



Level 1 Configuration - Own your data model

About the presenter



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Introductions

Companies represented today

Pharmaceutical / Biotech



Johnson & Johnson

Oil and Gas



Safety



Telecommunications



Introductions

Name 1 Cool fact about your company

- Planisware was spun out of Arianespace



Introductions

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Introductions

Name 1 Cool fact about your company

Pharmaceutical

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



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

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**.

The screenshot shows the Planisware V6 administration interface. The top navigation bar includes links for Planisware, Home, Administration (which is highlighted), Projects, Products, Roadmap, and a plus sign icon. Below the navigation is a secondary menu with Data, Modules, and Configuration (also highlighted). A dropdown menu for Object type shows PROJECT selected. At the bottom of this menu are Collapse all and Expand all buttons. The main content area is titled 'Alerts' and contains a large button with a plus sign, indicating a configuration section for alerts. Below this is another section titled 'Attribute settings' with a corresponding button.

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

(De)activating configuration tools

The screenshot shows the Planisware Administration Configuration interface. At the top, there's a navigation bar with links for Home, Administration (which is highlighted), Projects, Products, Roadmap, E-learning, and a plus sign for more. Below the navigation, there are tabs for Data, Modules, and Configuration, with Configuration being the active tab. A dropdown menu for 'Object type' is set to 'Project'. On the right, there's a 'Collapse all' button.

Under the 'Configuration' tab, there are two alert definitions:

- Alert 1 (Left):** For objects of type Project verifying the filter DESC = "" on the following event(s): creation on modification of the attribute(s): Description with priority 0 Message type Error message with cancelation. It includes a switch labeled AL_PRJ_DESC which is currently turned on (green). A red arrow points from a callout box below it to this switch.
- Alert 2 (Right):** Similar configuration to Alert 1, but the switch labeled AL_PRJ_DESC is turned off (gray).

A callout box with a red border and a downward arrow contains the text: "Click to activate or deactivate a tool."

Modifying configuration tools

To modify a configuration tool:

Click on a tool.



Alerts

For objects of type Project verifying the filter DESC = "" on the following event(s) creation on modification of the attribute(s): Description with priority 0 Message type Error message with cancellation Message "Please provide a description"

AL_PRJ_DESC

Name	AL_PRJ_DESC	Filter	DESC = ""
Label	Description of a project should not be left empty	Priority	0
<input checked="" type="checkbox"/> On creation	<input type="checkbox"/> On all modifications	Message type	Error message with cancellation
<input type="checkbox"/> On deletion		Message label	"Please provide a description"
On modification of the following attributes			
Description	<input type="checkbox"/> Send an email	<input type="checkbox"/> Send a notification	Email address
Sender	Groups / users		
Notification category	Notification object class		
Notification object formula	<input type="checkbox"/> Roles		
Subject	<input type="checkbox"/> Content		
Associated reporting	<input type="checkbox"/> Formula (1)		
Attribute (1)	<input type="checkbox"/> Formula (2)		
Attribute (2)	<input type="checkbox"/> Formula (3)		
Attribute (3)	<input type="checkbox"/> Formula (4)		
Attribute (4)	<input type="checkbox"/> Formula (5)		
Attribute (5)			

Part of the application you want to navigate to

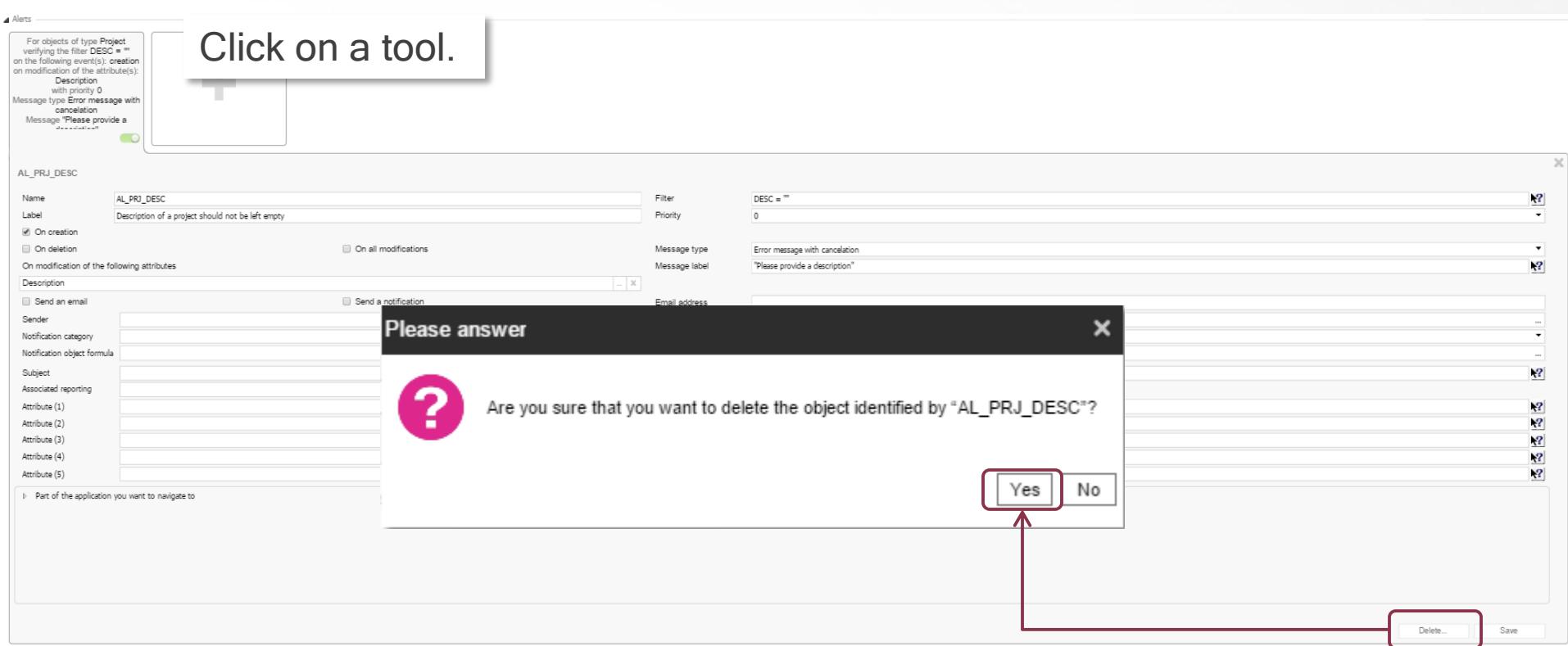
Modify your data.

Click Save.

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!

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

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

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!

1

1

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!

2

1

2

1

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
- 2 Determine the type of data needed

- Project, Activity
- Character, Number

User Attribute Creation

The screenshot shows the Planisware Administration Configuration screen. At the top, there's a navigation bar with 'Planisware' logo, 'Home', 'Administration' (which is highlighted in pink), 'Data', 'Modules', 'Configuration' (which is underlined in pink), 'Profile management', and a search bar. Below the navigation is a toolbar with 'Object type' dropdown set to 'PROJECT', 'Collapse all' and 'Expand all' buttons, and a large '+' button for creating new attributes.

Two user attributes are listed:

- 1** New attribute with description Limited values of Priority of type String holding the possible values 0, 1, 2, 3, 4, 5, 6, 7, 8, 9 using the formula _PAC_AA_N_PRIO
PEX158_PRIORITY
- 2** New attribute with description Customer Description of type String using the formula BREAKDOWN_0.DESC
QA_CUSTOMER_DESCRIPTION

A modal window titled 'Planisware Hyperdoc' is open on the right, containing fields for 'Name *' (PROJET_CODE), 'Associated dataset classes' (Project), 'Label' (Project Code), 'Type' (String), 'Default value' (empty), 'Possible values' (empty), 'Computation formula' (empty), 'Restrict access' (empty), and a 'Create' button.

- 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

User Attribute Creation - Project Code

The screenshot shows the Planisware Administration Configuration interface. The top navigation bar includes 'Planisware', 'Home', 'Administration' (highlighted in pink), 'Data', 'Modules', 'Configuration' (highlighted in pink), and 'Profile management'. A search bar and a help icon are also present.

The main area shows two existing attributes for 'PROJECT' objects:

- PEX158_PRIORITY**: New attribute with description 'Limited values of Priority of type String holding the possible values 0, 1, 2, 3, 4, 5, 6, 7, 8, 9 using the formula _PAC_AA_N_PRIO'
- QA_CUSTOMER_DESCRIPTION**: New attribute with description 'Customer Description of type String using the formula BREAKDOWN_0.DESC'

A large blue button with a white plus sign is centered in the middle of the screen, used for creating new attributes. To its right are 'Collapse all' and 'Expand all' buttons.

On the left, there is a configuration panel for a new attribute:

- Name ***: PROJET_CODE
- Associated dataset classes**: Project
- Label**: Project Code
- Type**: String
- Is indexed**: (checkbox)

To the right of this panel is a 'Planisware Hyperdoc' window containing fields for 'Default value', 'Possible values', 'Computation formula', and 'Restrict access', each with a corresponding input field and a '...' button.

- 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
- ② Determine the type of data needed

- Project, Activity
- 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 have 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

The screenshot shows the Planisware Administration interface. The top navigation bar includes 'Planisware', 'Home', 'Administration' (selected), 'Projects ATB5', 'Products', 'Roadmap', and a search bar. The 'Data' tab is selected in the left sidebar. The main area displays a table titled 'Possible values for user attributes'. The table has columns: Value type, Order, Internal value, Displayed value, and File. A 'Current filter' dropdown is set to 'DIFFICULTY_LEVEL'. A 'New' dialog box is open in the foreground, showing fields for 'Identification': 'Value type *' (set to 'DIFFICULTY_LEVEL'), 'Internal value *' (set to '5'), 'Displayed value' (set to '5'), and 'Order' (set to '5'). Buttons at the bottom of the dialog are 'OK', 'Apply', and 'Cancel'. Numbered circles (1-4) point to specific elements: 1 points to the 'Administration' tab; 2 points to the 'New' dialog; 3 points to the 'Internal value' field in the dialog; and 4 points to the 'File' column header in the table.

Value type	Order	Internal value	Displayed value	File
COUNTRY	1	1	1	X_QA_DATA
DIFFICULTY_LEVEL	2	2	2	X_QA_DATA
DIFFICULTY_LEVEL	3	3	3	X_QA_DATA
DIFFICULTY_LEVEL	4	4	4	X_QA_DATA
DIFFICULTY_LEVEL	5	5	1	X_QA_DATA
DIFFICULTY_LEVEL	6	6	2	X_QA_DATA
DIFFICULTY_LEVEL	7	7	3	X_QA_DATA
DIFFICULTY_LEVEL	8	8	4	X_QA_DATA

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

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

User Attributes - Possible Values

Administration:

The screenshot shows the Planisware Administration interface under the Configuration tab, specifically for the 'Activity' object type. A search bar at the top right contains 'Search...'. Below it, a navigation bar includes 'Data', 'Modules', 'Administration', 'Configuration' (which is selected), 'Products', 'Roadmap', and a '+' button.

The main area displays a grid of seven user attributes:

- New attribute with description Key Milestone Label of type String using the formula `PRINT_DATE(PS_OC_DATE_FORM "IF WBS_TYPE<>"" THEN WBS_TYPEDESC ELSE DESC FI`. Associated dataset classes: BP_UA_MS_LABEL.
- New attribute with description Difficulty Level of type DIFFICULTY_LEVEL restricted to DLEE.
- New attribute with description Difficulty Level of type Number holding the possible values TEST restricted to DLEE. Associated dataset classes: PAM_UA_N_DIFF_LEVEL.
- New attribute with description test1 of type TEST holding the possible values TEST1.
- New attribute with description test2 of type COUNTRY holding the possible values 1, 2, 3. Associated dataset classes: TEST2.
- New attribute with description Dataset class project of type Boolean. Associated dataset classes: TEST_UA_B_DATASET_PROJ.
- New attribute with description Testing Dataset Class of type String. Associated dataset classes: TEST_UA_S_DATASET.

A modal dialog is open for the third attribute ('PAM_UA_N_DIFF_LEVEL'). It shows the following details:

Name	PAM_UA_N_DIFFICULTY_LEVEL
Associated dataset classes	...
Label	Difficulty Level
Type	DIFFICULTY_LEVEL
Is indexed	<input checked="" type="checkbox"/>
Default value	Nil
Possible values	...
Computation formula	...
Restrict access	DLEE

Buttons at the bottom of the dialog include 'Delete' and 'Save'.

Activity Table:

The screenshot shows the Planisware Data view with the 'Activities*' table selected. The table has columns: Name, Description, Planned start, Difficulty Level, Planned finish, and Calendar.

	Name	Description	Planned start	Difficulty Level	Planned finish	Calendar
ATB5	ATB5	ATB5	01/01/13		06/08/14	
	G0	Gate 0	01/01/13	1	31/12/12	
	G1	Gate 1	13/06/13	2	12/06/13	
	G2	Gate 2	08/03/14	3	07/03/14	
	G3	Gate 3	07/08/14	4	06/08/14	
STAGE_A	Stage A	Stage A	01/01/13		12/06/13	
	TA	Task A	01/01/13		12/06/13	
STAGE_B	Stage B	Stage B	13/06/13		07/03/14	
	TB	Task B	13/06/13		07/03/14	
STAGE_C	Stage C	Stage C	08/03/14		06/08/14	
	TC	Task C	08/03/14		06/08/14	

- 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



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:

The screenshot shows the Planisware Administration interface. A user attribute named "PAM_UA_N_SKILLS" is being created. The "Associated dataset classes" dropdown is set to "Necessary Skill(s)". The "Type" dropdown shows "Skill..." and "Skill". The "Default value", "Possible values", "Computation formula", and "Restrict access" fields are empty. A "Create" button is visible at the bottom right.

Activity Table:

The screenshot shows the Planisware Activity Table. A context menu is open over a row in the table, specifically over the "Necessary Skill(s)" column. The menu title is "Choice of necessary skill(s)". The table lists various activities and tasks, including "ATB5", "G0", "G1", "G2", "G3", "Stage A", "Task A", "Stage B", "Task B", "Stage C", and "Task C". The "Necessary Skill(s)" column for Task A is highlighted. The context menu includes a search bar and a list of available skills: "ASKIL" (All skills), "SKIL-A" (Skill A), "SKIL-B" (Skill B), "SKIL-C" (Skill C), and "SKIL-D" (Skill D). Buttons for "Insert selection", "Remove selection", "Move up", and "Move down" are also present.

- 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 sim¹ project prioritization based on multiplying a project ²Difficulty 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

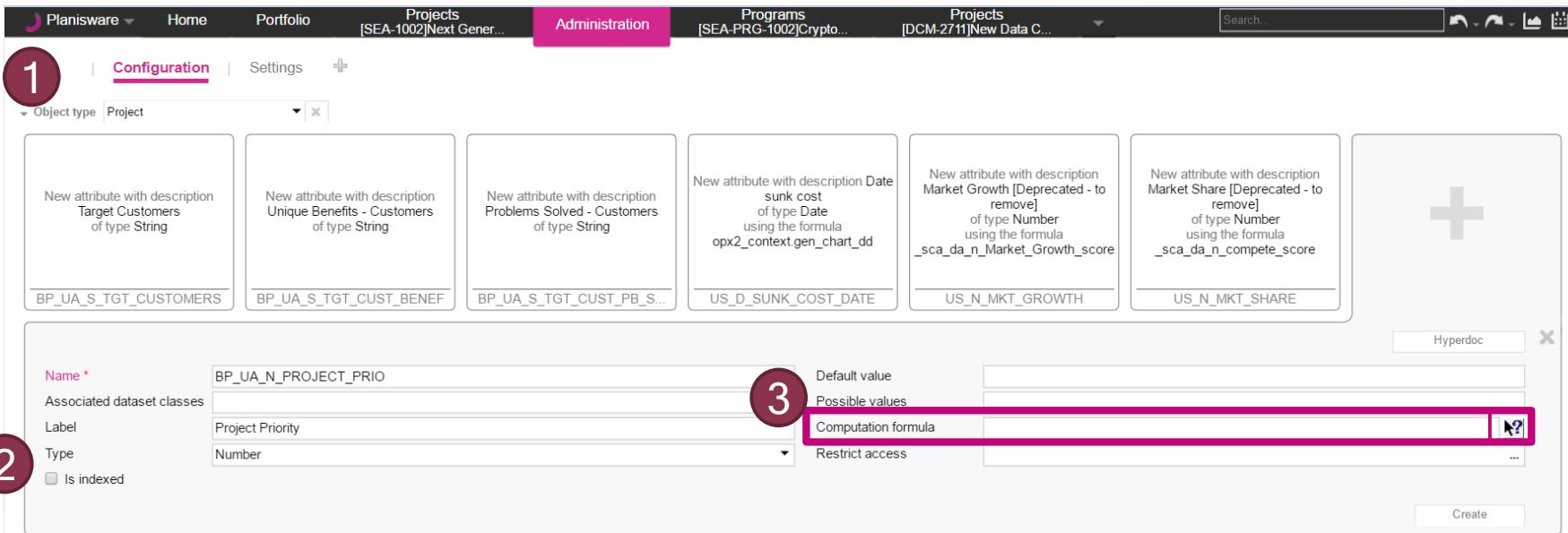
Type : Since we are multiplying several digits we expect our type to be a number

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



The screenshot shows the Planisware Configuration interface. A new named formula is being created under the 'Project' object type. The formula is named 'BP_UA_N_PROJECT_PRIO' with the label 'Project Priority' and type 'Number'. A checkbox 'Is indexed' is unchecked. The 'Computation formula' field contains the formula 'opx2_context.gen_chart_dd'. An info icon () is highlighted with a red circle and number '3', indicating it can be clicked to open the formula builder form.

Name *	BP_UA_N_PROJECT_PRIO
Associated dataset classes	
Label	Project Priority
Type	Number
<input type="checkbox"/> Is indexed	

Computation formula: opx2_context.gen_chart_dd

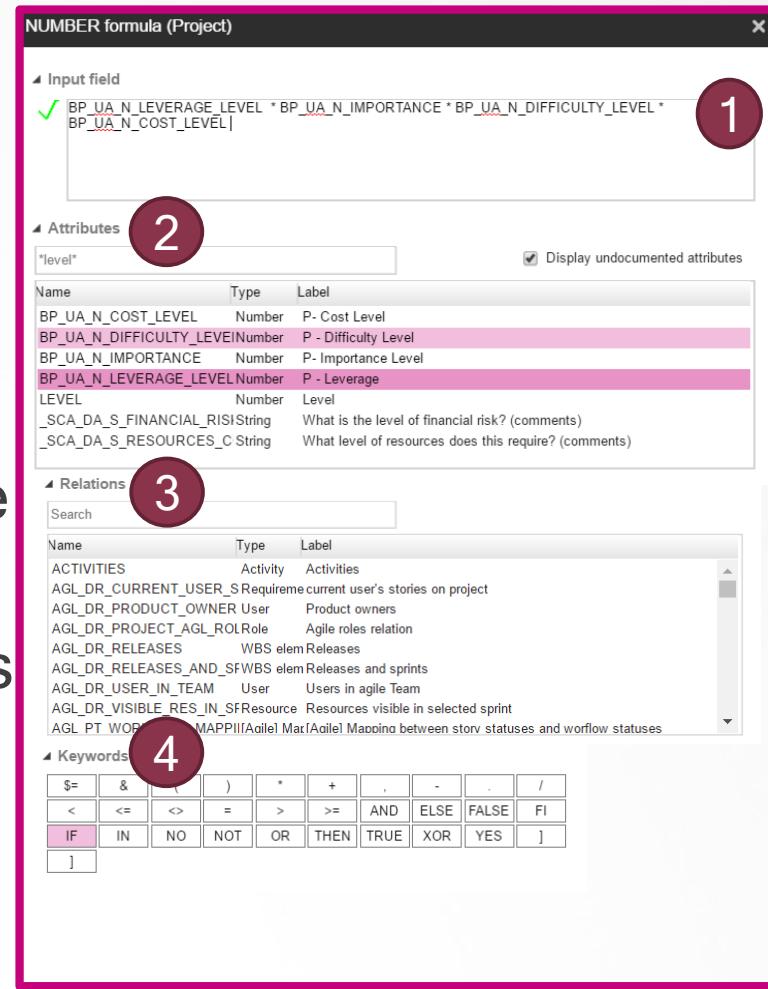
Default value: [empty]

Possible values: [empty]

Restrict access: [empty]

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

The screenshot shows the Planisware software interface. The top navigation bar includes links for Home, Portfolio, Projects (SEA-1002), Administration, Programs (SEA-PRG-1002), and Projects (DCM-2711). A search bar and various system icons are also present. Below the navigation is a secondary header with links for Wall, Stage & gate, Data, Dashboard, Gantt, Profit and loss, Requirements, Resources, Versions, KPI, Documents, Annotations, and an integrated Product Definition document.

The main content area displays a table of open projects:

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

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 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

The screenshot shows the Planisware Administration interface with the 'Configuration' tab selected. A specific attribute, 'BP_UA_N_PRIO_LEVEL', is being edited. A 'Hyperdoc item' dialog box is open over the configuration form.

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

Identification fields in the dialog:

- Name: DATA_SHARED
- File:
- Category:
- Associated dataset classes:

Bubble text area in the dialog:

This Prioritization Level is calculated by multiplying the project's **Leverage Level**, **Importance Level**, **Difficulty Level**, and **Cost Level**

Buttons at the bottom of the dialog: OK, Apply, Cancel

Other visible attribute descriptions in the background:

- New attribute with description Productivity Index of type Number using the formula IF _IND_NF_N_FIN_IND_OUT_DEV = 0 THEN 0 ELSE IND_NF_N_FIN_IND_NPV / _IND_NF_N_FIN_IND_OUT_DEV FI BP_UA_N_PI
- New attribute with description Project Priority Score of type Number using the formula BP_UA_N_LEVERAGE_LEVEL * BP_UA_N_IMPORTANCE * BP_UA_N_DIFFICULTY_LEVEL * BP_UA_N_COST_LEVEL BP_UA_N_PTS_SCORE
- New attribute with description [PEX] PTS Score of type Number using the formula _SCA_DA_N_R_D_SCORE_SCO BP_UA_C
- New attribute with description Technical Complexity of type String holding the possible values Low, Medium, High P_UA_PROJ_TECH_COMPL...
- New attribute with description Contract Status of type String holding the possible values Pre BP_AA_S_SEI_TRL_ASSESS =
- New attribute with description Current TRL of type String using the formula IF BP_AA_S_SEI_TRL_ASSESS = ... New a
- New attribute with description Next Upcoming Gate Date of type String

- 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

The screenshot shows the Planisware Administration interface. The top navigation bar includes links for Home, Portfolio, Projects, Administration (selected), Programs, and Projects. A search bar is also present.

The main area displays a list of attributes under the 'Object type' 'Project'. One attribute, 'BP_UA_N_PRIO_LEVEL', is highlighted with a red circle labeled '1'.

A modal window titled 'Hyperdoc item' is open over the list. It contains fields for 'Identification' (Name: DATA_SHARED, File: BP_UA_N_PRIO_LEVEL, Category: Associated dataset classes), 'Bubble text' (containing rich text about prioritization levels), and buttons for OK, Apply, and Cancel.

Other attributes visible in the list include:

- New attribute with description Productivity Index of type Number using the formula IF _IND_NF_N_FIN_IND_OUT_DEV = 0 THEN 0 ELSE IND_NF_N_FIN_IND_NPV / _IND_NF_N_FIN_IND_OUT_DEV FI BP_UA_N_PI
- New attribute with description Project Priority Score of type Number using the formula BP_UA_N_LEVERAGE_LEVEL * BP_UA_N_IMPORTANCE * BP_UA_N_DIFFICULTY_LEVEL * BP_UA_N_COST_LEVEL BP_UA_N_PRIO_LEVEL
- New attribute with description [PEX] PTS Score of type Number using the formula _SCA_DA_N_R_D_SCORE_SCO BP_UA_N_PTS_SCORE
- New attribute with description Technical Complexity of type String holding the possible values Low, Medium, High P_UA_PROJ_TECH_COMPL...
- P_UA_N_DIFFICULTY ...
- New attribute with description Next Upcoming Gate Date of type String

- 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

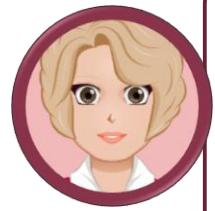
Hyperdoc

The screenshot shows a software interface for project management. At the top, there is a navigation bar with tabs for Home, Portfolio, Projects, Administration, Programs, and another Projects tab. The main area displays a grid of projects under the heading "ACME Hi Tech Top Projects". The columns include Name, Description, Stage & gate, P - Difficulty Level, P - Leverage, P - Cost Level, P - Importance Level, Project Priority Score, Priority, and Project ID. A tooltip is visible over the "Project Priority Score" column, explaining the calculation: "This Prioritization Level is calculated by multiplying the project's **Leverage Level**, **Importance Level**, **Difficulty Level**, and **Cost Level**".

Name	Description	Stage & gate	P - Difficulty Level	P - Leverage	P - Cost Level	P - Importance Level	Project Priority Score	Priority	Project ID
DCM-2531	New Data Center Monitoring Product 253	Planning	3.0	2.0	1.0	0.8	6.4	High	DCM-2531
DCM-2711	New Data Center Monitoring 271	Planning	1.0	3.0	1.0	0.8	2.4	Medium	DCM-2711
IMG-3242	New	Planning	1.0	1.0	2.0	0.8	3.2	Low	IMG-3242

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 add **1 sales** information to their project tables. Also, our European counterparts are fed up with seeing some **1 European Start** dates in the American Format. Lastly, we need to be able to set default values. For example a project's default **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

The screenshot shows the Planisware Intranet Server interface. The top navigation bar includes 'Planisware' with a dropdown, 'Home', 'Portfolio', and 'Projects [SEA-1002]Next Gener...'. Below the navigation is a toolbar with 'Wall', 'Stage & gate', 'Data', 'Dashboard', 'Gantt', and other icons. A search bar says 'By status Status Update*' and filters for 'New project', 'Open', 'Portfolio', and 'ACME Hi Tech Top Pro...'. The main area displays a table of projects:

Open	Name	Description	Stage & gate	Sales	P - Dif...
	DCM-2531	New Data Center Monitoring Product 253		28,800,000.0	
	DO...	Organize columns			
	IM	Open		_PM_SF_OPEN_PROJECT	
		Name		NAME	
		Description		DESC	
		Stage & gate		_PAC_SF_ICON	
		Sales		_IND_NF_N_FIN_IND_OUT_SALES	

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

Attribute Settings

The screenshot shows the Planisware Administration interface with several panels:

- Top Navigation:** Home, Portfolio, Projects [SEA-1002]Next Gener..., Administration [SEA-PRG-1002]Crypto..., Projects [DCM-2711]New Data C... Search...
- Left Sidebar:** Data, Configuration (highlighted), Settings, Tools.
- Object Type Selection:** Object type: Project.
- Content Panels:**
 - Project Priority Score:** Attribute Project Priority Score (BP_UA_N_PRIO_LEVEL) has no further configuration.
 - Sales:** Attribute Sales (_IND_SF_VFININDOUTSALES) has no further configuration.
 - Corporate Targets:** Attribute Corporate Targets (SCA_DA_N_Corporate_Targets) grouped under the category Sustainability Score with the values formatted as in 1,235.
 - Eco-Design Strategies:** Attribute Eco-Design Strategies (SCA_DA_N_ECO DESIGN SCORE) has no further configuration.
- Configuration Dialog (opened from Corporate Targets panel):**
 - Module:** sales
 - Category:** All
 - Search:** *sales*
 - Results:**
 - Named formulas:**
 - First 3 Yrs of Sales
 - First 5 Yrs of Sales
 - First Full Year Sales
 - Peak Sales
 - Program Sales
 - Program Sales Targets
 - Sales
 - Sales Delta
 - Symbolic fields:**
 - Sales
 - Buttons:** OK, Cancel.

Numbered steps:

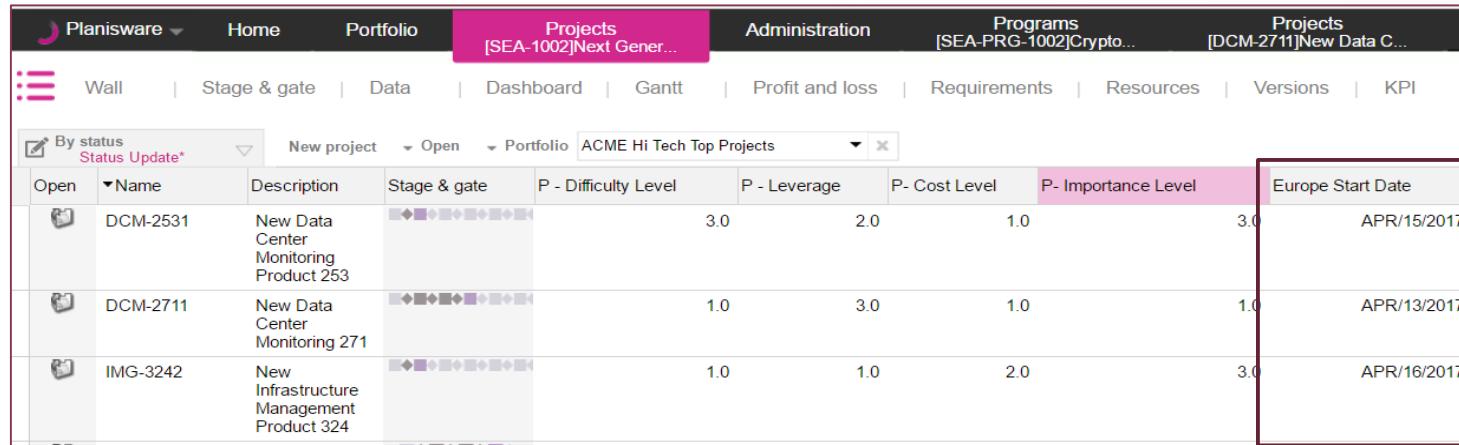
- 1 Select the correct class of the attribute you wish to limit
- 2 Find the exact Attribute for the attribute setting using the nickname
- 3 Mark hide in intranet Server
- 4 After clicking Save, this attribute will no longer be available for insertion, however if the attribute is already on a table,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

- 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 is 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



The screenshot shows the Planisware application interface. The top navigation bar includes links for Planisware, Home, Portfolio, Projects [SEA-1002]Next Gener..., Administration, Programs [SEA-PRG-1002]Crypto..., and Projects [DCM-2711]New Data C... . Below the navigation is a secondary menu with options like Wall, Stage & gate, Data, Dashboard, Gantt, Profit and loss, Requirements, Resources, Versions, and KPI. A search bar at the top right contains the text "ACME Hi Tech Top Projects". The main content area displays a table of projects:

Open	Name	Description	Stage & gate	P - Difficulty Level	P - Leverage	P- Cost Level	P- Importance Level	Europe Start Date
	DCM-2531	New Data Center Monitoring Product 253	[Progress Bar]	3.0	2.0	1.0	3.0	APR/15/2017
	DCM-2711	New Data Center Monitoring 271	[Progress Bar]	1.0	3.0	1.0	1.0	APR/13/2017
	IMG-3242	New Infrastructure Management Product 324	[Progress Bar]	1.0	1.0	2.0	3.0	APR/16/2017

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

Attribute Settings

The screenshot shows the Planisware Administration interface with the 'Configuration' tab selected. A search bar at the top right contains the text 'Search...'. Below the search bar are several navigation links: Home, Portfolio, Projects [SEA-1002]Next Gener..., Administration (highlighted in pink), Programs [SEA-PRG-1002]Crypto..., and Projects [DCM-2711]New Data C...'. On the left, there's a sidebar with 'Tools' and 'Object type' set to 'Project'. A large red circle labeled '1' is positioned over the sidebar.

The main content area displays a grid of attribute configurations:

Attribute	Description	Category	Value
Attribute Europe Start Date (BP_UA_DA_N_START_DATE)	with the values formatted as in APR/15/2017	Europe Start Date	Attribute Europe Start Date
Attribute Project Priority Score (BP_UA_N_PRIO_LEVEL)	has no further configuration.	Project Priority Score	Attribute Project Priority Score
Attribute Sales (IND_SF_VFININDOUTSALES)	is hidden from the user.	Sales	Attribute Sales
Attribute Corporate Targets (SCA_DA_N_Corporate_Targets)	grouped under the category Sustainability Score with the values formatted as in 1,235	Corporate Targets	Attribute Corporate Targets
Attribute Eco-Design Strategies (SCA_DA_N_ECO_DESIGN_SCORE)	has no further configuration.	Eco-Design Strategies	Attribute Eco-Design Strategies
Attribute What is the financial return? Margins? (SCA_DA_N_FINANCIAL_SCORE_SCC)	grouped under the category Product Attractiveness Score with the values formatted as in 1,234.6	What is the financial return? Ma...	Attribute What is the financial return? Margins?
Attribute Manufacturing/Supply Chain Score (SCA_DA_N_MANUFACTURING_SUPP)	grouped under the category Product Attractiveness Score with the values formatted as in 1,234.6	Manufacturing/Supply Chain S...	Attribute Manufacturing/Supply Chain Score

A modal dialog box is open for the 'Europe Start Date' attribute, labeled '2'. It contains fields for 'Module' (set to 'Attribute'), 'Category' (set to 'Europe Start Date'), and 'Format' (set to 'MM/DD/YYYY'). There are also dropdowns for 'Default column length' (set to '0') and 'Default value' (empty). A checkbox 'Hide in Intranet Server?' is checked. Buttons for 'Delete' and 'Save' are at the bottom right. A red circle labeled '3' is over the 'Module' field, and a red circle labeled '4' is over the 'Save' button.

- 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

The screenshot shows the Planisware software interface with the following details:

- Top Navigation:** Planisware, Home, Portfolio, Projects [SEA-1002]Next Gener..., Administration, Programs [SEA-PRG-1002]Crypto..., Projects [DCM-2711]New Data C...
- Sub-navigation:** Wall, Stage & gate, Data, Dashboard, Gantt, Profit and loss, Requirements, Resources, Versions, KPI.
- Search and Filter:** By status Status Update*, New project, Open, Portfolio ACME Hi Tech Top Projects.
- Table View:** A list of projects with the following columns:
 - Name: DCM-2531, DCM-2711, IMG-3242
 - Description: New Data Center Monitoring Product 253, New Data Center Monitoring 271, New Infrastructure Management Product 324
 - Stage & gate: Progress bar (mostly green)
 - P - Difficulty Level: 3.0, 1.0, 1.0
 - P - Leverage: 2.0, 3.0, 1.0
 - P - Cost Level: 1.0, 1.0, 2.0
 - P - Importance Level: 3.0, 1.0, 3.0
 - Europe Start Date: 15-04-2017, 13-04-2017, 16-04-2017

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

The screenshot shows the Planisware Administration Configuration page for the 'Project' object type. The top navigation bar includes links for Home, Portfolio, Projects, Administration (highlighted in pink), Programs, and Projects. A search bar and various system icons are also present.

1 In the top left, under 'Tools', there is a dropdown menu set to 'Project'. Below it, a table lists several attributes:

Attribute Description (DESC) has no further configuration. ,the default value is "Please Fill Me Out"	Attribute Europe Start Date (BP_UA_DA_EUR_START_DATE) with the values formatted as in APR/15/2017	Attribute Project Priority Score (BP_UA_N_PRIO_LEVEL) has no further configuration.	Attribute Sales (IND_SF_VFININDOUTSALES) is hidden from the user.	Attribute Benefits (PGM_MNGT_AA_T_BENEFIT) has no further configuration.	Attribute Corporate Targets (SCA_DA_N_CORPORATE_TARGETS) grouped under the category Sustainability Score with the values formatted as in 1,235	Attribute Eco-Design Strategies (SCA_DA_N_ECO_DESIGN_SCORE) has no further configuration.					
Europe Start Date		Project Priority Score		Sales		Benefits		Corporate Targets		Eco-Design Strategies	

2 On the left, a 'Description' section allows filtering by Attribute, Module, Category, and a 'Hide in Intranet Server?' checkbox.

3 A modal dialog is open for setting the 'Default value' for an attribute. It contains fields for 'Format', 'Default column length' (set to 0), and 'Default value' ('Please Fill Me Out').

4 At the bottom right of the dialog are 'Delete' and 'Save' buttons.

- 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

Project description ×

Definition | Rights & responsibilities | Roles | Visibility rules | History | Attribute list

Identification

Name * Description

Template

Dates

Start date End date

Relations

Customer <input type="button" value="▼"/>	Product <input type="button" value="▼"/>
Responsibility <input type="button" value="▼"/>	Strategic axis <input type="button" value="▼"/>
Project calendar <input type="button" value="▼"/>	Project Types <input type="button" value="▼"/>
Business Units <input type="button" value="▼"/>	Region <input type="button" value="▼"/>
Parent project <input type="button" value="▼"/>	Shared milestones <input type="button" value="..."/>

Notepad

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!

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

Hyperdoc

Named Formulas

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

We need more control over extending our data model!

Attribute Settings



Questions



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

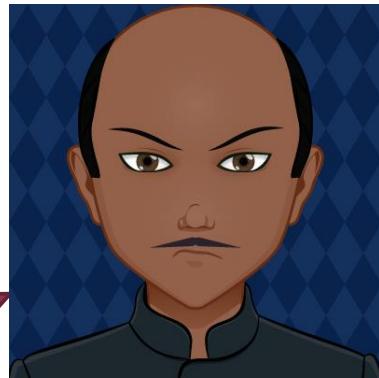
Meet Ajay, the Head of Usability

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

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

We need thorough methods to highlight important information!

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** that have the **1** **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.

The screenshot shows the Planisware Administration interface. The top navigation bar includes the Planisware logo, a dropdown menu, the title "Administration", and various icons for search, refresh, and help. Below the navigation is a toolbar with a "Data" tab and a "+" button. A sub-toolbar displays a "New" button, a dropdown for "Object type" set to "COLORS_RULES", and a close button. The main area has a header "Colors" and a table with columns "Identifier" and "Label". A row for "COLORS_RULES" is selected, showing the label "Colors management rules". To the right, a "Style manager" panel is open, showing a table with columns "Rule class (internal)", "Object id", "Formula", "Icon", and "Color". The "Color" column shows three swatches: a dark purple square at the top, a grey square in the middle, and a blue square at the bottom. The "Icon" column is empty for this row.

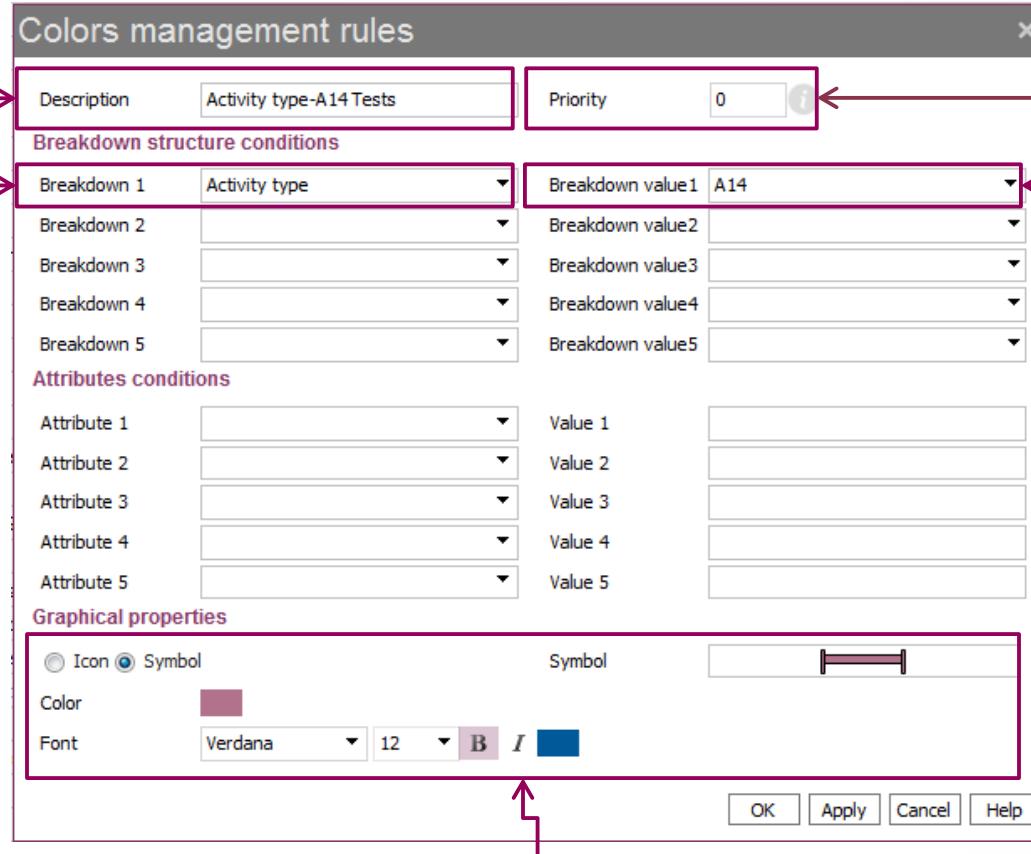
Creating new colors rules

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.



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.

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

View in Gantt

Rule definition

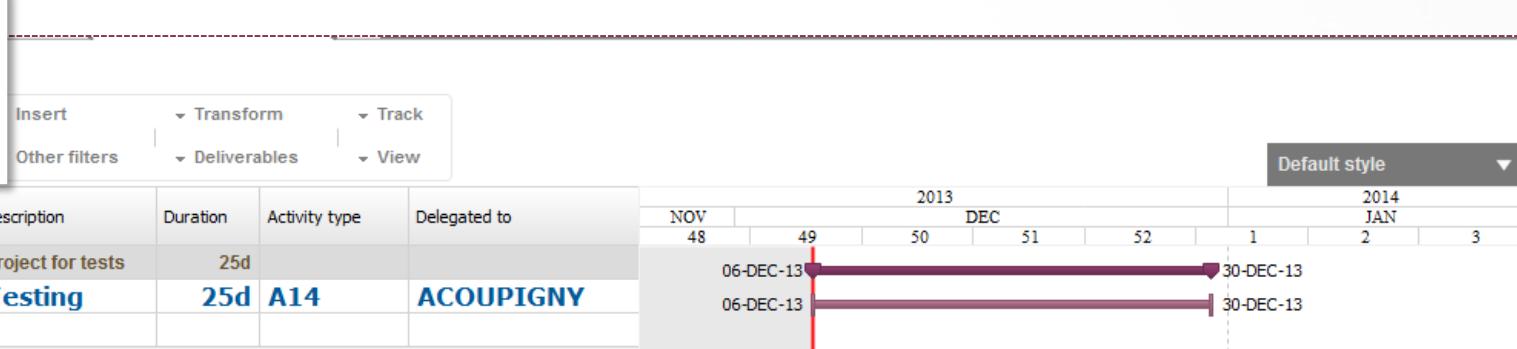
Ex. With symbol

Colors management rules

Description	Activity type-A14 Tests	Priority	0
Breakdown structure conditions			
Breakdown 1	Activity type	Breakdown value1	A14
Breakdown 2		Breakdown value2	
Breakdown 3		Breakdown value3	
Breakdown 4		Breakdown value4	
Breakdown 5		Breakdown value5	
Attributes conditions			
Attribute 1	Description	Value 1	Testing
Attribute 2		Value 2	
Attribute 3		Value 3	
Attribute 4		Value 4	
Attribute 5		Value 5	
Graphical properties			
Icon	Symbol	Symbol	
Color		Symbol	
Font	Verdana	12	B <i>I</i>
<button>OK</button> <button>Apply</button> <button>Cancel</button> <button>Help</button>			

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

Result: Rule rendering in Gantt



View in Gantt

Rule definition
Ex. with Icon

Colors management rules

Description	Activity type A04	Priority	0	i
Breakdown structure conditions				
Breakdown 1	Activity type	Breakdown value1	A04	
Breakdown 2		Breakdown value2		
Breakdown 3		Breakdown value3		
Breakdown 4		Breakdown value4		
Breakdown 5		Breakdown value5		
Attributes conditions				
Attribute 1		Value 1		
Attribute 2		Value 2		
Attribute 3		Value 3		
Attribute 4		Value 4		
Attribute 5		Value 5		
Graphical properties				
<input checked="" type="radio"/> Icon <input type="radio"/> Symbol		Image	Bullet_3d_16	
Color				
Font	<input type="button" value="Font"/>	0	<input type="button" value="B"/>	<input type="button" value="I"/>
OK Apply Cancel Help				

Rule rendering
in Gantt

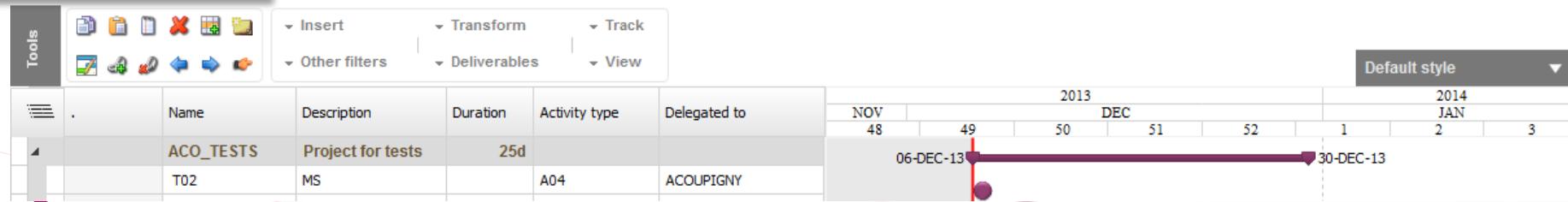


Image management - Scenario

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)?

1

2

3

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

The screenshot shows the Planisware application interface with the following details:

- Top Navigation Bar:** Data (highlighted in pink), Modules, Content Projects, Content Administration, Toolbar editor, Configuration, Profile management, Import/export.
- Toolbar:** Tools, New, Object type dropdown set to "Image Bank".
- Table View:** Shows a list of existing images in the "Image Bank" table. One row is selected: "ACME_IMG_DOWN" with description "Down". Other rows include "ACME_IMG_STABLE" (description "Stable"), "ACME_IMG_UP" (description "Up"), "caution", "KO", and "OK".
- Creation Dialog:** A modal dialog titled "Image bank (Creation)" is open. It has sections for "Identification" (Name: "ACME_IMG_STABLE", Description: "Stable") and "Import new image" (with a preview button). There is also a "Notepad" section and a toolbar at the bottom.
- Right Panel:** A vertical toolbar with icons for download (red), back (blue), forward (green), warning (yellow), error (red), and checkmark (green).

A large pink arrow points from the "Object type" dropdown in the toolbar down to the "Image bank (Creation)" dialog.

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

The screenshot illustrates the creation and application of symbolic fields in a project management system.

Left Panel: Symbolic Field Creation

- Symbolic field with description Project health of type Image:** A panel showing a preview of a green upward-pointing arrow icon.
- Symbolic field with description Test_ADM312_Priority_st_image of type:** A panel showing a preview of a red downward-pointing arrow icon.
- Symbolic field with description Test_ADM313_Priority_st_String of type:** A panel showing a preview of a blue right-pointing arrow icon.

ACME_SF_PJT_HEALTH Entity PROJECT

Name	Description	Project health
ACME_SF_PJT_HEALTH		

Symbol type used: Image

Field values

Filter	Image	Preview
1) ESTIMATE_AT_COMPLETION > BUDGET_AT_COMPLETION	ACME_IMG_1	
2) ESTIMATE_AT_COMPLETION = BUDGET_AT_COMPLETION	ACME_IMG_5	
3) ESTIMATE_AT_COMPLETION < BUDGET_AT_COMPLETION	ACME_IMG_6	
4)		
5)		

Right Panel: Project Health Visualization

A table titled "All projects*" showing project details:

Open	Name	Description	Estimate at completion (EAC)	Budget at completion (BAC)	Project health
	AUTOLOA	QA PEX02	184 922,5 EUR	184 922,5 EUR	
	AUTOLOA	QA PEX03	187 935,5 EUR	159 575 EUR	
	AUTOLOA	QA PEX04	179 090 EUR	159 575 EUR	
	AUTOLOA	QA PEX05	158 860 EUR	159 575 EUR	
	AUTOLOA	QA PEX06	159 575 EUR	159 575 EUR	
	AUTOLOA	QA PEX07	159 575 EUR	159 575 EUR	
	AUTOLOA	QA PEX08	159 575 EUR	159 575 EUR	
	AUTOLOA	QA PEX09	159 575 EUR	159 575 EUR	
	AUTOLOA	QA PEX10	159 575 EUR	159 575 EUR	
	AUTOLOA	QA PEX01	213 703 EUR	213 703 EUR	
	AUTOLOA	QA PEX02	184 922,5 EUR	184 922,5 EUR	
	AUTOLOA	QA PEX03	187 935,5 EUR	159 575 EUR	

A pink box highlights the "Field values" section, and a pink arrow points from it to the "Project health" column in the main table.

Status report

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

The screenshot shows the Planisware application's administration interface. The top navigation bar includes Home, Administration (which is selected), Projects AGL003, Buckets & investments, Programs, Proposal, and a plus sign for new items. Below the navigation is a breadcrumb trail: Rules > Content > Projects > Content Administration. A search bar shows 'Status report'. The main area displays a table of status reports, with one row selected: 'ACME_SR_PROJ_PROSPECTS' (Name), 'Project prospects' (Description), and 'Status report' (Status report type). A modal window titled 'Status report' is open, showing the 'Identification' section with the name 'ACME_SR_PROJ_PROSPECTS' and description 'Project prospects'. Under 'Identification', there is a checkbox labeled 'Generate Project fields' which is checked. A callout bubble with an arrow points to this checkbox with the text: 'Check this option to make fields available on projects'. Another callout bubble with an arrow points to a table titled 'Status report label' where the selected row 'ACME_SR_PROJ_PROSPECTS' is highlighted, with three values ('Good', 'Low', 'Medium') listed under the 'Name' column and corresponding images ('ACME_IMG_UP', 'ACME_IMG_DOWN', 'ACME_IMG_STABLE') listed under the 'Image' column.

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

The screenshot shows a software interface for managing projects. On the left, a table lists 'All projects*' with columns for Open status, Name, State, and Project prospects. An arrow points from the 'Project prospects' column to a dropdown menu titled 'Project prospects - Image'. This dropdown menu is highlighted with a red border and contains a search bar and a list of options: Identifier, Label, High, Low, and Medium. To the right of the dropdown is a vertical toolbar with various icons.

All projects*	Open	Name	State	Project prospects
AGL003	Open	AGL003	Simulation	High
AGL005	Open	AGL005	Simulation	Low
AGL006	Open	AGL006	Simulation	Medium
AGL007	Open	AGL007	Simulation	High
AGL008	Open	AGL008	Simulation	Low
AGL010	Open	AGL010	Simulation	Medium
AGL011	Open	AGL011	Simulation	High
AGL015	Open	AGL015	Simulation	Low
AGL021	Open	AGL021	Simulation	Medium
ATB_PROJ-01_EN	Open	ATB_PROJ-01_EN	Active	High
AUTOLOAD03_PEX01	Open	AUTOLOAD03_PEX01	Active	Low
AUTOLOAD03_PEX02	Open	AUTOLOAD03_PEX02	Active	High
AUTOLOAD04_PEX01	Open	AUTOLOAD04_PEX01	Active	Low
AUTOLOAD04_PEX02	Open	AUTOLOAD04_PEX02	Active	Medium
AUTOLOAD09_PEX01	Open	AUTOLOAD09_PEX01	Active	High
AUTOLOAD09_PEX02	Open	AUTOLOAD09_PEX02	Active	Low

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.

Indicators

Introduction

Classic indicators

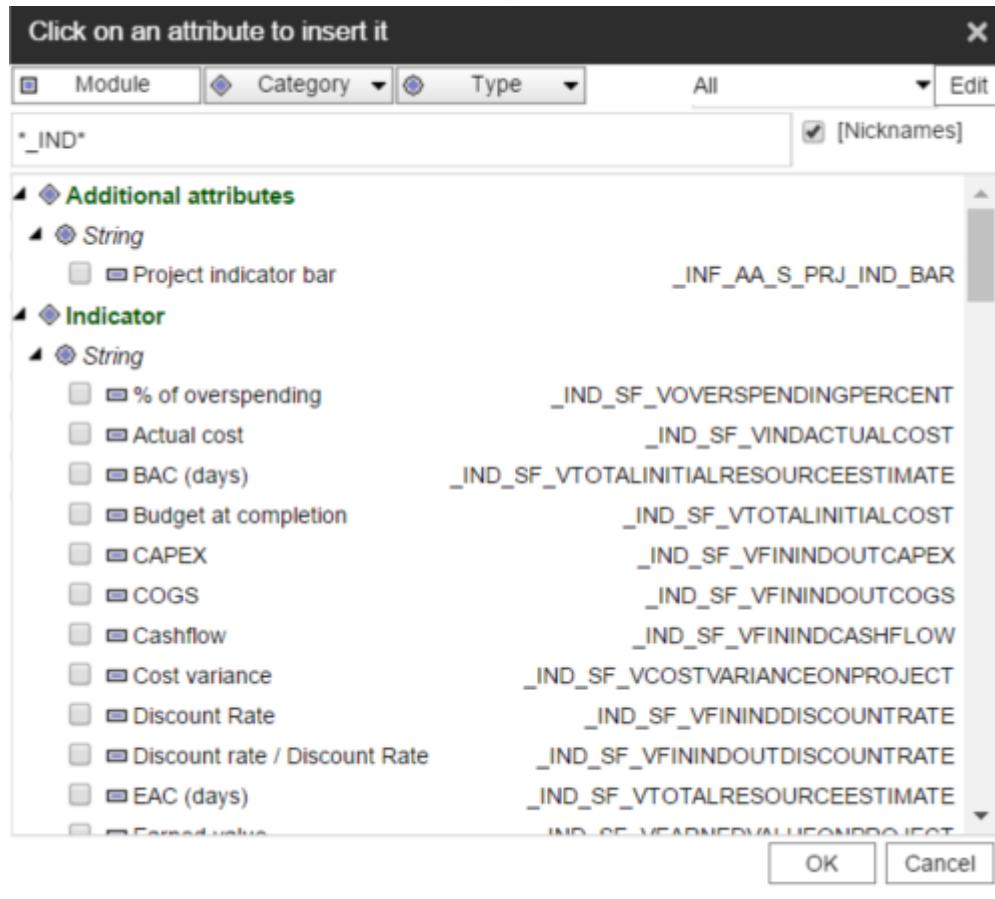
Managing indicators

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

The screenshot shows the Planisware Administration module interface. The top navigation bar includes links for Planisware, Home, Administration (which is highlighted in pink), Projects, Products, and Roadmap. Below the navigation is a toolbar with various icons, and a dropdown menu for 'Object type' set to 'INDICATOR'. A large central table lists numerous indicators, each with a name and description. A callout box with a pink arrow points to the 'New' button in the toolbar, which is highlighted with a red border. The callout text reads: 'Click on New from the toolbar to create custom indicators.'

Name	Description
Project	
COST_VARIANCE_ON_PROJECT	Cost variance
EARNED_VALUE_ON_PROJECT	Earned value
Launch_gate_date	Launch gate date
managed_risks	Managed risks
managed_risk_cost	Risk management cost
NumberOFMilestone	Number of Milestones
overspending_percent	% of overspending
PBP	Payback period
PercentComplete	Percent complete
Resource_overrun	Overrun
ROI	ROI
SCHEDULE_VARIANCE_ON_PROJECT	Schedule variance
TotalResourceLoad	Total resource load
total_cost_estimate	Estimate at completion
total_initial_cost	Budget at completion
total_initial_resource_estimate	BAC (days)
total_resource_estimate	EAC (days)
_FIN_IND_CASHFLOW	Cashflow
_FIN_IND_DISCOUNT_RATE	Discount Rate

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)

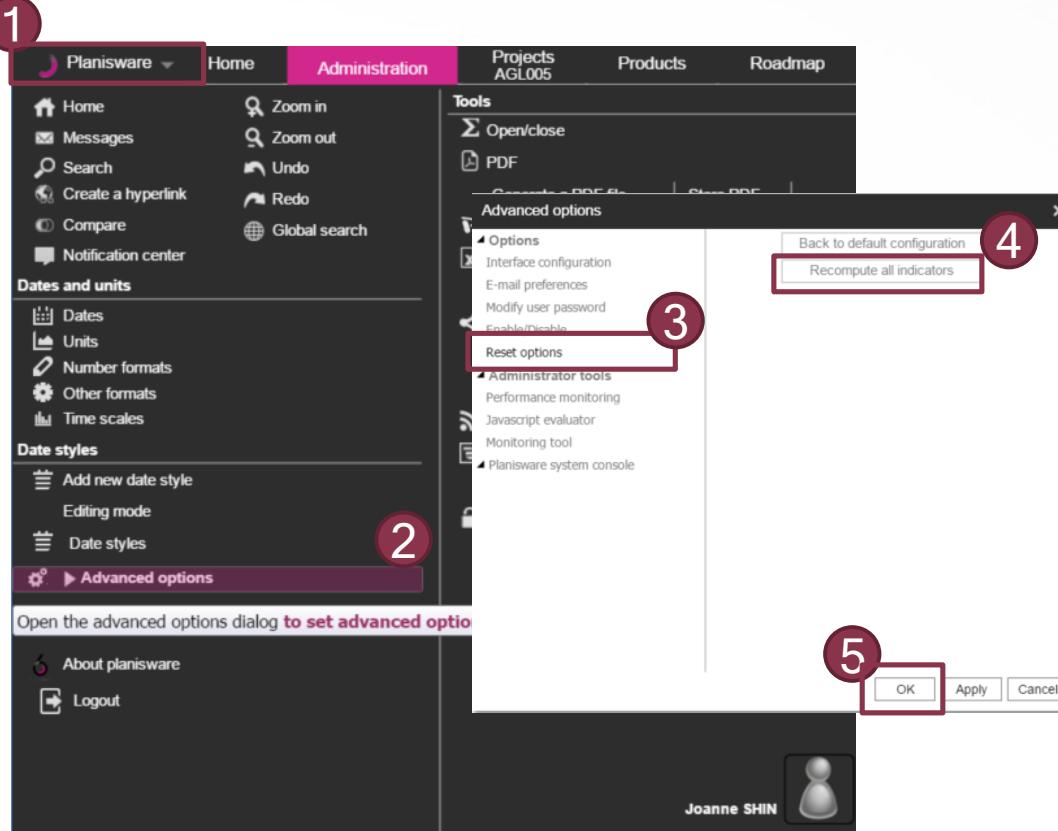
3 Select the correct type of the indicator (eg. Number, string, date, cost etc.)

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.)

The screenshot shows the 'New' dialog box for creating a new indicator. The 'Name *' field is populated with 'GROSS_MARGIN_CUSTOM' and the 'Description' field contains 'Gross margin (custom)'. A red circle labeled '1' is over the 'Name *' field. Below the main input fields, there are tabs for 'Description', 'Parameters', 'Batch settings', and 'Notification'. The 'Description' tab is selected. On the left, there's a sidebar with 'Identification' (set to 'For each'), 'Type' (set to 'Number'), and 'Caption' (with 'Text' and 'Caption formula' fields). A red circle labeled '2' is over the 'Identification' section, and another red circle labeled '3' is over the 'Type' section. On the right, there's a 'Project' dropdown set to 'Number', a formula field containing '_FIN_NF_OUT_GROSS_PROFIT/_FIN_NF_OUT_NET_SALES', and a 'Link' section with 'Associated reporting' and 'Display in current screen (no node or portal)' selected. A red circle labeled '4' is over the 'Caption' section. At the bottom right are 'OK', 'Apply', and 'Cancel' buttons.

Recomputing Indicators

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



- Click on the Planisware main menu.
- Click on Advanced options
- From the new popup, click on Reset options.
- Click on Recompute all indicators.
- 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**

Creating a new indicator bar

The screenshot shows the Planisware Administration interface. A large purple circle labeled '1' is at the top left. Below it, a smaller purple circle labeled '2' points to the 'Configuration' tab in the top navigation bar. Another small purple circle labeled '3' points to the 'Indicator bars' section in the main content area. A final small purple circle labeled '4' points to a plus sign icon in a red-bordered box, indicating where to click to add a new indicator bar.

1

2

3

4

Indicator bars

Indicator bar containing 5 indicator(s): Operating Cashflow, Revenues, Investment, NPV, Internal Rate of Return / IRR

Indicator bar containing 8 indicator(s): Budget at completion, Estimate at completion, Actual cost, Launch gate date, % of overspending, Schedule variance, Earned value, Cost variance

Indicator bar containing 5 indicator(s): Launch gate date, Cashflow, Investment, NPV, ROI

Indicator bar containing 3 indicator(s): Percent complete, NPV, Total resource load

Indicator bar containing 2 indicator(s): NPV, Percent complete

Indicator bar containing 6 indicator(s): Operating Cashflow, Investment, NPV, Payback period

Indicator bar containing 2 indicator(s): Risk management cost, Managed risks

Indicator bar containing 4 indicator(s): Earned value, Number of Milestones, Launch gate date, Percent complete

Indicator bar containing 4 indicator(s): NPV, Percent complete, Total resource load, Estimate at completion

Indicator bar containing 1 indicator(s): Launch gate date

Stage gate

+

Creating a new indicator bar

Indicator bars

Indicator bar containing 8 indicator(s): Budget at completion, Estimate at completion, Actual cost, Launch gate date, % of overspending, Schedule variance, Earned value, Cost variance	Indicator bar containing 1 indicator(s): Expected Commercial Value	Indicator bar containing 5 indicator(s): Launch gate date, Cashflow, Investment, NPV, ROI	Indicator bar containing 3 indicator(s): Percent complete, NPV, Total resource load	Indicator bar containing 2 indicator(s): NPV, Percent complete	Indicator bar containing 2 indicator(s): Number of red flags, Number of red flags High Priority	Indicator bar containing 6 indicator(s): Operating Cashflow, Investment, Cashflow, Discount Rate, NPV, Payback period	Indicator bar containing 4 indicator(s): EAC (days), BAC (days), Overrun, Percent complete	Indicator bar containing 2 indicator(s): Risk management cost, Managed risks
COST_DASHBOARD	INITIATIVE_DASHBOARD	issue_dashboard		Product overview	PROJECT_RED_FLAGS	PROJECT_REVENUE	RESOURCE_FORECAST	risk_dashboard

ECV - ECV

Name ECV
Description ECV
Description
Expected Commercial Value
€

5

6

Advanced... Delete Save

Indicator bar overview

Expected Commercial Value

€

Cursor	Name	Description	Don't display until	Reporting	Intranet page
FIN_IND_OUT_ECV	Expected Commercial Value				

7

< Insert

Remove >

Name	Description	Attribute
COST_VARIANCE_ON_PROJECT	Cost variance	_JNF_N_DPB
DPBP	Discounted payback period	
EARNED_VALUE_ON_PROJECT	Earned value	
Launch_gate_date	Launch gate date	_JNF_N_SUM_OF_MANAGED_RISK/_PM_NF_N_RIS
managed_risks	Managed risks	_JNF_N_N_MANAGED_RISK_COST
managed_risk_cost	Risk management cost	_JNF_NF_rule_N_numberOfMilestones
NumberOfMilestone	Number of Milestones	_JNF_CF_GENERIC_EAC - _JNF_CF_GENERIC_BUDGET
Overspending	Overspending	IF (ESTIMATE_AT_COMPLETION <> 0 AND BUDGET_A
overspending_percent	% of overspending	_JNF_N_PBP
PPB	Ppbayback period	
PercentComplete	Percent complete	
Resource_overrun	Overrun	
risk_global_cost	Risk global cost	
ROI	ROI	
SCHEDULE_VARIANCE_ON_PROJECT	Schedule variance	
TEST_VINCENT	TEST_VINCENT	
TotalResourceLoad	Total resource load	
total_cost_estimate	Estimate at completion	
total_initial_cost	Budget at completion	
total_initial_resource_estimate	BAC (days)	
total_resource_estimate	EAC (days)	
TEST_VINCENT_3	TEST_VINCENT	
FIN_IND_CASHFLOW	Cashflow	
FIN_IND_DISCOUNT_RATE	Discount Rate	
FIN_IND_INVESTMENT	Investment	
FIN_IND_NPV	NPV	
FIN_IND_OPERATING_CASHFLOW	Operating Cashflow	
FIN_IND_OUT_CAPEX	CAPEX	
FIN_IND_OUT_GROSS_PROFIT	Gross profit	
FIN_IND_OUT_INCREMENTAL_REVENUE	Incremental Revenue	
FIN_IND_OUT_MARGIN CONTRIBUTION	Margin Contribution	

Insert indicator in the indicator bar

List of indicators

FIN_CF_OUT_MARGIN CONTRIBUTION

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

Cursor	Name	Description	On class	File	Is active ?
	DEFAULT	Return to default bar		INDICATORS_BARS	<input type="checkbox"/>
	COSTASHBOARD	Costs	Project	INDICATORS_BARS	<input type="checkbox"/>
	INITIATIVEASHBOARD	Opportunities	Project	INDICATORS_BARS	<input type="checkbox"/>
	issue_dashboard	Issues	Project	INDICATORS_BARS	<input type="checkbox"/>
	Product overview	Product Overview	Project	INDICATORS_BARS	<input checked="" type="checkbox"/>
	PROJECT_RED_FLAGS	Red flags	Project	INDICATORS_BARS	<input checked="" type="checkbox"/>
	PROJECT_REVENUE	Revenue	Project	INDICATORS_BARS	<input checked="" type="checkbox"/>
	RESOURCE_FORECAST	Resource forecast	Project	INDICATORS_BARS	<input checked="" type="checkbox"/>
	risk_dashboard	Risks	Project	INDICATORS_BARS	<input type="checkbox"/>
	Schedule_project mana	Schedule	Project	INDICATORS_BARS	<input checked="" type="checkbox"/>
	Project overview	Project Overview	Project	INDICATORS_BARS	<input checked="" type="checkbox"/>

Deactivating indicator bar (2/2)

Project Overview

Net Present Value: 120 577,352 074 EU

Percent complete: 15,7955093 %

Total resource load: 2 750 in days

Estimate at completion: 213 703 EUR

Stage & Gate/Cost Status

Start: 01/01/10 Preparation work End: 11/03/15 R&D Industrialization PILOT Maintenance

Name	Description	End date			Workload (in hours)			Baseline
		Baseline	Forecast	Actual	Baseline	Forecast	Actual	Baseline
PREP	Preparation w	26/11/11	26/11/11	26/11/11	8 656	8 656	4 256	63 812
R&D	R&D	21/09/12	21/09/12		4 600	4 600	200	54 746
PILOT	PILOT	18/07/13	18/07/13		4 400	4 400		30 715

Recompute displayed bar indicators
Return to default bar

Project Overview
Red flags
Revenue
Resource forecast
Schedule Log

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

The screenshot illustrates the process of creating and applying an attribute chooser style in the Planisware interface.

1. Create a new attribute chooser style

A dialog box titled "Click on an attribute to insert it" shows a list of attributes under "UC attributes". A red box highlights the "New" button in the toolbar at the top left of the dialog.

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

The "Attribute chooser style (Creation)" dialog shows the "Definition" tab. It includes fields for "Name" (set to "UC attributes") and "Module", "Category", "Type" dropdowns. A red box highlights the "axis" dropdown menu, which contains options like "Consolidation structures", "Strategic axis", and "[Nicknames]". A red arrow points from the "UC attributes" list in the first dialog to the "axis" dropdown here. Another red arrow points from the "Access rights" section in the middle dialog to the "Edit" button in the bottom dialog.

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

The "Click on an attribute to insert it" dialog is shown again, but now it only displays attributes selected in the style: "Boolean" (with "Open" and "Open in read/write mode" checked) and "Date" (with "Creation date" and "Origin date" checked). A red box highlights the "Edit" button in the toolbar.

Tip : To set it as default use the template user

In the bottom right corner, there is a note: "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

All projects Project health

Shortcuts My styles All styles Filters

Project list

1.) Give your style a name up here

2.) Define the style with this button here

You currently have no styles for this table/chart. You can create some above.

Estimate at completion (EAC) Budget at completion (BAC) Project health Project prospects

	Input mode	Reading view	Organize columns	Chart properties	Default style	Estimate at completion (EAC)	Budget at completion (BAC)	Project health	Project prospects
1	AUTOLOAD09_P	Active	QA PEX08			54 128 EUR	213 703 EUR	Medium	Medium
2	AUTOLOAD09_P	Active	QA PEX09			53 594,5 EUR	184 922,5 EUR	Low	Low
3	AUTOLOAD09_P	Active	QA PEX10			54 128 EUR	213 703 EUR	High	High
4	AUTOLOAD11_P	Active	QA PEX01			53 594,5 EUR	184 922,5 EUR	Low	Low
5	AUTOLOAD11_P	Active	QA PEX02			187 935,5 EUR	159 575 EUR	Medium	Medium
6	AUTOLOAD11_P	Active	QA PEX03			37 905 EUR	159 575 EUR	Low	Low
7	AUTOLOAD11_P	Active	QA PEX04				159 575 EUR	Medium	Medium
8	AUTOLOAD11_P	Active	QA PEX05				159 575 EUR	High	High
9	AUTOLOAD11_P	Active	QA PEX06				159 575 EUR	Low	Low
10	AUTOLOAD11_P	Active	QA PEX07				159 575 EUR	High	High
11	AUTOLOAD11_P	Active	QA PEX08				159 575 EUR	Low	Low
12	AUTOLOAD11_P	Active	QA PEX09				159 575 EUR	Medium	Medium
13	AUTOLOAD11_P	Active	QA PEX10				159 575 EUR	Low	Low
14	AUTOLOAD11_P	Active	QA PEX01			54 128 EUR	213 703 EUR	Medium	Medium
15	AUTOLOAD11_P	Active	QA PEX02			53 594,5 EUR	184 922,5 EUR	Low	Low
16	AUTOLOAD11_P	Active	QA PEX03			10 302,5 EUR	159 575 EUR	Medium	Medium

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Apply and share a L1 style

The screenshot shows the Planisware interface with two main windows. On the left is the 'All projects' screen with a 'Project list' card selected. A green box highlights the 'Edit' button on this card, and a pink box contains the tip: 'Tip! As a Template user, make the style default. It will apply to all users of the profile'. A green arrow points from the 'Edit' button to the 'Table style (Modification)' dialog on the right. The dialog has a pink box around its title bar and another pink box around the 'Access rights' section. The 'Access rights' section includes checkboxes for 'Export style to other users' (checked), 'User groups with read permission' (X_QA_USERS), and 'User groups with write permission' (QA_ADM). The dialog also features 'OK', 'Apply', and 'Cancel' buttons at the bottom.

All projects Project list

Shortcuts My styles All styles Filters

Search, give your style a name

Project health

Project list

Add shortcut Redefine Edit Make default

Projects health - export

Input mode Reading view Organize columns Chart properties Default style

Table style (Modification)

Style | Context dependencies

Description

Name

Owner

Order 0

Filter

Activate toolbar display options

Documentation

Access rights

Export style to other users

User groups with read permission X_QA_USERS

User groups with write permission QA_ADM

OK Apply Cancel

Tip! As a Template user, make the style default. It will apply to all users of the profile

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

The screenshot shows the Planisware Administration interface for managing text keys. On the left, there's a sidebar with 'Customized text keys' and a 'Current filter' section. The main area displays a table of text keys with columns for Identifier, English, French, German, Italian, and a 'Is replacement active?' column.

Annotations highlight specific rows:

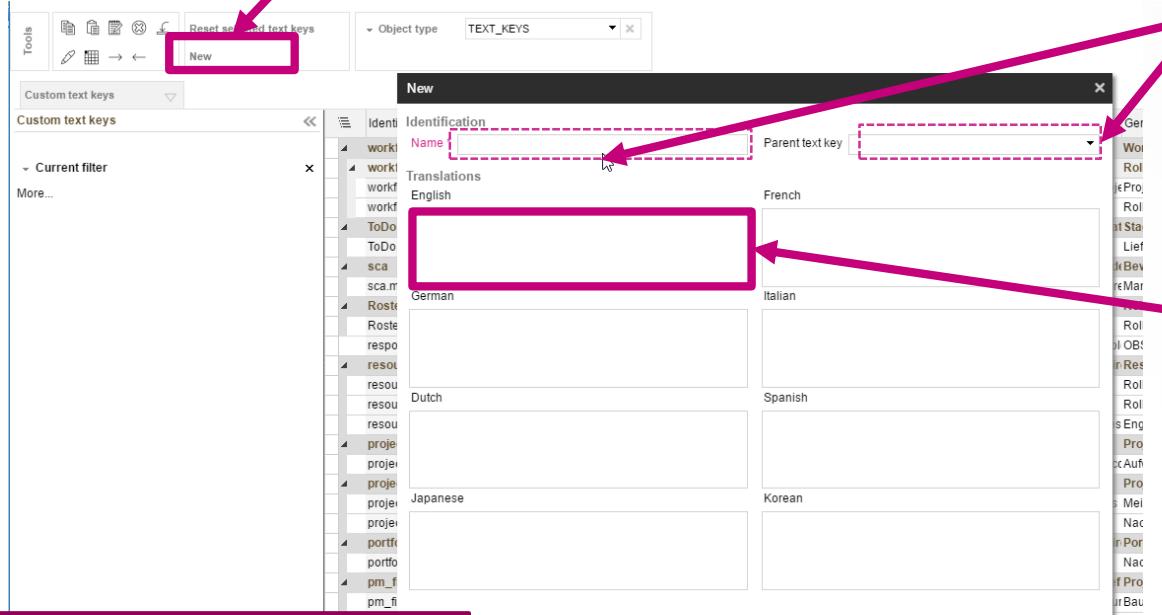
- Standard text key modified and replacement activated:** Points to the row for 'customer.create'. The 'Is replacement active?' checkbox is checked (green), and the English value 'Create a new customer' is highlighted in red.
- Standard text key not modified:** Points to the row for 'customer'. The 'Is replacement active?' checkbox is unchecked (grey).
- Custom text key:** Points to the row for 'cycle_time.abs_onb'. The 'Is replacement active?' checkbox is checked (green).
- Standard text key modified and replacement deactivated:** Points to the row for 'cycle_time'. The 'Is replacement active?' checkbox is unchecked (grey).

Identifier	English	French	German	Italian
Curve_search.Reference.pretty	Pretty reference option	Jolie option	reférence	Schöne Option
Curve_search.Reference_short	Reference	référence	Referenz	Referenza
Curve_search.Selected_curves	Result of the curve search	Résultat de la recherche	Ergebnis der Kurvens	Risultato della ricerca
Curve_search.Version	Version	Version	Version	Version
customer	Customer	Client	Marktsegment	Cliente
customer.create	Create a new customer	Créer un nouveau client	Neues Marktsegment	Crea un nuovo cliente
customer.document	Document associated to	Document associé au	Dokument zum	Documento associato a
customer.new	New customer	Nouveau client	Neues Marktsegment	Nuovo cliente
customer.plural	Customers	Clients	Marktsegmente	Clienti
customer.view	View customers	Afficher les clients	Marktsegmente anzeigen	Visualizza i clienti
customerValue	Customer value	Valeur client	Kunden nutzen	Valore cliente
customer_project	Customer (project)	Client (projet)	Marktsegment (Projekt)	Customer (project)
CUST_PROJ_DESC	Project description	Descriptif du projet	Type du projet	Categoria del progetto
cost_Proj_Wk	Project type	Durée de cycle	Zykluszeit	Durata del ciclo
cycle_time	Cycle time	Absolute value of onb	Wert der internen Obj.	Valore assoluto dell'ona
cycle_time.abs_onb	Absolute value of onb	Valeur absolue de l'ONB	Wert der internen Obj.	Valore assoluto dell'ona

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

4. Click OK to save creation and close the dialog

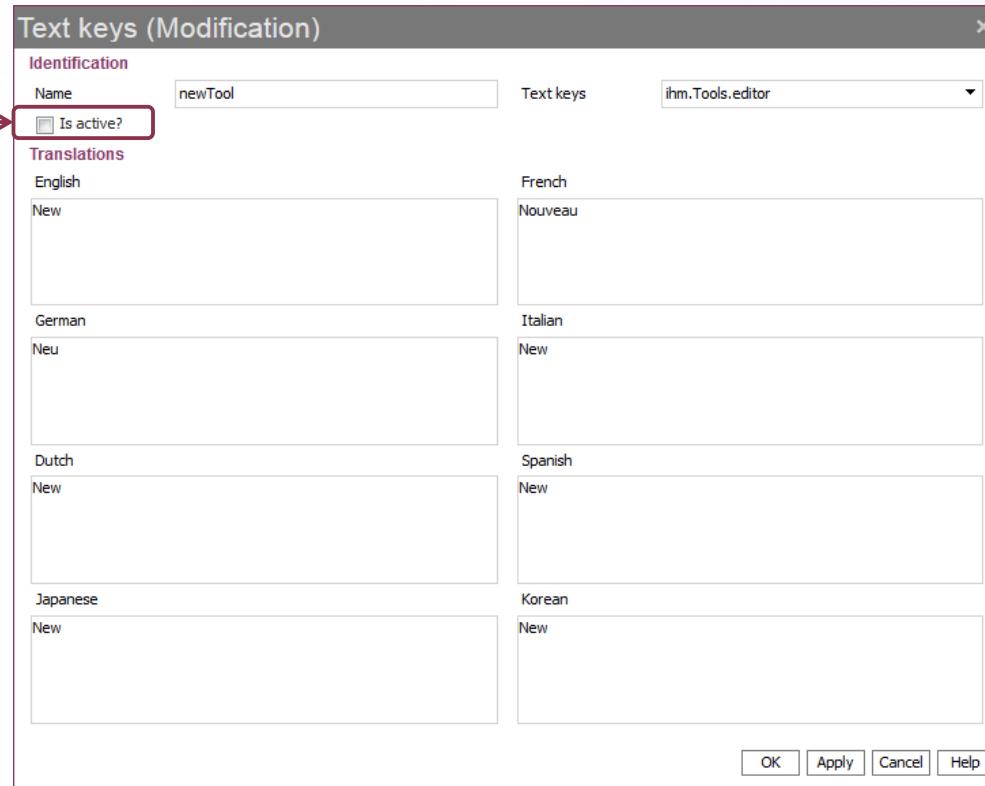
3. Enter the label for each language used in your system, in the appropriate zones; e.g. English label in the English zone

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

The screenshot illustrates the use of text keys in the Planisware interface across three windows:

- Edit custom form**: A dialog for creating a new custom form. In the "Description" section, the "Name" field is set to "Project - Project description" and the "Description" field contains the placeholder "#@CUST_PROJ_DESC".
- Text keys (Modification)**: A dialog for managing text keys. A text key named "CUST_PROJ_DESC" is defined, with its "English" value being "Project description" and its "French" value being "Descriptif du projet".
- Project description**: A detailed configuration dialog for a project. It shows various properties like Name, Start date, and Relations. In the Relations section, the "Customer" dropdown is populated with the value "#@CUST_PROJ_DESC", which corresponds to the text key defined in the second window.

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

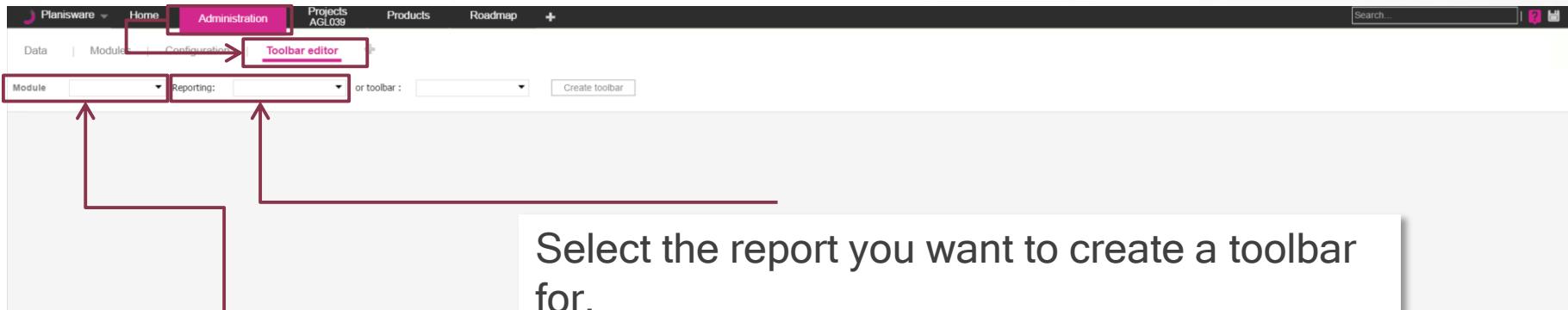
Analysis

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.

The screenshot shows the Planisware Toolbar editor interface. The top navigation bar includes 'Planisware', 'Home', 'Administration' (selected), 'Projects AGL039', 'Products', 'Roadmap', and search and help icons. Below the navigation is a toolbar with buttons for 'Data', 'Modules', 'Configuration', and 'Toolbar editor'. The main area has tabs for 'Module' (selected), 'Projects', 'Reporting', and 'Toolbar: PM.PM_CREA_2_AC1 or toolbar: _MOD_PM_TB-334'. Buttons for 'Publish', 'Edit', 'Save as new', and 'Discard toolbar modifications' are also present. On the left, a sidebar titled 'Preview' shows categories: 'Icon' (selected and highlighted with a red box), 'Button', 'Toggle', 'Menu', and 'Field'. The 'Icon' category displays various icons with their names and usage details. To the right, a 'Toolbar preview' window lists items like 'Key Events', 'Gauge Builder', and 'Risks', each with an 'Add' button. A large red arrow points from the text 'click the Icon/Button/Toggle/Menu/Field button.' to the 'Add' button in the toolbar preview area.

Adding Existing Tools

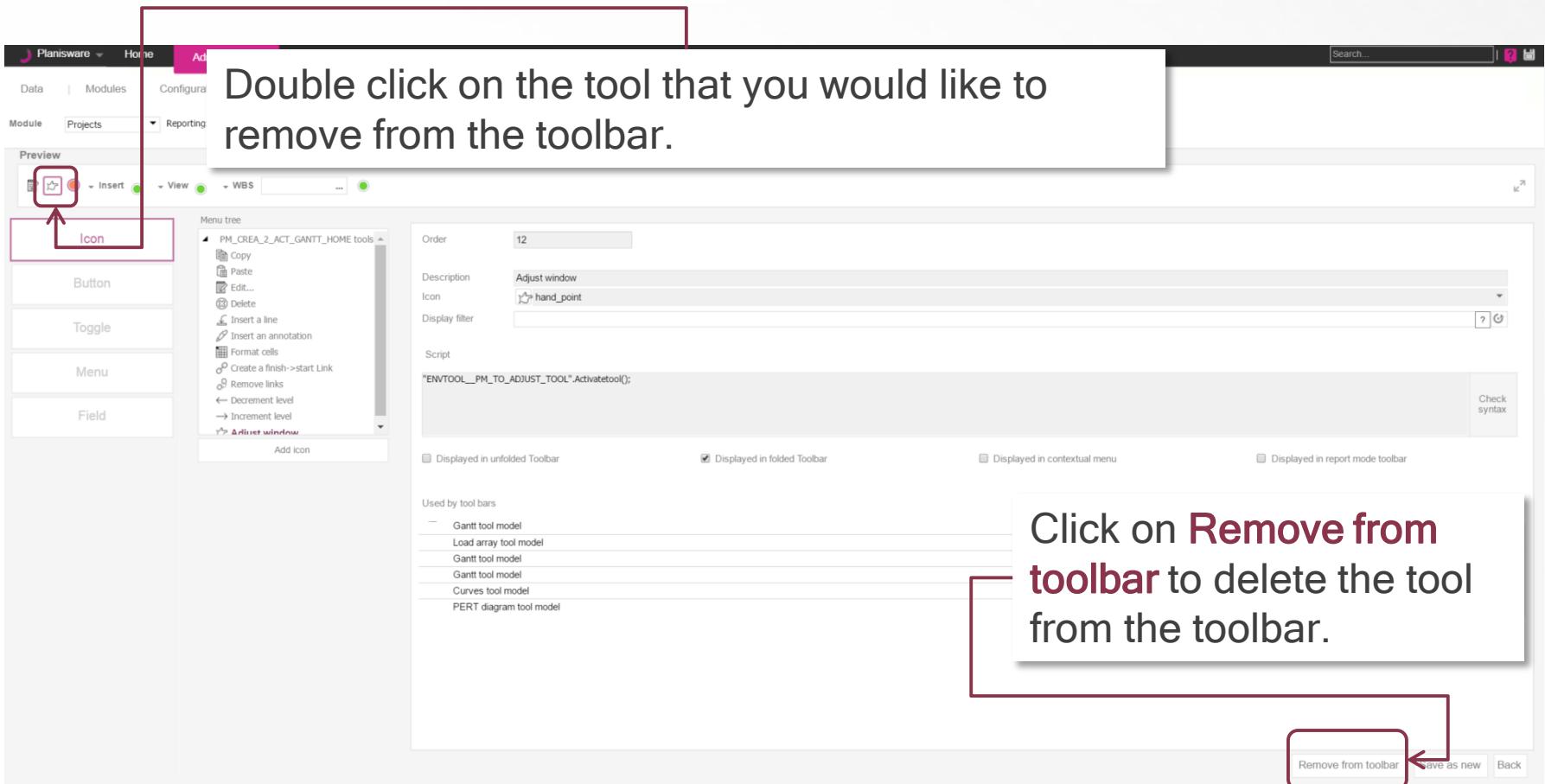
The tool is added to the toolbar.

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

The screenshot shows the 'Add Existing Tools' dialog in the Planisware interface. On the left, there's a sidebar with categories: Icon, Button, Toggle, Menu, and Field (which is highlighted with a pink border). The main area lists tools with their descriptions and usage details. A red box highlights the 'Portfolio' dropdown under the 'Field' category. A red arrow points from this box to a yellow dot located next to the 'Portfolio' entry in the list. To the right of the list is a vertical column of buttons labeled 'Add' and a 'Remove' button, all enclosed in a red box. A callout bubble with a red border points to the 'Remove' button with the text: 'To cancel adding a tool, click the **Remove** button corresponding to this tool.' At the bottom right of the dialog, there are 'New' and 'or' buttons.

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

Removing Tools from Toolbar



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

Unfolded/folded toolbar (V6.2)

The screenshot shows two instances of the Planisware interface. The top instance has an 'unfolded' toolbar where all buttons are visible. The bottom instance has a 'folded' toolbar where buttons are collapsed into groups. A red bracket on the right indicates that both states are supported in 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.

Planisware

Remove from toolbar Save as new Back

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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.

The screenshot shows the Planisware Administration interface with the 'Toolbar editor' page selected. In the top left, a context menu is open over the 'Projects' button, with the 'Edit tool' option highlighted. The main window displays the configuration for the 'View' menu item under the 'Menu tree' tab. The 'Order' field is set to 12. The 'Description' field contains 'View'. The 'Icon' field is empty. The 'Display filter' and 'Display script' fields are also empty. At the bottom of the configuration window, there are several checkboxes: 'Displayed in unfolded Toolbar' (checked), 'Displayed in folded Toolbar' (checked), 'Displayed in contextual menu' (unchecked), and 'Displayed in report mode toolbar' (unchecked). Below these checkboxes, a section titled 'Used by tool bars' lists several tool models: Gantt tool model, Gannt tool model, Gannt tool model, Curves tool model, PERT diagram tool model, and List differences between versions tool model. At the bottom right of the configuration window, there are buttons for 'Remove from toolbar', 'Save as new' (highlighted with a red box and arrow), and 'Back'.

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

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

The screenshot shows the Planisware Processes application. At the top, there's a navigation bar with 'Planisware', 'Home', 'Administration', 'Help center', and other tabs. Below the navigation bar is a search bar with '[Related modules=PM]' and a status bar with 'Data' and 'Gantt'. A large central window is titled 'E-learning' and contains a list of documents:

- Scoring**: Documentation on creating scorecard templates and using the scoring feature. Release: 6.0.0.0.
- Stage and Gate**: Documentation on using the Stage and Gate feature. Release: 6.0.0.0.
- Parametric estimations**: Documentation on parametric estimations. Release: 6.0.1.12.

At the bottom of the E-learning window, there are buttons for 'OK', 'Apply', and 'Cancel'. To the right of the E-learning window, there's a table with columns: 'Planned start', 'Planned finish', 'Owner', and 'Access rights'. The table lists various entries with dates ranging from 09/09/16 to 10/04/18 and owners like alix, hsebri, claire, etc.

Three numbered circles point to specific elements:

- 1 Click the question mark icon in the top right corner of the E-learning window.
- 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

The screenshot shows the Planisware software interface. At the top, there is a navigation bar with the Planisware logo, Home, Administration, Projects, Products, Roadmap, and a plus sign icon. A search bar is located on the right side of the navigation bar. Below the navigation bar is a section titled "Add modules" which displays a grid of various software modules. The modules include Activatab, Administration, Buckets & investments, E-learning, Home, Idea campaign, Planisware explorer, Portfolio, Presentations, Products, Programs, Projects, Projects copy, Proposals, Resources, Roadmap, TimeCard, and Workpackages. The "E-learning" module is highlighted with a red circle labeled "1". In the bottom right corner, there is a modal window for the "E-learning" module, containing tabs for "E-learning", "Close", "Remove", and "Add module". The "E-learning" tab is highlighted with a red circle labeled "3".

- 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

The screenshot shows the Planisware E-learning interface. At the top right is a toolbar with icons for help, search, message, information, and save. Below the toolbar is a search bar labeled "Search...". A pink arrow points from the search bar to a callout box containing the text: "Use the search bar to look up training materials relevant to the topic you are interested in, i.e. tool bar". The main content area displays a list of training materials. The first item is "Introduction to Planisware Processes", which is a white paper with 3 viewers and release 6.0.1.7. The second item is "Getting Started with the User Interface", which is a white paper with 2 viewers and release 6.1.3. The third item is "User Interface Introduction", which includes a thumbnail of an interface overview slide. At the bottom of the interface, there are buttons for "OK", "Apply", and "Cancel".

E-learning

Search...

All

Already viewed

Introduction to Planisware Processes

A general introduction to Planisware Processes, including notes on the global vision and introduction to each of the modules and features.

White paper Viewers: 3 Release: 6.0.1.7

General Features

User Interface

Getting Started with the User Interface

Introduces users to the Planisware V6 interface, while setting out the terminology used to describe the features found throughout.

White paper Viewers: 2 Release: 6.1.3

User Interface Introduction

Includes training slides for user interface introduction. The program includes slides on: Planisware main menu, navigation through the interface, E-learning feature, search feature, portfolio feature, interface elements, table configuration, style management menu, how data is displayed in the interface.

Lines/page 50 1 2 3 4 5 6 7 Next

OK Apply Cancel

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.

The screenshot shows the Planisware Administration interface. At the top, there is a navigation bar with links for Home, Administration, Projects, Products, Roadmap, and a search bar. Below this is a section titled "Add modules" displaying a grid of various Planisware modules. The "E-learning" module is highlighted with a red box. A detailed description of the E-learning module is provided below its thumbnail:

This module enables you to manage your company's roadmaps. Roadmaps are widely recognized as one of the most useful ways of visualizing long-term business strategies well into the future. They are particularly useful when business includes new product development and the search for new markets. Roadmaps enable you to clearly set out your different strategic objectives, defining timelines for different products or market releases, highlighting the most important issues and milestones, marking out the various dependencies there may be between different major events, and so on. The roadmap features in Planisware Processes include the ability to create styles to standardize the appearance of roadmap elements, according to their categorization.

At the bottom right of the "E-learning" module's description, there are four buttons: "E-learning" (highlighted with a red box), "Close", "Remove", and "Add module".

Adding a Document to the E-learning

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

The screenshot shows the Planisware application window with the 'Administration' tab selected. In the center, there is a table titled 'New subject' under the heading 'E-learning Administration'. The columns are labeled: Subject order, Description, Name, E-learning subject, E-learning document, Type, Release, and Planisware Tour. The 'E-learning subject' column header is highlighted with a red box. Below the table, there is a tree view of modules: Administration, 01. Introduction, and 02. Environment Setup. Under 01. Introduction, there are two items: 'Introduction to...' and 'Setting up the...'. Under 02. Environment Setup, there is one item: 'Setting up the...'. The 'Introduction to...' item has a detailed view below it: Description 'A01_Introd...', Name '01. Introduction', E-learning document '066_INTRO_ADMIN_EN...', Type 'White paper', Release '6.1.6'. The 'Setting up the...' item also has a similar detailed view.

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

- Click **New Subject**.

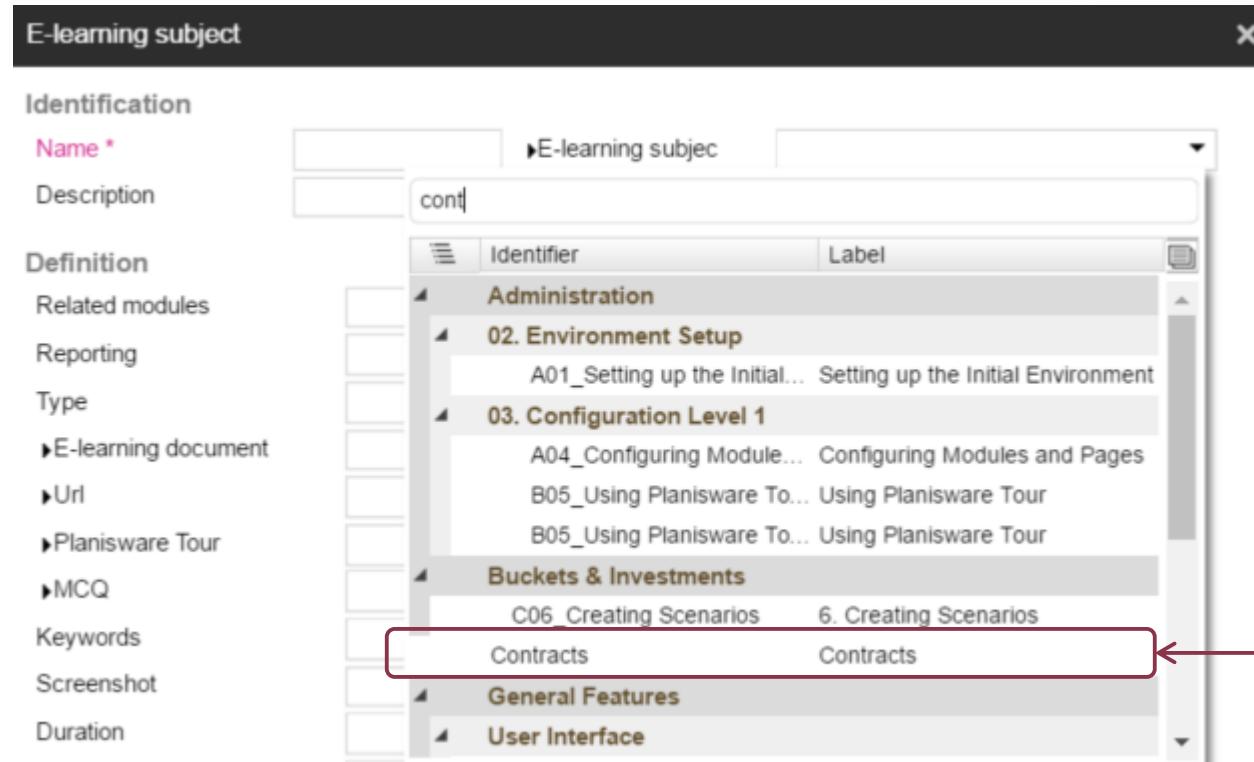
The screenshot shows the 'E-learning subject' dialog box. On the left, there is a sidebar with various settings like 'Identification', 'Definition', 'Reporting', 'Type', etc. The 'Identification' section has 'Name *' set to 'Contracts' and 'Description' set to 'Contracts'. The 'Definition' section has 'Subject order' set to '0' and 'Related modules' set to 'Administration'. At the bottom, there are buttons for 'OK', 'Apply', and 'Cancel'.

- 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.

Identification

Name	Contracts_doc	E-learning subject	Contracts
Description	Contracts_doc	Subject order	0

Definition

Related modules

Reporting

Type

►E-learning document

►Url

►Planisware Tour

►MCQ

Keywords

Screenshot

Duration

Release

Display condition

Main highlight subject

Subject details

Administration

Slide deck

Agenda.pptx

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.

OK Apply Cancel

Meet Ajay, the Head of Usability

Styles

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

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

Attribute Chooser Style

Colors and Images

We need thorough methods to highlight important information!

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



Text keys, toolbar, E-learning

Questions



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.



Locks

Introduction

Creating locks

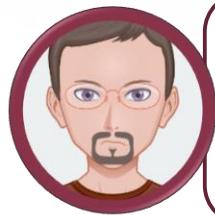
Ivan's first problem...

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



Locks - Scenario

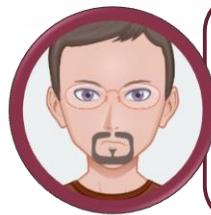
Scenario



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 **②** 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.

Project description x

Definition | **Rights & responsibilities** | Roles | Visibility rules | History | Attribute list

Access rights

Rights	Read/write access	Owner	intranet
User groups with read permission	...		
User groups with write permission	QA_AGILE_TEMPLATE_USER		

Project state

State	Simulation
<input type="checkbox"/> Permanent project in TimeCard	
<input type="checkbox"/> Project is a library	

Stage & gate

Gatekeeper	...		
Deliverable reviewer	...		
Name	Description	Gatekeeper	Planned start

OK Apply Cancel

OK Apply Cancel

Creating locks

To create a lock:

The screenshot shows a 'Locks' configuration screen for 'Project' objects. It includes a sidebar with a note about locking 'Description' attributes and a large '+' button. The main area has fields for 'Name*' and 'Description*', both marked as mandatory. Below these are checkboxes for 'On deletion', 'On modification of the following attributes' (with a dropdown menu), 'On all modifications', and 'Is active?'. A 'Create' button is at the bottom right. Red annotations with arrows point to specific fields and instructions.

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

Select attributes.

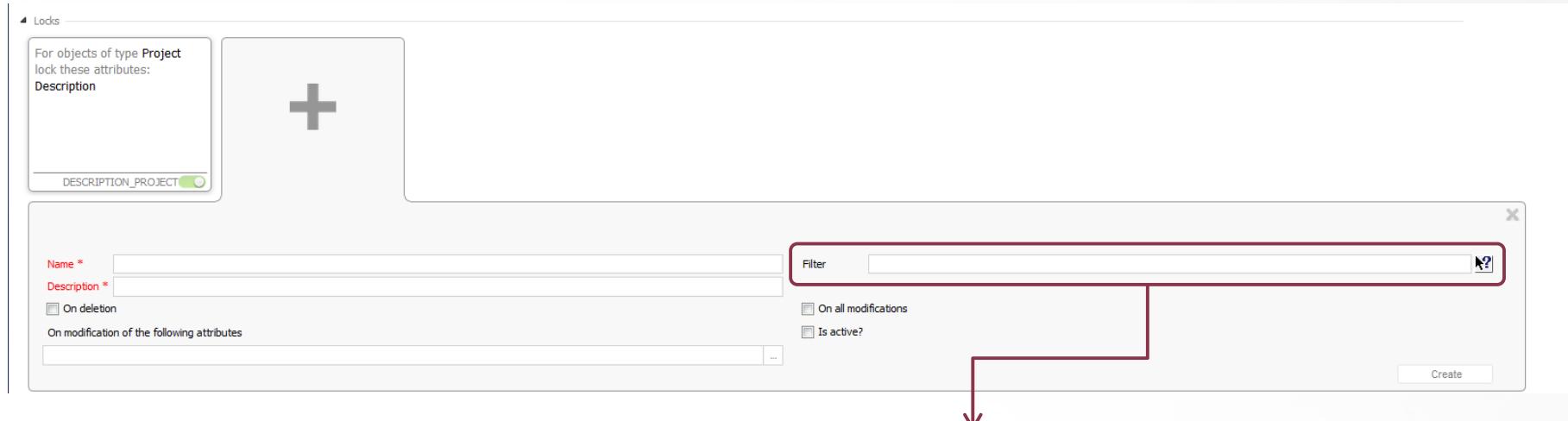
Check **On deletion** to prevent the attribute from deletion.

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:

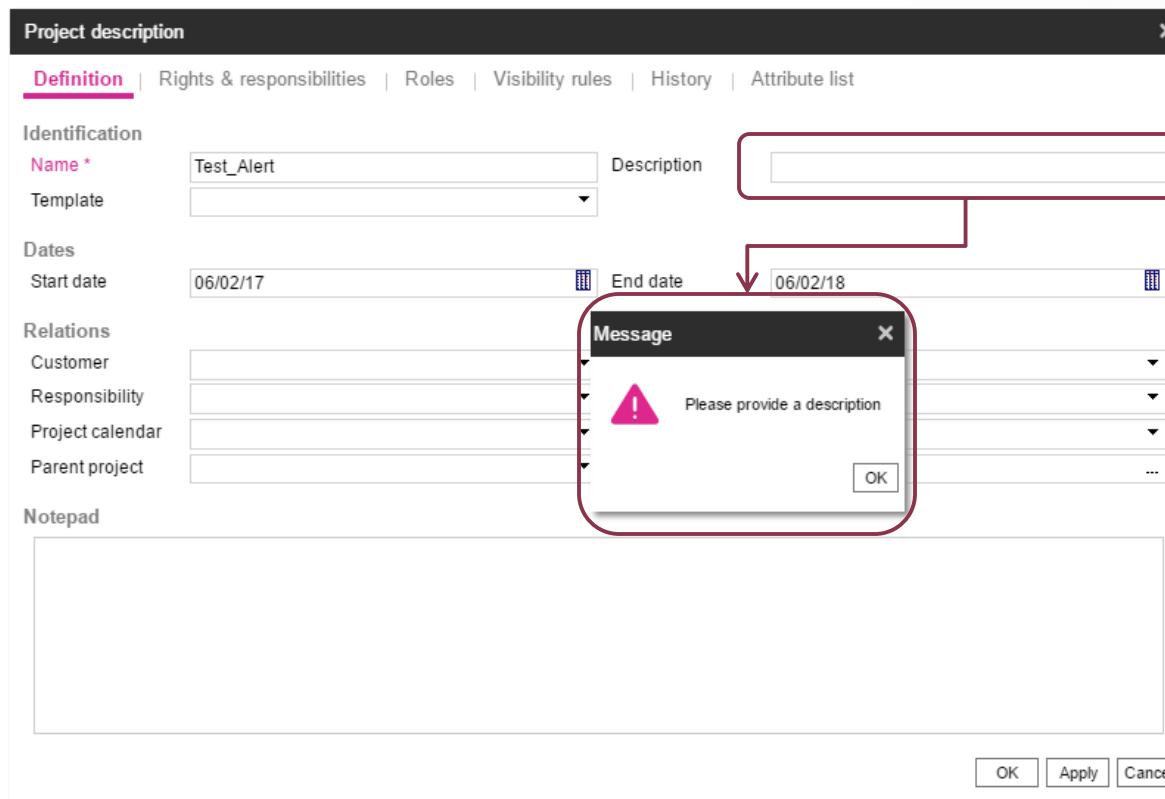
- 1 Figure out relevant classes and attributes
- 2 Determine what needs to be done

- Project: description
- 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.

The screenshot shows the 'Alerts' creation interface in Planisware. At the top left, there's a message box stating: 'For objects of type Project verifying the filter DESC = "" on the following event(s): creation on modification of the attribute(s): Description with priority 0 Message type: Error message with continuation Message "Please provide a description" AL_PRJ_DESC'. Below this is a red-bordered '+' button. The main form has sections for 'Name *' and 'Label *', both of which are currently empty. There are checkboxes for 'On creation', 'On deletion', 'On all modifications', and 'On modification of the following attributes'. Under 'On modification of the following attributes', there are two groups of checkboxes: 'Send an email' and 'Send a notification'. To the right, there are fields for 'Filter', 'Priority' (set to 0), 'Message type' (set to 'No message'), 'Message label', and several dropdown menus for 'Email address', 'Groups / users', 'Notification object class', 'Roles', 'Content', and five 'Formula' dropdowns labeled (1) through (5). At the bottom right is a 'Create' button.

Creating alerts

To create an alert:

Triggers or activation conditions

Alerts

For objects of type Project
verifying the filter DESC = ""
on the following event(s): creation
on modification of the attribute(s):

Description
with priority 0
Message type: Error message with
confirmation
Message "Please provide a
description"
AL_PRJ_DESC



Name *

Label *

On creation On deletion On modifications

On modification of the following attributes

Send an email Send a notification

Sender

Notification category

Notification object formula

Subject

Associated reporting

Attribute (1)

Attribute (2)

Attribute (3)

Attribute (4)

Attribute (5)

Filter

Priority

Message type No message

Message label

Email address

Groups / users

Notification object class

Roles

Content

Formula (1)

Formula (2)

Formula (3)

Formula (4)

Formula (5)

Part of the application you want to navigate to

Create

Creating alerts

To create an alert:

Immediate Message Popup Conditions

Alerts

For objects of type Project verifying the filter DESC = "" on the following event(s): creation or modification of the attribute(s):

Description
with priority 0
Message type: Error message with continuation
Message "Please provide a description"

AL_PRJ_DESC

Immediate Message Popup Conditions

Name * Label * Filter Priority

On creation On deletion On all modifications

On modification of the following attributes

Send an email Send a notification

Sender Notification category Notification object formula Subject Associated reporting
 Attribute (1) Attribute (2) Attribute (3) Attribute (4) Attribute (5)

Message type Message label Email address Groups / users Notification object class Roles Content
 Formula (1) Formula (2) Formula (3) Formula (4) Formula (5)

Part of the application you want to navigate to

Create

Creating alerts

To create an alert:

Persistent Notification

Alerts

For objects of type Project verifying the filter DESC = "" on the following event(s): creation on modification of the attribute(s):

Description with severity 0
Message type: Error message with continuation
Message "Please provide a description"

AL_PRJ_DESC

Persistent Notification

Name * Label * Filter Priority

On creation On deletion On modifications On all modifications

On modification of the following attributes

Send an email Send a notification

Sender Notification category Notification object formula Subject Associated reporting

Email address Groups / users Notification object class Roles Content

Attribute (1) Formula (1)
Attribute (2) Formula (2)
Attribute (3) Formula (3)
Attribute (4) Formula (4)
Attribute (5) Formula (5)

Part of the application you want to navigate to

Create

Creating alerts

To create an alert:

Changes in Data

Alerts

For objects of type Project verifying the filter DESC = "" on the following event(s): creation on modification of the attribute(s):

Description with priority 0
Message type: Error message with continuation
Message "Please provide a description"

AL_PRJ_DESC

Changes in Data

Name * Label *

On creation On deletion On all modifications

Filter Priority 0

On modification of the following attributes

Send an email Send a notification

Sender Notification category Notification object formula Associated reporting

Message type No message Message label

Email address Groups / users Roles Content

Attribute (1) Formula (1)
Attribute (2) Formula (2)
Attribute (3) Formula (3)
Attribute (4) Formula (4)
Attribute (5) Formula (5)

Part of the application you want to navigate to

Create

Creating alerts

Filter 

Priority 

Message type 

Message label

Email address

Groups / users

Notification object class

Roles

Content 

Select the type of the message.

Cancellation without message
Error message with cancelation
No message
Question Cancel/Continue
Alert message

Create

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

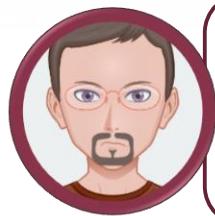
Ivan's third problem...



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

User trace - Scenario

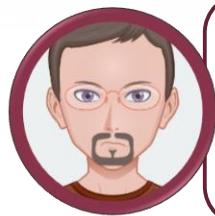
Scenario



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.

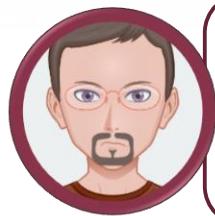
How to break down the situation:

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
- 2 Determine what needs to be done

- Project: description
- 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

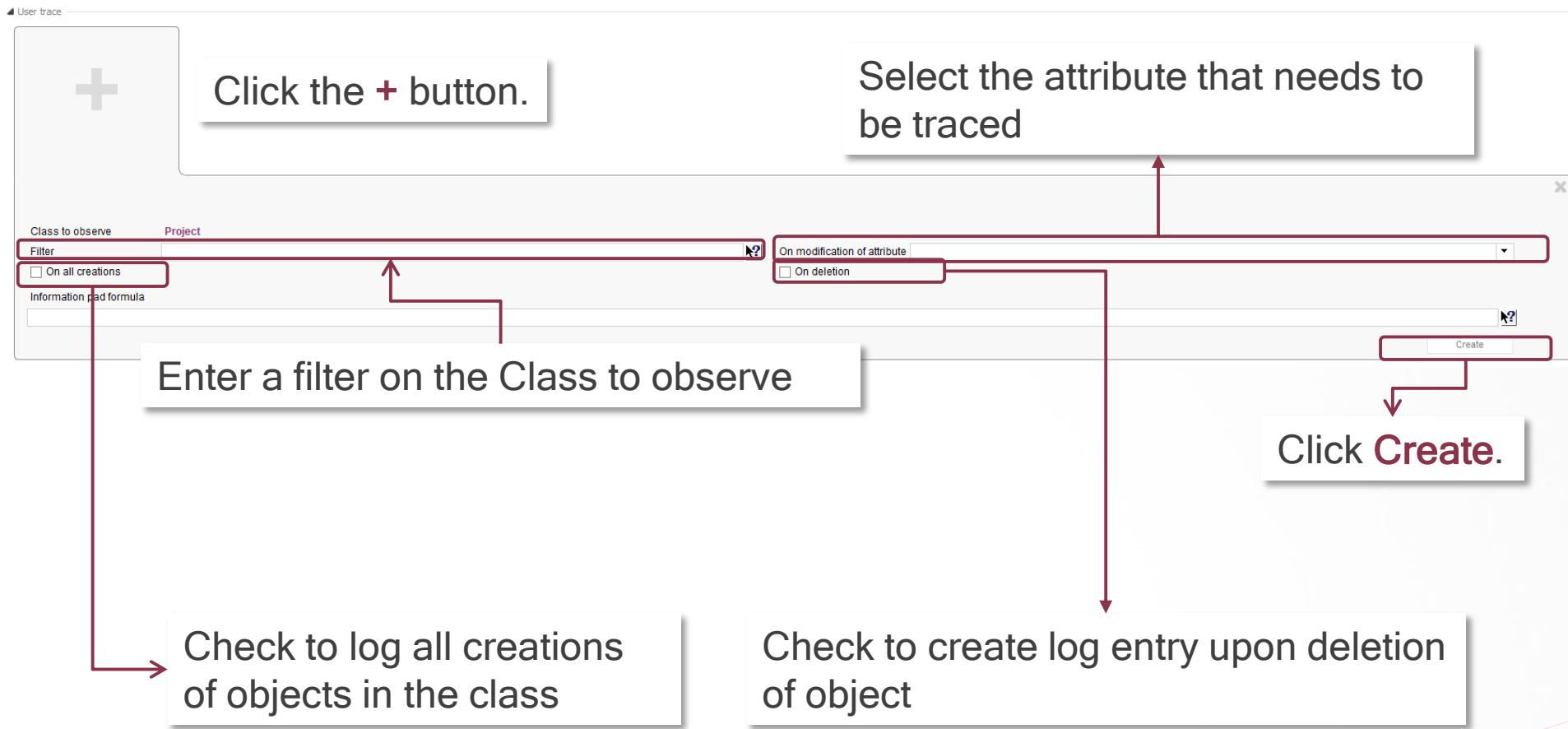
The screenshot shows the 'User trace' configuration dialog. At the top left, there is a list item: 'User trace on class Project on attribute Description'. To its right is a large button with a plus sign (+). The main area contains several input fields and checkboxes:

- 'Class to observe': A dropdown menu set to 'Project'.
- 'Filter': A dropdown menu set to 'On all creations'.
- 'Information pad formula': An empty text input field.
- 'On modification of attribute': A dropdown menu set to 'On creation'.
- 'On deletion': A checkbox that is unchecked.

At the bottom right of the dialog is a 'Create' button.

Creating user traces

To create an user trace:



Creating user traces

To create an user trace:

The screenshot shows the Planisware application interface. At the top, there's a navigation bar with 'Planisware', 'Home', 'Administration' (which is selected), 'Projects LP_TEST', 'Products', and 'Roadmap'. Below the navigation is a toolbar with various icons for 'Tools' like search, filter, and export. A dropdown menu 'Object type' is set to 'User traces logs'. The main area has a title 'User trace' with a sub-section 'User trace on class Project on attribute Description'. There's a large plus sign button to add new traces. On the left, there's a configuration panel for 'Information pad formula' containing the text 'Test'. The main workspace shows a table titled 'User traces logs' with columns: 'Class to observe', 'Traced object id', 'Event', 'User', 'Date', 'Attribute modified', 'Value before change', 'Value after change', and 'Informations'. A single row is shown for a 'Project' class with ID 'LP_TEST', event 'Modification', user 'LPATEL', date '02-14-17 21:52:52', attribute 'Description', value before change '6.2 proj', value after change '6.2 training project', and information 'Test'. A callout box points to the 'Information pad formula' field with the text: 'The Information column is filled by the Information pad formula.' Another callout box points to the 'User' and 'Date' columns with the text: 'The User and Modification Date are logged.' A third callout box points to the 'Value before change' and 'Value after change' columns with the text: 'The attribute value before and after the change is logged.'

User trace on class **Project** on attribute **Description**

Class to observe **Project**

Filter On all creations

Information pad formula
"Test"

On modification of attribute **Description**
 On deletion

Delete Save

Search... ?

Planisware Home Administration Projects LP_TEST Products Roadmap +

Data Modules Configuration

Tools

User traces logs Object type User traces logs

Class to observe	Traced object id	Event	User	Date	Attribute modified	Value before change	Value after change	Informations
Project	LP_TEST	Modification	LPATEL	02-14-17 21:52:52	Description	6.2 proj	6.2 training project	Test

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

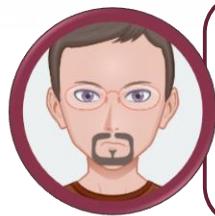
Ivan's fourth problem...

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



Data Management Rule - Scenario

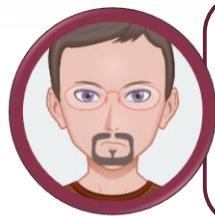
Scenario



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

Data Management Rule - Scenario

Scenario



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

1

2

Analysis

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

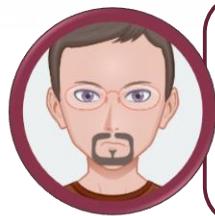
How to break down the situation:

1. Figure out relevant classes

- Project: Responsibility

Data Management Rule - Scenario

Scenario



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

1

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
- 2 2. Determine what needs to be done

- Project: Responsibility
- 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

Project description

Definition | Rights & responsibilities | Roles | Visibility rules | History | Attribute list

Identification

Name: AGL023 | Description: AGL023 Stage Gate

Template: TEMPLATE-F

Dates

Start date: 01/01/17 | End date: 01/01/19

Relations

Customer: [dropdown] | Product: [dropdown]

Responsibility: [dropdown] | Strategic axis: [dropdown]

Project calendar

Parent project: [dropdown]

Notepad

Search: [dropdown]

Identifier	Label
O1	InnovatorCorp r
O2	Product Support & Testing
A	Division A
P	Dept P
Q	Dept Q
R	Dept R
B	Division B
C	Division C
O3	Manufacturing
D	D
E	E
F	F

OK | Apply | Cancel

With a Data Management Rule restricting at level 2 of OBS

Project description

Definition | Rights & responsibilities | Roles | Visibility rules | History | Attribute list

Identification

Name: AGL023 | Description: AGL023 Stage Gate

Template: TEMPLATE-F

Dates

Start date: 01/01/17 | End date: 01/01/19

Relations

Customer: [dropdown] | Product: [dropdown]

Responsibility: [dropdown] | Strategic axis: [dropdown]

Project calendar

Parent project: [dropdown]

Notepad

Search: [dropdown]

Identifier	Label
O1	InnovatorCorp r
O2	Product Support & Testing
O3	Manufacturing
O4	Sales and marketing
O5	Project Management
O6	Product design, development & Enginee

OK | Apply | Cancel

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.

▲ Data management rule

For each Project
verifying the filter RESP='OBSE-A'
and name
=ADM_324_DMR1"
the attribute Customer
should verify
LIST_FIND(ID,'CUST-A,CUST-B')
Message type Alert message

Reduce_list_of_customer

For each Project
verifying the filter PARENT <=>
and name='CLV006_EN'
the attribute Description
should verify TRUE.
Message type Alert message

Test_heritage

Name *

For each Project

Filter

the attribute *
should verify
or
should always take the value

Message type

Message label

Alert message

Cancelation without message
Error message with cancelation
No message
Question Cancel/Continue
Alert message

Create

Creating data management rules

Example 1: Displaying only responsibility level 2 on projects.

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

The screenshot shows the Planisware Data Management Rule creation interface. On the left, there are three examples of rules:

- For each Project verifying the filter NAME = "OBS" the attribute Responsibility should verify TRUE
- For each Project verifying the filter RESP = "OBSE-A" and name = "ADM_324_DMR1" the attribute Customer should verify TRUE
- For each Project verifying the filter PARENT <="" and name = "CLV006_EN" the attribute Description should verify TRUE

A large text box in the center says: "Enter a **Name** (mandatory) and select an **Attribute**". A red box highlights the "Name" field containing "OBS_LEVEL_2". Another red box highlights the "Attribute" dropdown menu, which is open to show "LEVEL = 2". A callout arrow points from this dropdown to a list of responsibilities in a modal window titled "Project description". This list shows several items, with "02 Manufacturing" highlighted by a red box. A red arrow points from the "02 Manufacturing" item to the "Identifier" column of the list. A callout box on the left says: "Only the responsibilities of level 2 are available." A red arrow points from this text to the "02 Manufacturing" item in the list.

A large button on the right says "Click the + button." A red box highlights the "Save" button at the bottom right of the dialog. A red arrow points from the "Save" button to a callout box that says "Click Save." A red arrow also points from the "Save" button to the "Save" button in the top right corner of the main interface.

On the right side of the interface, there are message type and message label fields, and a "No message" button. At the bottom are "Delete", "Save", and "Cancel" buttons.

Examples

Data Autofill

DMR that autopopulates desc based on STATE + NAME

User Profiles

Introduction

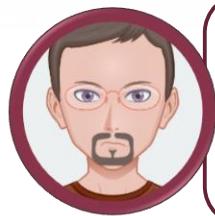
Ivan's fifth problem...



The financial team
would like access to
projects and reports.

User Profile - Scenario

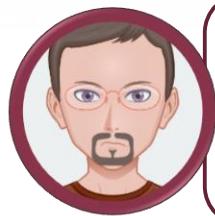
Scenario



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
2. Granting Access to Modules and Functionalities

- New user profile

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

Creating Profiles

The screenshot shows the Planisware Administration module. In the top navigation bar, 'Administration' is highlighted. Below it, the 'Profile management' tab is selected. A red box highlights the 'New profile' button in the toolbar. On the left, a table lists various profiles with columns for Name, Description, Activetab, and Adminr. A red arrow points from the 'New profile' button to the 'Create/Edit profile' dialog box on the right. This dialog has fields for 'Name *' and 'Description', and a 'Setting file' section with a dropdown menu.

To create a new profile:

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

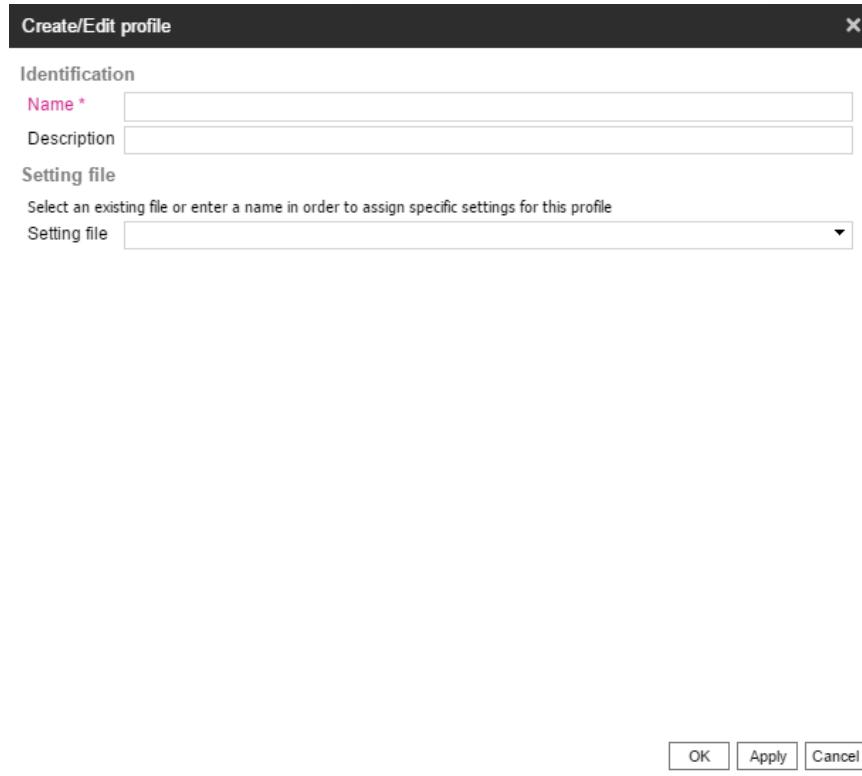
• Enter a profile name and description.

• 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).



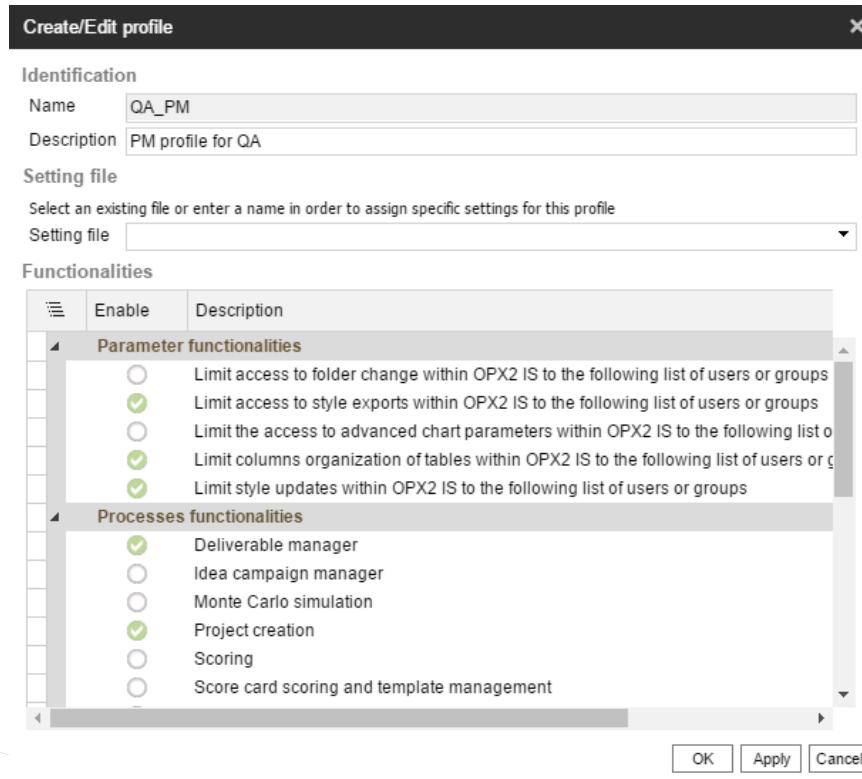
To assign a Setting file:
Enter a name in the **Setting file** field.
The system checks if the common file exists and creates it if necessary. It also creates a global setting file object if necessary (Object type GLOBALSETTING_FILE in Administration > Data).

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

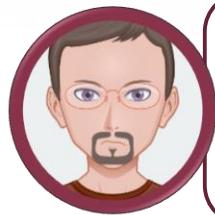
Ivan's final problem...



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

Access Right - Scenario

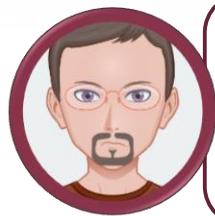
Scenario



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 restrict the creation to Project Managers.

2

1

Analysis

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

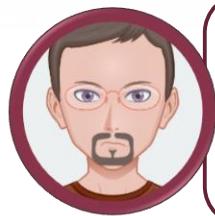
How to break down the situation:

1. Figure out relevant profiles
2. Determine what needs to be done

-Profile: Every profiles besides PM
-Revert Project Creation functionality

Access Rights - Scenario

Scenario



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

2

1

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
2. Determine what needs to be done

-Profile: Every profiles besides PM
-Revert Project Creation functionality

Introduction

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

The screenshot shows the Planisware interface with the 'Administration' tab selected. Below the tabs, there are sections for 'Data' and 'Profile management'. The 'Profile management' section is active, indicated by a pink underline. It includes a 'Modules' dropdown set to 'Modules' and a 'New profile' button. A search bar is present. On the right, there is a table with columns for 'tab', 'Administration', and 'Buckets & investments'. The table rows show various profile configurations with green checkmarks indicating active access. A mouse cursor is hovering over the 'Functionalities' section in the sidebar.

tab	Administration	Buckets & investments
✓	✓	✓
○	○	○
○	✓	✓
○	○	○
○	✓	○
○	✓	○
○	○	✓

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 profile 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.

The screenshot shows the Planisware administration interface. At the top, there's a navigation bar with 'Planisware' logo, 'Home', 'Administration' (which is the active tab), and 'Projects'. Below the navigation is a sub-menu with 'Data', 'Profile management' (which is also active, indicated by a pink underline), 'Modules', and 'Configuratio'. The main content area has a header 'Modules' with a dropdown arrow and a 'New profile' button. Below that is a search bar with a clear 'x' button. The main area is titled 'Functionalities' and contains a table with columns for 'Modules' and 'Functionalities'. A red rounded rectangle highlights the 'Modules' column header, and a red arrow points from the bottom right of the table towards the 'Modules' column header. The table rows correspond to the profiles listed in the screenshot above.

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.

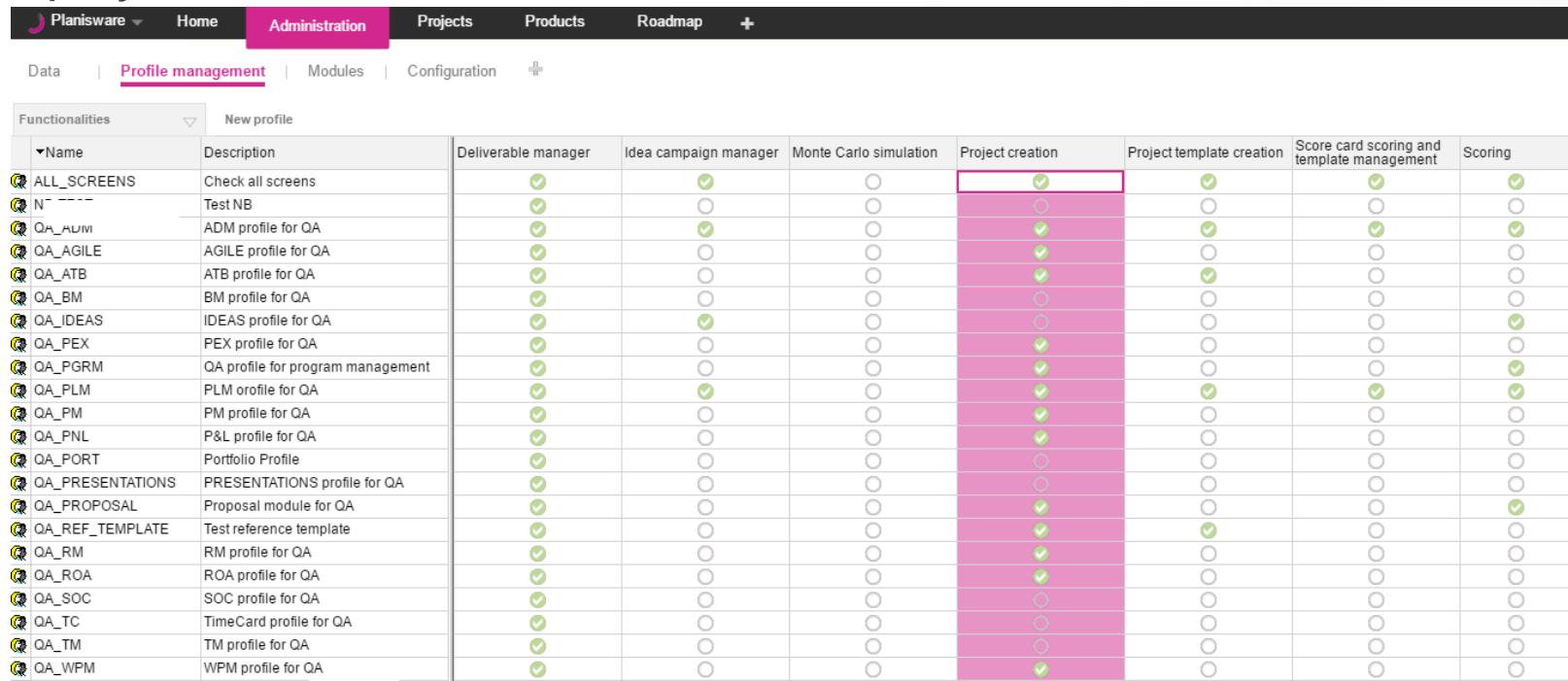
The screenshot shows the Planisware Administration - Modules page. At the top, there are tabs for Home, Administration (which is selected), Projects, Products, Roadmap, and a plus sign. Below the tabs, there are links for Data, Profile management, Modules (which is selected and highlighted in pink), Configuration, and a plus sign. The main area is titled "Administrate access to modules" and displays thumbnails for various modules: Activatab, Buckets & investments, E-learning, Home, Idea campaign, Planisware explorer, and Portfolio. Each thumbnail has a green toggle switch below it. Below the thumbnails, there is a form for the "Administration" module. The "User groups" field contains the value "ALL_SCREEN,QA_PM,QA_PEX,QA_PROPOSAL,QA_ADM,QA_PNL,QA_SOC,QA_RM,QA_IDEAS,QA_PLM,QA...". A red box highlights this field. To the right of the form, there are sections for Object filter, Default dataset class, Other dataset class, and Homepage reporting. At the bottom of the form, there is a large text box containing information about the module, and three checkboxes at the bottom left: "Check mcq completion before adding the module", "E-learning percentage completion", and "Do not memorize the last selected reporting". At the bottom right, there are buttons for Duplicate, Settings, Content, E-learning, Save (which is highlighted with a red box), and Cancel.

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.



The screenshot shows the Planisware software interface with the following navigation bar:

- Planisware ▾
- Home
- Administration** (highlighted in pink)
- Projects
- Products
- Roadmap
- +

Below the navigation bar, the main content area has the following tabs:

- Data
- Profile management** (highlighted in pink)
- Modules
- Configuration
- +

The main content area displays a table titled "Functionalities" with the following columns:

Name	Description	Deliverable manager	Idea campaign manager	Monte Carlo simulation	Project creation	Project template creation	Score card scoring and template management	Scoring
ALLSCREENS	Check all screens	✓	✓	○	✓	✓	✓	✓
N-----	Test NB	✓	○	○	○	○	○	○
QAADM	ADM profile for QA	✓	✓	○	○	✓	✓	✓
QAAGILE	AGILE profile for QA	✓	○	○	○	○	○	○
QAATB	ATB profile for QA	✓	○	○	○	✓	○	○
QBAM	BM profile for QA	✓	○	○	○	○	○	○
QAIDEAS	IDEAS profile for QA	✓	✓	○	○	○	○	✓
QAPEX	PEX profile for QA	✓	○	○	○	✓	○	○
QAPGRM	QA profile for program management	✓	○	○	○	○	○	✓
QAPLM	PLM profile for QA	✓	✓	○	○	✓	✓	✓
QAPM	PM profile for QA	✓	○	○	○	✓	○	○
QAPNL	P&L profile for QA	✓	○	○	○	✓	○	○
QAPORT	Portfolio Profile	✓	○	○	○	○	○	○
QAPRESENTATIONS	PRESENTATIONS profile for QA	✓	○	○	○	○	○	○
QAPROPOSAL	Proposal module for QA	✓	○	○	○	○	○	✓
QAREFTEMPLATE	Test reference template	✓	○	○	○	○	○	○
QARM	RM profile for QA	✓	○	○	○	✓	○	○
QAROA	ROA profile for QA	✓	○	○	○	✓	○	○
QASOC	SOC profile for QA	✓	○	○	○	○	○	○
QATC	TimeCard profile for QA	✓	○	○	○	○	○	○
QATM	TM profile for QA	✓	○	○	○	○	○	○
QAWPM	WPM profile for QA	✓	○	○	○	✓	○	○



The functionality is selected.



The functionality is deselected.

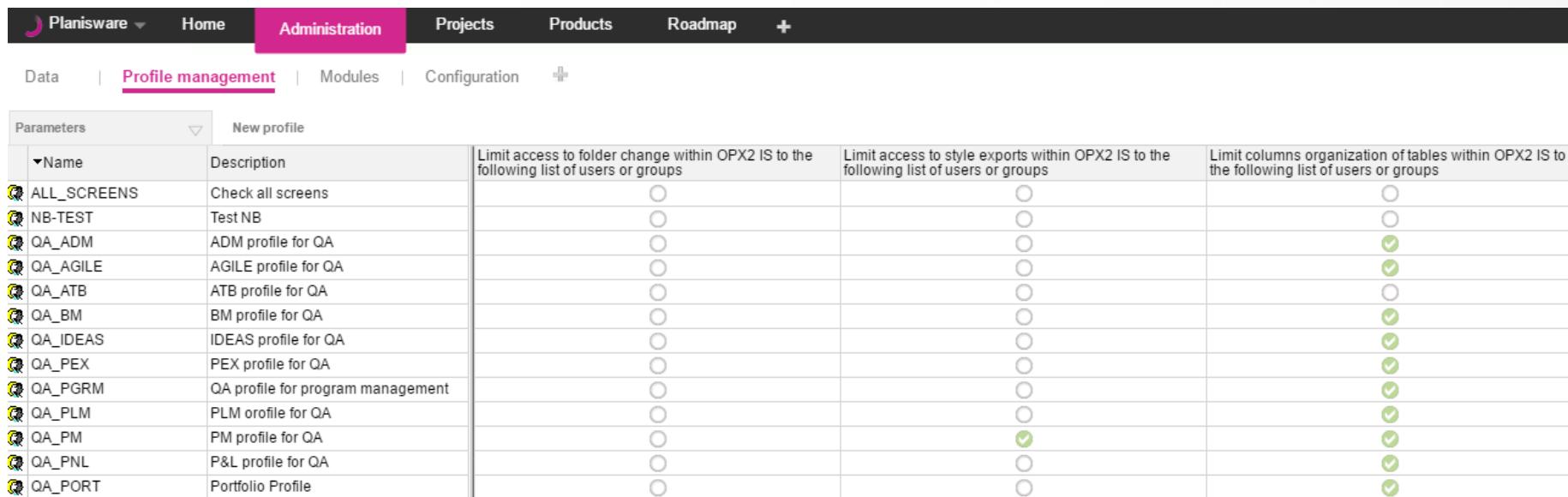
Granting Access to Functionalities

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.



The screenshot shows the Planisware administration interface. The top navigation bar includes links for Planisware, Home, Administration (which is highlighted in pink), Projects, Products, Roadmap, and a plus sign. Below the navigation is a secondary menu with Data, Profile management (which is underlined in pink to indicate it is selected), Modules, Configuration, and a plus sign. The main content area is titled "Parameters" and features a table with a header row: "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", and "Limit columns organization of tables within OPX2 IS to the following list of users or groups". The table lists various profiles: ALLSCREENS, NB-TEST, QA_ADMIN, QA_AGILE, QA_ATB, QA_BM, QA_IDEAS, QA_PEX, QA_PGRM, QA_PLM, QA_PM, QA_PNL, and QA_PORT. Each profile has a corresponding row in the table with three checkboxes. A legend at the bottom left explains the symbols: a green circle with a checkmark for selected, and an empty circle for deselected.

Parameters	New profile	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
ALLSCREENS	Check all screens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NB-TEST	Test NB	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
QA_ADMIN	ADM profile for QA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
QA_AGILE	AGILE profile for QA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
QA_ATB	ATB profile for QA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
QA_BM	BM profile for QA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
QA_IDEAS	IDEAS profile for QA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
QA_PEX	PEX profile for QA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
QA_PGRM	QA profile for program management	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
QA_PLM	PLM orofile for QA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
QA_PM	PM profile for QA	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
QA_PNL	P&L profile for QA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
QA_PORT	Portfolio Profile	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



The parameter is selected.



The parameter is deselected.

Granting Access to Parameters

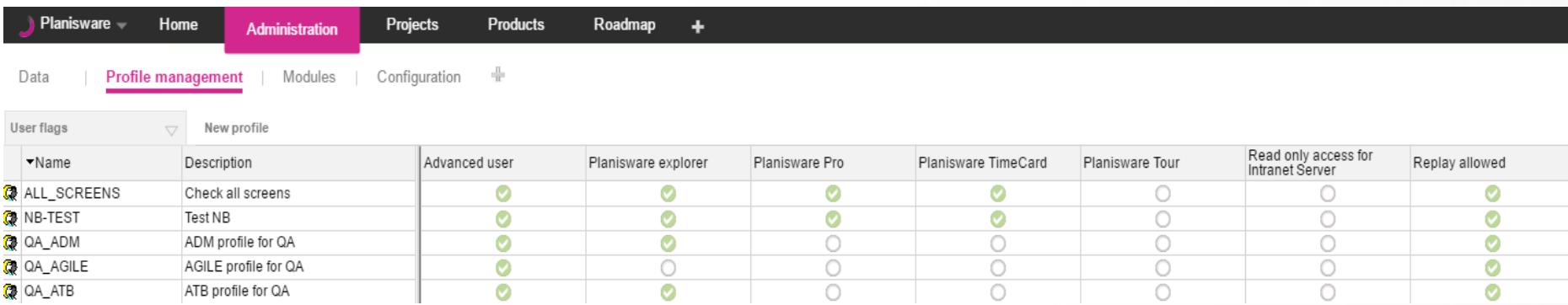
Parameter	If the parameter is allowed in the Style Manager menu, the user can
Hide attribute profile tools	Not use the 'New' and the 'Edit' buttons in the Attribute chooser dialog
Limit access to folder changes within OPX2 IS to the following list of users or groups	Add styles as shortcuts
Limit access 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.



User flags		New profile						
Name	Description	Advanced user	Planisware explorer	Planisware Pro	Planisware TimeCard	Planisware Tour	Read only access for Intranet Server	Replay allowed
ALLSCREENS	Check all screens	✓	✓	✓	✓	○	○	✓
NB-TEST	Test NB	✓	✓	✓	✓	○	○	✓
QA_ADMIN	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:

The screenshot shows the Planisware Data Management Rule (DMR) configuration screen and a task creation dialog.

Data Management Rule Configuration:

- Name:** OBS_OF_THE_PROJECT
- For each:** Activity
- Filter:** Project.NAME = "OBS" AND OBS element FROM(currentrule.activity.project.RESP)
- Message type:** Alert message
- Message label:** (empty)
- Alert message:** (empty)

A large callout box points to the **+ button** in the top-left corner of the configuration area, with the text: **Click the + button.**

Create or view a task Dialog:

- Identification:**
 - Name:** A
 - Description:** (empty)
 - OBS element:** O3
 - Dates:** (empty)
 - Duration:** (empty)
 - Planned start:** (empty)
 - Start no earlier than:** (empty)
 - Actual start:** (empty)
 - Positioning:** (empty)
 - Notepad:** (empty)
- Advanced properties:** (tab visible)
- Collaborative:** (tab visible)

A large callout box points to the **Create** button at the bottom-right of the dialog, with the text: **Click Create.**

Callout Annotations:

- A red arrow points from the **OBS element** dropdown in the DMR configuration to the **O3** entry in the **Identifier** table of the task creation dialog.
- A red box highlights the **O3** row in the **Identifier** table of the task creation dialog.
- A red box highlights the **O3** entry in the **OBS element** dropdown of the DMR configuration.
- A red box highlights the **OBS** entry in the **Filter** condition of the DMR configuration.
- A red box highlights the **OBS_OF_THE_PROJECT** entry in the **Name** field of the DMR configuration.

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

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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()**.

▲ Data management rule

For each Project
the attribute State
should verify LEVEL = 2
Message type Alert message

For each Project
verifying the filter RESP='OBSE-A'
and name ='ADM_324_DMR1'
the attribute Customer
should verify
LIST_FIND(ID,'CUST-A,CUST-B')
Message type Alert message

For each Project
verifying the filter PARENT <=''
and name='CLV006_EN'
the attribute Description
should verify TRUE
Message type Alert message

Reduce_list_of_customers

Test_heritage

DMR_STATE

Name: DMR_STATE

For each: Project

Filter:

the attribute: State

should verify: VALUE IN("Active", "Simulation")

Message type: Alert message

Message label:

Delete Save

Meet Ivan, the IT Security Officer

Locks

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

Data management rules

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

User profiles

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

Alerts

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

Access rights

The financial team would like access to projects and reports.

User Trace

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



Questions



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

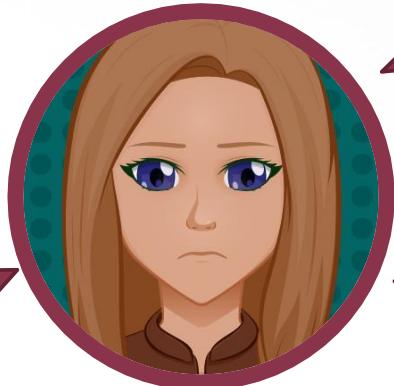
We need a traceable process to assign responsibility for a sequence of different activities in a project!

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!



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”

The screenshot shows the Planisware administration interface with the following details:

- Header:** Planisware, Home, Administration (highlighted in pink), Projects PROJ_EN01, Search... (with a question mark icon), and a file icon.
- Navigation:** Data, Modules, Configuration (highlighted in pink).
- Object Type:** Object type dropdown set to Project.
- Buttons:** Collapse all, Expand all.
- Content:** Two large empty boxes labeled "Program" and "Product description".
- Modals:** Two windows are open:
 - Project description:** Shows fields like Name (PRJ_001), Description (PRJ test PRJ X), Status (Active), and more.
 - Project template description:** Shows fields like Name (PRJ_TPL_001), Description (PRJ test TPL X), Status (Active), and more.
- Bottom Left:** A section labeled "_PM_POPUP_PROJECT_FORM - Project description" with fields: Name (_PM_POPUP_PROJECT_), Report description (Project description).
- Bottom Right:** A modal dialog titled "Click ‘Create’ to duplicate the report" with a "Create" button highlighted by a red arrow.
- Bottom:** A sidebar with expandable sections: Data management rule, Indicator bars, Locks, Sequence generated code, Simple workflows, and Symbolic fields.

Create the Configurable report

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

The screenshot shows the Planisware Form builder interface for a project named PROJ_EN01. The main area displays a configuration screen for 'Project description' with tabs for 'Definition', 'Rights & responsibilities', 'Roles', and 'Visibility rules'. On the left, there's a sidebar with sections for 'Widgets' (Text cell, Headband, Image, Formula) and 'Attributes' (Access to shared milestones, Associated country, BS 4, Common datasets, Customer, Deliverable reviewer, Description, End date, Gatekeeper, Historized attribute, List of visible resources, Name, Notepad, Origin date, Owner). A reporting toolbar is visible at the top, and a note indicates that attributes and widgets can be added via drag & drop.

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

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

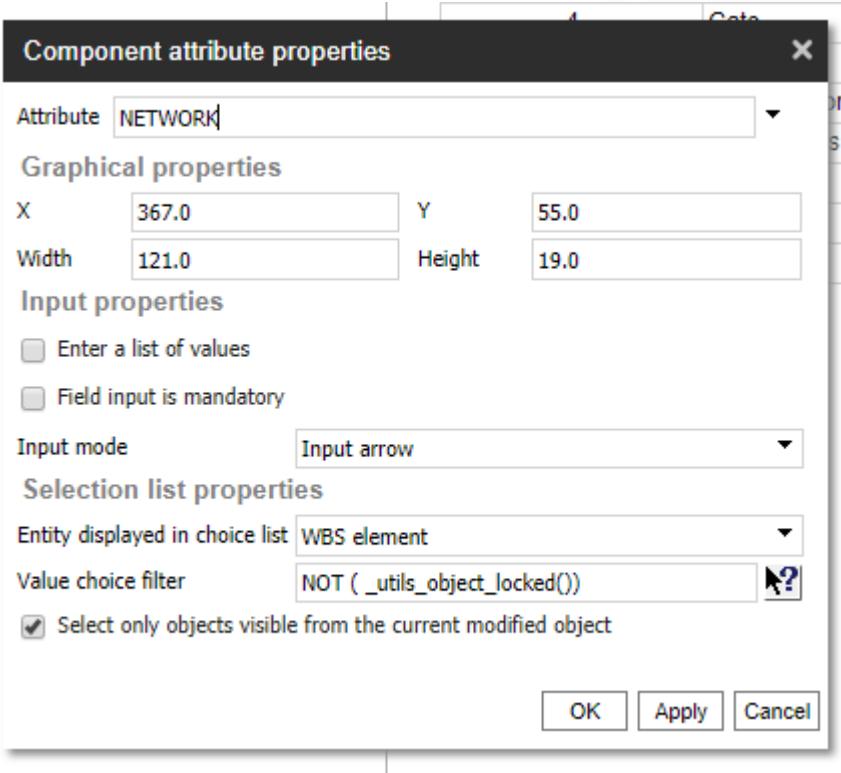
» Publication settings

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

Original
Form builder
Hidden

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

Tools Options

Widgets

- Text cell
- Headband
- Image
- Formula

Attributes

- Access to shared miles
- Associated country
- BS 4
- Common datasets
- Customer
- Deliverable reviewer
- Description

Identification

Name * Name Description

Template Project template

Dates

Start date Origin date End date

Relations

Customer Customer Product

Responsibility Responsibility Strategic

Project calendar Project calendar BS 4 Shared milestones

Associated country

Component attribute properties

Attribute: USER_ATTRIBUTE_ACME_UA_COUNTRY

Graphical properties

X: 120 Y: 235

Width: 182 Height: 19

Input properties

Enter a list of values

Field input is mandatory

Input mode: Input arrow

Selection list properties

Entity displayed in choice list:

Value choice filter:

Select only objects visible from the current modified object

OK Apply Cancel

Drag & drop field "Associated country" to the form

Click this tool to insert : field label + field itself

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

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	Original	Definition	Original	Original
1	Original	Rights & responsibilities	Original	Original
2	Original	Roles	Original	Original
3	Original	Visibility rules	Original	Original
4	Original	History	Original	Original
5	Original	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	Form builder	Definition	Form builder	Form builder
1	Original	Rights & responsibilities	Original	Original
2	Original	Roles	Original	Original
3	Original	Visibility rules	Original	Original
4	Original	History	Original	Original
5	Original	Attribute list	Original	Original

Relations

Customer	CUST-A
Responsibility	OBSE-B
Project calendar	CAL5D

Associated country

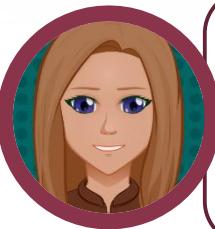
Notebook

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

Status Reports

Status Reports

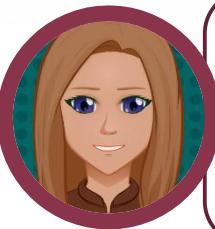
Scenario



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.

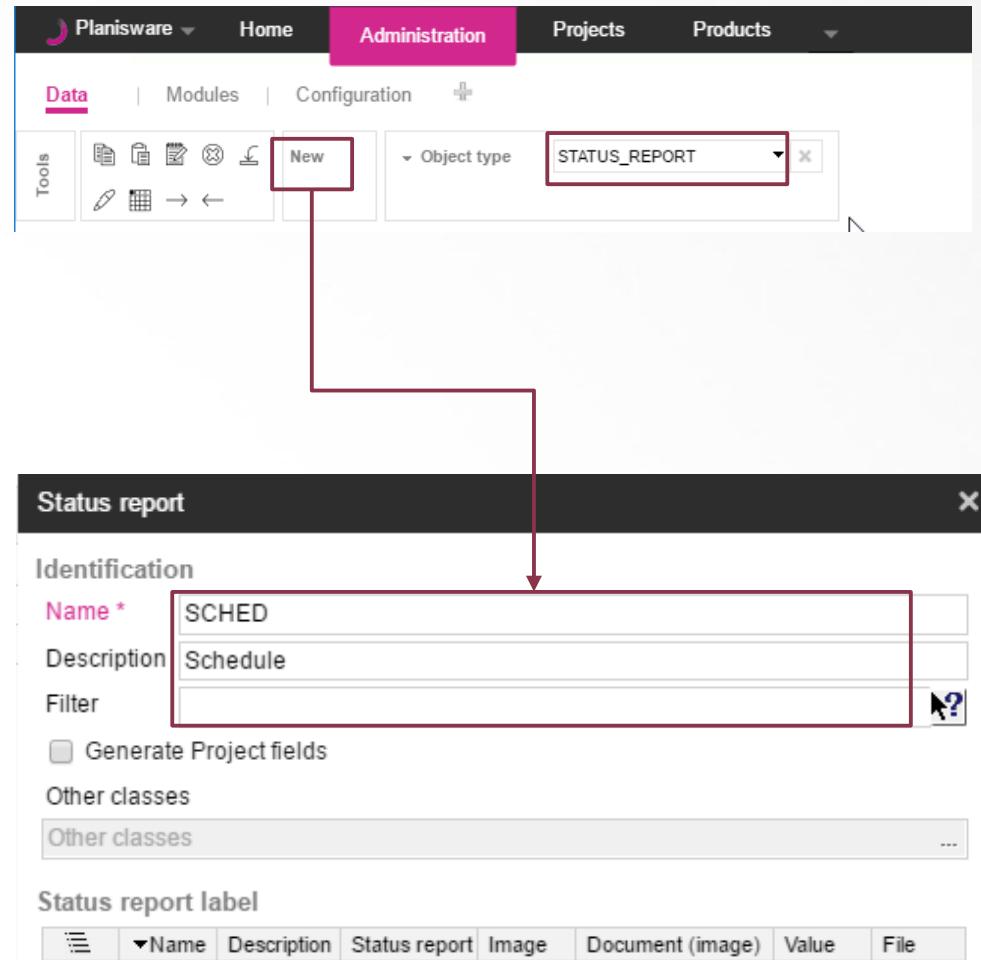
On the project list,
images that are linked
to the latest labels of
the status report can
be displayed.

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
	CN_PEX3				01-JAN-11	31-DEC-15
	QA_SIMU_A				01-JAN-11	26-NOV-14
Consolidated portfolio						
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.

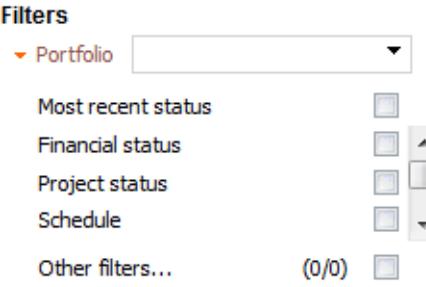
Note: In the Filter box, if you enter
\$CURRENT_PAGE_OBJECT_ID=ID, this status report is
created only from the user wall.



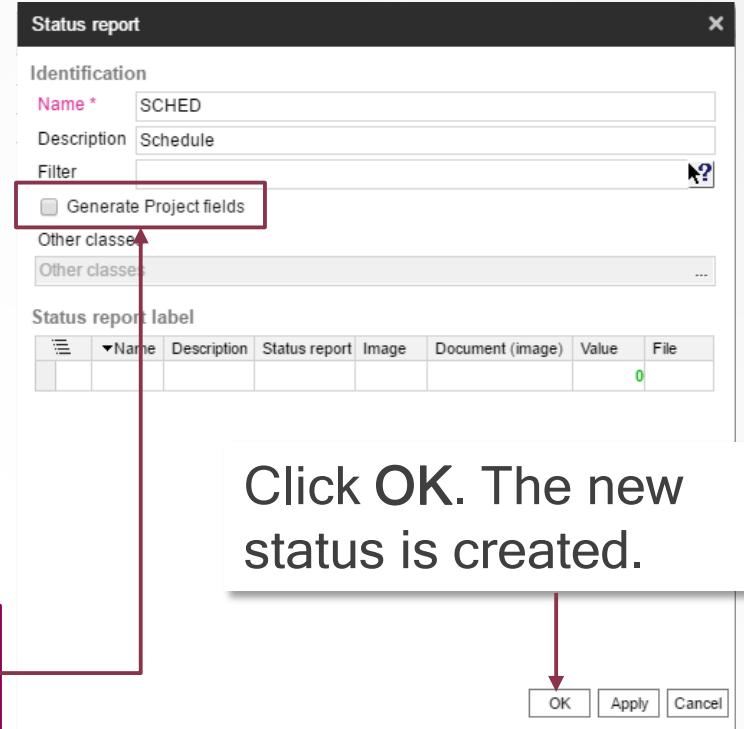
Creating Status Reports and Labels

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



- 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

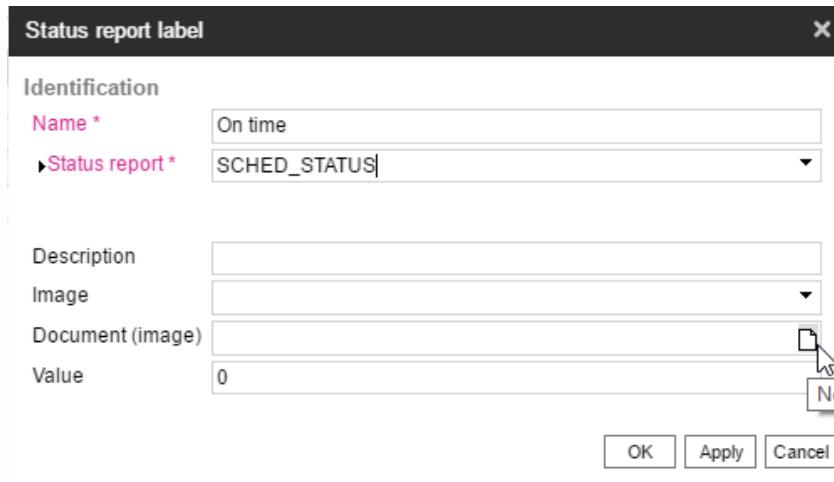
- Upon status creation, Planisware automatically generates:
- Filters in the different walls
 - Wall in Project module and User Wall in Home
- Indicators at the project level:
 - Current and last value
 - Trend
 - Last user who updated the status
 - Last update date

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.

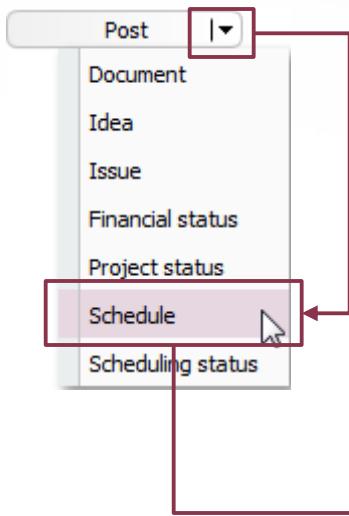
Creating Status Reports and Labels

- 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.

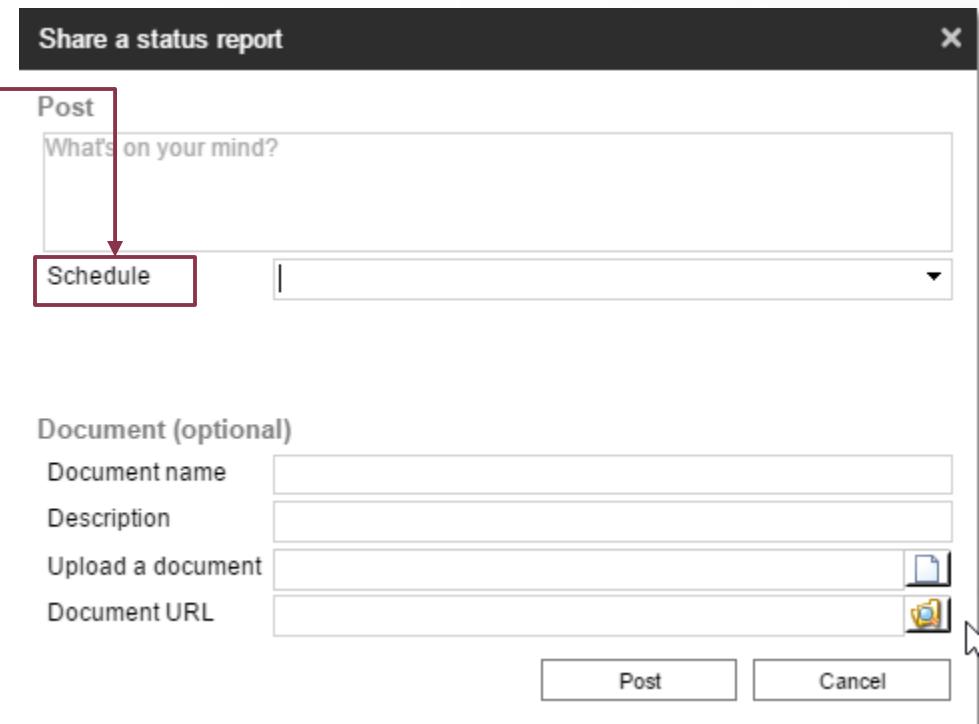


- Enter a name.
 - Select the status report, you want this label to be linked to.
 - Select an image or a Document (image).
-
- Click **OK**. A line is created for this label in the table.

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.



Share a status report

Post

What's on your mind?

Schedule

Document (optional)

Document name

Description

Upload a document

Document URL

Post Cancel

Displaying Status on the User Wall

- The status report displayed on the User wall.

The diagram illustrates the 'User wall' feature. On the left, there is a 'Filters' sidebar with a dropdown menu set to 'Portfolio'. Underneath are four filter options: 'Most recent status' (selected), 'Financial status', 'Project status', and 'Scheduling status'. Below these is a '(0/0)' button. A red box highlights the 'Most recent status' filter. A large red arrow points from this sidebar to a central 'Wall' interface. The 'Wall' interface features a calendar at the top with dates 51 through 22. Below the calendar is another 'Filters...' section with a 'Wall' checkbox checked. Underneath are four status items, each with a small icon and a brief description:

- Leakage of seal reduced - Financial status: Budget is overevaluated - Manon CHAIX - 4 minutes ago (OK)
- Leakage of seal reduced - Scheduling status: OK - Manon CHAIX - 7 minutes ago (OK)
- Leakage of seal reduced - Project status: Sunny - Manon CHAIX - 8 minutes ago (On time)

Each status item includes a 'Share' link and a 'Comment' input field. A 'Comments' count of '20' is shown in the bottom right corner of the wall area. A red box highlights the 'Most recent status' filter in the 'Wall' sidebar.

Possible to display only the most recent statuses.

Displaying Status Trend

- The status report displayed on the User wall.

The screenshot shows the Planisware application interface. At the top, there is a navigation bar with links for Home, Administration, Projects (highlighted in pink), E-learning, and a plus sign. Below the navigation bar, there are tabs for Data and Wall, with a plus icon next to them. The Tools section contains icons for document, file, and portfolio management. A dropdown menu for Portfolio is open, showing options like New and Open. The main area displays a table titled "All projects*" with columns for Open, Name, State, Description, Stage & gate, and several Merial Project Health Test metrics (User, Previous, Image, Trend). The first row shows project 003 (Active) with a yellow/red status bar. The second row shows project 005 (Can be conso...) with a green/blue status bar and the text "on track.1" under Stage & gate. The third row shows project 006 (Active) with a grey status bar. Below this table is another table with columns for Name, Description, Status report, Image, Document (image), Value, and File. This table lists various project health test categories and their corresponding status and images. For example, the "HS_PROJECT_HEALTH_TEST" category has entries for AT RISK, ON TRACK, and TROUBLE, each with a grey status bar. The "MM_PROJECT_HEALTH_TEST" category has entries for "not on track" and "on track", with the "not on track" entry having a red status bar and the "on track" entry having a green status bar. The "MRL_PROJECT_HEALTH_TEST" category has entries for "Not on track" and "on track". The "NIKO_NIKO" category has entries for Happy_Niko, Neutral_Niko, and Unhappy_Niko. The "PROJECT_HEALTH" category has entries for At risk, On track, and Trouble, with the "At risk" entry having a red status bar and the "On track" entry having a green status bar.

Open	Name	State	Description	Stage & gate	Merial Project Health Test - User	Merial Project Health Test - Previous	Merial Project Health Test	Merial Project Health Test - Image	Merial Project Health Test - Trend
	003	Active	Antheia						
	005	Can be conso...	Cronus2		ADMIN	on track.1	Not on track		
	006	Active	Finis						

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.

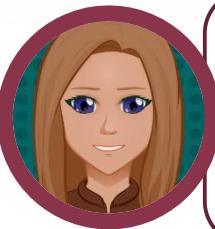
Verify the status fields for the project are set according to the status you created

Verify that the trend indicator works

Creating workflows

Workflows

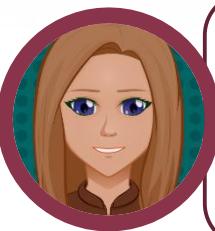
Scenario



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**

In the Simple workflow grouping click on the + to access the new workflow attribute sheet.

This workflow is currently deactivated

Name * Name

Description * Description Enter the workflow only once

Report Report

Create

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.

The screenshot shows the 'Workflow attribute sheet' dialog box. At the top left is a large gray plus sign icon. Below it, a message box contains the text 'This workflow is currently deactivated'. The main form has fields for 'Name *' (ACT_SWF-001), 'Description *' (Activities Simple Workflows 001), and 'Report' (Report). To the right, there is a 'Filter' section with a checkbox labeled 'Enter the workflow only once' which is checked. A 'Create' button is at the bottom right. Arrows from the surrounding text boxes point to the 'Deactivated' message, the 'Report' field, and the 'Only once' filter checkbox.

Name *		ACT_SWF-001
Description *		Activities Simple Workflows 001
Report		Report

Filter

Enter the workflow only once

Create

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

The screenshot shows the Planisware interface with the following elements:

- Top Left:** A sidebar with the text "Simple workflow ACT_SWF-001 (Activities Simple Workflows 001) with no entry condition".
- Top Center:** A large plus sign icon.
- Text Overlay:** "By default the Simple workflow is not active. Activate the workflow with the switch button." with a pink arrow pointing to a switch button on the sidebar.
- Workflow Preview:** A preview area titled "ACT_SWF-001 - Activities Simple Workflows 001 This workflow is currently deactivated". It contains fields for Name (ACT_SWF-001), Description (Activities Simple Workflows 001), Report (Report), and a checkbox for "Enter the workflow only once".
- Preview Content:** "Here is the preview of the steps and the actions of the workflow." with a pink arrow pointing to a circular diagram labeled "ACT_SWF-001" containing a checkmark.
- Action Buttons:** A row of buttons: "Duplicate", "Advanced...", "Delete...", and "Save".
- Delete Button:** A pink arrow points from the "Delete..." button to the text "Delete the current Simple workflow".
- Save Button:** A pink arrow points from the "Save" button to the text "Save modifications applied on the attribute sheet".
- Text Labels:** "Edit the Steps and actions of the created workflow." (near the top right of the preview area) and "It is possible to copy an existing simple workflow by clicking on Duplicate." (near the bottom left).

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.

The screenshot shows the Planisware interface with the following details:

- Top Navigation:** Planisware logo, Home, Projects (*Prasugrel CRUSH), Portfolio, Data, Modules, Configuration, Workflow Activities Simple Workflows 001 (highlighted in pink), Toolbar editor, Profile management, Cost algorithms.
- Definition Section:** Contains fields for Name (ACT_SWF-001), Description (Activities Simple Workflows 001), Report (Report), and checkboxes for "This workflow is currently deactivated" and "Enter the workflow only once".
- Steps Section:** Shows a workflow diagram with two steps: "Start" and "Step". The "Start" step is the first in the sequence, followed by "Step". A pink arrow points from the "Start" step to a callout box.
- Callout Boxes:**
 - The Start step is not modifiable/removable.** (Associated with the "Start" step)
 - To edit the first step, click on it to get all options in a right panel.** (Associated with the "Step" step)

Build your workflow

- Create the first step

Definition

This workflow is currently deactivated

Name ACT_SWF-001

Description Activities Simple Workflows 001

Report Report

Steps

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.

Start → Step

Click on the + to add a new step.

Step
Delegation needed

Responsible
PROJECT_TEAM ...

Informed
PROJECT_MANAGER ...

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

Save

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

The screenshot shows a workflow configuration interface with the following elements:

- Definition:** A section with fields for Name (ACT_SWF-001), Description (Activities Simple Workflows 001), and Report (Report). It also includes a toggle for deactivation and a help icon.
- Steps:** A main area where a new step is being created. A tooltip says "Enter a label for the Step." A "Step" button with a checkmark and a plus sign is shown, with a tooltip "Click on the + to add a new step."
- Responsible:** A list of users: PROJECT_TEAM (with an ellipsis).
- Informed:** A list of users: PROJECT_MANAGER (with an ellipsis).
- Save:** A "Save" button with a disk icon.
- Annotations:** Several callout boxes with arrows pointing to specific UI elements provide instructions: "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.", "Specify Informed user(s): the user(s) receiving emails when action is executed. The list of Informed is plugged on the roles.", and "When doing modifications on the current Step you need to save them."

Build your workflow

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

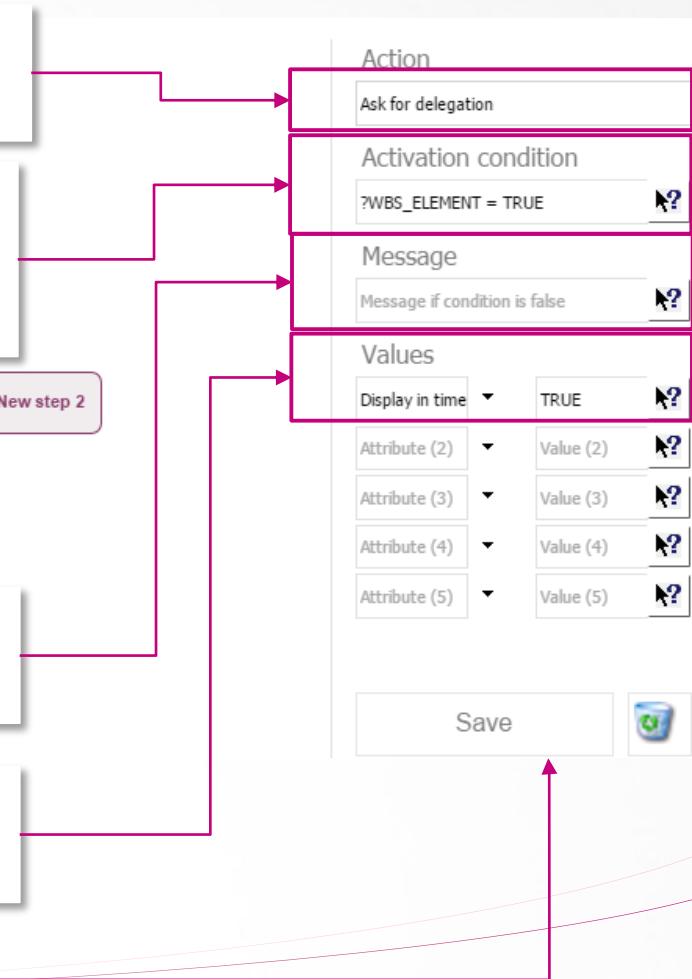
Step 1 Modify the label of the action. This will be the label of the workflow button.

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.

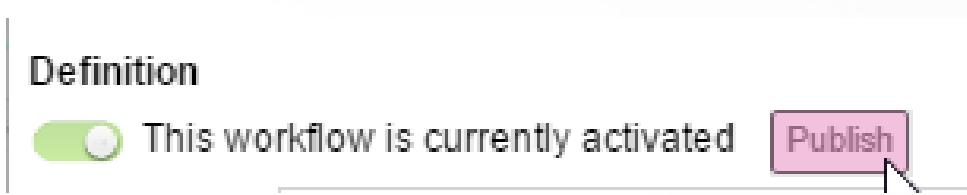
It is possible to set a value on an attribute as soon as the action is executed.



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

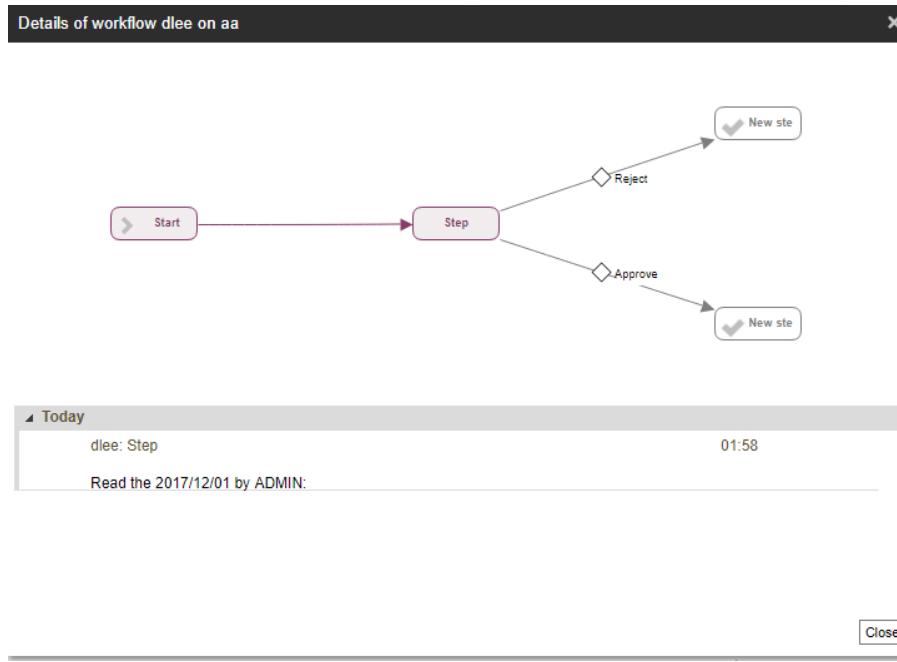


- Any **modification** requires save and publish again
- Workflow will not be applied on objects created before activation and publication of the workflow
- All active workflows are automatically published on startup of the Intranet server
- It is not possible to publish an inactive workflow

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



Create or view a task

Approve | Reject You are Responsible, Informed on task Step of workflow dlee on the Task: aa

Scheduling | Hours & expenditures | Advanced properties | Gate | Scorecard | Collaboration | Deliverables

Identification

Name	aa	Activity type	▼
Description	Hair care	WBS element	005
►OBS element	SBU01	▼	

Dates

Duration	▼	Calendar	BP_STANDARD
Planned start	2019/12/02	Expected finish	2019/12/01
Start no earlier than	▼	Finish no later than	▼
Actual start	▼	Actual Finish	▼
Positioning	EARLIEST	▼	

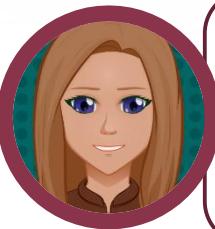
Notepad

OK | Apply | Cancel

Import Export

Import Export

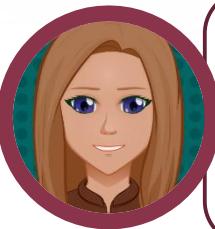
Scenario



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

Format

Identification

Name: ACME_EXP_PROJ_HEALTH
Description: Project health
Object type: Project

Template

Create from table style: AMBER ADM.Project.Project he:
Filter on data
Import object ID: Name

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

Import/export format	File order number	Internal planisware attribute	Planisware attribute description	Import attribute
Project:ACME_EXP_		5BUDGET	Budget at completion (BAC)	BUDGET
Project:ACME_EXP_		3COMMENT	Description	COMMENT
Project:ACME_EXP_		1NAME	Name	NAME
Project:ACME_EXP_		4PREDICTED-COST	Estimate at completion (EAC)	PREDICTED-C
Project:ACME_EXP_		8REAL-FINISH	Planned finish	REAL-FINISH
Project:ACME_EXP_		7REAL-START	Planned start	REAL-START
Project:ACME_EXP_		2STATUS	State	STATUS
Project:ACME_EXP_		_PM_SF_OPEN_PROJECT	Open	_PM_SF_OPEN
Project:ACME_EXP_		6_SOC_DYN_ACME_SR_PROJ	Project prospects	_SOC_DYN_AC

OK Apply Cancel

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Define target and export data

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

Import/export target

Format definition

Type: CSV file format

Format: Project:ACME_EXP_PROJ_HEA

File name,url or database connector: E:\doc\ marketing\user_group\2016\export.csv

Data source path:

Database where clause:

Pick the format in the list

Import/export target

MACHINE: //roxana:1521/roxana12c

Data source host: 127.0.0.1

Crypted password: 1UAVXSMX094969WV5SU9XSPSE:

Data source port: 12500

Driver type: Planisware connect service

Dbms type: Oracle (version 10)

Commit modifications:

Events: Import → Export

Set the path of the exported file

Log of the previous exports

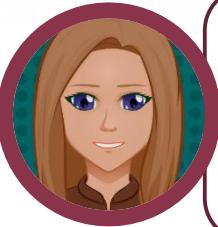
Edit	Import/export target	User	Import/export date	Import/export direction	Number of errors	Target file	Number of created
<input checked="" type="checkbox"/>	E:\doc_marketing\user_group\2016\export.csv	AMBER	08/11/16	Export			
<input checked="" type="checkbox"/>	E:\doc_marketing\user_group\2016\export.csv	AMBER	08/11/16	Export			
<input checked="" type="checkbox"/>	E:\doc_marketing\user_group\2016\export.csv	AMBER	08/11/16	Export			

Click “Export” to generate the file

Code generator

Code generator

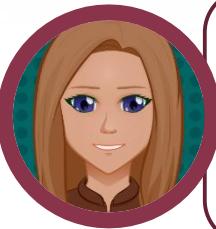
Scenario



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.

The screenshot shows the Planisware configuration interface. A modal window titled "ACME_SGC_TSK_CODE" is open, containing fields for Name (ACME_SGC_TSK_CODE), Description, Task code, and Generated string. The Generated string section contains a formula: "TSK_CODE_" + RANDOM_NUMBER(1000). A pink arrow points from the "Name" field to a callout box labeled "1 Enter a Name for the Sequence generated code". Another pink arrow points from the formula field to a callout box labeled "2 Enter the desired formula in the field Code generation formula". A third pink arrow points from the "Default value" field in the Attribute settings dialog to a callout box labeled "Under Attribute settings, change the default value for the Name attribute. Allocate code generator as default value (uppercase and between '')".

Code generator with description Task code with the sequence key ID and with the generation formula ID

+

ACME_SGC_TSK_CODE

Name ACME_SGC_TSK_CODE

Description

Task code

Generated string

The following formula is called on the generated sequence number. It allows you to modify the generated character string from the sequence number.
The sequence number is called with the expression "VALUE" in the

Code generation formula "TSK_CODE_" + RANDOM_NUMBER(1000)

Delete... Save

1 Enter a Name for the Sequence generated code

2 Enter the desired formula in the field Code generation formula

Under Attribute settings, change the default value for the Name attribute. Allocate code generator as default value (uppercase and between "")

Name

Attribute Name

Module

Category

Hide in Intranet Server?

Format

Default column length 0

Default value "ACME_SGC_TSK_CODE"

Delete Save

Sequence generated code

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

Create or view a task

Identification

Name	ACME_SGC_TSK_CODE
Description	New task
►OBS element	

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

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

Create or view a task

Scheduling | Costs | Hours & expenditures | Advanced

Identification

Name	TSK_CODE_78
Description	New task
►OBS element	OBSE-B

Activities*

Insert Transform

	Name	OBS element
▶	PROJ_EN01	OBSE-B
▶	WBS1	OBSE-B
▶	START	OBSE-B
▶	END	OBSE-B
▶	WBS2	OBSE-B
	ACME_SGC_TSK_CODE	

Meet your manager, Silvia

Workflow

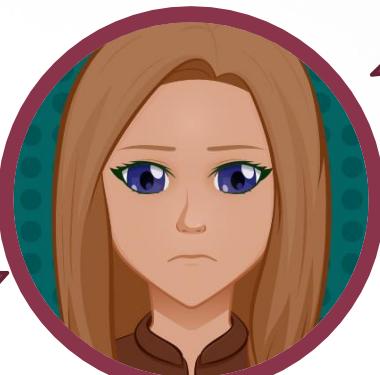
We need a traceable process to assign responsibility for a sequence of different activities in a project!

Status Reports

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

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

Code Generator



The layout of our forms need to be updated!

Configurable Reports

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

Import/Export

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)