

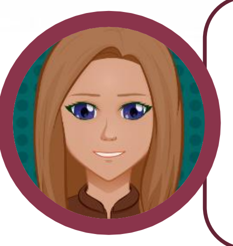


Planisware

Code generator

Code generator

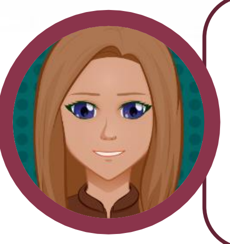
Scenario



Is there a way to automatically name some tasks so users who create them don’t need to come up with names for them?

Code generator

Scenario



Is there a way to automatically name some tasks so users who create them don’t need to come up with names for them?

Analysis

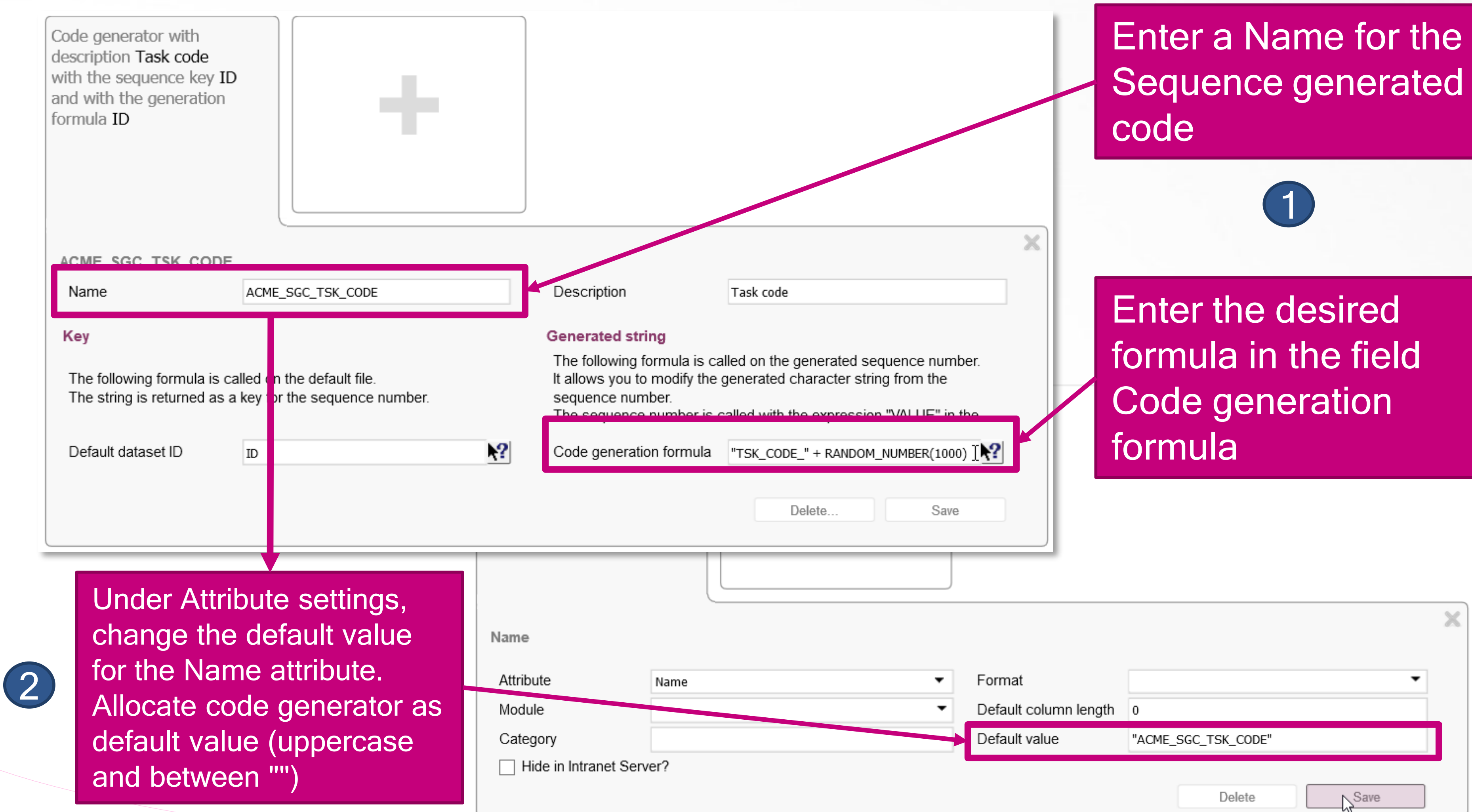
You can now create **sequence generated code** and allocate this value, as a default value, whenever an object is created.

How to break down the situation:

1. Create the code generator on the task class
2. Update the *Attributes default value* of the task class to use this newly created code

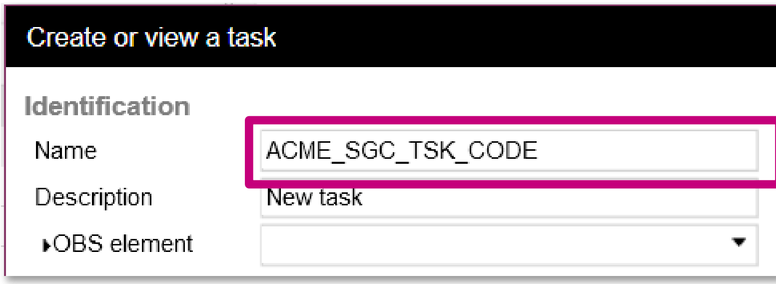
Sequence generated code

- Navigate to Administration > Configuration. Select the object type you want to create the code on. Press the plus icon under the Sequence generated code to create a new one.

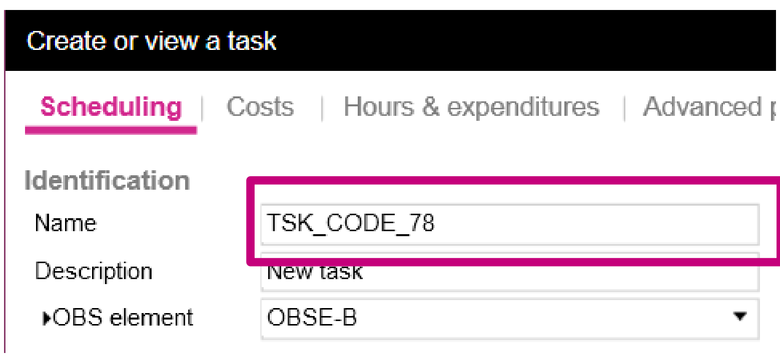


Sequence generated code

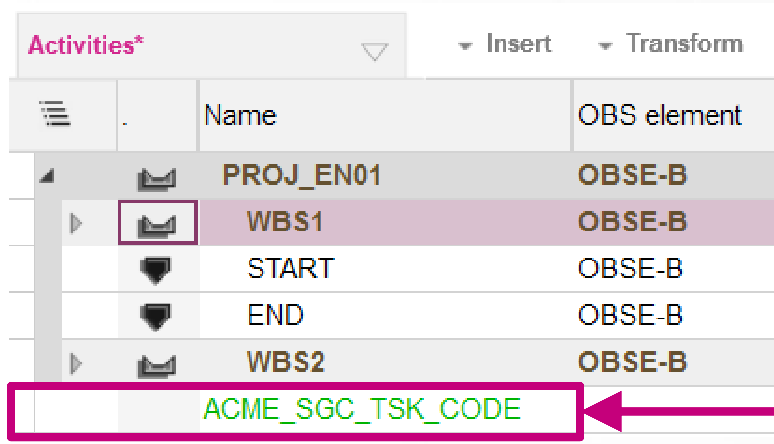
When you create a new task, code generator is displayed in NAME field



1- Once the object is created (click "Apply"), sequence automatically generates its code for the name



2- Sequence generated code is also visible in table (switch to "Input mode)



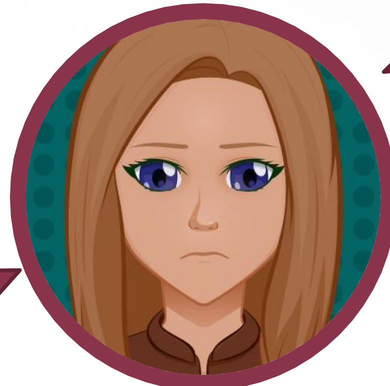
Meet your manager, Silvia

Workflow

We need a traceable process to assign responsibility for a sequence of different activities in a project!

Status Reports

Our team has a variety of projects to keep track of and we lack effective ways to manage their different statuses!



Code Generator

We need to find ways to make data entry more automated and efficient!

Configurable Reports

The layout of our forms need to be updated!

Import/Export

We need an easy way to import data from/export data to Excel!

Planisware

Questions

Download training material

https://l1training.planisware.com/sat0/l1training.pptx

https://l1training.planisware.com/sat0/nf.pdf

(need to log in with your username/password before downloading)