
ProjeQtOr

ProjeQtOr User guide

Release 12.3

ProjeQtOr

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You will find the full list of developments covered in the update [here](#).

Improvement of Diary view



Better visibility, more intuitive. Timely events on the correct time.

Discover

Quick planning



a quick local calculation is done to directly show impact of change.

Gantt Bars - Description

OAuth2 for IMAP mailboxes



Now possible to read IMAP Mailboxes. Applies to Input Mailbox

Check it out

Filters management



New criterias and new shared filters Add value when comparing fields.

Check it out

FEATURES

ProjeQtOr is a “Quality based Project Organizer”.

It is particularly well suited to IT projects, but can manage any type of project.

It offers all the features needed to different Project Management actors under a unique collaborative interface.

1.1 Features

1.1.1 Start guide

Startup page for new installations to assist the administrator in the first steps of implementing the application.

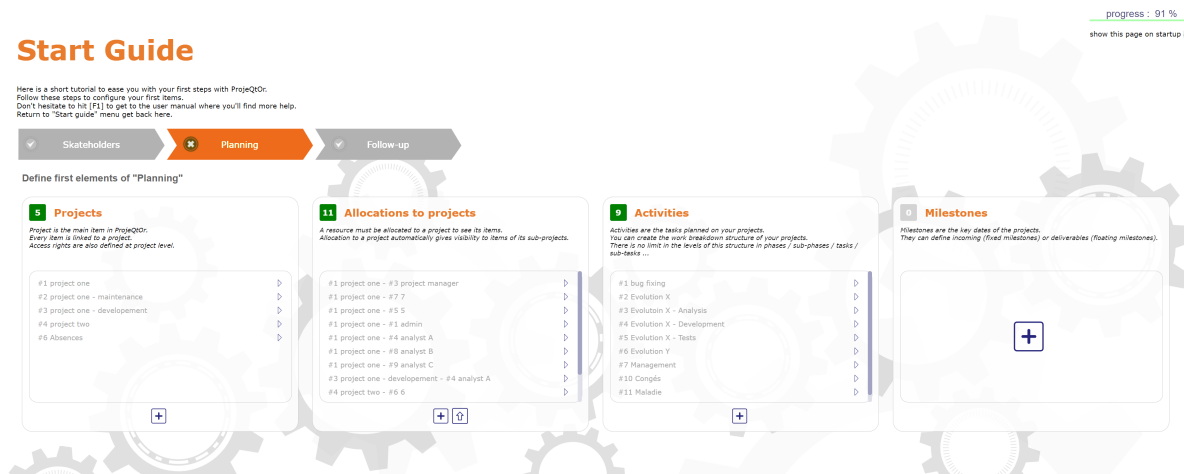


Fig. 1: Start guide

Several steps are necessary to configure the bases and a progress display allows you to determine the percentage of progress in the installation. You can hide this section on startup by unchecking the “show this page on startup” checkbox.



Fig. 2: progress of installation

To display it again, select it as the start page in the *users settings* screen or in the *session menu*

The guide is available at the next login and can also be found in the main menu

1.1.2 Planning management

ProjeQtOr provides all the elements needed to build a planning from workload, constraints between tasks and resources availability.

Note: Multiple Access : Users can edit the same item (if they have the right) at the same time, without disturbing each other, as long as they don't edit and save exactly the same field and at the exact same time.

Project

The project is the main element of ProjeQtOr. it is a planning element.

It is also the highest level of visibility and definition of access rights based on profiles.

You can define profiles, some have visibility on all projects, others only on the projects they are assigned to.

You can also define sub-projects of a project and sub-project of sub-projects without limit to this hierarchical organization.

This allows for example to define projects that are not real projects, but just a definition of the structure for your organization.

See also:

Project and *Gantt Planning view*

Activity

An activity is a task that must be planned, or includes other activities.

This is usually a task that has a certain duration and should be assigned to one or more resources.

See also:

Gantt Planning view. and *See:Activity*

Milestones

A milestone is an event or a key date of the project.

Milestones are commonly used to track delivery dates or force a start date of activity.

They can also be used to highlight the transition from one phase to the next one.

Unlike activities , milestones have no duration and no work.

But on ProjeqtOr, you can specify deadlines (positive or negative) to apply to your milestones

See also:

Milestones

Resources

Resources can be assigned to activities.

This means that some work is defined on this activity for the resource.

Only the resources allocated to the project of the activity can be assigned to the activity.

See also:

Resource

Real work allocation

Resources enter their time spent on the Real work allocation screen in their

This allows for a real-time monitoring of work.

Moreover, updating the left work allows to recalculate the planning taking into account the actual progress on each task.

See also:

timesheet.

Planning

The planning is based on all the constraints defined:

- left work on each activity
- availability of resources
- rate of *resource allocation to projects* and *Allocation rate*
- *Assignments rate* of resources to activities in *assignment section*.
- *Planning modes* for each activity (as soon as possible, fixed duration, ...).
- *Dependencies* between activities.
- *Priority* of activity and *Planning priority*.
- The planning is displayed as a *Gantt chart*.

Project Portfolio

The planning can also be viewed as a *project portfolio*, which is a Gantt planning view restricted to one line per project, plus optionally selected milestones.

Global Planning

The *Global Planning* allows you to display many more elements on the gantt chart in addition to the usual projects, activities, and milestones.

In this diagram view, you can view decisions, test sessions, deliveries, risks, tickets or opportunities ...

All of which can be linked to an activity or any other element of the diagram.

Resource Planning

You can display the planning for each *resource*, but also by *teams*, by *pool of resources* or you can display all the resources whatever their *assignments*.

See also:

Planning elements - Gantt Chart and Resource planning

Resource management

ProjeQtOr manages the availability of resources that can be allocated to multiple projects. Tool calculates a reliable, optimized and realistic planning.

Resources

A *resource* can be a person working on the activities of one or more projects. Or material assigned to a particular task.

A resource can also be a group of persons for which you do not want to manage individual detail. See: *Teams* and *Pool of resources*

You can manage this through the capacity of the resource, *FTE*, that can be greater than 1 (for a group of people for example) or less than 1 (for a person working part-time).

Allocations

The first step is to allocate each resource to the projects on which it has to work.

Specifying the *allocation rate* (% of maximum weekly time spent on this project)

Where again the periods during which it will be planned on these projects.

Assignments

Then you can assign resources to project activities.

You fill in the workload you assigned to the resource.

Only the resources allocated to the project of the activity can be assigned to the activity.

See: *Assignments*

Calendars

To manage working and non-working days, for resources with reduced working hours or with a different rhythm from the French calendar, for days off or public holidays, you have configurable calendars.

You can create multiple calendars to manage different types of availability.

- you can create a '80%' calendar with every Wednesday closing day, for example.
- you can manage separate vacations when working with international teams.
- A calendar is assigned to each resource.

See also:

Calendars

Real work allocation

Resources enter their time spent on the *Timesheet screen*. This allows for a real-time monitoring of work.

The planning recalculation takes into account the left work and makes it possible to take into account the actual progress on each task.

Tickets management

ProjeQtOr offers a Ticketing environment.

With its bug tracking to monitor incidents on your projects, you with the ability to include work on planned tasks of your projects.

Ticket

A Ticket is an intervention that does not need to be planned or that cannot be planned.

It is generally a short task, whose granularity, too small, cannot correspond to an activity and whose progress you want to follow to describe and provide a result.

For example, bug fixes or issues can be handled through tickets. You cannot plan bugs until they are identified and logged, and you must be able to provide a solution to a bug (workaround or workaround).

- Ticket management allows you to program *delays* according to the type of ticket
- As on an activity it is possible to estimate the workload.
- You can assign a *coordinator* and/or a manager.
- It is possible *to attach external documents, to link other elements, to leave notes...*

Simple tickets

Simple tickets are just simplified representations of Tickets for users that will “create” tickets but not “treat” them.

Elements created as simple tickets are also visible as Tickets, and vice versa.

See also:

Ticketing - Tickets dashboard

Costs management

Costs can be tracked on projects. From resources, activities, assigned work, and other management expenses, all project costs are tracked, consolidated, and can generate invoices.

Projects

The Project is the main entity of ProjeQtOr.

In addition to tracking work on projects, ProjeQtOr can track the costs associated with this work.

Activities

An Activity is a task that must be planned, or includes other activities.

Work assigned to resources on activities is converted into associated costs.

Resource cost

To calculate the cost of expenses ProjeQtOr defines the Resources cost.

This cost may vary depending on the role of the resource and may change over time.

See also:

Functions and cost

Project expenses

Projects expenses can also record expenses not related to resource costs (purchase , lease, sub-contracting).

See also:

Project expenses

Individual expenses

Individual expenses can record expenses generated by a given resource.

See also:

Individual expenses

Quote, Orders, Term, Bill

ProjeQtOr can manage various financial elements found on a project:

- Quotation (proposals),
- Orders (received from customers),
- Invoicing Terms,
- Bills.

See also:

Expenses - Incomes - Client invoices - Financial Gallery

Quality management

The specificity of ProjeQtOr is that it is Quality Oriented : it integrates the best practices that can help you meet the quality requirements on your projects.

This way, the approval stage of your Quality Systems are eased, whatever the reference (ISO, CMMI, ...).

Workflows

Workflows are defined to monitor changes of possible status.

This allows, among other things, to restrict certain profiles from changing some status.

You can, for instance, limit the change to a validation status to a given profile, to ensure that only an authorized user will perform this validation.

See also:

Workflow

Delays for tickets

You can set delays for tickets or on ticket types. This will automatically calculate the expiry date of the Ticket when creating the Ticket.

The supported and closing time of the ticket can be defined and calculated for statistical purposes.

See also:

Delay for tickets

Indicators

Indicators can be calculated relative to respect of expected work, end date or cost values.

Some indicators are configured by default, and you can configure your own depending on your needs.

Non respect of indicators (or the approach of non-respect target) can generate Alerts.

See also:

Unit indicators

Checklists

It is possible to define custom Checklists that will allow, for instance, to ensure that a process is applied.

See also:

Checklist

Reports

Many Reports are available to track activity on projects, some displayed as graphs.

See also:

Reports

All is traced

All your manipulations, modifications, recordings are traced. Nothing is drawn at random.

You can follow, in a centralized and collaborative way, all the elements created: list of questions and answers, recording decisions affecting the project, managing the configuration of documents, follow-up meetings ...

In addition, all updates are tracked on each item to retain (and display) a history of the item's life.

See also:

Control and automation - Reports - Activity stream - The history

Risks management

ProjeQtOr includes a comprehensive risks and opportunities management, including the action plan necessary to mitigate or treat them and monitoring occurring problems.

Risks

A Risk is a threat or event that could have a negative impact on the project, which can be neutralized, or at least minimize, by predefined actions.

The risk management plan is a key point of the project management. Its objective is to :

- identify hazards and measure their impact on the project and their probability of occurrence,
- identify avoidance measures (contingency) and mitigation in case of occurrence (mitigation),
- identify opportunities,
- monitor the actions of risks contingency and mitigation,
- identify risks that eventually do happen (so they become issues).

Opportunities

An Opportunity can be seen as a positive risk. This is not a threat but an opportunity to have a positive impact on the project.

They must be identified and followed-up not to be missed out.

Issues

Issue is a risk that happens during the project.

If the risk management plan has been properly managed, the issue should be an identified and qualified risk.

Actions

Actions shall be defined to avoid risks, not miss the opportunities and solve issues.

It is also appropriate to provide mitigation actions for identified risks that did not occur yet.

See also:

Risks and issues management

Perimeter management

ProjeQtOr allows you to monitor and record all events on your projects and helps you in managing of deviations, to control the perimeter of projects.

Meetings

Follow-up and organize Meetings, track associated action plans, decisions and easily find this information afterwards.

Periodic meetings

You can also create Periodic meetings, which are regularly recurring meetings (steering committees, weekly progress meetings, ...)

Decisions

Decisions follow-up allows you to easily retrieve the information about the origin of a decision :

- who has taken a particular decision ?
- when?
- during which meeting ?
- who was present at this meeting?

Not revolutionary, this feature can save you many hours of research in case of dispute.

Questions

Tracking Questions.

Answers can also simplify your life on such exchanges, which often end up as a game of Ping.

Pong with a poor Excel sheet in the role of the ball (when it is not a simple email exchange...).

Product and Version

ProjeQtOr includes Product management and Product Versions.

Each version can be connected to one or more projects.

This allows you to link your activities to target version.

This also allows to know, in the case of Bug Tracking, the version on which a problem is identified and the version on which it is (or will be) fixed.

See also:

concept - common-sections - type-restriction-section - Steering

Documents management

ProjeQtOr offers integrated Document Management.

This tool is simple and efficient to manage your project and product documents.

ProjeQtOr support only digital document.

A document will be stored in the tool as versions.

Document can be versioning and an approver process can be defined.

Define a structure for document storage. Directories structure is defined in document directory screen.

Global definition of directories is directly displayed in the document menu, to give direct access to documents depending on the defined structure.

See also:

Documents - Repertory and Document - Document directory

Commitments management

ProjeQtOr allows you to follow the requirements on your projects and measure at any time coverage progress, making it easy to reach your commitments.

In addition to the standard functionalities to manage your projects and monitor costs and delays, ProjeQtOr provides elements to monitor commitments on products.

By linking these three elements, you can obtain a requirements covering matrix, simply, efficiently and in real time.

Requirements

Requirements management helps in describing requirements explicitly and quantitatively monitor progress in building a product.

Test cases

The definition of Test cases is used to describe how you will test that a given requirement is met.

Test sessions

Test sessions group test cases to be executed for a particular purpose.

See also:

Requirements and tests - Requirements dashboard

Asset Management

ProjeQtOr includes IT asset management. The park is made up of equipment and each of these equipment may contain other equipment and will have a type of equipment.

Licenses

The concept of license will be managed in the form of equipment, by defining license type equipment, which is linked to software type equipment.

This method makes it possible to define a stock of purchased licenses and to assign them progressively to the equipment on which they are installed.

Equipment

This feature allows you to manage equipment types, categories, brands and models of equipment.

But also the suppliers and the locations of this equipment.

See also:

Module Management - Requirements dashboard

Humans Resources

This section allows to manage the society's Humans Resources This system comes in addition to the standards of the management of absences

- You can define the employees, contract types, the contract for the employees
- You can choose the leave entitlement standard for each type of contract
- The employee may reserve periods of leave of absence according to his rights.
- The system also includes a validation process of the requests during the leave period.

Humans Resources Sections

- Leaves Calendar
- Leaves Period
- Leaves rights earned
- Employees
- Employment Contract
- Employee Managers
- Leaves Dashboard
- Regulated leaves parameters

Variable capacity

- The resources may have a capacity that varies over time.
- This allows you to reserve and enter additional time (for periods of overtime)
- or less than the standard capacity (for some periods of rest)

See also:

humans resources - Variable capacity - Resource

Tools

ProjeQtOr includes some tools to generate alerts, automatically send emails on chosen events, import or export data in various formats.

ProjeQtOr includes an import feature for almost all elements of project management, from CSV or XLSX files.

All lists of items can be printed and exported to CSV and PDF format.

The details of each item can be printed or exported in PDF format.

The Gantt planning can be exported to MS-Project format (XML).

Internal alerts can be generated automatically based on defined events.

These alerts can also be dispatched as emails.

It is also possible to manually send emails from the application, attaching the details of an item.

It is also possible to retrieve answers to this type of email to save the message in the notes of the relevant item.

ProjeQtOr provides administrative features to manage connections, send special alerts and manage background tasks treatments.

Moreover, the tool features its own CRON system, independent of the operating system and able to handle the PHP stop and restart.

See also:

Tools - Administration

1.2 Activity Stream

The Activity stream allows you to display certain information about each of the elements of ProjeQtOr.

It is a kind of light history which allows you to quickly see the information of creation, deletion, changes of state of the element or the comments left by users according to their right of visibility.

The screen dedicated to the Activity Stream allows you to view all the feeds.

1.2.1 Filter system

This filter allows you to restrict the display by ...

- Type of element
- Its id
- Author
- Team
- Periods
- Show the closed items

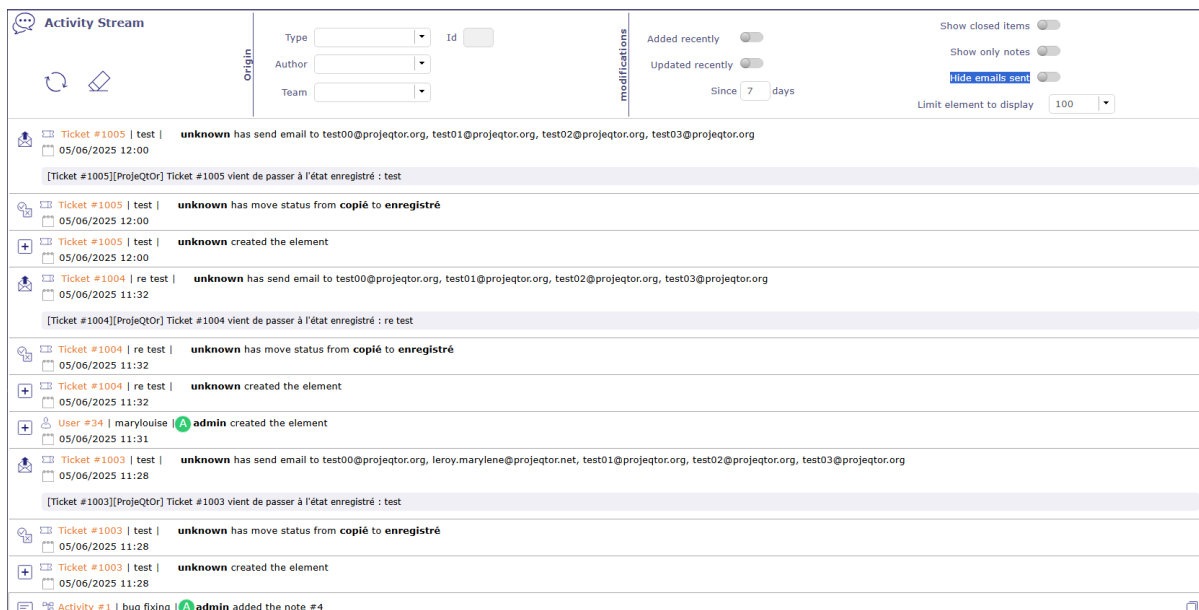


Fig. 3: Task list zone v9

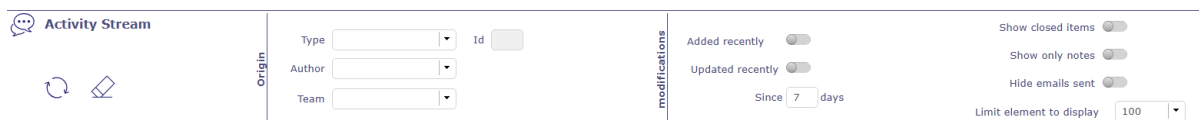


Fig. 4: Filter system

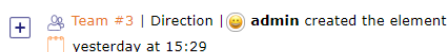
- Show only notes
- Hide email sent

You can also select the amount of information to display and restrict the list to the screen.

1.2.2 Elements displayed

We can see on this summary several elements:

- The element and its ID
- The name given to this element
- The creator of change
- The operation that was performed
- The date and the hour of the change
- Any notes related to the item
- Emails sent for the element with the object and text of the message.



histo#3279

Fig. 5: Activity stream line

The impacted elements are all clickable.

Notes

In the case of notes, the comment is displayed alone.

You can view notes in discussion mode if you filter the stream activity screen by author.

This allows you to escalate an entire discussion.

1.2.3 Activity Stream on element screen

You can view the Activity Stream for each element on the screen of the latter.

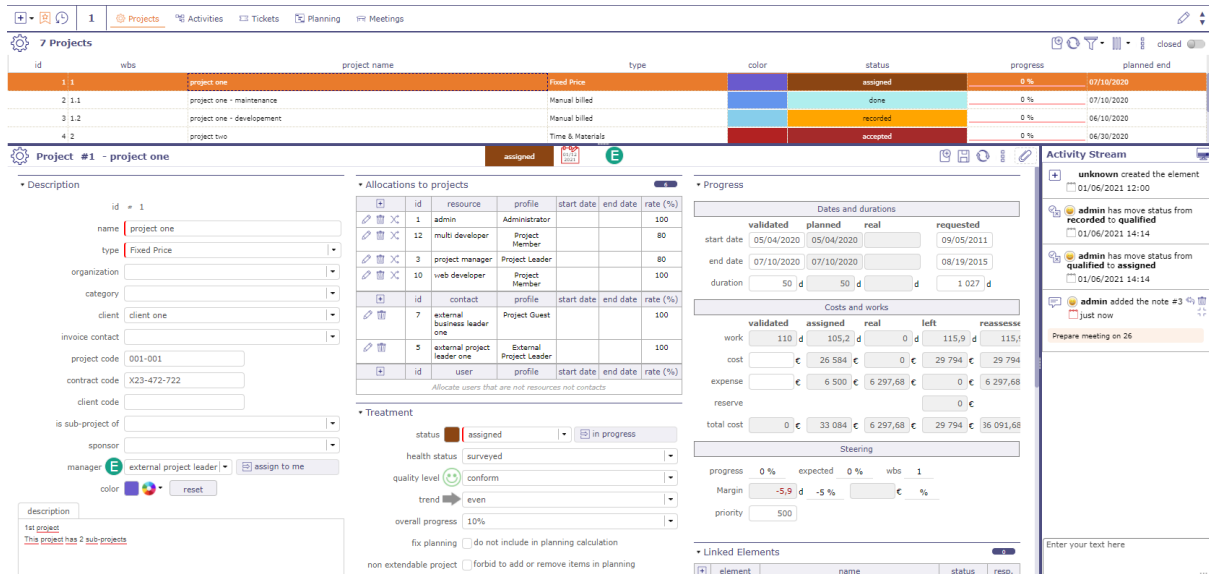






Fig. 6: Activity stream on the screen of a Project element

The items displayed depend on your visibility rights.

- Click on  in the details zone tools to display the Activity stream zone.
- Click on  to hide it.
- Click on  to choose the location of the zone on the left of the page
- Click on  to choose the location of the zone at the bottom of the page

Activity stream information

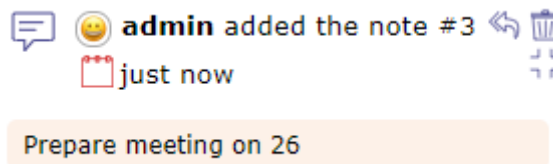






Fig. 7: Activity stream details

In the activity stream area you can view the same information as on the dedicated screen.

- The author of the information relayed with his profile icon

- The type of information displayed: creation, deletion, change of state or comments
- The date and time of the modification




Type of information

-  Note/Comment
-  Creation
-  Change of state
-  Mail sending



Add a note

You can add a note simply by clicking in the text box at the bottom of the activity stream area.

By default, your note is visible to all users assigned to the project linked to the item.

- Click on  to make your note private
- Click on  to share it in public (project team: resources allocated to the project)
- Click on  to share the note only with your team

Likewise, it is possible to view the notes directly by using the following buttons

- Click on  to hide note comment.
- Click on  to display note comment.

By default, you will see all visible notes for each item.

- Click on **Show only notes on activity feed** to display only notes type information.

CONCEPTS

This chapter defines the concepts of ProjeQtOr.
They can be referred in the following chapters.

2.1 Concepts

2.1.1 Project

A project is the main entity of ProjeQtOr.

Project element is more than a *planning element*.

It is also used to allow gathering all data depend on project:

- *Risk management*: mitigation, reserve
- *Ticketing*: Issue, Bug tracking, Change request, Support
- *Steering*: *Steering, Decisions, Action plan*
- *Requirement & Test*
- *Expense and Incomes*: project expenses, individual expenses, activities expenses, Order, Bill, Payment...
- *Documents*

Allows restricting data visibility to users by project.

The project data visibility is granted according to the user profile.

See also:

Profiles definition and *Allocation to project*

Project selector

The project selector works as a filter.

By default, the selector displays “all projects”, you can change this view in the user parameters and choose the project to display by default.

You can restrict data for one or more dedicated projects without necessarily being bound.

Note: The project type is defined in a project type.

Which is associated to a project. See: *Project*

See also:

Top bar and *User parameters*

Project's type

Four project types can be defined:

Operational project

Code: OPE

Most common project to follow activities.

A project can be non billable, used for internal or administrative project for example or billable project

You can choose the *invoice type* associated with each project among : manual Billed, fixed price, capped time, time & materials, internal.

See also:

Project

Invoice Type

Administrative project

Code: ADM

Allows to follow the non productive work as holidays, sickness, training, ...

All resources have access to this project type without being allocated (Project) or assigned (Activity).

Create an activity, like an OPE project, for each type of absence.

See also:

Absences

Template project

Code: TMP

Designed to define models to be copied into an operational project.

Any project manager (profile) can see and copy these projects without having to be assigned to them. To edit this template project directly, an assignment is required.

To modify it without assignment, you must first copy the project into an operational type project (OPE).

A model project, even if it is displayed in the Gantt chart, is not taken into account in planning. Even if there are assignments and assigned load, it is not stored and therefore is not planned.

You will not be able to display the planning detail on template type projects.

See also:

Copy an item

Proposal project

Code: PRP

Proposal-type projects are intended to identify strategic projects. It allows you to define objectives based on internal and external factors to achieve them.

For projects of this type, 4 additional fields are displayed:

- Strength
- Weakness
- Opportunity
- Threat

Strategic value is mandatory.

The project is automatically saved as “Under construction” and is read-only.

See also:

critical resource

Allocation to project

Concepts

- *Profiles definition*
- *Stakeholder definition*

Allocation to project is used to:

- Define project data visibility with access right.
- Define resource availability.
- Define the period of access to project data by the user.

You can select user, resource or contact.

if the selected contact is also a resource, then it will be displayed in the assignment table at the resource level.

User and contact allocation

Allocation to project can be defined on *Project* and *Users* screen.

The selected profile allows you to define the rights on all the elements of the project.

The profile displayed first will be the default but the profile given to an assignment may be different on each project.

These rights only apply to the selected project. If a sub-project is created on it then the rights will be automatically inherited.

You can change the profile on any project at any time.

The period selection allows you to define the visibility period of the project data. It can be used to limit the access period, in accordance with the service agreement.

Note: Profile defined in allocation to project does not grant or revoke access to users.

General access to application functionalities and data is defined by default user profile.

Resource allocation

Allocation to project allows to define the resource availability on project.

A resource may be allocated to projects at a specified rate for a period.

Allocation to project can be defined on *Project* and *Resource* screens.

You can also allocate a team or an organization to a project in *Teams* and *Organization* screens.

Note: A resource allocated to a project can be defined as *responsible* of project items treatment.

Period & Rate

A resource may be allocated to a project at a specified rate for a period.

This rate is used to keep some scheduling time for other tasks.

For example, if the allocation rate is 50%, the resource whose weekly calendar is 5 days (Monday to Friday) will not be scheduled more than half of this calendar, therefore 2.5 days per week.

If the period is not specified then the resource is allocated throughout the project.

Warning: The planning calculator tries to plan, the remaining work on the task assigned to a resource within the allocation to project period.

If remaining work on the task can't be planned, a purple bar appears in the Gantt view.

Change resource

A resource can be changed on allocation to project.

All tasks assigned to old resource will be transferred to the new resource with planned work and remaining work.

Work done on tasks belongs to always the old resource.

Multi-allocation

A resource can be allocated to multiple projects in the same period.

In the section **Allocations** in *Resource* screen, a tool allows to displayed conflicts.

Tip: How resolve conflicts?

You can change allocation period to avoid overlap between projects.

You can change the rate of allocation for it does not exceed 100% for the period.

2.1.2 Activity

An activity is a kind of task that can be planned or that groups other activities.

This is usually a long-term task that can be assigned to one or more resources.

Activities will appear on the Gantt schedule view.

You might consider an activity as:

- Planned tasks,
- Modification requests,
- Some phases,
- Versions or new deployments,

Activities can be grouped as a Mother / Daughter link. The parent activity must belong to the same project.

A WBS structure is applied and a dynamic index is calculated for all activities and it can be changed in the Gantt planning view using drag and drop.

An activity can be linked to elements that cannot be planned like tickets, so that the time spent on tickets can be taken into account in the overall planning of the project. This option allows you to assign a time pool that will be

scheduled and to link tickets to this tank. The time spent on tickets will then be decremented to that of the planning activity.

See also:

Planning activity

Assignment

The assignment is used to assign resources to project tasks (activity, test session, meeting). Only resources allocated by the project can be assigned to project tasks.

It consists to assign a resource to a task in a specific function and contains data about work on task, planned, real, left and reassessed work.

You keep track of the resources that have been assigned and worked on the activity.

You can define a period for the resource on each of the activities.

You can also define an assignment rate for each activity that will determine the daily planning based on the percentage of its *FTE*.

Important: Basic, you cannot delete a resource assignment after the resource has entered actual work on the activity.

This assignment can be deleted by a profile including the option “Can delete items with real work” in the access rights menu in the specific acces.

Similarly, if the resource has completed its activity, deletion is not possible.

See also:

Activity - Test sessions - Steering

Assignment section in common section

2.1.3 Organization

The notion of organization introduces a way to consolidate projects on a different hiererchic structure, apart from projects / sub-projects structure.

It defines the structure of the company in the frame of organizations: departments, units, location, ...

The organization summarizes the data of the projects in progress for the organization.

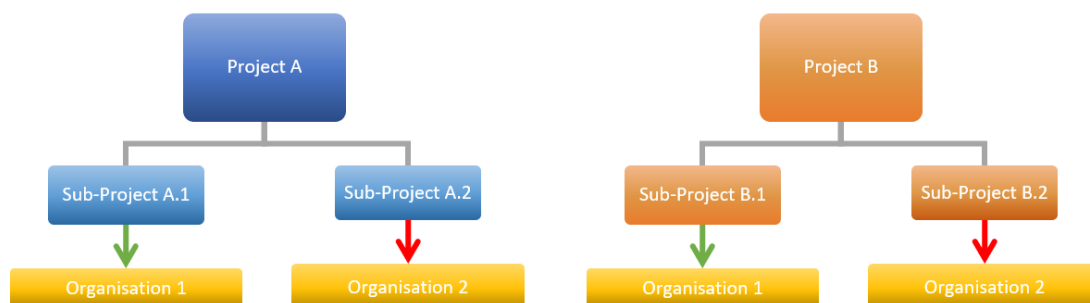


Fig. 1: distribution within organizations

Each project can be linked to an organization and resources can be linked to an organization.

Note: Depending on the profile, you can limit the visibility of resources to people in the same organization or team as the current user.

Sub-projects are by default attached to the same organization as the parent, but can be integrated into another organization.

2.1.4 Product

identifying

Product versions can be identified in these elements:

- *Activity*
- *Milestone*
- *Requirements and tests*
- *Test cases*
- *Test sessions*
- *Ticketing*
- *Documents*

A product can be a material object or for IT/IS projects is a software application.

It can have a complex structure that can be composed of sub-product and components and its components can have several versions that represent each declination.

A product is an element delivered by a project.

Several element can identified a product and/or a product version. *Documents* themselves can be identified to products.

The link with the project have no impact on project planning. It indicates only that project is devoted to a specific product versions.

The link management is done on *Project* and *Product version* screens.

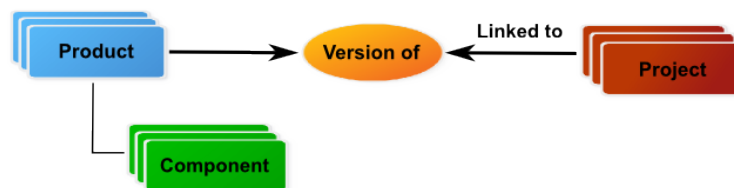


Fig. 2: Link with projects

See also:

product structure - Product version - Configuration Management
and *Documents*

Product structure

The product structure is defined depending on the relationships defined between product and component elements.

The rules defining a product structure are:

Relationships between...

... product elements

- A product can have several sub-products.
- A sub-product can be in the composition only one product.

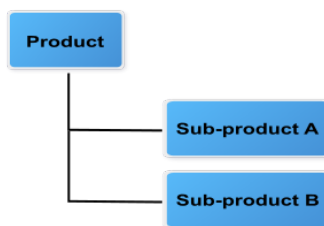


Fig. 3: Relationships between product elements

... product and component elements

- **A product can be composed of several components.**
 - A component can be in the composition of several products.

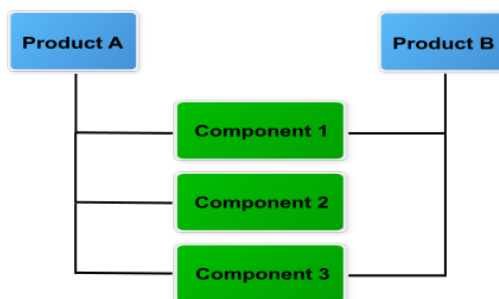


Fig. 4: Relationships between product and component elements

... component elements

Components can be linked between them (N to N relationships).

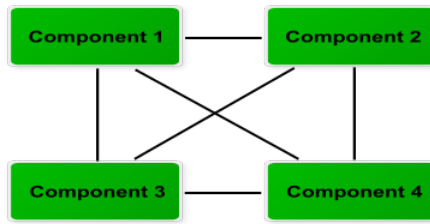


Fig. 5: Relationships between component elements

Versions of product and component elements

A product can have several versions that represent each declination of product.

A component can have several versions that represent each declination of the component.

Links can be defined between versions of products and components, but only with the elements defined in the product structure.

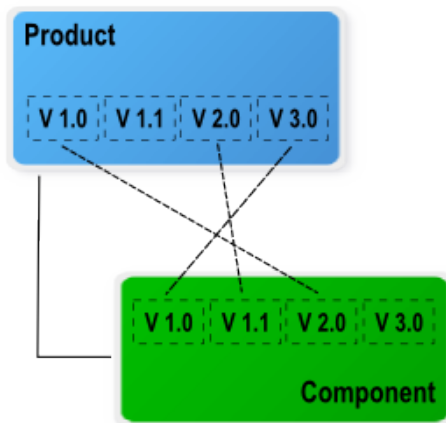


Fig. 6: Link between versions of product and component

2.1.5 Planning

ProjeQtOr implements work-driven planning method based upon on resource availability and their capacity.

Resource availability is defined by *calendars* and *project allocation period*.

Each resource is attached to a calendar to define its working days and tasks assigned to the resource will be planned according to working days defined in the calendar.

Resource capacity (*FTE*) is defined on daily base and the planning tool does not exceed the daily resource capacity.

See also:

Resource calendar and *Allocation to project*

The *project allocation rate* is used to resolve allocation conflicts between projects and allows to define resource availability for a project during a period. Use with the resource capacity, it allows to define the project allocation capacity on a weekly base.

The *task assignment rate* is used to keep some scheduling time each day for other tasks. Use with the resource capacity, it allows to define the assignation capacity on a daily base.

Planning elements

ProjeQtOr offers standard planning elements like Project, Activity and Milestone but also, two more planning element: Test session and Meeting.

Project

This planning element defines the project.

It allows to specify information on the project sheet like the customer, bill contact, sponsor, manager and objectives.

Sub-project is used to split the project, to correspond the organizational breakdown or something else by instance.

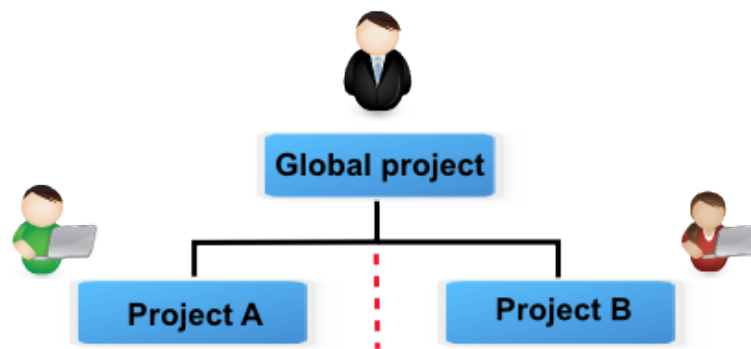


Fig. 7: Separation of duties

- Documents, notes and attachments can be annexed.
- A project leader and team can be allocated to each sub-project.
- Project allocation allows to define data visibility and isolate sub-projects.

See also:

Project and Allocation to project

Activity

This planning element can be a phase, a delivery, a task or any other activity.

An activity can grouped other activities or be a task. This allows to define the structure of phases and deliveries.

Dates, works and costs of activities (child) are summarized in the activity (parent).

A task is assigned to resources for to be performed.

See also:

Activity

Test session

This planning element is a specialized activity aimed for tests.

A test session allows to define a set of test case that must be run to meet a requirement.

It can grouped other test sessions or be a task. This allows to define the structure of test sessions.

Dates, works and costs of test sessions (child) are summarized in the test session (parent).

A task is assigned to resources for to be performed.

See also:

Test sessions

Milestone

This planning element is a flag in the planning, to point out key dates.

May be a transition point between phases, deliveries.

ProjeQtOr offers two types of milestone floating and fixed.

See also:

Milestone

Meeting

This planning element acts like a fixed milestone, but it's a task.

Like a milestone, a meeting can be a transition point.

But also, like a task because it's possible to assign resources and planned work.

See also:

Steering

Dependency

Dependencies allow to define the execution order of tasks (sequential or concurrent).

All planning elements can be linked to others by dependencies.

There are several types of dependencies that allow to start and/or finish before/after another element.

Dependencies can be managed in the Gantt chart and in screen of planning element.

A delay can be defined between predecessor and successor.

Planning mode

Planning mode allows to define constraints on planning elements: activity, test session and milestone.

Milestones planning mode

Planning modes are grouped under two types for milestone :

Floating

- These planning modes have no constraint date.
- Planning element is floating depending on its predecessors.

Fixed

- These planning modes have constraint date.

See also:

Activity and Test session planning modes and *Milestone planning modes*.

Planning elements planning mode

Several planning modes for your project elements are proposed to best manage the time spent on certain planning elements.

- As soon as possible
- Work together
- Fixed duration and parent activity
- Constraint duration
- Must not start before validated start date
- Must start at validated date
- Should end before validated end date
- Regular between dates
- Regular in full days
- Regular in half days
- Regular in quarter days
- Recurry (on weekly basis)
- Manual planning

Note: You can set the default scheduling mode for an item from its type

See also:

Planning Modes

Activities types, Milestones types and *Test sessions types* screens.

Planning priority

Planning items are scheduled in this priority order:

1. Manual planning
2. Dependency
3. Fixed date
4. Recurring activities
5. Fixed duration
6. Others

You can also fill in the priority field in the management section of your planning items to define a different planning order than the default. Possible values are from 1, for the highest priority, to 999, for the lowest priority.

See also:

Planning order for more details

Note: If projects have different priorities, all elements of project with highest priority are planned first.

Project structure

Work breakdown structure (WBS) is used to define project structure.

Breakdown can be done with sub-projects, activities and test sessions.

Structure management

- As seen previously, the project can be split in subprojects.
- All other planning elements concerned by the project or subproject are put under them without structure.
- Planning elements can be grouped and orderly in hierarchical form.
- Structure management can be done in the Gantt chart or in planning elements screen.

WBS element numbering

- The project is numbered by its id number.
- All other elements are numbered depending on their level and sequence.
- WBS numbering is automatically adjusted.

Project planning calculation

The project planning is calculated on the full project plan that includes parents and predecessor elements (dependencies).

The calculation is executed task by task in the following order:

1. Manual Planning
2. Dependencies (Predecessor tasks are calculated first)
3. Prioritized planning elements
4. Project priority
5. Task priority
6. Project structure (WBS)

The remaining work (left) on tasks will be distributed on the following days from starting planning date, taking into account several constraints:

- Resource availability and capacity
- Project allocation capacity (Project allocation rate)
- Assigantion capacity (Task assignment rate)
- Planning mode

Resource overloads

- This is not possible to overloading the resources.
- The planning calculation process respects availability and capacity of the resource.
- If it is not possible to distribute remaining work, on already planned days, the calculation process uses new available time slot.

Draft planning

Two methods can be used to create a draft planning.

Use planning mode “fixed duration”

This planning mode is used to define fixed duration tasks. See: *Planning modes*

Dependencies allow to define the execution order of tasks. See: *Dependencies*

You can define this planning mode as default in the Activities Types screen for some types of activities you'll use in draft plannings


Use faked and team resource

The faked and team resource can be useful to get a first estimate of project cost and duration without involving the real resources.

Planning schedule is calculated using of the work-driven planning method.

Faked and team resources can be mixed in same draft planning.

Faked resources

- For instance, you want to define a Java developer resource. You can create a resource named “Java developer #1”.
- There are several levels of Java developer with different daily costs (beginner, intermediary and expert).
- You can define for this resource the functions and average daily cost for each level. (See: *assignment*)
- You assign this resource to tasks, to a specific function (level). (See: *assignment*)
- Faked resource will be easily replaced with real resources when project becomes real, with allocation replacement feature .

Team resource

- A team resource is a resource whose daily capacity has been defined to represent capacity of a team (Capacity (FTE) > 1).
- For instance, you needed to define four Java developers, but you don't want to create a resource for each. You can *overload* the daily capacity of the resource (Example: Capacity FTE=4).
- Using team resources is very easy but renders estimation of project duration as draft, not taking into account constraint of different resources such as possibly different skills or expertise level.
- With team resources it is very easy to estimate planning with different number of members in the team : what if I include 5 Java developers instead of 4 ? Just change capacity to 5 and re-calculate planning...

2.1.6 ProjeQtOr roles

A stakeholder can play many roles in ProjeQtOr.

Specific roles are defined to allow:

- To categorize the stakeholders involved in the projects.
- To identify the stakeholders on items.
- To regroup the stakeholders to facilitate information broadcasting.

Profiles definition

The profile is used to define in-app permissions and data access rights.

Each resource, user or contact is assigned a profile. This is mandatory. This is the default profile.

Multiple resources, users, or contacts can have the same profile. They are linked to a profile and belong to this group and share the same application behavior.

The profile is used to define access rights to application and data, first.

Also, the profile is used to send message, email and alert to groups.

See also:

Profils and Access rights

A profile can be selected to a user, resource or contact in project allocation.

▼ Allocations to projects 8




	id	resource	profile	start date	end date	rate (%)
	1	admin	Administrator			100
	4	analyst A	Project Member			100
	8	analyst B	Project Member			100
	9	analyst C	Project Member			100
	3	project manager	Project Leader			80
	id	contact	profile	start date	end date	
	7	external business leader one	Project Guest			
	5	external project leader one	External Project Leader			
	id	user	profile	start date	end date	
	34	johndoe	Project Guest			

Fig. 8: Profiles allocation to the project

The profile selected is used to give data access to elements of the projects.

A resource can have a different profile on each project to which it is assigned.

The profile is used to define who can change from one status to another one.

You can restrict or allow the state transition to another one according to the profile.

See also:

Workflow screen.

Predefined profiles

ProjeQtOr offer some predefined profiles.

Administrator profile

- Only these users can manage the application and see all data without restriction.
- The user “admin” is already defined.

Supervisor profile

- Users linked to this profile have a visibility over all the projects.
- They cannot create or modify any element.
- This profile allows to monitor projects.

Project leader profile

- The project leader has a complete access to owns projects.

Project member profile

- A project member is working on projects allocated to it.
- The user linked to this profile is a member of team projects.

Project guest profile

- Users linked to this profile have limited visibility to projects allocated to them.
- The user “guest” is already defined.

ProjeQtOr allow to involve client employees in their projects.

The distinction between this profile and its equivalent, user access is more limited.

2.1.7 Stakeholder definition

ProjeQtOr makes it possible to define the roles of the stakeholders.

The definition of stakeholders is done in part with the profile and with the definition of user / resource / contact. This allows certain access and visibility rights to be determined.

These combinations are used to define:

- Connection to the application.
- Data visibility.
- Availability.
- Roles.

These stakeholders can be either resource, contact, or users, and they can also be all three.

profile

- To a user, interface and data visibility is based on its user profile.
- User profile defined general access to application functionalities and data.
- Only resource can be planned on a planning element.
- ProjeQtOr allows to involve contacts in projects.

Access rights

- Defined if a user has access to own projects or over all projects.

- Access right on all project is typically reserved for administrators and supervisors. They have access to all elements of all projects.

Shared data

- For a stakeholder, data on user, resource and contact are shared.
- Allocation to project and user profile are also shared.

Tip: For a stakeholder, you can define and redefine the combination without losing data.

2.1.8 Resource function and cost

Function

The function defines the generic competency of a resource.

It is used to define the role play by the resource on tasks.

In real work allocation screen, the function name will be displayed in the real work entry.

A main function must be defined to resource and it is used as default function.

A daily cost can be defined for each function of the resource.

See also:

Functions screen allows to manage function list.

Resource cost definition

Allows to define the daily cost, according to the functions of the resource.

The daily cost is defined for a specific period.

When real work is entered, the real cost is calculated with work of the day and daily cost for this period.

When the project planning is calculated, resource cost is used to calculate planned cost.

Planned cost is calculated with planned work of the day and current daily cost.

See also:

Function and cost are defined in *Resource* screen.

Resource calendar

A calendar defines the working and off days in a the year.

You can define as many calendars as needed. Each resource is attached to a calendar.

Calendars are used in the planning process which dispatches work on every working day. Working days defined in a calendar allows to show availability of resources.

During the planning process, the assigned work to a resource is planned in its working days.

The default calendar is used to define the working days in the year. By default, this calendar is defined for all resources.

Warning: You must re-calculate an existing planning to take into account changes on the calendar.
--

Note: A calendar is set in *Resource* screen.

The calendar is defined in *Calendars* screen.

2.1.9 Contexts

The contexts defines a list of elements selectable to define ticket context and test case environment.

Contexts are initially set to be able to define contexts for IT Projects, for three context types :

- Environment
- Operating System
- Browser

They can be changed to be adapted to any kind of project.

AGILE METHODS

This chapter includes ProjQtOr features that allow you to practice agile methods.

3.1 Agile Methods

Agile methods are groups of practices of piloting and realization of projects. They originate from the Agile Manifesto, written in 2001, which uses the term “agile” to refer to multiple existing methods.

Agile methods are more pragmatic than traditional methods, involve the client as much as possible and allow a great reactivity to his requests. They are based on an iterative, incremental and adaptive development cycle and must respect four fundamental values, based on twelve principles, from which a base of practices, either common or complementary, derives.

3.1.1 KanBan

Other sections

- *Actions*
- *Requirement*
- *Ticketing*

The Kanban methodology originated from the Japanese automotive industry. It was created with the aim of optimizing production.

It is a visual task management tool that allows you to track tasks in real time, manage priorities and promote collaboration between team members.

It works by simple drag and drop in a column. Each column respects the rules of the workflow linked to the element of your kanban

In ProjQtOr, you can create a new Kanban board for:

- Tickets,
- Activities,
- Actions,
- Requirements

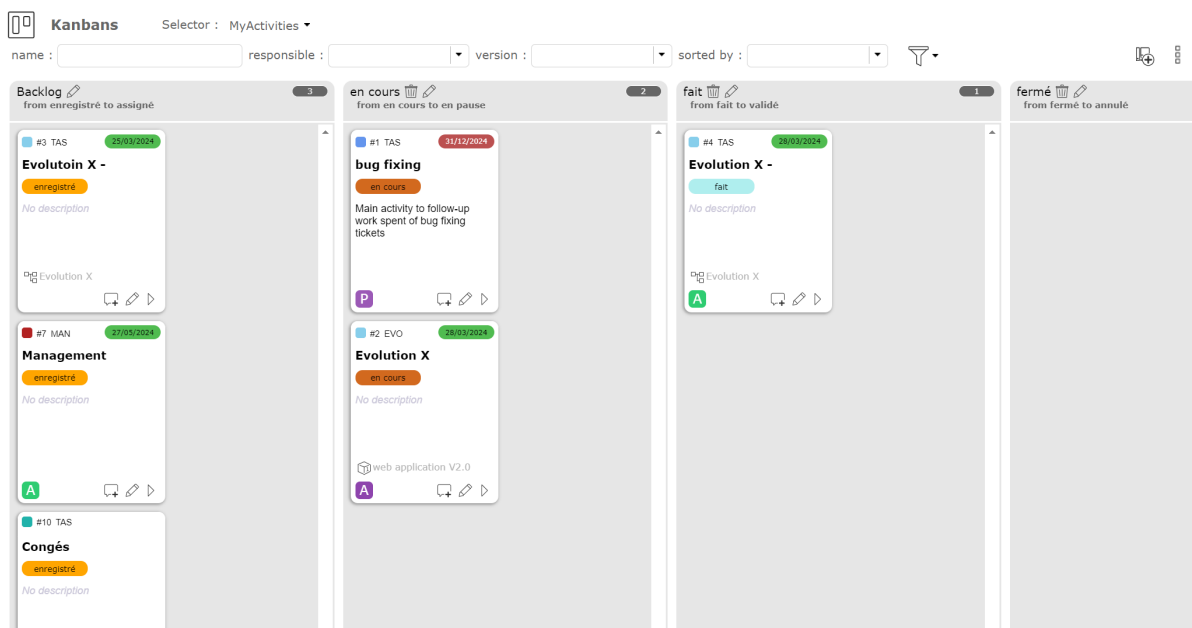


Fig. 1: Kanban Screen

Dashboard management

The Kanban Dashboard allows you to customize the display of tiles and the different kanbans.

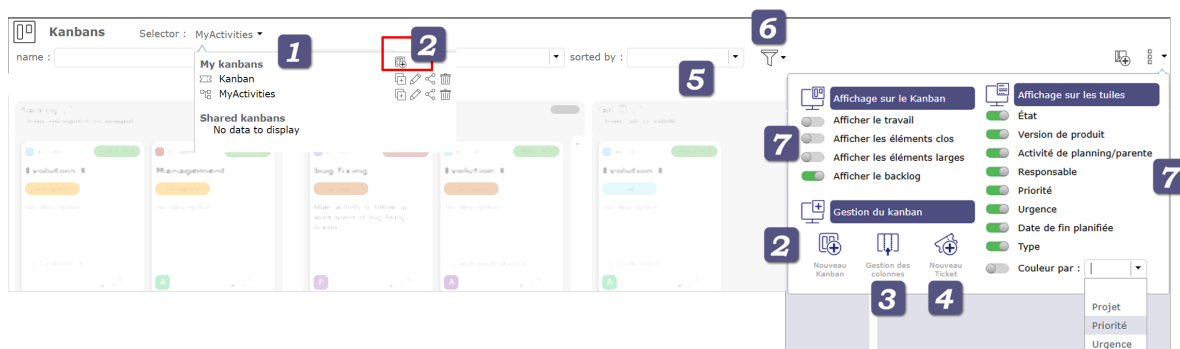


Fig. 2: Header area

You can create or modify columns or even create tiles or new kanbans, export or print your tiles...

Interface areas:

- 1 The Drop-down list
- 2 Create a new table
- 3 Create a new column
- 4 Create a new element
- 5 Fields restriction
- 6 Kanban filters
- 7 Display options on kanban
- 8 Display options on tile

The Drop-down list

You can see the complete list of created tables by clicking on the Kanbans drop-down list in the My Kanbans section.

The icon used for kanban tables created corresponds to the type of elements selected.

You can see the shared kanban tables by others users on the shared Kanbans section.

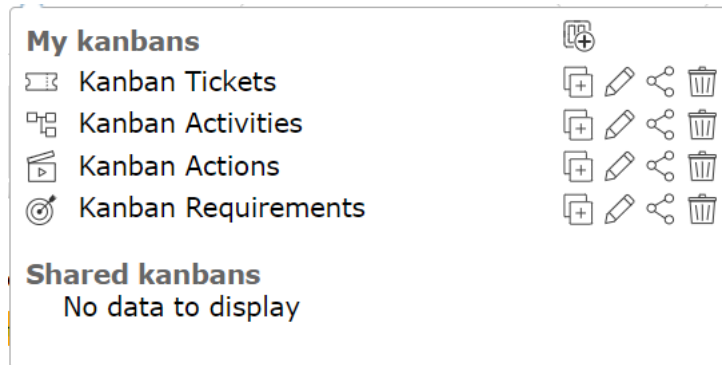








Fig. 3: List of existing kanban


- Click on  to create a new kanban
- Click on  to copy this kanban
- Click on  to edit this kanban
- Click on  to share this kanban. The icon is fill  when it is already shared.
- Click on  to delete this kanban

BACK

Create a new table

When you create a kanban, no matter what type, only one column is available.

You create the following columns according to your needs.

- Click on  to create a new Kanban

Add a new Kanban

name

type of item

type

shared

Fig. 4: Add a new kanban of tickets

You will need to define:

- **Name** for the new Kanban board
- **Type of item:** you can define a Kanban of Tickets, Activities, Actions or Requirements

When you have selected the item type, you must then define the type of Kanban board to apply:

- **Status:** you will manage the most standard “status based” kanban board
- **Target product version:** you can distribute the tickets among the target product version
- **Planning activity:** You will be able to send tickets among planning activities, which can be your Sprints in the Scrum method.
- **Target milestone** You manage your elements according to the target milestones of your project

You can choose directly if you want to share the newly created kanban with other users so that they can use it.

When you share a Kanban, other users will see your share in the list of shared Kanbans.

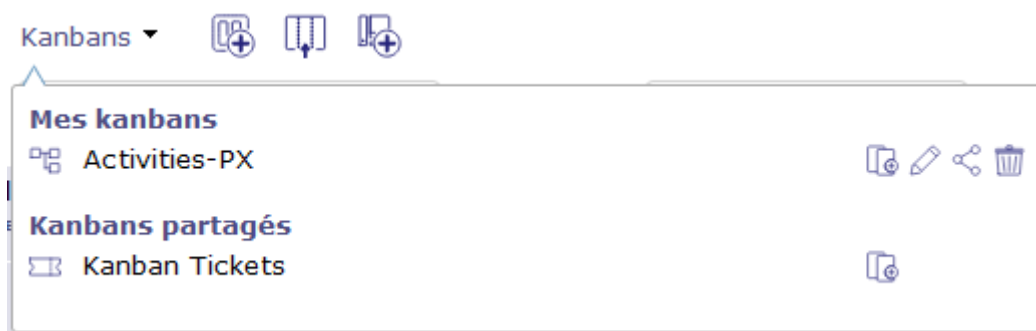


Fig. 5: Shared Kanban

Each time you access the Kanban screen, the last selected Kanban map is displayed.

See also:

Planning activity on the tickets screen and *Milestone*

BACK

Create a new Column

By default, when you create a new Kanban table, it gets a single column.

- Click on to create a new Column

The pop up is different depending on the type of kanban board created beforehand.



Fig. 6: Add a new column

In the case of a status arrangement, the columns contain items from one status to another in the order of presence of your workflow.

The next column will show the next status following your workflow to the last or the status you have determined.



Each column indicates the number of elements contained in.



Fig. 7: Select the next status







Fig. 8: Details header column

- Click on  to edit the column name.
- Click on  to delete the column.

BACK

Create a new element

The creation button change depending on the type of the element selected.

- Click on  to add a new ticket into the Kanban Board or
- Click on  to add a new action into the Kanban Board or
- Click on  to add a new activity into the Kanban Board or
- Click on  to add a new action into the Kanban Board

BACK

Fields restriction

As with other ProjeQtOr screens, you can restrict the display of items in the created columns of your kanban.

You can restrict items by name, manager, version, and sort them by ID, name, manager, status, or target version product.

BACK

Advanced filters

- Click the icon to set an advanced filter.

The advanced filter is used to define a clause to filter and sort

See also:

Advanced filters in Graphic User Interface

BACK

Display options on kanban

Many options allow you to customize the display of your kanban or tiles.

For the kanban:

- Show work on elements

Allows you to display the estimated, actual, and remaining work on each task.



In progress		
de in progress à in progress		
estimé	réel	reste
25,0 j	109,7 j	6,0 j

Fig. 9: You can view the work information of items on each column.

- Show idle elements

Allows you to display closed items in the columns of your kanban.

- Show large element

The tiles for each element will adapt to the full width of the column. This allows much more information to be displayed as the project name.

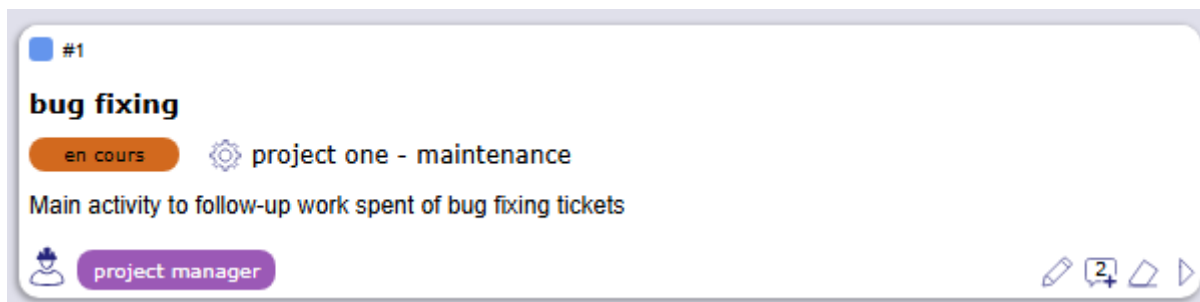


Fig. 10: Large tiles

- Show backlog

The backlog column of your kanban is hidden by default. It defines the initial state of your tiles in your kanban. The backlog is the list of pending tasks: these are all the ideas, requests, or work that need to be done but have not yet been planned or started.

and for the personalization of the tiles:

- Status
- Product version
- Planning/Parent activity
- Manager
- Priority
- Urgency
- Planned end date
- Type
- Color by Project / Priority / Urgency

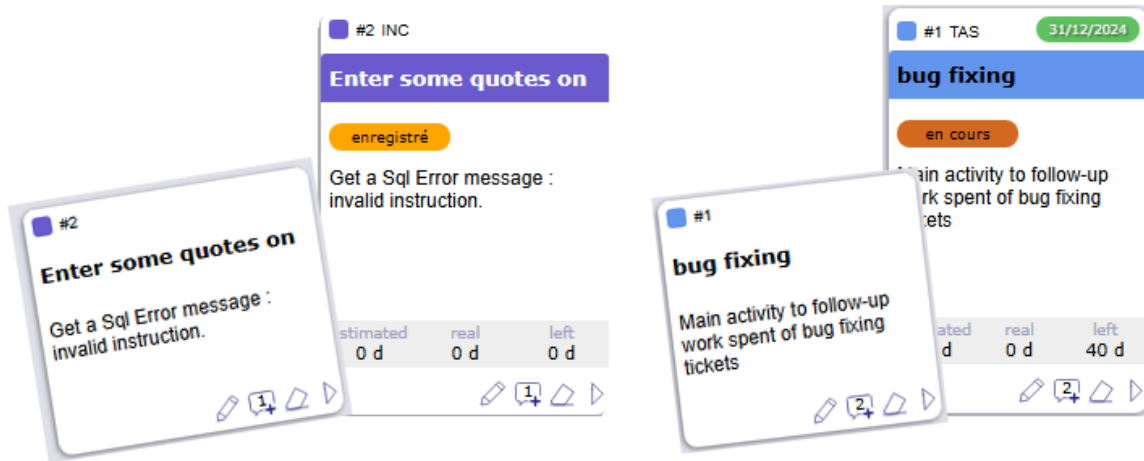


Fig. 11: difference between tickets tile and Activity without display options and with all options

All these options allow you to have simple tiles or tiles offering maximum information.

The estimated work, actual work, and work remaining information on the selected item can be displayed.

If your profile is not allowed to see the job, you will not have access to this option.

The format for displaying the job (days or hours) depends on the global parameter.

- **unit for real work allocation** for Tickets
- **unit for workload** for Activities

Show idle elements allows you to display or not inactive elements (closed, canceled, paused, etc.)

By default, Kanban board columns display two tiles side by side. By displaying the tiles in wide mode, each tile takes the maximum width of the column and allows to display much more information.

Tip: When you create a kanban, you do not yet have columns representing a state, a set of states or even versions. The tiles then appear in a Backlog column. You have the option to display or hide this column.

BACK

Details of an element

The kanban tile represents your task. Whether it is an activity, an action, a requirement or a ticket

The kanban tile is customizable. You can hide some information.

Interface areas:

- ID of the element and the color of the project color
- The type of the element
- The planned due date for the element
- The name of the element
- Status in which the tile is located in relation to your *Workflow*
- The description of the element

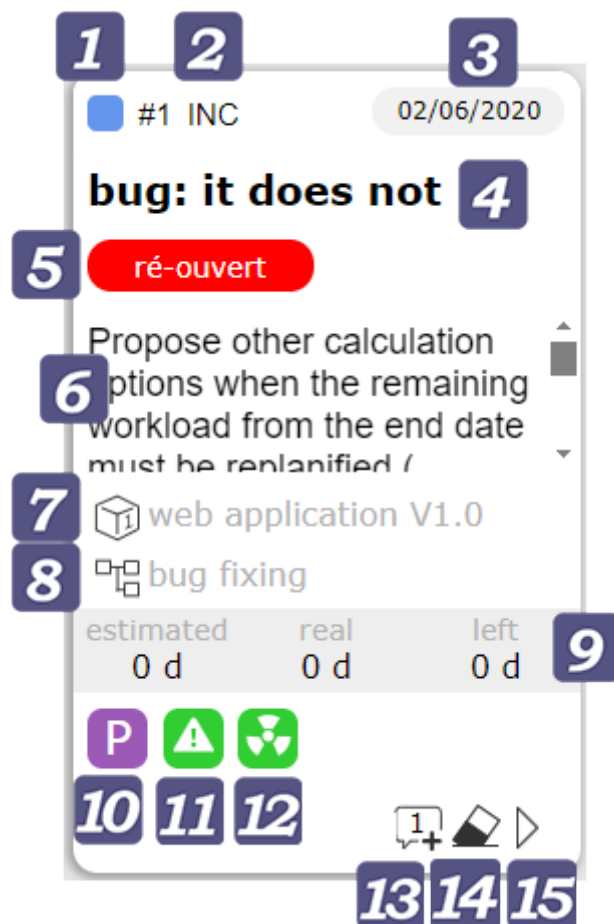


Fig. 12: Kanban Tile

- 7 The target product version
- 8 The planning activity or parent activity related to the element
- 9 Estimated work | Real work | Left work
- 10 Responsible of work Photo - The name is displayed on mouse over
- 11 Priority of the element - *Priorities* are customizable.
- 12 Urgency of the element - *Urgency* are customizable.
- 13 Add a note. The number of notes is displayed on the icon
- 14 Vote. The button allows you to vote on the item if you have the rights. Click the button to display the voting pop-up
- 15 Go to. The button allows you to go to the item's page if you have the rights.

Contextual menu

By right-clicking on a tile, you access the contextual menu which gives you access to several options

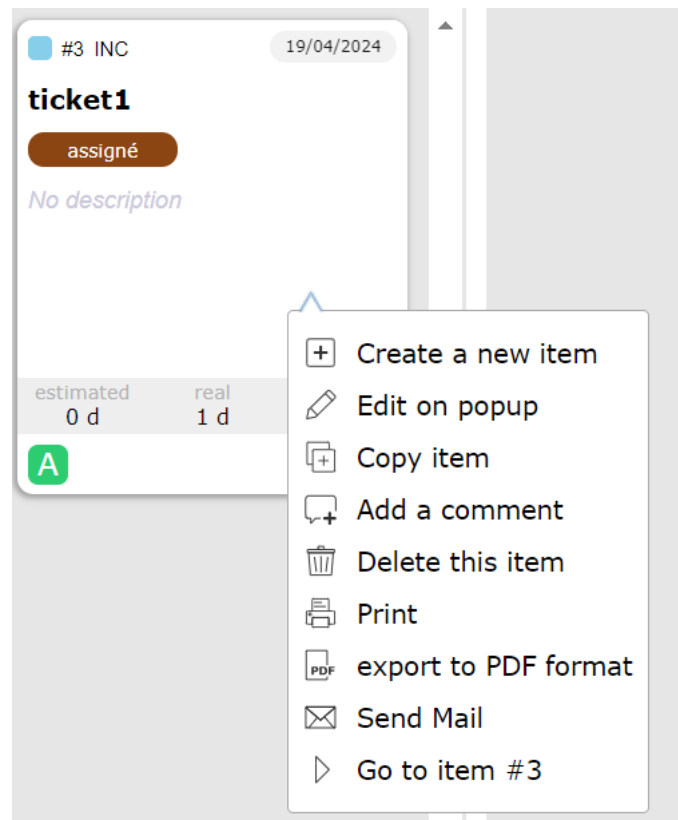




Fig. 13: contextual menu

These are the main options like create, edit, copy but also shortcuts to add comments or go to the element.

Operations on element

Edit an element

- Click on  to edit the element.
- Click on the button to edit the element directly from the Kanban screen. A pop-up is displayed with your item information as on the dedicated screen.
- Click on  to save your changes

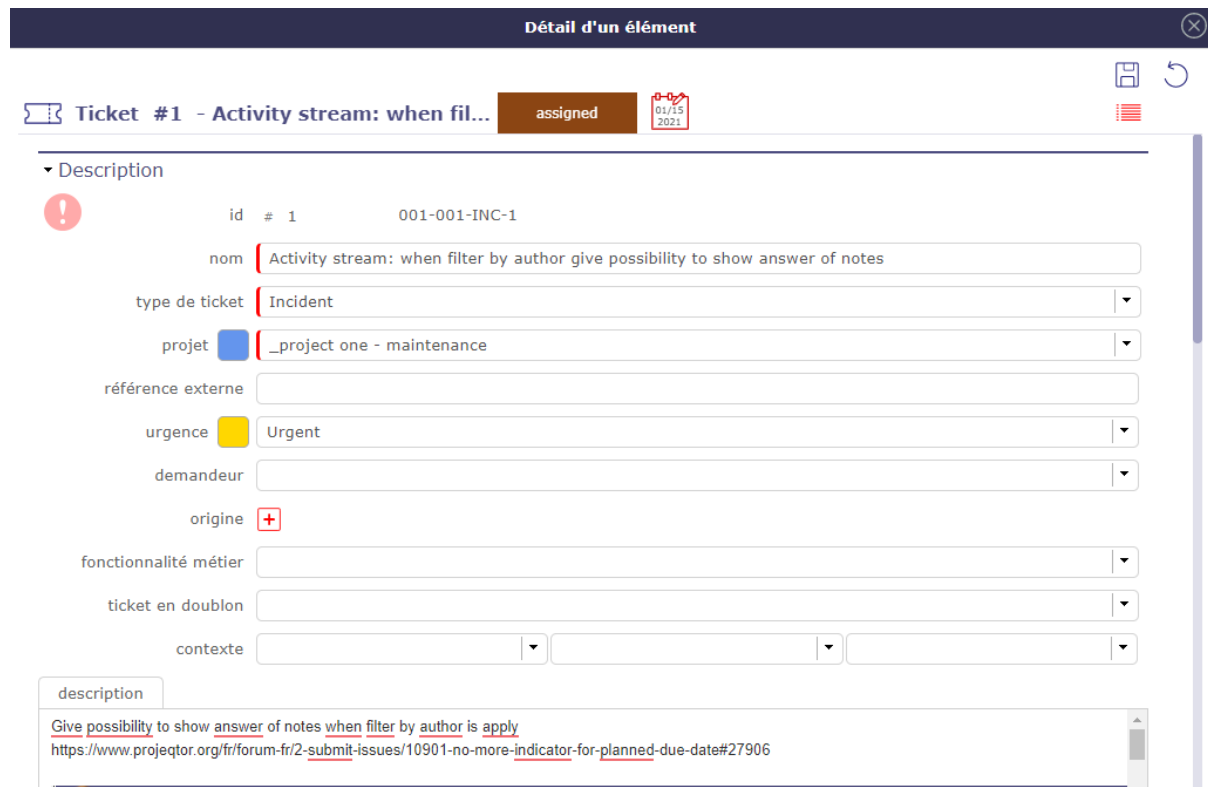


Fig. 14: Edit element window

Moves an element

To move tickets, activities, or anything else from your kanban, drag and drop a ticket into the corresponding column.

The heading of the moved element then changes to **green** when it is on a column where the movement is allowed and is **red** when it is on a column where the movement is prohibited.

If the Kanban is arranged as statuses, the new status after move, will be the first status of the range defined for the column.

For Kanbans based on the target product version and planning activities, the new field value will simply be the target.

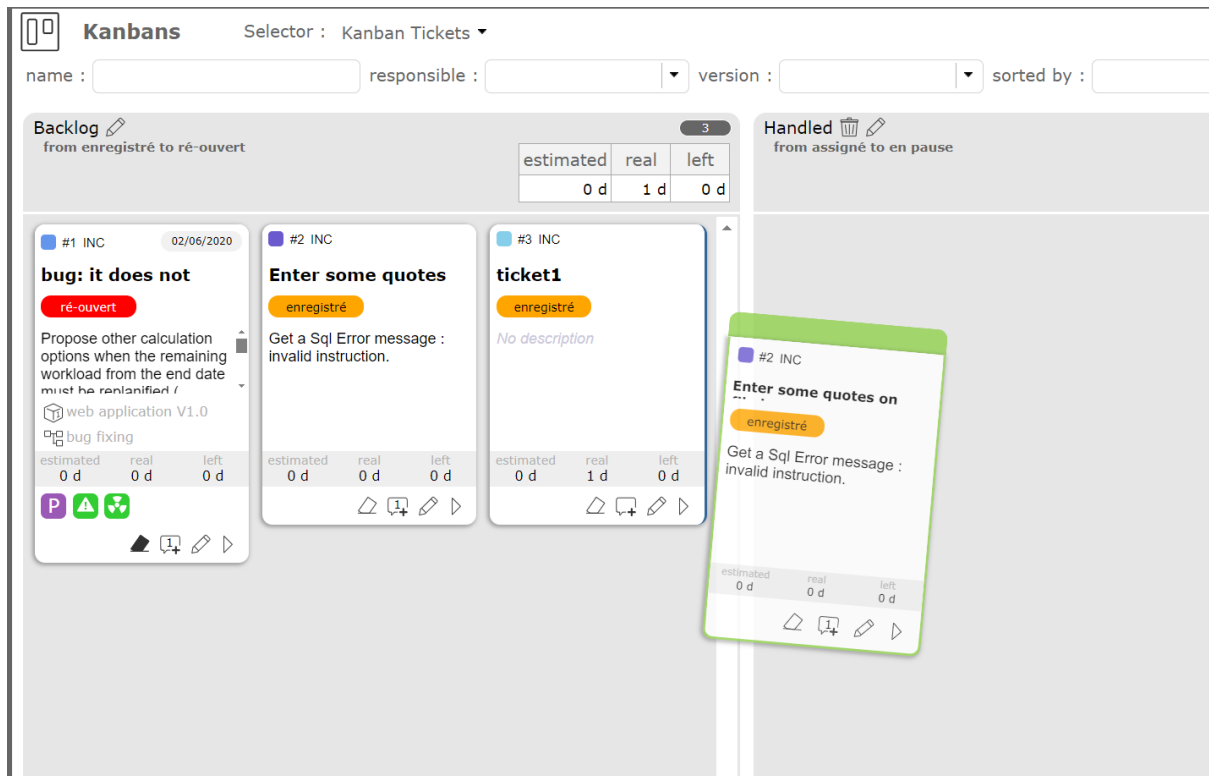


Fig. 15: Move an element

Forbidden moves

Displacements will change the value of the corresponding field for the moved element.

But the “status” change must respect the workflow configuration for the given item type. This is why some movements are prohibited.

Permitted moves are easily identified from prohibited moves by the color of the Ticket header or the moved Activity.

Updating

Depending on the configuration of the ticket type, some state changes may require the definition of new fields.

For example, in the default configuration, when changing to the “assigned” state, “responsible” is required, and when transitioning to the “terminated” state, “result” is required “.

In this case, when you move a ticket in the Kanban columns, a pop-up window appears to allow you to enter the missing value if it is not already defined.

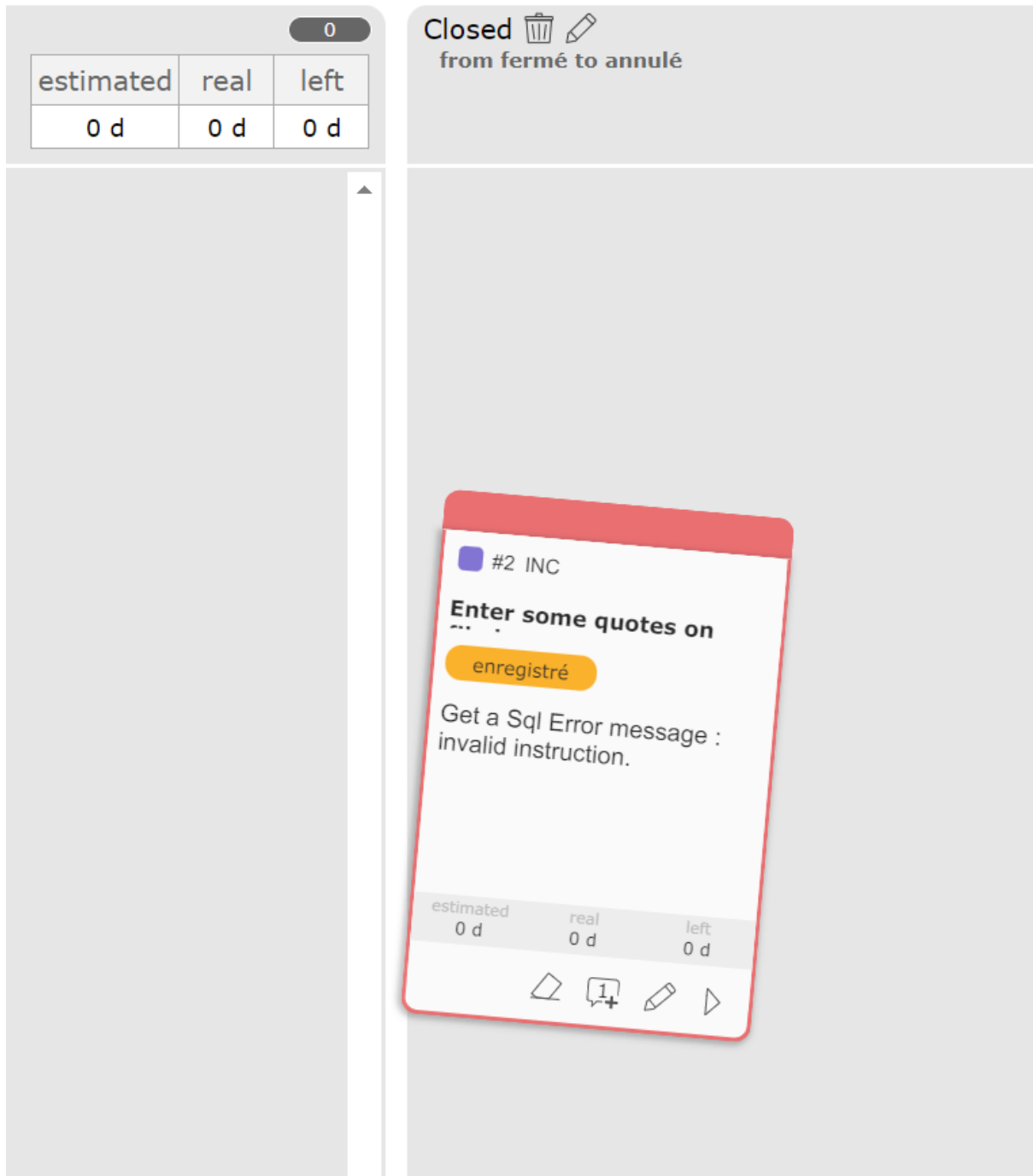


Fig. 16: movement refused

Vote

If the voting settings and your rights allow you to vote on an element, then the vote button will be clickable and you will be able to vote directly on the element from the Kanban screen.

Fig. 17: Vote pop-up

Enter your vote. The remaining points are automatically decremented.

Click on validate to close the pop-up.

According to the rules established for voting on the item, the button will fill up as the votes are cast.

See also:

voting management

3.1.2 Live Meeting

LiveMeeting allow you to manage meetings in an agile way:

- Manage written production quickly and easily
- Recovery in the liveMeeting of the agenda established on the meeting screen
- Automatic saving of the minutes when leaving the live meeting
- Automatically share the time between all participants
- Dynamically measure the speaking time of each participant
- Easily write minutes while assistants speak
- Easily manage actions / decisions / questions while writing minutes and add them with the enter button.
- Manage tickets, activities, actions and requirements with Kanban while writing minutes.
- Kanban status change manipulations are also indicated in the meeting minutes.

Click this button to access the Live Meeting Management screen.

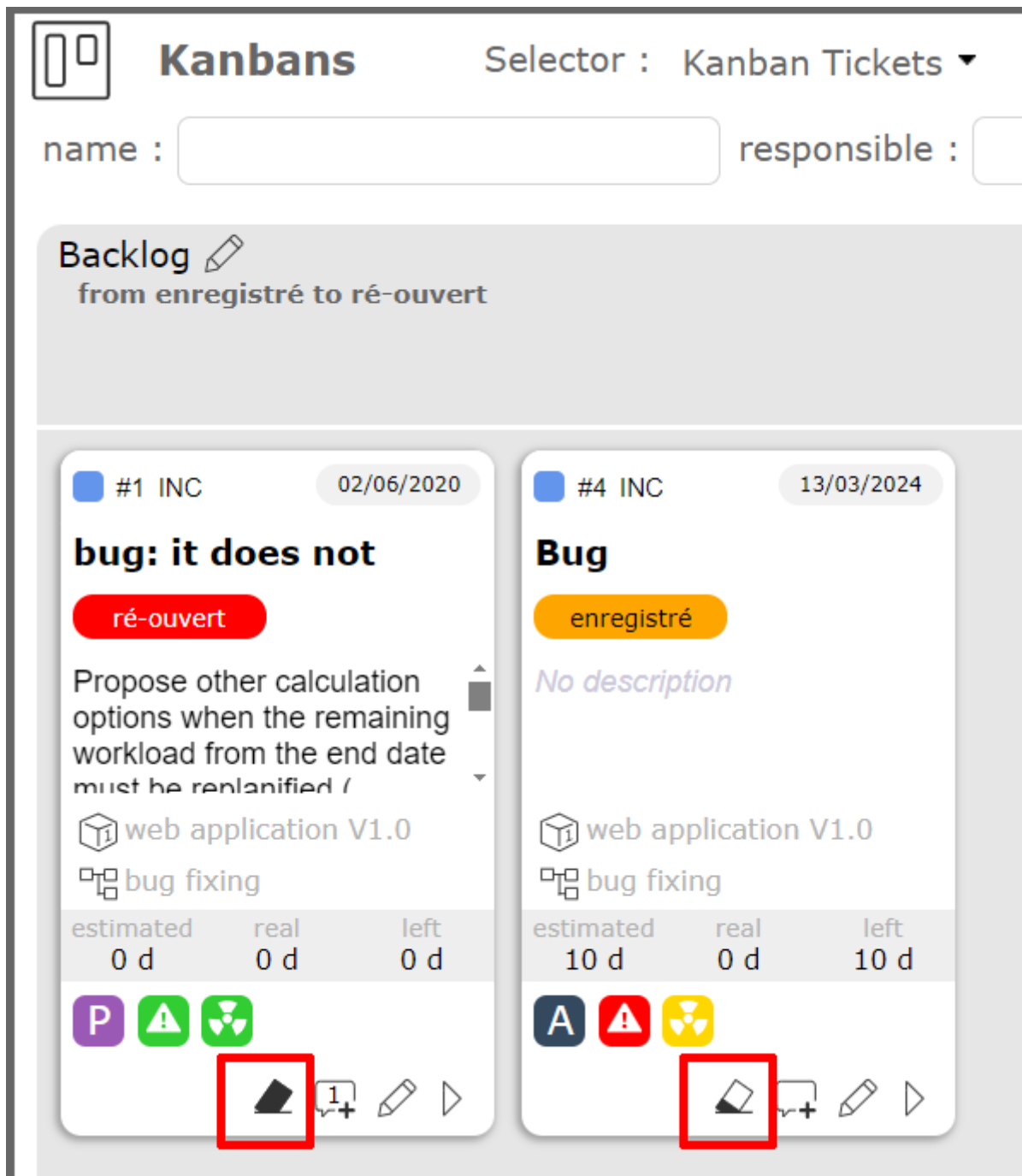


Fig. 18: icon indicating that votes have started or have been completely filled

▼ Description

id # 1 001-001-STE-1

name

meeting type

project

meeting date from to

location

Fig. 19: The Live Meeting button

Meeting : CommiteePX Hide time counters

external project lead 00:29:53	web developer 00:00:15	project manager 00:59:56	multi developer 00:29:55
--	----------------------------------	------------------------------------	------------------------------------

project manager [11:40:10]:

pause [11:40:15]





web developer [11:40:17]:

pause [11:40:22]

multi developer [11:40:28]:

Actions					Decisions					Questions				
id	name	responsible	due date	status	id	name	responsible	due date	status	id	name	responsible	due date	status

Fig. 20: The Live Meeting screen

- Click on **Hide time counters** to show or hide participants' tabs with their speaking time
- Click on  to exit the LiveMeeting screen
- Click on  to manage your kanbans since the livemeeting
- Click on  to display the QUEStions / Actions and Decisions
- Click on  to save the live meeting report

Starting a meeting

When the Live Meeting screen opens, the duration of the meeting is automatically distributed equally to all participants.

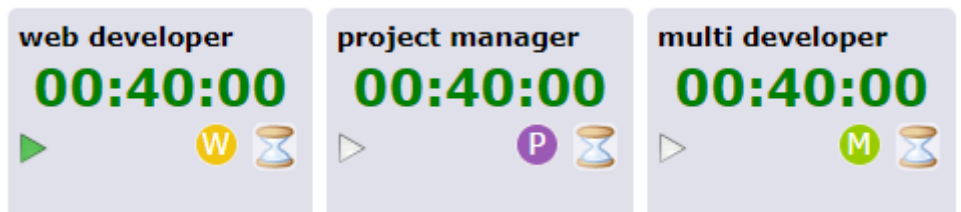





Fig. 21: Time distribution

- Click on  to start the meeting and to start decrementing the speaking time
- Click on  To stop the meeting and therefore close the LiveMeeting window to return to the current meeting screen
- Click on  to pause the speaker's time

Set the organizer

Before starting the meeting, you can define an organizer who will need additional speaking time to be able to lead the meeting.

To designate it, click twice on the hourglass  to obtain the symbol  on the icon.

The organizer is designated, and sees his time increment double by taking equitable time on the other participants.

Meeting : Commitee #5

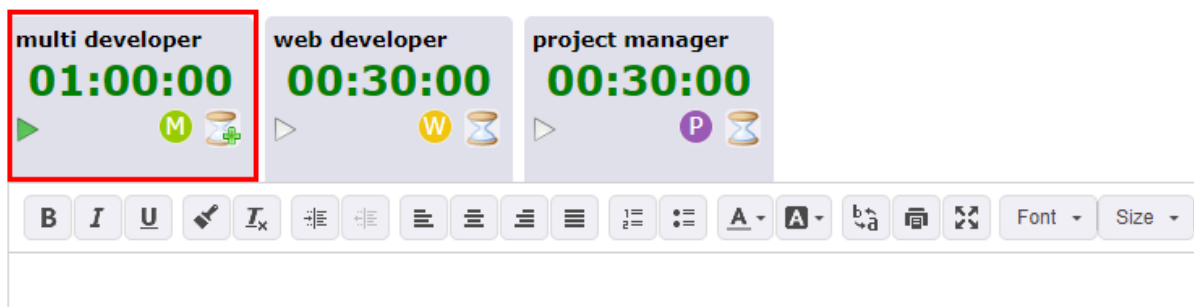


Fig. 22: The designated organizer has a PPlus on the hourglass icon of his tab



Note that only one participant can be defined as an organizer.

To set another participant as an organizer, you must first redefine the current organizer as a normal participant by clicking the hourglass button again.

Speaking Time

If you started the meeting by clicking on the Play icon at the top right of the screen, then this is the first speaker displayed, the one with the green sign that will begin speaking.

Otherwise, click on the speaker's tab of your choice to start your speaking time.

- Click on  to prevent a speaker from speaking
- Click on  to give him the floor again

If you prevent a speaker's speaking time by clicking on the hourglass, then the remaining speaking time of the speaker will be redistributed to the other participants entitled to speak.

Write a meeting report

During the course of the meeting, the person in charge of the report can inform and report the words of the various participants.

The text editor is dynamic and reacts to speakers who have the floor.

When one speaker is finished and another speaker speaks, a field is added in the text editor with the name of the speaker with the detail of the time

The pause is also mentioned always with the detail of the time.

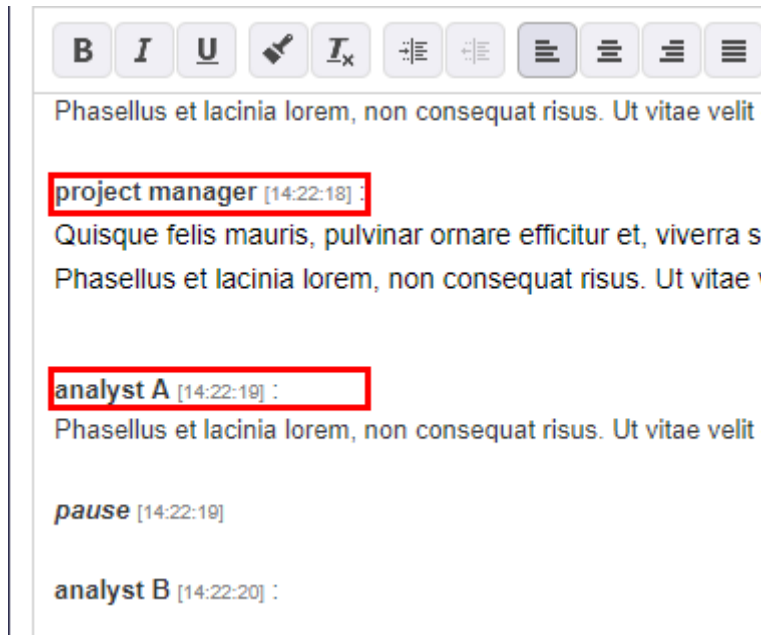


Fig. 23: Field with the speaker's name

When you stop LiveMeeting by clicking | meetingStop | the meeting report is automatically copied to the Minutes field in the treatment section.

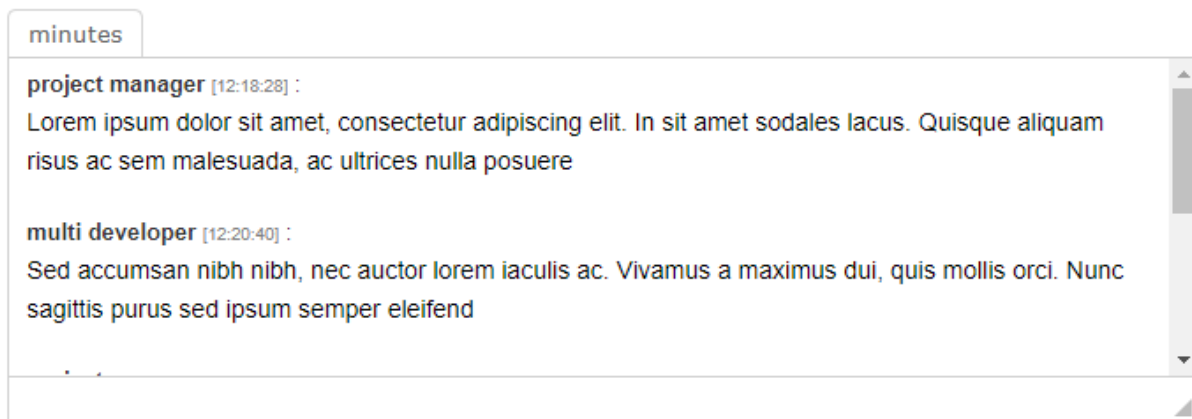


Fig. 24: The meeting report is copied in the minutes field in the treatment section

Actions, Decisions and Actions

In the lower part of the screen, if the kanban is not open, you have direct access to actions, decisions and questions.



Fig. 25: Actions, Decisions, Questions Management

Each list acts as the standard “linked element” element present on almost every element screen.

You can then list an item to add it to the list of related items, but also create a new item to add to the list, just like for the Linked Items feature.


All linked items through this feature will appear in linked items in the meeting.

There is a slight difference with related items, when you click on the name of an item, you are not redirected to it.





It simply opens in a pop-up form, allowing you to update it without leaving the LiveMeeting screen.

New element


You can create, edit, or delete an action, decision, or question from the live meeting screen.

Click on  at the top right of each section to add a new element

A pop up opens and allows you to create and edit the selected element.

- Click on  to select an item into the list by
- Click on  to create an item
- Click on  to undo the current manipulating and close the window
- Click on  click on filter to restrict display

You can also create a new item directly.

Fill in the fields with an explicit title and click on  to validate.

The line is displayed directly in the corresponding section without opening the pop up.



Fig. 26: Creating a new element

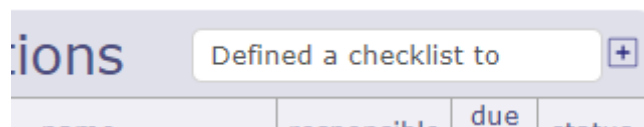


Fig. 27: Add a new element

3.1.3 Planning Poker

Planning Poker, also known as Scrum Poker, is a consensus-based gamified estimation technique primarily used to estimate the relative effort or size of development goals. (wikipedia)

ProjeQtOr integrates planning poker into its functionalities. You will be able to plan a planning poker session as a meeting and see it appear on the Gantt chart.

You define the project to which the session is linked, the user story (s) as well as the voters.

Planning poker session

The planning poker session screen is reserved for the session organizer and certain supervision profiles.

A planning poker session can be scheduled and is visible on the Gantt chart of the planning view.

Run a poker session

You define a date for your session, one or more user stories and the participants in the votes.

Click on Run estimate in front of the user stories you want to launch or on run all to launch all the user stories

When at least one user story is started, then voters will be able to access it on the planning poker estimate screen.

Only profiles with update rights can vote on the planning poker sessions screen.

The user story estimate is identical between the planning poker session screen and the planning poker estimate screen.

Planning poker type

In ProjeQtOr, basic, you find the types “live session” or “session with a due date”.

The types are customizable and can be changed according to your needs.

See: *Planning poker type*

User story

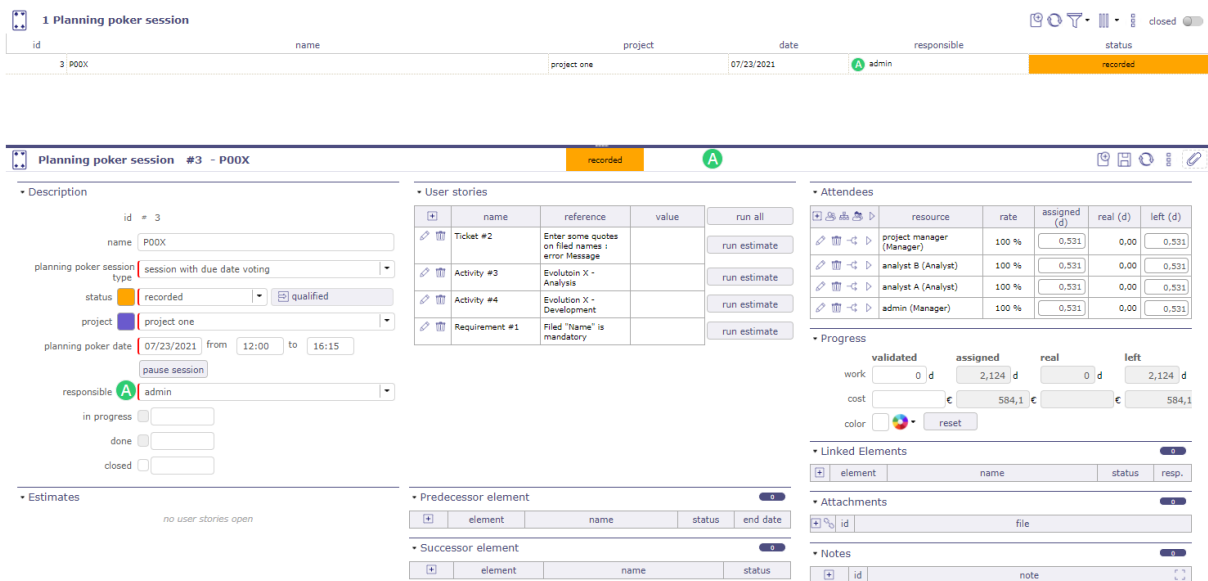


Fig. 28: Planning poker session screen

The User Story represents an Agile practice, used above all in Scrum, to “capture” the needs of the users by expressing in a general and not detailed way, the characteristics, the functions and the requirements of the product to be created.

In ProjeQtOr, a user story can be a ticket, an activity or a requirement.

A session can contain several user stories, there is no limit.

Each of these user stories can be started individually, in part or in full.

Attendees

Participants can be resources, contacts, or users.

Participants are assigned as on an activity, with a function linked to a cost.

You can assign a load manually but if you have entered a time slot then the load is automatically calculated.

Pause and stop session

You can pause the session. This will remove user stories from the planning poker estimates screen without actually closing or stopping the session.

Stop the session, will change the status of the latter to “done”.

User stories will still be visible on the estimates planning poker screen but you will no longer be able to vote.

Change the status to **in progress** so that the pause and closed buttons are visible again.

Closed a poker session

When all the votes are recorded, you have two options :

- Close the vote
- Turn the cards over

When you turn over the cards, the vote is indicated on each participant's card.

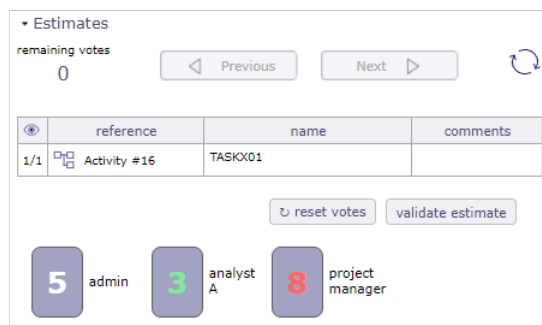


Fig. 29: Flip cards

You then have the possibility to reset the votes and this in accordance with the Scrum method, until the vote is unanimous.

If all the votes are unanimous, when the user story is closed, the complexity point that was voted on is indicated.

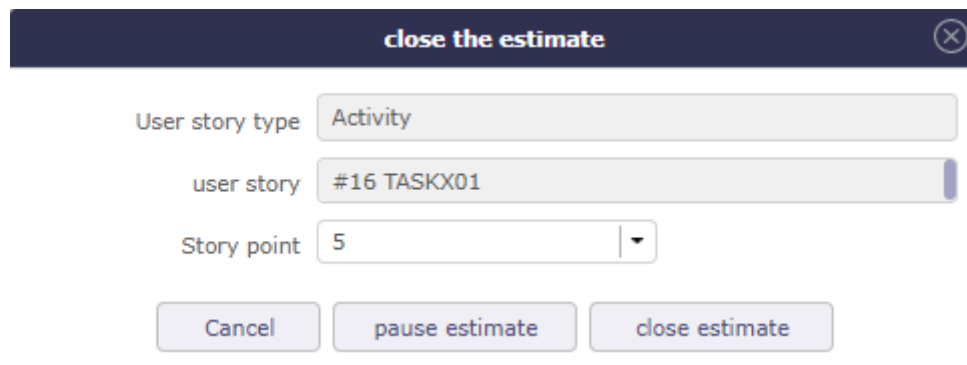


Fig. 30: Close of unanimous votes

If you close without the votes being unanimous, at the time of closing, the lowest and highest values are shown.

The lowest value is selected by default, but you can click the highest value to select it or select another value from the drop-down list.

When the estimate is closed, the value that was voted on is displayed in the user story table.

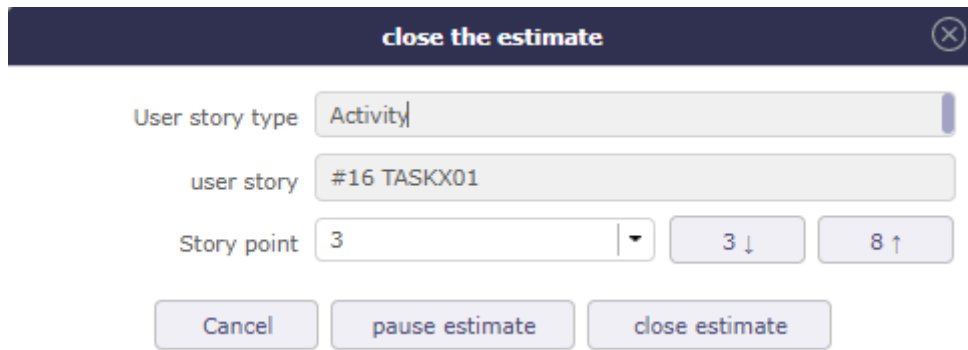


Fig. 31: Closure of non-unanimous votes

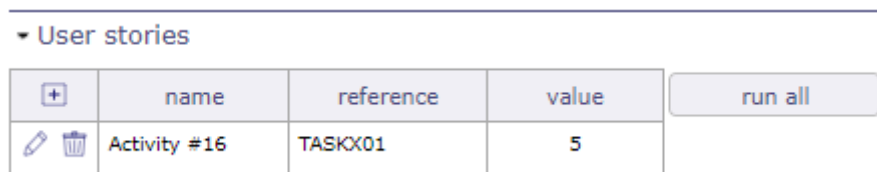


Fig. 32: Report of the value in the table of user stories

Planning poker estimate

This screen is intended for participants of the voting sessions.

User stories are visible on the planning poker estimates screen only when at least one user story is started.

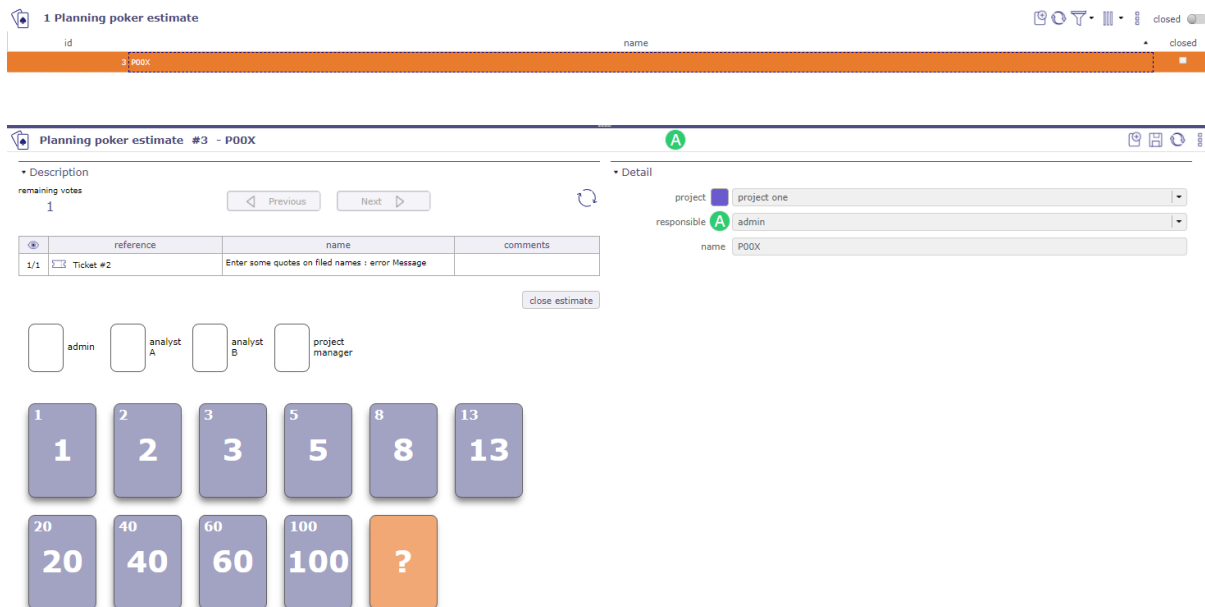


Fig. 33: Estimate planning poker screen

The participants can vote thanks to a series of numbered cards on the principle of the Fibonacci sequence, but in a rounded way.

These values are customizable.

See: *list of value - Story point*

Estimate an user story

Each participant clicks on a card in order to estimate the proposed user story.

If more than one user story then click on **next** to vote for the next user story.

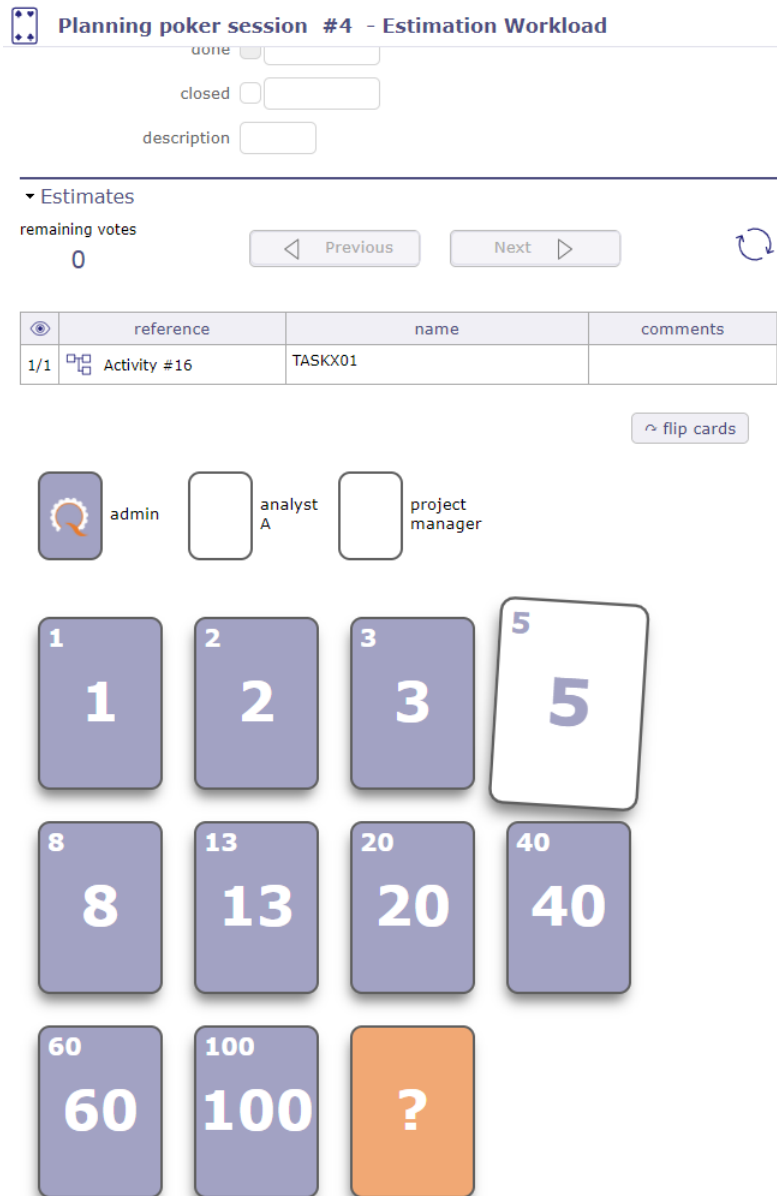



Fig. 34: Planning Poker estimate

- Click on  to refresh your screen and the votes
- Click on **flip** card to return the cards. Only if the user has the rights to do so.

When you have voted, the card changes color. Your vote has been registered

Remaining vote

The remaining votes correspond to the number of votes you need to cast.

Use this information to make sure you don't forget a user story.

SETTINGS

ProjeQtOr provides a very rich user interface.

It may be frightening at first glance because of the very numerous elements it provides, but once you'll get familiar to the structure of the interface you'll discover that it is quite simple as all screens have the same frames and sections always have similar structure and position.

4.1 User parameters

The User Settings screen allows you to configure personal settings, that is, for your personal session.

The parameters are organized by tab.

You can access the user parameters by going through the Configuration menu or through the connection window.

Note: User parameters are efficient even without saving.

Saving parameters will retrieve the selected parameters on each connection.

See also:

Menu session

4.1.1 Tab Display

Generic display parameter for user. Choose your theme - Language or size of icons...

Allows you to define the display of some elements of the interface like the history, the checklists, the closed elements or the style of the notes

or choose default behaviors like closing the page or flipping mode.

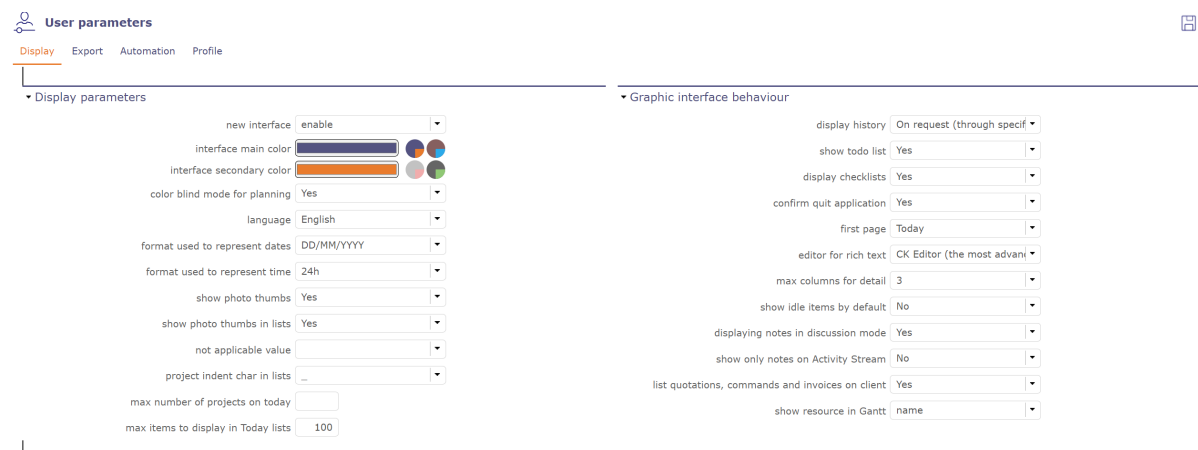


Fig. 1: Display Parameters

A color system for color blind people can be obtained on the planning view to modify the gantt bars and adapt them for this handicap.

See also:

Detail's bars Gantt

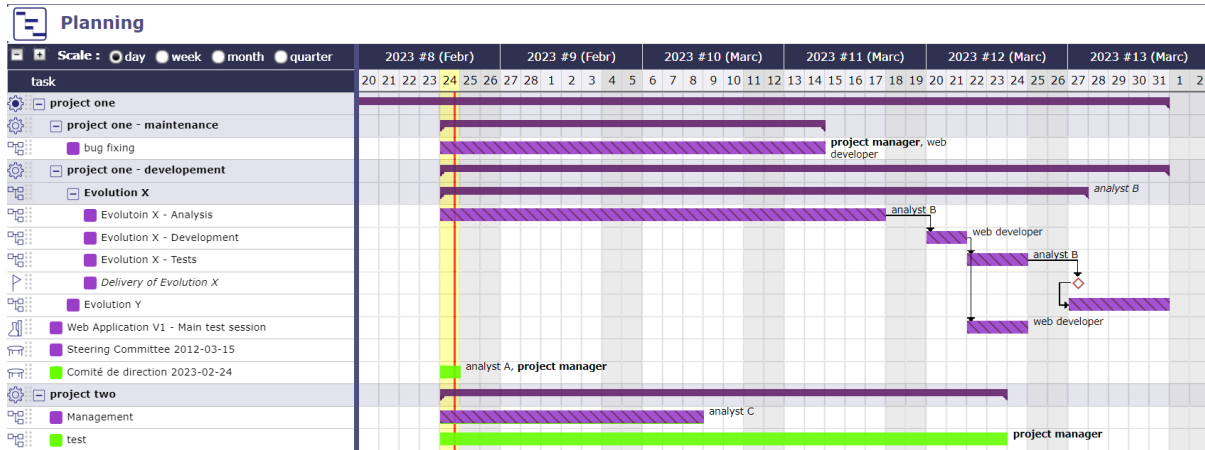


Fig. 2: Blind color Gantt view

4.1.2 Tab Export

In this section, you define some simple export or print settings.

4.1.3 Tab Automation

Default selected project and choice of character (Set to “none” to get a flat list) used to indent lists of projects, to represent the WBS structure of projects and sub-project.

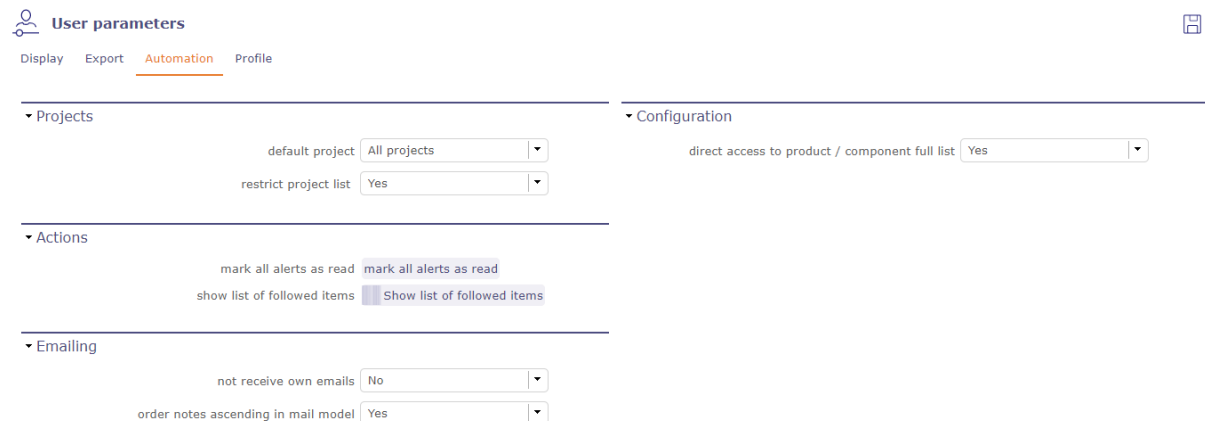


Fig. 3: Automation tab

You can also see all the items you are registered for tracking and delete them from this window.

4.1.4 Tab Profile



A photo can be defined for a user, a resource and a contact.

It is a visual identification associated with the name.

To default, the first letter of the name appear as long as you don't add photo.

Photo management

Browse your pc to find an image that suits you or drag and drop in the area indicated and validate.

- Click on  or photo frame to add an image file. To complete instruction (see: *Attachment file*).
- Click on  to remove the image.
- Click on the image to display the photo in its original format.

Note: Photo management can also be done in *Users, Resource , Contacts* screens, *thumbnails*

Section Password

Click on **Change Password** to set a new one.

4.2 Global Parameters

Global parameters screen allows configuration of application settings.

Depending on the modules installed, some tabs may not appear.

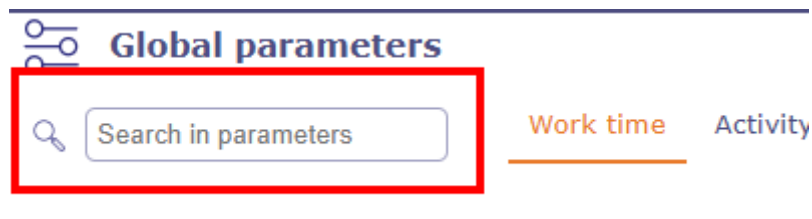


Fig. 4: Search in parameters

A search field allows you to find the parameters containing the entered word.

When you choose a setting, the search takes you directly to the corresponding tab and section and the setting is then highlighted.

Tip: Good to know

Moving the mouse over the caption of a parameter will display a tooltip with more description about the parameter.

4.2.1 Tab Work time

Daily work hours

Definition of the working hours applied in your company.

Used to calculate the time based on “hours worked”.

Global parameters

IMAP | Work time | Activity | Planning | Display | References | Configurat

Search in parameters

Automatic import of replies to emails

- IMAP host to check email input
- IMAP user to check email input
- IMAP password to check email input

files

nds)

ation

mailing list for logs

▼ Automatic import of replies to emails

email input check cron delay (in seconds)

IMAP host to check email input

IMAP user to check email input

IMAP password to check email input

Signing start identifier

action after processed emails

include attachments

allow up to (MB)

Fig. 5: Displaying the result of a search

Working hours per project

You can also apply specific working hours to each of your projects by setting the working hours per project option to yes.

You can then apply specific working hours on the project screen.

▼ Daily work hours

AM start time

AM end time

PM start time

PM end time

working hours per project ▼

Fig. 6: Workflow screen

Open days

Possibility to define the working days in the company.

For each day of the week, you can choose between open days or off days.

See also:

Resource section Calendars

Note: This parameter are taken into account in : **working days on calendars**,

The working days on the calculation and the display, the working days on the display of real work allocation.

Units for work

Parameters to determine the units used to calculate the actual work

Unit for Timesheet (real work) & Unit for Workload

Parameters to real work allocation and workload.

The fields Unit for real work allocation and for all work data can be in days or hours.

Number of hours per day

Allows to set number of hours per day.

Warning:

- If both values are different, rounding errors may occur.
- Remember that data is always stored in days.
- Duration will always be displayed in days, whatever the workload unit.

Timesheet

Defines behavior of tasks in the real work allocation screen.

Display only started tasks

Display only tasks with the *Macro status* activated.

Set to first 'in progress' status

Change the status of the task to the first "in progress" status when actual work is entered.

Set to first 'done' status

Change status of the task to the first "done" status when no left work remains.

Max days to book work (warning) :

Number of days that user can enter real work in the future before getting a warning.

Leave blank if you do not want warning.

This parameter does not apply to administrative projects

Max days to book work (blocking)

Number of days that user can enter real work in the future. This limit is blocking.

Leave blank if you do not want blocking.

This parameter does not apply to administrative projects.

Lock timesheet before validated start date

In the planning modes "must start on the validated date" and "does not start before the validated date", it is possible to block the resource allocation sheets before the validated start dates entered

Alert resource on input done by someone else

Alert the resource when some real work is entered by someone else.

Select your type of alert : Internal, Email, both or none.

Alert when timesheet canceled by other

Send an alert or mail when timesheet is cancelled by another resource.

Select your type of alert : Internal, Email, both or none

Display pools on timesheet

Possibly to display the pool whose the resource belongs to.

You can manage different trigger settings per recipient

Warning: Resources that do not have access to the imputations screen do not receive these alerts

Show pool to update their left work

This option is only accessible if the previous one is set to no.

When the resource pools are not displayed in the allocation lines, an icon gives you the possibility of displaying at least the remainder to be done for them.



					0	0	0	0	0	0	0	0	0	0
Analyste	25/03/2024	08/04/2024	10	0	0	0	0	0	0	0	0	0	10	10
Analyste	11/04/2024	22/04/2024	5	0	0	0	0	0	0	0	0	0	5	5 
					0	0	0	0	0	0	0	0	0	0
Analyste			0	0	0	0	0	0	0	0	0	0	0	0

Fig. 7: Line of the pool

					0	0	0	0	0	0	0	0	0	0
e	25/03/2024	08/04/2024	10	0	0	0	0	0	0	0	0	0	10	10
l	11/04/2024	22/04/2024	5	0	0	0	0	0	0	0	0	0	5	5
+	11/04/2024	22/04/2024	15	0	0	0	0	0	0	0	0	0	15	15
					0	0	0	0	0	0	0	0	0	0

Fig. 8: Line of the pool

- Click on  to view the resource pool row and edit the left work.

Auto update left work on Pool

If a resource in the pool fill real work on a schedulable task in its own name while it has a remaining amount of 0, then the remaining time on the pool will be decremented.

After submit, alert to project leader

After submission what type of alert would you want to send to the project leader

After submit, alert to team manager

After submission what type of alert would you want to send to the team manager

After submit, alert to organism manager

After submission what type of alert would you want to send to the organism manager

If work input to soon, alert to the project leader

If the resource starts filling out actual work on an activity that shouldn't start on the date of this posting, then the project manager can receive an alert, an email, or both.

Timesheet input format

- Week / Month: You can choose between displaying by week or by month directly on the allocation sheet using the dedicated button.
- Week: Display will only be done per week.
- Month: Display will only be per month Be careful with this display which can cause problems on screens that are too small (<15")

Hide button "Enter real as planned"

Define whether to show/hide autofill of scheduled work.

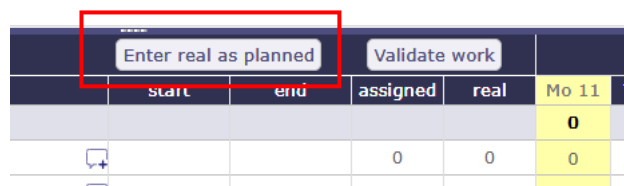


Fig. 9: Enter real as planned on the timesheet screen

4.2.2 Tab Activity

Tickets

Specific behavior for ticket management

Only responsible works on ticket

Only responsible can enter some real work on the ticket.

Ticket responsible from product Responsible

Select if the product Responsible is displayed (always, if empty, never) as Ticket Responsible on that screen

Limit planning activity to those with flag

Display planning activity selected for the ticket

Enable to filter ticket reports by priority

Can display tickets on Report screen by level of priority

Display ticket at client level

Display of tickets on the client screen and on the Contacts screen

Display ticket at version level

Display of tickets on the version screen

Manage accountable on tickets

Display the coordinator as Accountable, so the Responsible is the current actor

Controls and restrictions

Specific parameters for the control and management of restrictions

Allow type restriction on project

Allow to define additional restriction's type on each project additionally to restrictions defined at project type level. If so, a Restrict Types button appears in the detail area and allows you to define the type restriction .

▾ Types restrictions

restrict types (when restricting types, only these types will be displayed for the projects of this type)

restrictions exist for

Restriction on types by profile hides items

If set to yes, users with profiles won't see items of unselected types

If set to no, users will just not have possibility to create new items with such types

Limit the functions to those of the resource

On assignments limit functions to those of the resource. Ones with cost and default one.

Tag list by project

By enabling this option, tags that are created on a project will only be visible on that project and saved tags will not be added to existing ones on another project.

Leaves system

Allows you to determine who will be the administrator of regulated absences.

The administrator of regulated absences can define the parameters and authorizations of the screens in this module.

4.2.3 Tab Planning

Planning

Specific parameters about Gantt planning presentation.

Apply calculation priority per project

Promote the prioritization of activities to preferentially calculate the tasks of a project together.

Allows to preserve the consistency of a project in particular for parent activities.

Does not prioritize activities with a fixed duration compared to other planning modes.

No allows to preserve behavior existing before V12.0.

Do not start before the validated start date

This option allows you to use the validated dates of the project to start it at a later date.

- Planning only starts from this date, as if there was a fixed milestone preceding the project.
- Resource timesheets on the project will be blocked before the specified date.

Priority of activities from end date

If this parameter is Yes, the activities will be prioritized according to the validated end date.

Despite its priority place in the WBS, the Evolution X - Analysis activity is scheduled after the Evolution X - Development activity due to its end date later than the second

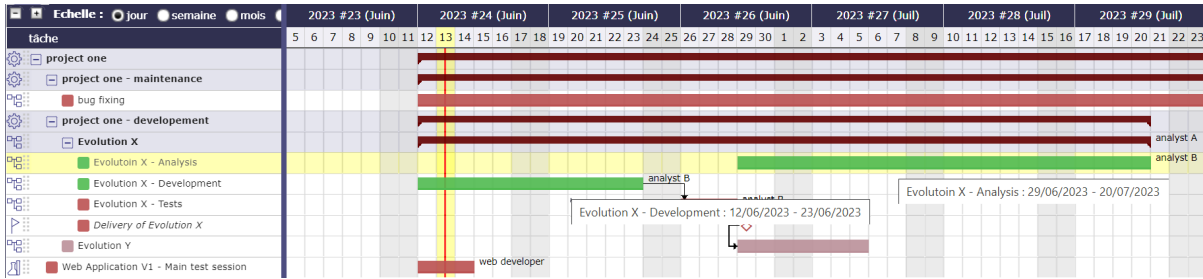
✕

restrict types

when restricting types, only these types will be displayed for the projects of this type

Actions type	<input type="checkbox"/> Project	<input type="checkbox"/> Customer	<input type="checkbox"/> Internal		
Activities type	<input type="checkbox"/> Task	<input type="checkbox"/> Development	<input type="checkbox"/> Evolution	<input type="checkbox"/> Management	<input type="checkbox"/> Phase
Budget type	<input type="checkbox"/> Initial	<input type="checkbox"/> Additional			
Catalogs type	<input type="checkbox"/> Product	<input type="checkbox"/> Service			
Change requests types	<input type="checkbox"/> recurring problem	<input type="checkbox"/> functional improvement	<input type="checkbox"/> technical improvement	<input type="checkbox"/> regulatory constraint	<input type="checkbox"/> process and quality
Client contract type	<input type="checkbox"/> management assistance	<input type="checkbox"/> hosting	<input type="checkbox"/> technical improvement	<input type="checkbox"/> maintenance & support	
Client invoices type	<input type="checkbox"/> Partial bill	<input type="checkbox"/> Final bill	<input type="checkbox"/> Complete bill		
Component Version Types	<input type="checkbox"/> Major Version	<input type="checkbox"/> Minor Version	<input type="checkbox"/> Patch		
Components type	<input type="checkbox"/> specific	<input type="checkbox"/> on the shelf			
Decisions type	<input type="checkbox"/> Functional	<input type="checkbox"/> Operational	<input type="checkbox"/> Contractual	<input type="checkbox"/> Strategic	
Deliverable type	<input type="checkbox"/> document	<input type="checkbox"/> software	<input type="checkbox"/> hardware		
Delivery type	<input type="checkbox"/> document	<input type="checkbox"/> software	<input type="checkbox"/> hardware		
Documents type	<input type="checkbox"/> Contract	<input type="checkbox"/> Management	<input type="checkbox"/> Meeting Review	<input type="checkbox"/> Follow-up	<input type="checkbox"/> Financial
	<input type="checkbox"/> Need expression	<input type="checkbox"/> General Specification	<input type="checkbox"/> Detailed Specification	<input type="checkbox"/> General Conception	<input type="checkbox"/> Detail Conception
	<input type="checkbox"/> Test Plan	<input type="checkbox"/> Installaton manual	<input type="checkbox"/> Exploitation manual	<input type="checkbox"/> User manual	
Incoming type	<input type="checkbox"/> document	<input type="checkbox"/> software	<input type="checkbox"/> hardware		
Issues type	<input type="checkbox"/> Technical issue	<input type="checkbox"/> Process non applicability	<input type="checkbox"/> Process non conformity	<input type="checkbox"/> Quality non conformity	<input type="checkbox"/> Delay non respect
	<input type="checkbox"/> Resource management issue	<input type="checkbox"/> Financial loss	<input type="checkbox"/> Customer complaint		
Meetings type	<input type="checkbox"/> Steering Committee	<input type="checkbox"/> Progress Metting	<input type="checkbox"/> Team meeting		
Milestones type	<input type="checkbox"/> Deliverable	<input type="checkbox"/> Incoming	<input type="checkbox"/> Key date		
Notifications type	<input type="checkbox"/> ALERT	<input type="checkbox"/> WARNING	<input type="checkbox"/> INFO		
Opportunities type	<input type="checkbox"/> Contractual	<input type="checkbox"/> Operational	<input type="checkbox"/> Technical		
Organizations types	<input type="checkbox"/> Department	<input type="checkbox"/> Unit	<input type="checkbox"/> Location		
Products type	<input type="checkbox"/> software	<input type="checkbox"/> service			
Products version type	<input type="checkbox"/> Major Version	<input type="checkbox"/> Minor Version	<input type="checkbox"/> Patch		
Questions type	<input type="checkbox"/> Functional	<input type="checkbox"/> Technical			
Requirements type	<input type="checkbox"/> Functional	<input type="checkbox"/> Technical	<input type="checkbox"/> Security	<input type="checkbox"/> Regulatory	
Risks type	<input type="checkbox"/> Contractual	<input type="checkbox"/> Operational	<input type="checkbox"/> Technical		
Test cases type	<input type="checkbox"/> Requirement test	<input type="checkbox"/> Unit test	<input type="checkbox"/> Non regression		
Test sessions type	<input type="checkbox"/> Evolution test session	<input type="checkbox"/> Development test session	<input type="checkbox"/> Non regression test session	<input type="checkbox"/> Unitary case test session	
Tickets type	<input type="checkbox"/> Incident	<input type="checkbox"/> Support / Assistance	<input type="checkbox"/> Anomaly / Bug		
provider contract type	<input type="checkbox"/> management assistance	<input type="checkbox"/> hosting	<input type="checkbox"/> technical improvement	<input type="checkbox"/> maintenance & support	

Fig. 10: Restrict type box



planning mode for parent tasks

Activities that have sub-activities are planned in a smoothed manner over the duration made up of the sub-activities.

This parameter allows you to modify the behavior of this smoothing

- **without overbooking**

If the resource is already used the duration of the parent activity can be extended

- **with inter-project overbooking**

If the resource is used on another project the resource can be overused so as not to extend the duration of the parent activity

- **with intra-project overbooking**

The duration will be preserved by possibly overusing the resource

Show resource in Gantt

Select if the resource can be displayed in a Gantt chart, and format for display (name or initials or none).

Apply strict mode for dependencies

Defines if a task can begin the same day as the preceding one.

- If yes, the successor should begin the next day
- If no, the successor can start the same day.

Manual progress of fixed-duration activities

Choose whether the progress should be calculated or entered manually.

Possibility of managing activities on real time

If yes, you correlate the validated, assigned, actual loads and the rest to be done.

That is, the validated load, the assigned load and the revised (reassessed) load will always be equal.

If so, the addition of an “activity over time” option is added to the *activity types*.

Warning: This option is not available for activities managed in work units.

Default overuse mode in planning calculation

You can automate the overuse calculation on the Gantt chart.

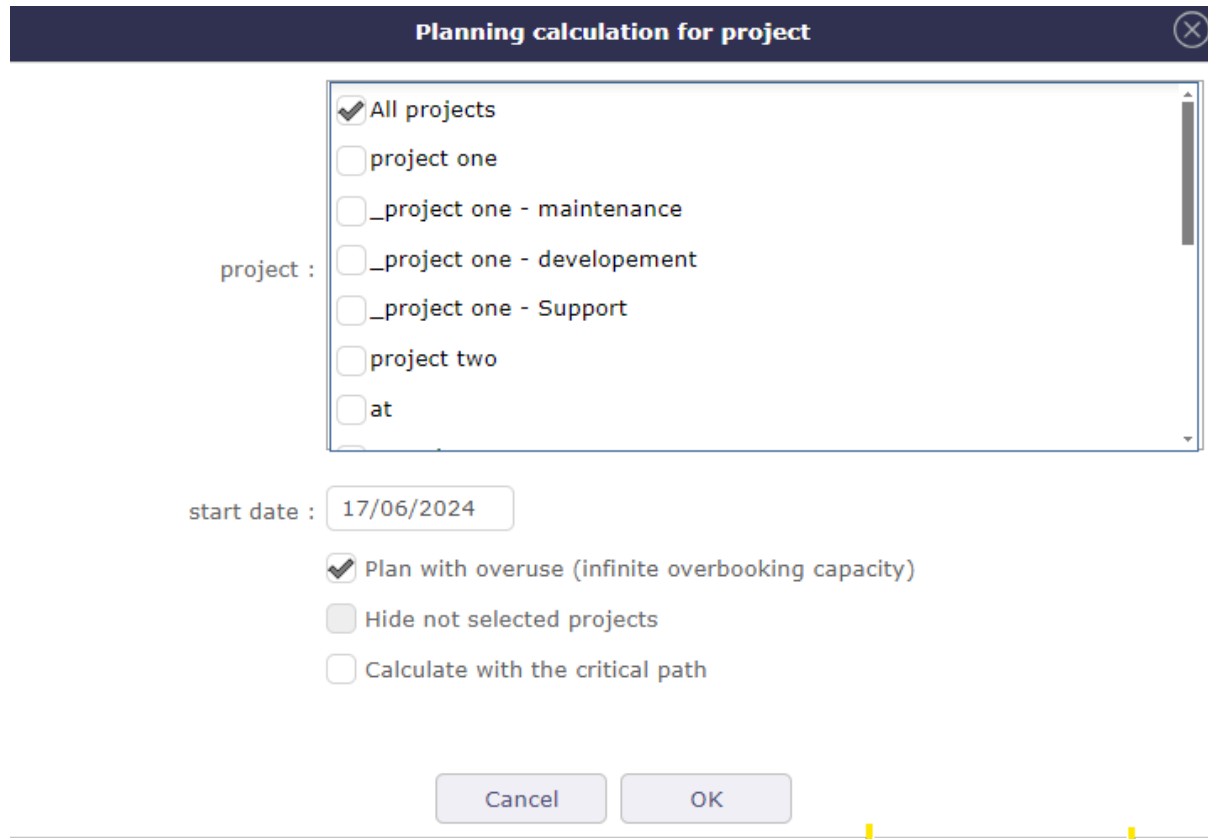


Fig. 11: Automatic calculation of overuse

In this case, the checkbox will be automatically enabled for each calculation launched.

Manage inherited end date

- End date can be inherited from successors or parents.
- Gantt bars are displayed in pink if they are driven by inherited end dates.
- Whether this parameter is Yes or No, the last priority criterion is the order in the WBS.
- Prioritization by end date occurs just before this default criterion.

Manual planned interventions enter work as

Choose whether the work entered in the manual planning should be saved as real work or planned work.

See also:

Manual planning mode

Planned Interventions

Effect of capacity on planned interventions

- **Limit duration**

Limit duration a resource with capacity 0.8 can be planned only one half-day of 0.5d

- **Determine Duration**

Determine duration a resource with capacity 0.8 can be planned on 2 half-days of 0.4d each

- **None**

A resource with capacity 0.8 can be planned on 2 half-days of 0.5d each

max items to display in Gant Planning

You choose the number of rows you display in the Gantt chart.

Milestones

Specific parameters for Milestones management

Auto link the milestone

It optionally allows you to display the element linked to the milestone (The option above should be on “yes” to have access to the selection of milestone targeted)

Set milestone from product version

It optionally allows you to automatically retrieve the milestone from the milestone of the Project Version.

Update milestone responsible from deliverable

Update milestone Responsible automatically when the Responsible of deliverable has changed.

Update milestone responsible from incoming

Update milestone Responsible automatically when the Responsible of deliverable has changed.

Update deliverable responsible from milestone

Update deliverable Responsible automatically when the Responsible of milestone has changed.

Update incoming responsible from milestone

Update incoming Responsible automatically when the Responsible of milestone has changed.

Allocation & Assignment

Specific parameter for Pool of resource et behavior on activities.

Automatic allocation of pool resources

Automatic allocation of resources of the pool when allocating a pool to a project.

- **Explicit allocation**

When you assign the pool to the project, the resources will appear in the allocation table in addition to the pool row.

And in the drop-down list of resources for assigning to activities.

- **Implicit allocation**

When you assign the pool to the project, only the row of the pool is shown in the allocation table.

The resources composing it are however present in the drop-down list of resources on the table of assignments.

- **No**

None of the resources making up the pool are visible in the assignments table and they will not appear in the drop-down list of assignments.

Status change on assignment

When you assign a resource to a schedulable element of ProjeQtOr, you can modify the status of the element when creating an assignment.

For this behavior to be effective, you must specify which status will trigger this behavior. See: *Status*

When creating the assignment, the status will be automatically changed unless it was already in the trigger status..

Automation

Parameters to manage automations

Consolidate validated work & cost

Select if validated work & cost are consolidated on top activities and therefore for projects.

Select whether posted work and cost are consolidated across major activities and therefore across projects.

It is therefore the charges and costs of the sub-activities that will be transferred to the “mother” activities and therefore to the projects.

- **Never:** Not consolidated. Charges and costs will only be entered and consolidated manually.
- **Always:** The values are always replaced on the parent activities and the project. If the parent activities were filled in then the values will be overwritten by the child activities.
- **Only is set:** Replaces values only if parents are given. An exception is made if the parent is set to 0 / “null”. In this case, the parent is not overwritten.

Auto set Responsible if single resource:

Behavior about management of responsible, including automatic initialization of responsible.
Automatically set Responsible if not set and by the only one resource allocated to the project

Auto allocated manager to the project:

Automatically create an allocation for the project Manager to the project. He should be a resource.

Auto set responsible if needed:

Automatically set Responsible to current resource (as using the element) if not set and if a Responsible is required (respecting access rights)

Auto assign responsible to activity:

Assign automatically the Responsible to activity

Auto set parent status:

Automatically set the status of the parent element (in the WBS structure) from the status of the child elements.
So that when the first child changes to “in progress”, the parent changes to “in progress” and when all children are done, the parent changes to done.

Copy items directly to status “recorded”

When you *copy elements* in projeQtOr, many options are available as well as the possibility to check a box that will move the copied element to the first state of your workflow.

Without this box enabled, the element will remain in the intermediate state “copied” which could cause errors in calculations or automation.

Enabling this setting allows you to automatically check the box in the element copy function.

4.2.4 Tab Display

Display

Graphic interface behavior and generic display parameters.

Name of the instance

Change the window’s name. The name appears at the top center of the window.

Max number of projects on today

Limit the display of the “today list”. items are generally ordered by issue date increasing.

Max items to display in Today lists

Limit the display of items displayed in sections of the Today screen. Items are generally ordered by ascending issue date.

Quick filtering by status

Allow to filter on lists the element by status checking boxes. Refresh to make appear on boxes a new state just created on list .

Quick filtering by tags

Allows you to filter items on lists by tags by checking the corresponding boxes.

Save tags directly under the item name. Display existing tags using the activation switch and filter your lists using tags.

hide hours on ticket due dates

This option allows you to display due dates on tickets without times.

Default values for user parameters

Default values for user

New interface

Choose between interface v8.6 or the new interface v9.0

Theme colors

The v9.0 interface is composed of two main colors which are declined throughout the application in different hues and saturation to keep the same charter spirit.

- Interface main color: choose the main color that will be applied to the main architectural elements
- Interface secondary color: choose the secondary color that will be applied on the navigation and highlighting elements
- Color discs: You have pre-recorded color discs available. One offers the colors of classic ProjeQtOr. Two others are proposals. The fourth will take the colors that you have saved in the global settings for your instances. They are accelerators to apply your themes.

Default language

Choose among 19 languages / easy come back with translation in target language.

Default theme (only available with version 8.6)

More than 30 themes choices.

First page

Choice of the first visible screen after the connection.

Lock first page

Allows the administrator to select the screen of their choice and block it for users.

They will not see the setting in their connection menu or in user settings > Display

Menu top mode view

You choose how your favorites will be displayed. As text, icons, or both.

Menu left mode view

The top menu is invisible or not at each connection.

Choose how your principal menu will be display. Text or icons and text.

Tip: Menu v9.0

To show or hide the icons of the new menu, right click on the menu.

Icone size in menu (only available with version 8.6)

Icon size are default : user can overwrite these values.

Display of the upper menu (only available with version 8.6)

The top menu is invisible or not at each connection.

Display of the left menu (only available with version 8.6)

The top menu is invisible or not at each connection.


Create new item on pop-up

You determine if the global creation button will open a pop up or go directly to the screen of the element you want to create.

Display history

- No
- Yes
- Yes with work
- On request through specific button

To show or hide the icons of the new menu, right click on the menu.

The button  will then be displayed in the menu of the details area of each element.

Editor for rich text

Choose your favorite text editor.

Not applicable value

Choice of the symbol defining the non-applicable values.

On the global view the value of the field that has no applicable value for the given column will display this symbol

Restrict project list

When creating an element, name of the project stays like than the one selected at the selector or on contrary offers choice on global list of projects

Export in XLS or ODS

Choose the format in which you want to export either in native excel format or with the ODS format of OpenDocument.

Displaying notes in discussion mode

By default, the notes are displayed in ascending order of creation. To quickly and easily view the replies to certain notes, this option allows you to display the replies under the corresponding notes with an indentation to the right.

Show only notes on Activity Stream

if so, you will not see the status change and item update.

Not receive own emails

You don't receive the emails you create.

Order notes ascending in email model

Choice of display of notes in the email template.

If **YES**, you display the notes in ascending order of creation. From the first ID to the last. Some notes containing answers will therefore not necessarily follow the order of display.

If **NO**, You display the notes as they appear on the screen with the answers under the corresponding notes

In email templates you can call notes in different ways.

With the codes `${NOTES}` and `${NOTESTD}`

`${NOTESTD}` allows you to display notes as they are by default.

Notes		
admin	13/12/2022 10:47	...
user5	02/12/2022 12:02	...
user3	02/12/2022 12:02	...
user1	02/12/2022 12:01	...
user2	02/12/2022 12:01	...
admin	02/12/2022 12:01	...
admin	02/12/2022 12:01	...
admin	02/12/2022 12:00	...
user1	02/12/2022 12:00	...
user5	02/12/2022 11:59	...
user2	02/12/2022 11:58	...
admin	02/12/2022 11:47	...
admin	02/12/2022 11:47	...

Fig. 12: Notes displayed by default in emails

`${NOTE}` allows you to display notes on a new table model.

See also:

email template

Notes		
Id	Nom	Date
5	Client ma note	2022-12-02 11:47:26
6	Revenir ma note	2022-12-02 11:47:52
9	Client ma	2022-12-02 11:58:07
11	Client ma	2022-12-02 11:59:37
12	Client doit payer ma note	2022-12-02 12:00:16
13	test	2022-12-02 12:00:55
14	test	2022-12-02 12:01:14
15	test 2	2022-12-02 12:01:47
16	client ma 2	2022-12-02 12:01:54
17	Supprimer photo	2022-12-02 12:01:56
18	test	2022-12-02 12:02:00
19	Client ma	2022-12-02 12:02:11
21	test	2022-12-13 10:47:47

Fig. 13: Notes displayed in spreadsheet in emails

List quotations, commands and invoices on client

Display or not the list of financial elements related to the customer on the screen of the latter.

Please note that the parameter also exists on the user side. If the latter is not activated also then the financial elements will not be visible.

Enable direct update of test case run

Display or not the list of financial elements related to the customer on the screen of the latter.

Colors of activities by type in the planning

Display or not the list of financial elements related to the customer on the screen of the latter.

Format used to represent dates

Choose the date format you want to use.

Format used to represent time

Choose 24h or 12h time format to display times in the app.

4.2.5 Tab References

Format for reference numbering

Sections for format references

Prefix format for reference

Allows to define reference formats for items of element, documents and bills.

Can contain prefix :

- {PROJ} for project code,
- {TYPE} for type code,
- {YEAR} for current year
- {MONTH} for current month.

Number of digits for reference number

Indicate the number of digits you want to appear in your reference.

Change reference on type or project change

Change the reference on type change of element will generate missing numbers in reference.

Document reference format

Sections for document format references

Document reference format

Format can contain :

- {PROJ} for project code,
- {TYPE} for type code,
- {NUM} for number as computed for reference,
- {NAME} for document name.

You can allow or forbid downloading locked files in this section.

Version reference suffix

Suffix can contain {VERS} for version name.

Separator for draft in version name

Choose the sign for the separator of the draft.

Preserve uploaded file name

If yes, the file is downloaded with the name of original file.

If no, the document take the reference formatted name.

Forbid download of locked document

Forbid document download if yes is checked.

Add version of document without uploading a file

Possibility to add a new version without file.

Bill reference format

Sections for bill format references

Invoice reference format

Reference format : can contain {NUME} for version name.

The {NUM} code can only be used for the document.

Number of digit for invoice number

Choice of the number of digits to display in an invoice.

4.2.6 Tab Configuration

Product and Component

This menu contains all the parameters for configuration management

Display Business features

Filter on date.

Display language in Product/Component (Version)

Enable language.

Display contexts in Product/Component (Version)

Enable contexts.

Display Tenders on Products, Components, Versions

Display a section to list linked Tenders on products, component, product version and component versions.

Include sub-products in structure

Include sub-products in display of product structure (flat or not).

Versions

This section allows you to manage more details in the behavior of the elements linked to the versions.

Display the start and delivery milestones

Display start and delivery milestones for product/component version and delivery dates in flat structure.

List of activity on component version

Display the list of activity.

Direct access to product / component full list

When selecting a component, we go directly to the full list (with filter capacity), without going through the pop-up window.

Automatic format of version name

Ability to choose a preformatted format for version names.

Separator between name and number

Choose the character of the separator for version names.

Auto subscription to versions

Subscription automatic to versions or components when you subscribe to product or component.

Types of copy of Component Version

You can choose between :

- Free choice
- Copy structure from origin version
- Replace the origin version with new copied one

Enable Product Versions compatibility management

Display compatibility section in product version details.

Display product version on delivery

Allows to link a delivery to product version.

Sort versions combobox in descending order

Change sort order for versions in combobox to have more recent first (descending on name).

Sort version composition and structure on type

Sort version composition and structure by type ascending and name descending.

Manage component on requirements

Manage component and target component version on requirements.

Manage component on change requests

Manage component and target component version on change requests.

Do not add closed and delivered versions to a project

When adding a product to a project, do not add its closed and delivered versions.

Allow activities on delivered version

Include delivered products versions in target product version list for activities.

Automatically set component version if unique

Automatically set component version if there is only one component version of the selected component that is linked to the selected product version.

4.2.7 Tab Financial

Input of amounts for expenses

Parameters for choosing the input method for expenditure amounts.

Input mode for amounts

Defined for expenses items if the amounts must be entered without taxes and calculated in with taxes or vice versa.

Input mode for invoice lines

Defined for expenses items if the total bill lines feed the total with or without taxes. The parameter is priority if there a bill lines.

Input of amounts for incomes

Parameters for choosing the method of entering income.

Input mode for amounts

Defined for incomes items if the amounts must be entered without taxes and calculated in with taxes or vice versa.

Input mode for invoice lines

Defined for incomes items if the total bill lines feed the total with or without taxes. The parameter is priority if there a bill lines.

Automation of financial

The Deferral of expenses option occurs during the automatic generation of an expense from an offer, order or invoice.

If the expense is linked to an offer, an order AND / OR an invoice, then this is carried over to the related elements. This update is recursive.

If the expense is generated from an invoice, it is reported on the order linked to the invoice and on the offer linked to the order.

Revenue and Work unit management

Parameters used in the unit of work catalog.

Number of complexities

Parameter used to define the default maximum number used in the unit of work catalog.

Copy revenue into validated cost of activities.

Copy revenue into validated cost of activities.

Enable work command.

You link your activities managed by the work units to an order.

This will be decremented by units of work already carried out and invoiced. You can then invoice precisely for the work already done.

Translation

Choose how the monetary units behave in your area

Currency

Choose your symbol displayed on each monetary box

Currency position for cost display

Symbol sets before or after each monetary box

Multi-currency

It is possible to define a local currency for each project. The project carries the conversion rate between global currency and local currency.

Allow local currencies per projet

Allow to set a local currency for each project.

Subprojects automatically inherit the local currency.

Data is entered in local currency and consolidated in global currency.

Show data in global currency

Show date in global currency when project uses a local currency.

4.2.8 Tab Mailing

Emailing

Settings allowing the application to send emails.

Set the administrator's email address, with the option to choose a different "From" and "Reply To" address, as well as the display name.

You must configure the login information with the credentials provided by your email service provider.

The maximum size for sending emails is expressed in bytes by default if you do not specify the units.

You can use kilobytes (KB), megabytes (M), and gigabytes (G) with integer values.

The size must be less than or equal to the PHP parameter "upload_max_filesize".

replies for email

To reply to these emails, you must configure *automatic import for replies* in the *Automation tab*; otherwise, they will not be processed by the application.

A reply to an email will be added to the existing item as a note and if an attached file is attached to the reply email, then the file will also be added to the attached files

Tip: 1K will stand for 1024 bytes.

Mail titles

▼ Mail titles	
title of mail for new items	[\${dbName}] \${item} #\${id} has been created : "\${name}"
title of mail for modified items	[\${dbName}] \${item} #\${id} has been modified : "\${name}"
title of mail on status change	[\${dbName}] \${item} #\${id} moved to status '\${status}' : "\${name}"
title of mail on responsible change	[\${dbName}] \${responsible} is now responsible of \${item} #\${id} : "\${name}"
title of mail on modified description	[\${dbName}] Description has been modified on \${item} #\${id} : "\${name}"
title of mail on modified result	[\${dbName}] Result has been modified on \${item} #\${id} : "\${name}"
title of mail on note add	[\${dbName}] New note has been posted on \${item} #\${id} : "\${name}"
title of mail on note change	[\${dbName}] A note has been modified on \${item} #\${id} : "\${name}"
title of mail on assignment add	[\${dbName}] New assignment has been added on \${item} #\${id} : "\${name}"
title of mail on assignment change	[\${dbName}] An assignment has been modified on \${item} #\${id} : "\${name}"
title of mail on attachment add	[\${dbName}] New attachment has been posted on \${item} #\${id} : "\${name}"
title of mail when sending manual email	[\${dbName}] message from \${sender} : \${item} #\${id}
title of mail to user	[\${dbName}] message from \${sender} : Your account information
body of mail to user	<p> \${url}. Your login is \${login}. Your password is initialized to \${password}. You will have to change it on first connection. In case of an issue contact your administrator at \${adminMail}. </p>
title of mail to approvers	[\${dbName}] message from \${sender} : You need to approve a document
body of mail to approvers	<p> Document #\${id} : "\${name}". Please access this document and follow approval process. </p>
title of email on allocation add	[\${dbName}] New allocation of resource \${responsible} has been created on Project \${project}
title of email on allocation change	[\${dbName}] Allocation of resource \${responsible} has been changed on Project \${project}
title of mail to scheduled reports	[\${dbName}] Report \${report} - \${date}
body of mail to scheduled reports	[\${dbName}] Report \${report} - \${date}

Fig. 14: Mail titles section

Parameters to define title of email depending on event.

It is possible to use special fields to call a function or data of the project.

See also:

Automatic emails grouping

Special Fields

Automatic emails grouping

Parameters to define if the email group is active or not.

Activate email grouping

When email grouping is enabled, automatic emails sent within the defined period are grouped into a single email. For example when the status of an element has been modified several times in less than Xs then you will not receive an email for each change of state.

Grouping period (in seconds)

Defines the period (in seconds) during which if an email is send after another on same item. Then emails are grouped into single one.

How to treat different formats

If grouped emails refer to different templates, you can :

- send all messages, one for each template
- Only send the last message
- Merge all messages and send a single email

You'll can see this email in the **email to send** screen in the Tools menu.

Test email configuration

You can test the settings of your email submissions.

Send email to

Sent a email to check sptm configuration.

Warning: This operation saves global parameters.

4.2.9 Tab Authentication

User and password

Parameters to manage how the connection behaves

▼ User and password

default profile on user creation	<input type="text" value="Project Guest"/>
password strength	<input type="text" value="[# 1] length"/>
password min length	<input type="text" value="3"/>
lock user after wrong tries	<input type="text"/>
password validity (in days)	<input type="text"/>
allow 'remember me'	<input type="text" value="Yes"/>
initialize password on user creation	<input type="text" value="No"/>
require old password on password change	<input type="text" value="No"/>
new password must be different from old password	<input type="text" value="No"/>

Fig. 15: Authentication screen

default profile on user creation

You can choose the default profile and password when you create a new resource/user/contact.

This profile can be changed on each project.

Password strength

You define the difficulty of your password.

Password length, if special characters or numeric characters are used.

Password min length

You define the length of your password.

Lock user after wrong tries

You can choose to block the user after x connection attempts.

Password validity (in days)

You can define the validy period of your password. After this period, you will have to renew your password.

Allow 'remember me'

You can display or no the check box on the login screen "remember me".

Initialize password on user creation

You can initialize password on user creation. The application will define a new password to random value.

You can reset all the password with the *multiple update fonction*

Require old password on password change

ProjeQtOr verify old password on password change.

New password must be different from old password

If you have a regular password change policy, you can set the option to prohibit the same password.

LDAP Management Parameters

All the necessary parameters for connecting your projeqtOr instances with your corporate LDAP

Set the base dn, host, port, version...

Default profile for Ldap users, message on creation new user from Ldap,

Actions on LDAP user creation

Project to allocate automatically...

Single Sign On SAML2

Single sign-on is a method that allows a user to access multiple computer applications (or secure websites) by performing a single authentication.

When connected to the SSO service, the service tells each application that the user is logged on.

This avoids having to connect to applications one by one.

In concrete terms, the site or service to which the user is trying to connect makes a request to the server or the identity provider's site. This one asks if the user is connected. If so, he transmits the information.

Depending on the protocol used, the two sites exchange keys, signatures and / or other information to verify the identity of the user.

When you want to disconnect from ProjeQtOr with the SSO method, the logout screen gives you several options.

- local disconnection of projeqtOr. I do not leave my SSO session
- Internal reconnection: I reconnect to ProjeQtOr locally. I leave my SSO session. I should identify myself again
- SSO disconnect. I leave my SSO session. I should identify myself again

▼ Ldap management parameters


connection with LDAP user	<input type="text" value="No"/>	▼
LDAP base dn	<input type="text" value="dc=projeqtorg,dc=org"/>	
format serveur address as URI	<input type="text" value="No"/>	▼
LDAP host	<input type="text" value="localhost"/>	
LDAP port	<input type="text" value="389"/>	
LDAP version	<input type="text" value="3"/>	▼
use SSL over TLS	<input type="text" value="No"/>	▼
LDAP user	<input "="" type="text" value="cn=Manager,dc=projeqtorg,dc="/>	
LDAP password	<input type="password" value="....."/>	
LDAP user filter	<input type="text" value="uid=%USERNAME%"/>	
default profile for Ldap users	<input type="text" value="Project Guest"/>	▼
message on creation new user from Ldap	<input type="text" value="Internal alert"/>	▼
on LDAP user creation	<input type="text" value="set the user as a resource"/>	▼
Project to allocate automatically	<input type="text"/>	▼

Fig. 16: LDAP

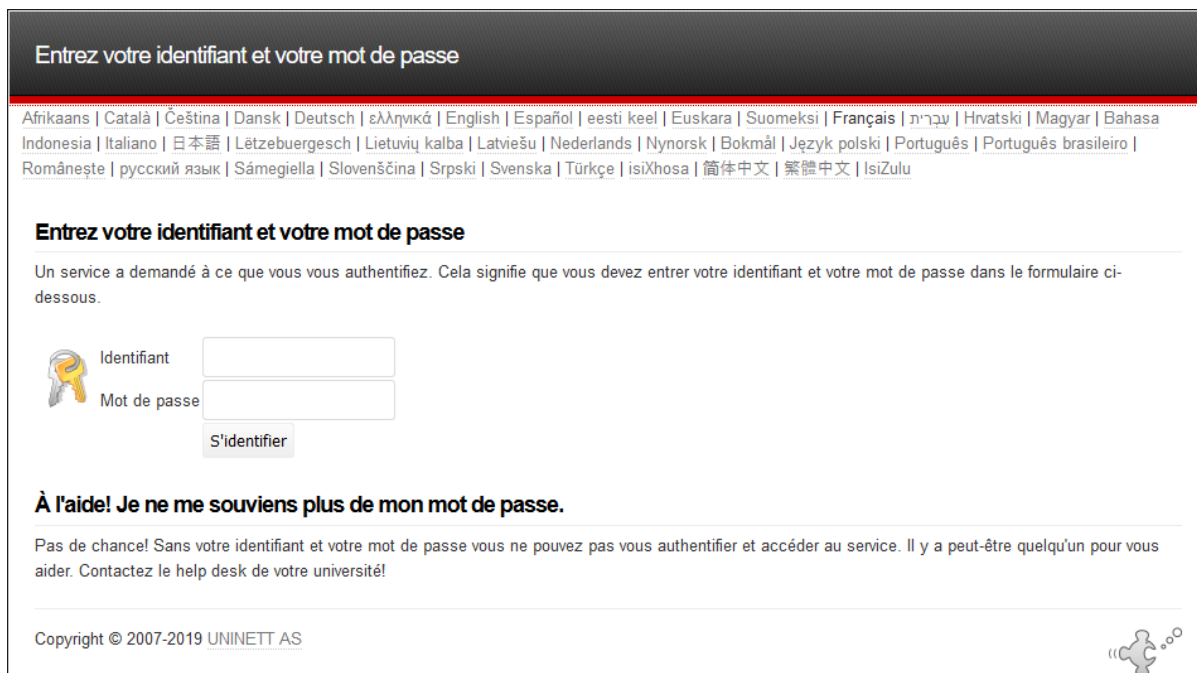


Fig. 17: With the single sign on you do not go through the login screen of projeqtor but by a screen dedicated to single sign-on

Parameters

This is an SSO connection via the SAML2 protocol

- Set the Entity ID, the IDP certificate, the single sign on and logout. . .
- Default profile for users, message on creation new user from SAML,
- And some parameters for users

4.2.10 Tab Automation

Management of automated service (CRON)

Parameters for the *Cron* process.

Defined frequency for these automatic functions

It will manage :

- **Alert generation:** Frequency for recalculation of indicators values.
- **Check alert:** Frequency for client side browser to check if alert has to be displayed.
- **Import:** Automatic import parameters as below.

Warning: Cron working directory should be set out of the path web..

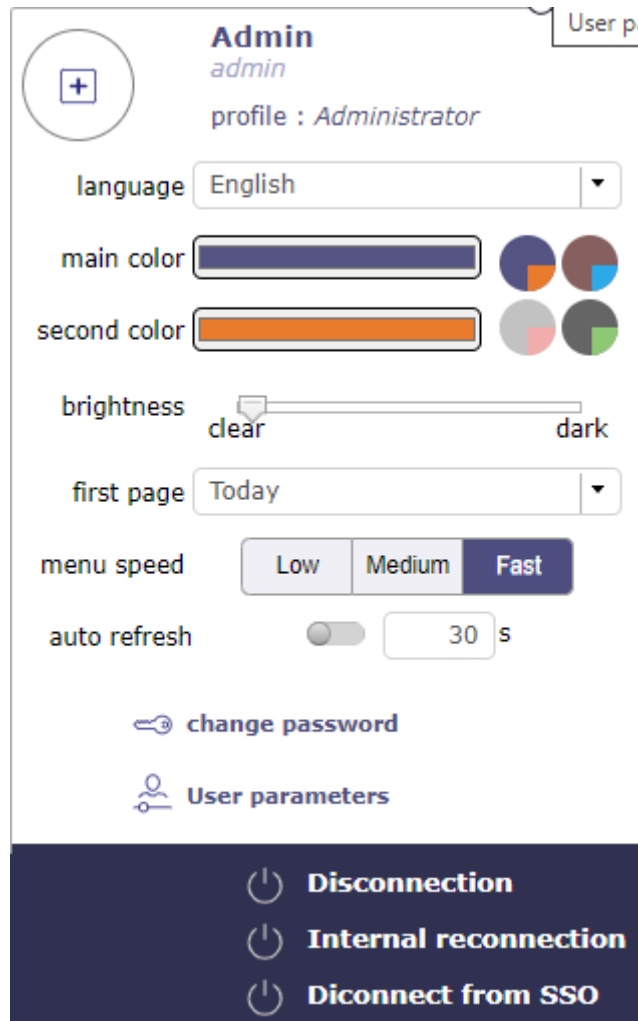


Fig. 18: Disconnection screen

▼ Single Sign On through SAML2

SSO SAML Login

SSO common name

Entidy ID of the IDP

Single Sign On Service

Single Lougout Service

X509 certificate of IDP

SAML attribute for user login name

SAML attribute for user email

SAML attribute for user full name

IDP is ADFS

default profile for SAML users

message on creation new user from SAML

on SAML user creation

Project to allocate automatically

SP Metadata Display the Metadata of SP

remark To sign SAML transactions, put files sp.key (private key) and sp.crt (public certificate) in folder sso/cert of ProjeQtOr

Fig. 19: Global parameters: LDAP

Automatic archiving of history

This section allows you to manage the behavior of the history.

Archive history older than (in days)

Determines how often your history is archived.

Start time of daily archiving

Choose the time at which the daily archiving will start.

Archive all history for idle items

Choose whether the history of closed items should be archived or not.

Automatic import of files

▼ Automatic import of files

directory of automated integration files	<input type="text" value="../files/import"/>
automatic import cron delay (in seconds)	<input type="text" value="60"/>
log destination	<input type="text" value="log as file"/> ▼
mailing list for logs	<input type="text"/>

Fig. 20: Automatic import of files

Automatic import settings for *cron* processes.

Warning: Directory of automated integration files should be set out of the path web.

Automatic import of replies to emails

- Defined parameters for the “Reply to” process
- It will manage connection to IMAP INBOX to retrieve email answers.

Email input check cron delay (in seconds)

Delay of -1 deactivates this functionality.

Email reception

When you have completed the IMAP settings for receiving emails, you receive your email with a new header. See the image below.

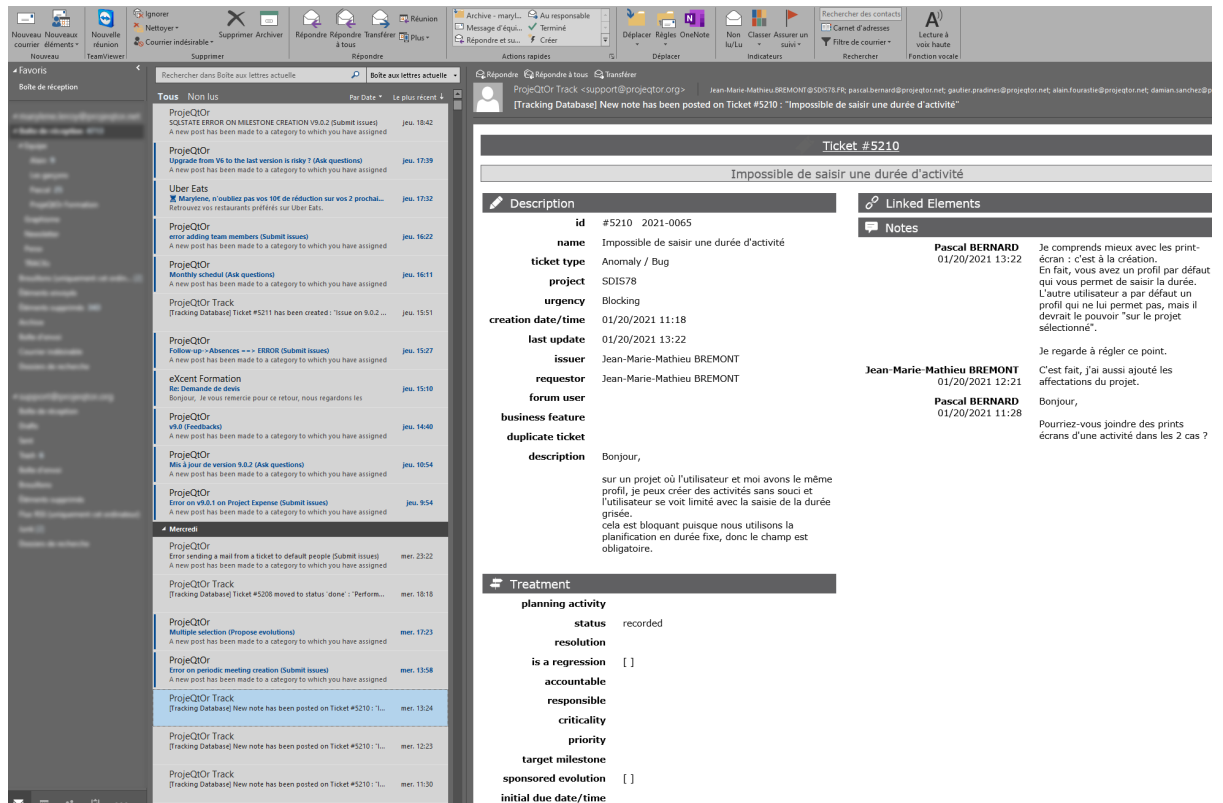


Fig. 21: receiving an email settings

You always find the name of the item that is related to your application. A single click takes you to the item page. The line in the header tells you where your answer should be positioned to allow you to retrieve the response text in your ProjeQtOr instance without the original message.

Signing start identifier

When you have completed the IMAP settings for receiving emails, you receive your email with a new header. See the image below.

The fields allows you to identify the beginning of your signature in order to avoid retrieving the signature in the response.

For example, enter, so that ProjeQtOr recognizes that your signature begins with this word. He will not take back everything behind.

Action after processed emails

You can determine what action to perform when receiving the email.

- Mark as read, which is the default
- Removal

▼ Automatic import of replies to emails

email input check cron delay (in seconds)

IMAP host to check email input

IMAP user to check email input

IMAP password to check email input

Signing start identifier

action after processed emails ▼

- mark as read
- delete mail

Fig. 22: Global parameter for automatic import for replies email

Note: IMAP host

- Must be an IMAP connection string.
- To connect to GMAIL input box, host must be: {imap.gmail.com:993/imap/ssl}INBOX
- You must set these parameters if you want to use the *Not receive his own mails* option in the user settings

Automatic planning calculation

▼ Automatic planning calculation

differential calculation

frequency	value
minute	0
hour	all
day of month	all
month	all
day of week	all

start date for differential planning ▼

complete calculation

frequency	value
minute	0
hour	2
day of month	all
month	all
day of week	all

start date for complete planning ▼

Automatic feeding of the real ▼

Fig. 23: Activated or deactivated this feature by simple click

Differential calculation

Project planning is recalculated only for those who need to be. A data or more has been changed into the project so a new calculation is expected.

Complete calculation

All projects planning are recalculated.

Automatic feeding of the real

You automatically fill in the actual work from the scheduled work up to a given date.

The automatic calculation of projects from the day after this date is triggered.

The actual work is automatically entered from the scheduled work until the day before the start of the schedule calculation.

Warning: For security, and to avoid overlapping with a manual input of reality, if the resource has reality for a given date, we do not copy the possible planned existing in reality.

For each scheduled job found, if no job exists for the relevant resource on the date of the scheduled job, copies the scheduled job to an actual job.

We will mark the actual work entered automatically (technical zone type label) to distinguish between automatic feeding and manual feeding.

This area will not be processed for screen renderings, but will analyze any unexpected behavior.

Frequency

Select the frequency on the calendar by clicking on the button **defined parameters** and choose the schedule, day, month.

The image shows a dialog box titled "Define parameters" with a close button (X) in the top right corner. Below the title bar, the word "frequency" is centered. There are five rows of settings, each with a label and a dropdown menu:

- minute: 0
- hour: 2
- day of month: all
- month: all
- day of week: all

At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

Fig. 24: Define parameters

Start date for

c planning calculation

	frequency	value	
differential calculation	minute	0	define parameters activate
	hour	all	this feature is not active
	day of month	all	
start date for differential planning	first day of current week first day of current month today yesterday 2 days before today 3 days before today 7 days before today 10 days before today 15 days before today 30 days before today		define parameters activate this feature is not active
complete calculation			
start date for complete planning	first day of current week		▼
Automatic feeding of the real	No		▼

Fig. 25: legend

Select when you want to recalculate project(s) according the date of today's date

Generation of alerts if real work is not entered

Specific settings for alerts based on a profile.

- An email is sent on the agreed date.
- Click on the button **Define Parameters**
- Select the frequency of the calendar with which the emails will be generated and sent to the profile.
- See: *Management of automated service (CRON)* to set the send frequency.

In addition to the sending frequency, you can refine the generation with several additional options.

Control input up to

Select when you want to be controlled: current day, previous day or next days.

Number of days to control

Choose how many days will be controlled

Send alert to resource

Choose how alerts will be sent, Internal alert, email, both or none

Only incompletes imputation

The goal is to be able to send alerts on charges only if the entry is incomplete, not if it is greater than the capacity of the resource.

With the option checked, when generating alerts, an entry greater than the capacity of the resource does not trigger an alert.

Warning: All days of the week, open or off days are taken into account.

Off days in real work allocation will not send you an alert.

4.2.11 Tab System

Files and directories

Definition of directories and other parameters used for Files and documents management.

Fill in the weight and the access paths to the storage of your documents and attached files.

Warning: **Attachments Directory** and **Root directory for documents** Should be set out of web reach.

Temporary directory for reports Must be kept in web reach.

Translation data

Parameters to define character sets, their encoding, their behavior... for saving files on the server.

Charset to save files on server

Keep empty for Linux servers, files names will be stored in UTF8.

For windows OS server, define charset as “windows-1252” (for western europe) or similar corresponding to your localization.

Time zone

Select your time zone.

Separator for CSV files

Choose the field separator for csv exports.

Export CSV to UTF-8 format

Preserve UTF-8 for exported csv files. If set no, will encode in CP1252 (recommended for windows in English and western Europe Languages).

Security - Message when a try to hack is detected

To secure the solution and avoid Cross Site Scripting type attacks, we have implemented CSRF token.

Configure the email that will be notified if a try to hack security flaw is detected.

Several possibilities of sending are configurable.

Miscellaneous

Settings for the update.

Check for new version

Auto check (or not) for existing new version of the tool (only administrator is informed).

PDF export

Basic settings for PDF exports.

Memory limit for PDF generation.

Size In MB. Too small can lead to PDF error but too big can crash the server.

Font for PDF Export.

Freesans give great portability for non ANSI characters - Helvetica give smaller PDF files.

SSL connection to database

Allows to set up a secure SSL connection:

- SSL Key
- SSL Certification
- SSL Certificate Authority

Enter patch to corresponding files to enable SSL connection to the database.

Warning: Take care that these files must exist and be valid SSL files.

If values are incorrect, the application will not work any more, and you'll have to manually fix parameters in the database.

4.2.12 Special Fields

Special fields can be used in the title and body mail to be replaced.

by item values :

- **\${dbName}** the display name of the instance
- **\${id}** id of the item
- **\${item}** the class of the item (for instance "Ticket")
- **\${name}** name of the item
- **\${status}** the current status of the item
- **\${project}** the name of the project of the item
- **\${type}** the type of the item
- **\${reference}** the reference of the item
- **\${externalReference}** the *external reference* of the item
- **\${issuer}** the name of the issuer of the item
- **\${responsible}** the name of the responsible for the item
- **\${sender}** the name of the sender of email
- **\${sponsor}** the name of the project sponsor
- **\${projectCode}** the project code
- **\${contractCode}** the contact code of project
- **\${customer}** Customer of project
- **\${url}** the URL for direct access to the item
- **\${login}** the user name
- **\${password}** the user password
- **\${adminMail}** the email of administrator

4.3 Administration Console

Note: The screens described below are restricted to users with administrator profile.

Users with other profiles can not access it, whether display or access rights are granted or not.

Administration console allows to execute administration tasks on application.

Administration

Background tasks

cron status: running
General cron sleep time = 10 seconds
Alert generation cron delay = 30 seconds
Automatic import cron delay = 60 seconds
Automatic notification generation cron delay = 3600 seconds
Administration cron check for leave rights earned disabled
Send grouped emails
Email input

[stop](#)

Send an internal alert

addressees:

sent date:

type:

title:

message:

[send](#)

Manage connections

active connections: 2 [disconnect all users](#)

global disconnection

frequency	value	define parameters
minute	0	activate this feature is not active recurrently
hour	1	
day of month	all	
month	all	
day of week	all	

application status: open [close application](#)

closed message:

Consistency checks

run consistency checks: [scan for issues](#) [fix issues](#)

automatic correction

frequency	value	define parameters
minute	0	activate this feature is not active recurrently
hour	1	
day of month	all	
month	all	
day of week	all	

automatic search

frequency	value	define parameters
minute	0	activate this feature is not active recurrently
hour	1	
day of month	all	
month	all	
day of week	all	
email		

Maintenance of Data

close emails: sent since more than days
[close](#) [deactivate](#) this feature is active recurrently

delete emails: sent since more than days
[delete](#) [deactivate](#) this feature is active recurrently

close alerts: sent since more than days
[close](#) [deactivate](#) this feature is active recurrently

delete alerts: sent since more than days
[delete](#) [deactivate](#) this feature is active recurrently

delete notifications: sent since more than days
[delete](#) [deactivate](#) this feature is active recurrently

delete connection logs: closed since more than days
[delete](#) [deactivate](#) this feature is active recurrently

update reference for:
[update](#)

Log files maintenance

log level:

delete log files: older than days
[delete](#) [activate](#) this feature is not active recurrently

log files maintenance: [show log files list](#) [show last log file](#)

Fig. 26: Administration screen

4.3.1 Background tasks

the CRON

The *CRON* program starts and stops background jobs that process and periodically check indicators to generate the corresponding alerts, warnings or even automatic imports if necessary.

This program automatically runs scripts, commands, or software at a specified date and time, or a pre-defined cycle.

▼ Background tasks

```

cron status  running
              General cron sleep time = 10 seconds
              Alert generation cron delay = 30 seconds
              Automatic import cron delay = 60 seconds
              Automatic notification generation cron delay = 3600 seconds
              Administration cron check for leave rights earned
disabled
              Send grouped emails
              Email input
              stop
    
```

Fig. 27: Background tasks is running in Administration console

You can activate or deactivate CRON directly from the info bar.



Fig. 28: CRON activation button

See also:

The CRON button

4.3.2 Send an internal alert

Allows to send an internal alert to users.

▼ Send an internal alert

addressees

sent date

type

title

message

Fig. 29: Internal Alert

Internal alerts can be sent to users.

You can define a date and time for sending, specific addressees or all users, the type of message that users will receive: information, an alert or a warning...

This can be a good step to warn users before a temporary shutdown of ProjeQtOr for update for example.

An internal alert can be sent by the administrator or by monitoring indicators.

By the administrator

The administrator can send internal alert by administration console.

The message will be received by user via message pop-up.

Monitoring indicators

Monitoring indicators send only warning and alert message.

The message contains information that explains the alert:

- Item id and type.
- Indicator description.
- Target value.
- Alert or warning value.

See also:

The indicators are defined in *Indicators screen* .

4.3.3 Manage connections

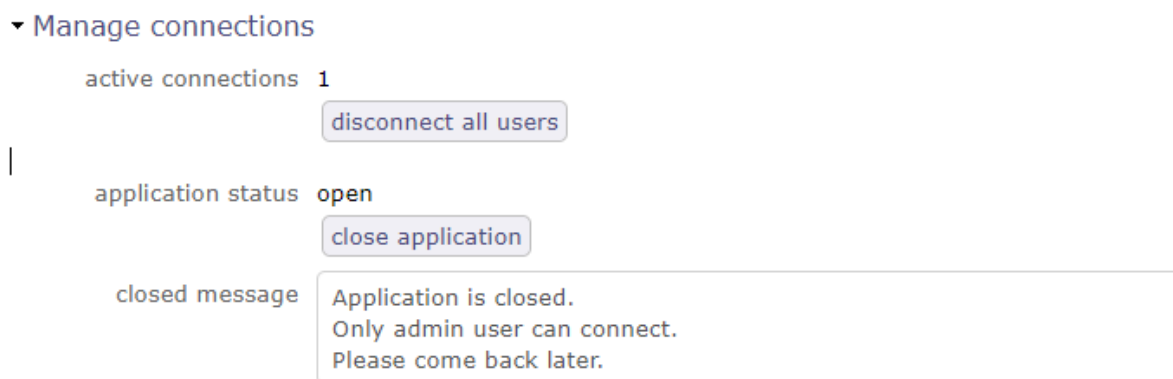


Fig. 30: Manage connections

Allows to force disconnection of active users and close the application for new connections.

Disconnect all users

- The button `Disconnect all users` allows to disconnect all connected users except your own connection.
- The application status is displayed below.
- Disconnection will be effective for each user when his browser will check for alerts to be displayed.
- The delay for the effective disconnection of users will depend on the parameter “delay (in second) to check alerts” in *Global parameters* screen.

Open/Close application

- The button `Open/Close application`
- Allows to open and close application.
- When the application is closed the message below will appear on login screen.

4.3.4 Consistency check

▼ Consistency checks

run consistency checks

scan for issues

fix issues

automatic correction

frequency	value
minute	0
hour	7
day of month	all
month	all
day of week	Monday

define parameters

deactivate

this feature is active recurrently

automatic search

frequency	value
minute	0
hour	1
day of month	all
month	all
day of week	Friday
email	admin@xxx.fr

define parameters

deactivate

this feature is active recurrently

Fig. 31: consistency check

- on the WBS sequence search for duplicates, sequence holes, incorrect order
- on the presence of one and only one line of “PlanningElement” for the planifiable elements
- on the consolidation of ticket work
- on consolidation of work on activities
- on assignments

You can program the search for the consistency check as well as its execution.

Set the desired frequency settings and activate the service.

4.3.5 Maintenance of Data

The administrator has the possibility to:

▼ Maintenance of Data

close emails sent since more than days

this feature is not active recurrently

delete emails sent since more than days

this feature is not active recurrently

close alerts sent since more than days

this feature is not active recurrently

delete alerts sent since more than days

this feature is not active recurrently

delete notifications sent since more than days

this feature is not active recurrently

delete connection logs closed since more than days

this feature is not active recurrently

update reference for ▼

Fig. 32: Maintenance of datas

- Close and delete sent emails and alerts.
- Delete history of connections.
- Updating references for any kind of element.

You can automate these cleanings by activating them using the corresponding buttons.

4.3.6 Log files maintenance

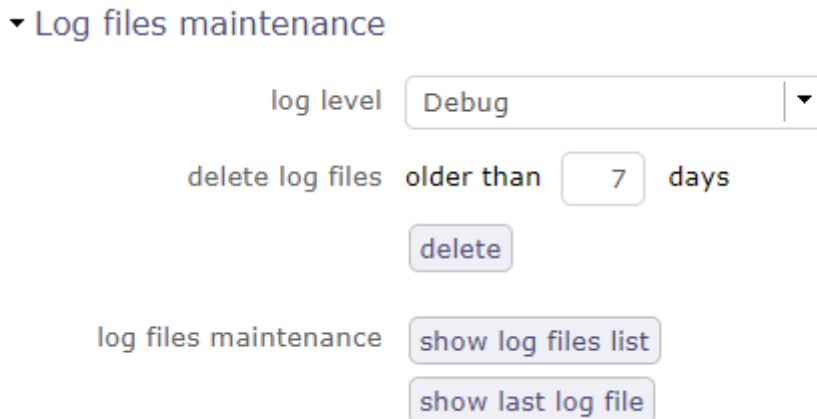


Fig. 33: Log files maintenance

The administrator has the possibility to choose the level of the log files among debug, trace, script and errors.

- delete files on a given number of days.
- Show the list of logs
- Show the last logs list.

4.3.7 Ordering projects by priority

You can list projects in priority order rather than WBS order across a set of reports using this administration feature.

This reordering can only be performed within the same project level.

Reports that can benefit from priority ordering include:

- Workload plans (weekly, monthly),
- Planning reports (monthly and annual, project resources and project resources),
- Monthly planning colored by resource (fixed or not).

4.4 API REST 2

ProjeQtOr provides an API to interact with its elements. It is provided as a REST web service.

The GET, PUT, POST and DELETE methods are used for elements.

For security reasons, the API is not enabled by default.

Generate a .htpasswd file to see related topics on the net. A template is provided in /api/.htpasswd, referencing the user projeqtor and password projeqtor.

It is provided for testing purposes only. Do not use it in a production environment as it will expose all your data.

Update the .htaccess file to specify the location of your .htpasswd file:

AuthUserFile “/pathToFile/.htpasswd” The default location is the Apache directory.

Log files maintenance			
name	date	size	
projeqtor_20210114.log	less than half an hour ago	1.6 KB	⌵ ⌂
projeqtor_20210113.log	yesterday at 23:02	6.3 KB	⌵ ⌂
projeqtor_20210112.log	01/12/2021 18:59	77 B	⌵ ⌂
projeqtor_20210111.log	01/11/2021 15:30	1.2 KB	⌵ ⌂
projeqtor_20210108.log	01/08/2021 18:57	3.1 KB	⌵ ⌂
projeqtor_20210107.log	01/07/2021 19:27	647 B	⌵ ⌂
projeqtor_20210106.log	01/06/2021 17:32	285.3 KB	⌵ ⌂
projeqtor_20210104.log	01/04/2021 11:08	246 KB	⌵ ⌂
projeqtor_20201218.log	12/18/2020 14:30	510.7 KB	⌵ ⌂
projeqtor_20201217.log	12/17/2020 23:03	444.5 KB	⌵ ⌂
projeqtor_20201216.log	12/16/2020 18:27	68.6 KB	⌵ ⌂
projeqtor_20201215.log	12/15/2020 17:30	327.5 KB	⌵ ⌂
projeqtor_20201214.log	12/14/2020 23:56	696.7 KB	⌵ ⌂
projeqtor_20201211.log	12/11/2020 17:01	649.1 KB	⌵ ⌂
projeqtor_20201210.log	12/10/2020 17:59	205.2 KB	⌵ ⌂
projeqtor_20201209.log	12/09/2020 21:43	340.8 KB	⌵ ⌂
projeqtor_20201208.log	12/08/2020 17:07	5.8 KB	⌵ ⌂
projeqtor_20201207.log	12/07/2020 19:39	36.5 KB	⌵ ⌂
projeqtor_20201204.log	12/04/2020 17:54	2.6 KB	⌵ ⌂
projeqtor_20201202.log	12/02/2020 09:55	1.1 KB	⌵ ⌂
projeqtor_20201201.log	12/01/2020 16:44	16.2 KB	⌵ ⌂
projeqtor_20201130.log	11/30/2020 19:28	9.5 KB	⌵ ⌂
projeqtor_20201127.log	11/27/2020 17:27	4.1 KB	⌵ ⌂
projeqtor_20201126.log	11/26/2020 17:15	21.5 KB	⌵ ⌂
projeqtor_20201125.log	11/25/2020 17:23	13.8 KB	⌵ ⌂
projeqtor_20201124.log	11/24/2020 16:48	1.9 KB	⌵ ⌂
projeqtor_20201123.log	11/23/2020 18:21	12.8 KB	⌵ ⌂
projeqtor_20201117.log	11/17/2020 15:53	7.8 KB	⌵ ⌂
projeqtor_20201116.log	11/16/2020 20:41	155.7 KB	⌵ ⌂
projeqtor_20201113.log	11/13/2020 17:31	4.8 KB	⌵ ⌂
projeqtor_20201112.log	11/12/2020 14:03	318.2 KB	⌵ ⌂
projeqtor_20201110.log	11/10/2020 17:06	1.9 KB	⌵ ⌂
projeqtor_20201109.log	11/09/2020 17:49	13.7 KB	⌵ ⌂
projeqtor_20201107.log	11/07/2020 00:37	77 B	⌵ ⌂
projeqtor_20201106.log	11/06/2020 11:58	1.5 KB	⌵ ⌂
projeqtor_20201105.log	11/05/2020 15:19	576 B	⌵ ⌂
projeqtor_20201103.log	11/03/2020 18:14	653 B	⌵ ⌂
projeqtor_20201102.log	11/02/2020 22:51	1.9 KB	⌵ ⌂
projeqtor_20201030.log	10/30/2020 19:08	179.4 KB	⌵ ⌂

Fig. 34: Log files list

▼ Ordering projects by priority

launch to reordering

run

automatic reordering

frequency	value
minute	0
hour	1
day of month	all
month	all
day of week	all

define parameters

activate

this feature is not active recurrently

Fig. 35: Ordering project by priority

4.4.1 How the API works

The user used, the one defined in. `htpassword`, must exist as a user in the database. The access rights: read, create, update, delete, must be defined for this user. This allows you to provide some access to external users and control the visibility they get on your data.

METHODS

- GET : read
- PUT : create and update
- POST : create, update
- DELETE : delete

Important: For PUT, PUSH and DELETE methods, the data must be encrypted with the AES-256 algorithm, with the key as the API key defined for the user.

The administrator must provide this API key to the API consumer. You can use the AESCRT library provided in the `/external` directory for encryption.

PUT and PUSH methods are similar and can both be used to create or update items.

The only difference is in the way of sending data: as a Post table for POST, as a file for PUT.

The DELETE method requires data, formatted as for a PUT, but only the ID is required.

For PUT, POST and DELETE, you can provide:

- A single element: `{“id”: “1”,... }`
- A list of elements: `{“identified”: “id”, “elements”: [{“id”: “1”,... }, {“id”: “2”,... }]}`
- The Json format retrieved from GET can be used for PUT, POST and DELETE.

4.4.2 Queries in Json

Some examples of queries in Json format.

GET

- **URL:** `http://myserver/api/{objectclass}/{objectid}` - (EX: `http://myserver/api/Project/1`)
Full description of the object of the given class with the given ID
- **URL:** `http://myserver/api/{objectclass}/all` - (EX: `http://myserver/api/Project/all`)
Full description of all objects of the given class
- **URL:** `http://myserver/api/{objectclass}/filter/{filterid}` - (EX: `http://myserver/api/Project/filter/1`)
Full description of all objects of the given class matching the given stored filter. Filter id can be retrieved when saving the filter. Using a filter of a different class may lead to unexpected results
- **URL:** `http://myserver/api/{objectclass}/search/{crit1}/{critN}` - (EX: `http://myserver/api/Activity/search/idProject=1/name like '%error%'`)
Full description of all objects of the given class matching the given criteria. You can provide as many criteria as you want, they will be included in the where clause with the AND operator. Unlike the example, the criteria must be “url encoded” use the PHP function `urlencode()` for example
- **URL:** `http://myserver/api/{objctcclass}/updated/{start date}/{end date}` - (EX: `http://myserver/api/Project/updated/20231101000000/20231231235959`)

Full description of all objects updated between start date and end date. Date format is YYYYMM-MDDHHMMSS. Date > = “date start” and date < “end date”

POST

- **URL:** `http://myserver/api/{objectclass}`

EX: Data provided in json format as a POST value

Full description of updated or created objects with 2 additional fields: `apiResult`: update status and `apiResultMessage`

PUT

- **URL:** `http://myserver/api/{objectclass}`

EX: Data provided in json format as a file

Full description of updated or created objects with 2 additional fields: `apiResult`: update status and `apiResultMessage`

DELETE

- **URL:** `http://myserver/api/{objectclass}`

EX: Data provided in json format as a file

Full description of updated or created objects with 2 additional fields: `apiResult`: update status and `apiResultMessage`

Here is an example of PHP code calling the API for PUT and POST request (create, update).

Note: Note that by default ProjeQtOr API uses 128 bits encryption key, that is why in examples function `AesCtr::encrypt` uses 128 as last parameter.

If you want to change it, you can force API to use a different encryption key length, just add in `parameters.php`

```
$aesKeyLength=256; // Possible values are 128, 192, 256
```

(256 bits encryption may be illegal in some countries)

This request lists all Tickets:

```
$fullUrl="http://myserver/api/Ticket/list/all";
$curl = curl_init($fullUrl);
curl_setopt($curl, CURLOPT_HTTPAUTH, CURLAUTH_BASIC);
curl_setopt($curl, CURLOPT_USERPWD, "projeqtor:projeqtor");
curl_setopt($curl, CURLOPT_RETURNTRANSFER, true);
curl_setopt($curl, CURLOPT_SSL_VERIFYPEER, false);
$curl_response = curl_exec($curl);
echo $curl_response;
curl_close($curl);
```

With DELETE that allows to delete ticket with ID #1 :

```

$fullUrl="http://myserver/api/Ticket";
$data='{"id":"1"}';
$data=AesCtr::encrypt($data, 'ApiKeyForUserProjeqtOr', 128);
$curl = curl_init($fullUrl);
curl_setopt($curl, CURLOPT_HTTPAUTH, CURLAUTH_BASIC);
curl_setopt($curl, CURLOPT_USERPWD, "projeqtOr:projeqtOr");
curl_setopt($curl, CURLOPT_RETURNTRANSFER, true);
curl_setopt($curl, CURLOPT_SSL_VERIFYPEER, false);
curl_setopt($curl, CURLOPT_CUSTOMREQUEST, "DELETE");
curl_setopt($curl, CURLOPT_POST, true);
curl_setopt($curl, CURLOPT_POSTFIELDS, $data);
$curl_response = curl_exec($curl);
echo $curl_response;
curl_close($curl);

```

Put PUT and POST (creation or update) that allows to update name of ticket with ID #1 :

```

$fullUrl="http://myserver/api/Ticket";
$data='{"id":"1", "name":"name to be changed for Ticket 1"}';
$data=AesCtr::encrypt($data, 'ApiKeyForUserProjeqtOr', 128);
$curl = curl_init($fullUrl);
curl_setopt($curl, CURLOPT_HTTPAUTH, CURLAUTH_BASIC);
curl_setopt($curl, CURLOPT_USERPWD, "projeqtOr:projeqtOr");
curl_setopt($curl, CURLOPT_RETURNTRANSFER, true);
curl_setopt($curl, CURLOPT_SSL_VERIFYPEER, false);
curl_setopt($curl, CURLOPT_CUSTOMREQUEST, "PUT");
curl_setopt($curl, CURLOPT_POST, true);
curl_setopt($curl, CURLOPT_POSTFIELDS, $data);
$curl_response = curl_exec($curl);
echo $curl_response;
curl_close($curl);

```

```

$fullUrl="http://myserver/api/Ticket";
$data='{"id":"1", "name":"name to be changed for Ticket 1"}';
$data=AesCtr::encrypt($data, 'ApiKeyForUserProjeqtOr', 256);
$curl = curl_init($fullUrl);
curl_setopt($curl, CURLOPT_HTTPAUTH, CURLAUTH_BASIC);
curl_setopt($curl, CURLOPT_USERPWD, "projeqtOr:projeqtOr");
curl_setopt($curl, CURLOPT_RETURNTRANSFER, true);
curl_setopt($curl, CURLOPT_SSL_VERIFYPEER, false);
curl_setopt($curl, CURLOPT_CUSTOMREQUEST, "POST");
curl_setopt($curl, CURLOPT_POST, true);
curl_setopt($curl, CURLOPT_POSTFIELDS, $data);
$curl_response = curl_exec($curl);
echo $curl_response;
curl_close($curl);

```

4.5 Configuration Management

4.5.1 Module Management

The Module Management allows to choose the module(s) that will appear in the interface. Each module can be enabled/disabled individually.

This enables or disables a consistent group of features.

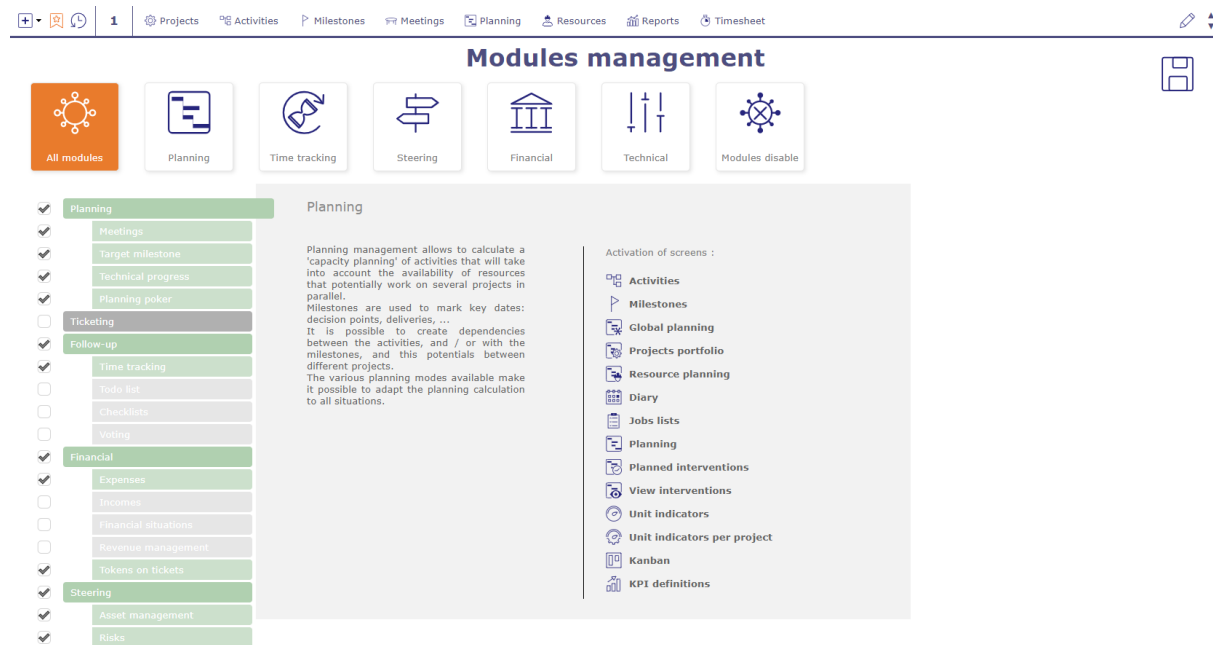


Fig. 36: Module management screen

The menu at the top of the page allows you to display all the modules or to display the modules corresponding to a part of the scope of the project management.

When you have selected one of these menus, the modules are displayed below.

- Click on a module to display its description, as well as the list of screens that will be activated or deactivated.
- Click on the checkboxes to enable or disable the module.

Warning: Disabling some modules will also hide reports, all related parameters and some fields.
For example, the project and activity expense fields are hidden when the financial/expense module is disabled.

4.6 Access rights

4.6.1 Profiles

The profile is a group of rights. Each with specific access rights to the database.

Thus, each user is linked to a profile which defines the data that he can see and possibly manage.

See also:

Concept

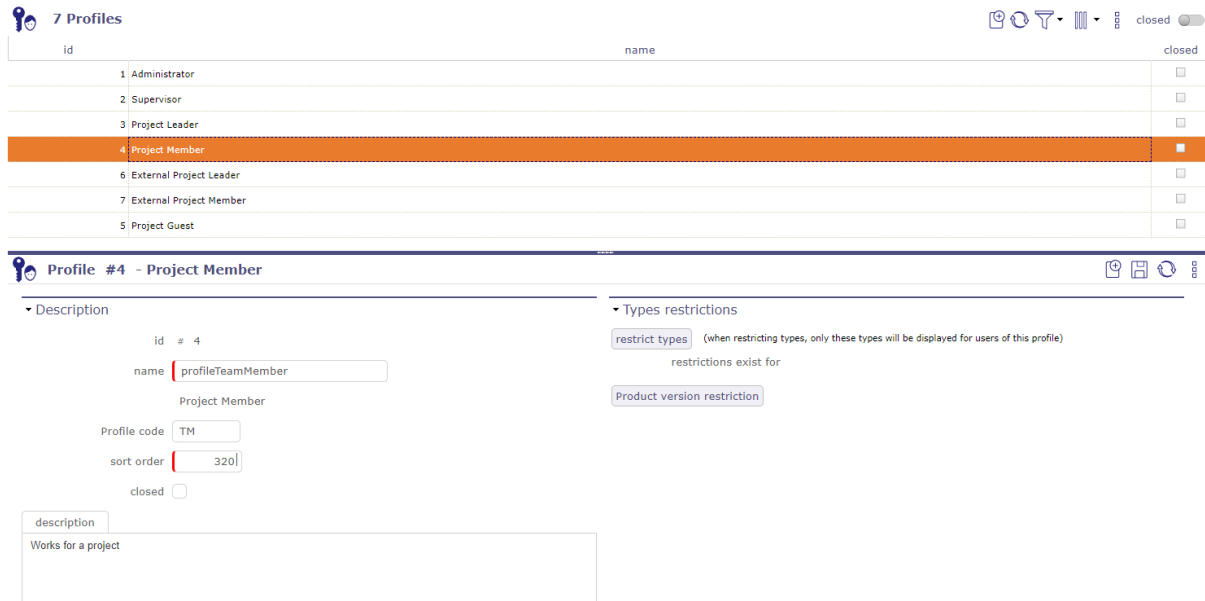


Fig. 37: Profiles screen

Value of Field “Name”

- The value of field “Name” is not the name displayed, but it is a code in the translation table.
- The value of field “Name” must be a significant name and must not contain spaces or special characters.
- The name displayed at right of the field is the translated name.
- when the new profile is created, it appears in the list of existing profiles in the list box.
- It remains between square brackets because it does not exist in *Translatable name*.

Tip: Ideally, the value of the field should start with “profile” to be easily identified in the translation table.

Field Profile code

You can put the abbreviations you need and they do not have an impact on most profiles.

However, for administrators and project managers, you must respect these codes so that the application recognizes them.

- **ADM:** will designate administrator.
- **PL:** will designate project leader.

Sort order

The sort order is important in profiles because it allows the most important profile to be placed at the top of the drop-down lists.

When a project manager assigns a resource, he can assign a profile to them, starting from his own profile and going down to the lowest one.

If the administrator profile is, due to its sort order, below the project manager in the list, in this case, the project manager could assign the administrator profile to any resource on the project in question.

8 [Trainee]

Profile #8 - [Trainee]

▼ Description

id # 8

name

[Trainee]

Profile code

sort order

closed

Fig. 38: Profile description with translatable name

7 Profiles

closed

id	name	sort closed	order
2	Supervisor	<input type="checkbox"/>	200
3	Project Leader	<input type="checkbox"/>	310
1	Administrator	<input type="checkbox"/>	320
4	Project Member	<input type="checkbox"/>	320
6	External Project Leader	<input type="checkbox"/>	410
7	External Project Member	<input type="checkbox"/>	420
5	Project Guest	<input type="checkbox"/>	500

Fig. 39: sort order with administrator below project leader

Fig. 40: Project manager can assign a resource with the administrator profile

Restriction zone

The restriction zone offers two types of restriction:

- By type based on ProjeQtOr elements (actions, activities, invoices, catalog ...)
- By product versions

See also:

Restriction types

4.6.2 Access to forms

This settings screen allows you to define access to the element screens for each profile.

Users who have access to this screen cannot modify their own screen access rights.

The checkbox is read-only to make sure that at least one profile can always access it.

Only another profile with access to the screen will be able to uncheck this box.

- Click the checkbox to allow or revoke access to a profile screen.
- Click to open all sections
- Click to close all sections

Access to forms							
Environment cloning parameters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Global parameters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User parameters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
Modules management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profiles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to forms	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access modes (project dependant)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to data (project dependant)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access modes (not project dependant)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to data (not project dependant)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Specific access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents rights per directory	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fig. 41: Access to forms screen

4.6.3 Access modes

The access mode defines a combination of rights to Created, Read, Update or Delete items.

It's the CRUD RIGHTS:

- Create rights
- Read rights
- Update rights
- Delete rights

Each access is defined as scope of visible and/or updatable, that can be, by kind of elements.

Project dependant

By default, ProjeQtOr offers 10 different access modes.

Each access defines the visibility that can be applied by type of elements dependent on a project (activity, ticket, action, ...).

You can choose from several levels of visibility for each CRUD entitlement.

- **No element:** No element is visible and updatable.
- **Own elements:** Only the elements created by the user.
- **Elements he is responsible for:** Only the elements the user is responsible for.
- **Elements of own project:** Only the elements of the projects the user/resource is allocated to.
- **All elements on all projects:** All elements, whatever the project.

Value of Field “Name”

- The value of field “Name” is not the name displayed, but it is a code in the translation table.
- The value of field “Name” must be a significant name and must not contain spaces or special characters.
- The name displayed at right of the field is the translated name.
- when the new profile is created, it appears in the list of existing profiles in the list box.
- It remains between square brackets because it does not exist in *translatable name*.

Tip: Ideally, the value of the field should start with “accessProfile” to be easily identified in the translation table.

Not project dependant

The non-dependent elements of a project, such as organizations, parameters, lists of values, tools or even controls and automatisms can also be set with CRUD rights.

These elements must be visible. So the reading right is granted on a basic basis.

ProjeQtOr offers 5 different access modes where you can define creation, update and deletion rights.



- **Yes:** allows the right to ...
- **No:** does not allow the right to ...
- **Own elements:** Only the elements created by the user.
- **Elements he is responsible for:** Only the elements the user is responsible for.

You can then define a mode corresponding to the visibility rights that you wish to grant on each profile in the access to data not dependent on the project.

4.6.4 Access to data

This screen allows to set element access mode for each profile.

Allows to define scope of visibility and/or updating of data in elements for users and resources.

- Click on  to open all the sections
- Click on  to closed all the sections

Project dependant

This screen is only for the elements reliant on a project.

For each element, selected the access mode granted to a profile.

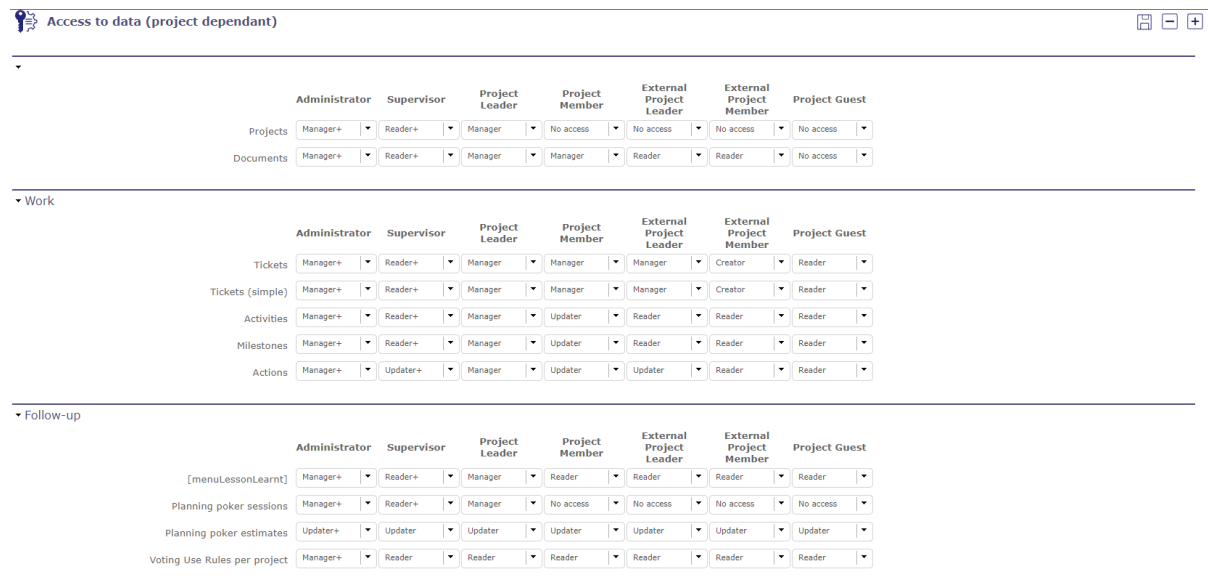


Fig. 42: Access to data (Project dependant) screen

Not project dependant

This screen allows to set for each profile, elements access rights.

Allows to grant access rights (read only or write) to users, to data on specific elements.

This screen is only for the elements not reliant on a project.



For each element, select the access rights granted to a profile.

Some features do not have a manager or are not linked specifically to a user profile, like messages, tools or even environmental parameters.

Certain access modes are therefore not offered in the drop-down lists on certain elements of this screen.

4.6.5 Access to reports

This screen allows to define report access for each profile. Users belonging to a profile can see the corresponding report in the report list. Reports are grouped by report categories

- Click on checkbox to permit or revoke access to the report for a profile.
- Click on  to open all the sections
- Click on  to closed all the sections

4.6.6 Document rights per directory

You can define the access rights to documents according to the profile at each level of the document directory tree.

By default, all values are initialized for each existing directory from the existing values in the “Project-dependent access to data” rights screen.

4.6.7 Specific access

This screen groups specific functionalities options. Users belonging to a profile can have access to the application specific functions. Depending on options of functionality, allows to grant access rights, to define data visibility or to enable or disable option.

For each option, select the access granted to a profile.

Access to resource data

This section allows to:

- Defines who will be able to see and update *real work* for other users.
- Defines who can *validate work* for resource.
- Defines who have access on *Diary* for resources.
- Defines who, as a resource, can *subscribe to survey* for users.
- Defines who have access on *Reports* for resources.

Note: Validate real work: in most cases, it is devoted to project leader.

Work and Cost visibility

This section defines for each profile the scope of visibility of work and cost data on project and activity for example.


Assignment management

This section defines the visibility and the possibility to edit assignments (on activities or else).

Display specific buttons

This section defines whether some button, checklist, job list will be displayed or not (if defined).

Display of combo detail button

- This option defines for each profile whether the button  will be displayed or not, facing every combo list box.
- Through this button, it is possible to select an item and create a new item.
- This button may also be hidden depending on access rights (if the user has no read access to corresponding elements).

Access to...

... The todo list

... Checklist

... Jobs list

allows you to display the corresponding sections on the element screens.

Bulk Edit

- Defines the possibility or not to change one or more criteria for one or more selected rows at a time

Conditional display

This section allows you to view the voting table in the voting section of the ticket details tab.

Voting tables

The voting table must display the real name of the voters, the number of points awarded to the selected item, their user name and the name of the client to which the user belongs.

voter's name	value	user	client
Administrateur	3	Administrateur	
analyst A	2	analyst A	

Name of voters

If you don't want to see or display so much detail, you can only display the names of people who voted on this item.

```
name of voters : Administrateur, analyst A,
```

Planning access rights

This section defines access for each profile to planning functionality.

Calculate the planning

Defines whether a profile has the right to recalculate the schedule using the calculator tool.

Can plan with overuse of resource

Defines whether a profile can check the Calculate with overuse box in the calculator tool of the schedule view.

Access to resource planning of others

Defines which profile has the right to view the scheduling information of other resources.

Change the Validated Date

Validated information can be sensitive data; you decide whether a profile can modify these fields.

Change the Project Priority

Change the Priority of Other Items

Priority can have a significant impact on the scheduling of projects and their items. This is why ProjeQtOr allows you to define a specific profile to modify these values.

Change manual progress If manual progress for fixed-duration activities is enabled in the global settings, you can define whether a profile has the right to modify this field in the details of schedulable items.

Validate the Planning

Enable automatic calculation

Enable automatic calculation

Defines which profile will be able to use automatic calculation on the planning view.

Monthly consolidation of projects

This section defines the right for each profile if it can validate and / or block the allocations of the resources of a project for a defined month.

Unlock items

This section defines for each profile the ability to unlock any document or requirement.

Otherwise, each user can only unlock the documents and requirements locked by himself.

Reports

This section defines for each profile the ability to change the resource parameter in reports.

Financial

This section defines for each profile the possibility of modifying the financial situations or of being able to automatically generate a project expense.

Specific update rights

You determine for each profile whether they have the rights to perform or execute certain features. The mention of “all” refers to the elements of any user.

- Can manage all notes.
- Add notes on a closed element
- Adding notes to a read-only element
- Can delete all attached files.
- Can force delete.
- Can delete items with real work
- Can force close.
- Can update creation information (header of the details area).
- Can view components on tickets.
- Can update left work (Assignment and/or timesheet).
- Can work on tickets
- Activation of the assignment breakdown
- Can manage votes.
- Can impose a layout on other users.
- Can create new tags.

Limit visibility to resources

By profil, allows to restrict or not the number of resources displayed, by organizations or own team, on resource lists.

By profil, allows to restrict or not the number of resources displayed, by organizations or own team, on resource screen.

Limit visibility to organizations

By profil, allows to restrict or not the number of organizations displayed, by organizations or own organization, on organization lists.

By profil, allows to restrict or not the number of organizations displayed, by organizations or own organization, on organization screen.

4.7 Audit connections

Audit connection proposes a view of “who is online”.

you can know which platform the user has logged on to, his browser and dates of his first and last access, as well as the duration of the connection

The screenshot shows the '2 Audit connections' interface. At the top, there is a table with columns: id, session id, user, first access, last access, duration, platform, browser, disconnection requested, and closed. Two connections are listed:

id	session id	user	first access	last access	duration	platform	browser	disconnection requested	closed
109	kfigmpq8d519ppv843egkskp7i	member1	01/27/2021 14:59	01/27/2021 15:06	00:07:15	Windows	Mozilla Firefox	<input type="checkbox"/>	<input type="checkbox"/>
108	g8klfbfbing7ratr7apdokhb0f3	admin	01/27/2021 14:49	01/27/2021 15:07	00:18:20	Windows	Google Chrome	<input type="checkbox"/>	<input type="checkbox"/>

Below the table, the details for 'Connection #109' are shown. It is divided into two sections: 'Description' and 'Connection status'.

Description:

- id: # 109
- session id: kfigmpq8d519ppv843egkskp7i
- user name: member1
- platform: Windows
- browser: Mozilla Firefox
- browser version: 84.0
- browser user agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:84.0) Gecko/20100101 Firefox/84.0

Connection status:

- first access: 01/27/2021 14:59
- last access: 01/27/2021 15:07
- duration: 00:08:15
- closed:
- Disconnection:
- disconnection requested:

Note: The administrator has the possibility to force the disconnection of any user (except his own current connection, see: *admin-console*).

4.8 Translatable name

For profiles and access modes, the value of field “Name” is translatable.

The field “Name” in screens *Profiles* and *Access modes* is not the name displayed, but it is a code in the translation table.

The name displayed at right of the field is the translated name.

The translated name depends on user language selected in *User parameters* screen.

Note: If translated name is displayed between square brackets [], then the value of field “Name” is not found in the translation table.

Translation table files

- In ProjeQtOr, a translation table file is defined for each available language.
- The files are named “lang.js” and are localized in a directory named with ISO language code.

Tip: For instance: ../tool/i18n/nls/fr/lang.js.

How to modify the translation file?

- You can edit file “lang.js” to add translation of new value or to modify the existing value translation.
- Or, you can download Excel file named “lang.xls”, available on ProjeQtOr site. You can modify the translation tables of all languages and produce files “lang.js”.

4.9 List of Types

Each element of ProjeQtOr can be typed at your convenience according to your profession or your field of activity.

Each type is presented the same. A very simple description section, with different fields depending on the element, and a behavior section that will condition your future actions according to the parameters entered.

4.9.1 Behavior section

This section is common to several element types.

Allows to determine some GUI behavior, according to element types.

Description or Comments

Box checked indicates the field *Description* is mandatory.

Responsible

Box checked indicates the field *Responsible* is mandatory when the status to treatment of the item is “In progress”.

Result

Box checked indicates the field *Result* is mandatory when the status to treatment of the item is “done”.

Flag status

You can lock the macro status: In progress - Done - Closed - Canceled

Those fields allow to determine whether the checkbox fields concerned are locked or not.

If the box is checked then you will only be able to modify the macro status thanks to the workflow statuses.

No left work on done

- The plannable elements cannot be passed to status **done** if there is still left work.

Project



Projects type #75 - Manual billed

Description Detail

▼ Behavior

- description mandatory
- lock "in progress" if checked, 'in progress' can be changed only by status
- lock "done" if checked, done can be changed only by status
- lock "closed" if checked, "closed" can be changed only by status
- lock "cancelled" if checked, "cancelled" can be changed only by status
- no left work on done item can't be "done" with left work
- lead project Projects of this type will not contain activities

Fig. 43: Behavior zone of project

Lead Project

The definition is made by the project type, you define that certain types of projects can not have activities, only subprojects or milestones.

Activity

activity on real time

Possibility of managing activities on real time.

See also:

Global parameters | Assignment section

▼ Behavior

- description mandatory
- responsible mandatory on "in progress" status
- result mandatory on done status
- lock "in progress" if checked, 'in progress' can be changed only by status
- lock "done" if checked, done can be changed only by status
- lock "closed" if checked, "closed" can be changed only by status
- lock "cancelled" if checked, "cancelled" can be changed only by status
- todo list treatment mandatory on done status
- can have sub-activities if unchecked, activity won't appear in the list Parent Activity
- no left work on done item can't be "done" with left work

Fig. 44: Behavior zone of activity

No left work on done

The activity cannot be passed to status **done** if there is still left work.

Todo list

Checked box prohibits status change to completed if not all to-do list items are set to “completed”

Ticket

Resolution

Box checked indicates the field **Resolution** is mandatory when the status to treatment of an item is **done**.

Lock solved

Box checked indicates the field **Solved** is read only. The value of field must come from the field “Solved” defined in the selected resolution.

Todo list

Checked box prohibits status change to completed if not all to-do list items are set to “completed”

Translation

Translation Request type

initial status of items

The initial state of the lines corresponds to the state of the request which will result in the automatic generation of the translation lines according to the languages recorded on your product or component version.

translation delay (nb days)

The translation deadline (in days) determines the deadline for the planned delivery date which will be calculated automatically from the creation of the request. This period is expressed in calendar duration and does not take into account non-working days.

Translation item type

status of generation of item

Corresponds to the state in which the rows will be created.

4.9.2 Types restrictions

Allows to limit values displayed in the list of values for each element type.

Restrictions can be defined for a project, a project type or a profile.

Note: Types restrictions section on Project screen

To display types restrictions section: Go to *Global parameter > Tab Activity > Controls and Restrictions Section* “allow type restriction on project” must be set to “Yes”. Possibility to define more restrictions to a project against restrictions defined at the project type level.

Type restriction management

▾ Types restrictions

(when restricting types, only these types will be displayed for the projects of this type)

restrictions exist for

Fig. 45: Restrict types section

- Click on Restrict types button to display the dialog box.
- For each element type, select values that will be in the list of values displayed.
- By default, if no type of element is selected, all the values of the line will be displayed on each screen that will be affected.

restrict types
✕

when restricting types, only these types will be displayed for the projects of this type

Actions type	<input type="checkbox"/> Project	<input type="checkbox"/> Customer	<input type="checkbox"/> Internal		
Activities type	<input type="checkbox"/> Task	<input type="checkbox"/> Development	<input type="checkbox"/> Evolution	<input type="checkbox"/> Management	<input type="checkbox"/> Phase
Budget type	<input type="checkbox"/> Initial	<input type="checkbox"/> Additional			
Catalogs type	<input type="checkbox"/> Product	<input type="checkbox"/> Service			
Change requests types	<input type="checkbox"/> recurring problem	<input type="checkbox"/> functional improvement	<input type="checkbox"/> technical improvement	<input type="checkbox"/> regulatory constraint	<input type="checkbox"/> process and quality
Client contract type	<input type="checkbox"/> management assistance	<input type="checkbox"/> hosting	<input type="checkbox"/> technical improvement	<input type="checkbox"/> maintenance & support	
Client invoices type	<input type="checkbox"/> Partial bill	<input type="checkbox"/> Final bill	<input type="checkbox"/> Complete bill		
Component Version Types	<input type="checkbox"/> Major Version	<input type="checkbox"/> Minor Version	<input type="checkbox"/> Patch		
Components type	<input type="checkbox"/> specific	<input type="checkbox"/> on the shelf			
Decisions type	<input type="checkbox"/> Functional	<input type="checkbox"/> Operational	<input type="checkbox"/> Contractual	<input type="checkbox"/> Strategic	
Deliverable type	<input type="checkbox"/> document	<input type="checkbox"/> software	<input type="checkbox"/> hardware		
Delivery type	<input type="checkbox"/> document	<input type="checkbox"/> software	<input type="checkbox"/> hardware		
Documents type	<input type="checkbox"/> Contract	<input type="checkbox"/> Management	<input type="checkbox"/> Meeting Review	<input type="checkbox"/> Follow-up	<input type="checkbox"/> Financial
	<input type="checkbox"/> Need expression	<input type="checkbox"/> General Specification	<input type="checkbox"/> Detailed Specification	<input type="checkbox"/> General Conception	<input type="checkbox"/> Detail Conception
	<input type="checkbox"/> Test Plan	<input type="checkbox"/> Installaton manual	<input type="checkbox"/> Exploitation manual	<input type="checkbox"/> User manual	
Incoming type	<input type="checkbox"/> document	<input type="checkbox"/> software	<input type="checkbox"/> hardware		
Issues type	<input type="checkbox"/> Technical issue	<input type="checkbox"/> Process non applicability	<input type="checkbox"/> Process non conformity	<input type="checkbox"/> Quality non conformity	<input type="checkbox"/> Delay non respect
	<input type="checkbox"/> Resource management issue	<input type="checkbox"/> Financial loss	<input type="checkbox"/> Customer complaint		
Meetings type	<input type="checkbox"/> Steering Committee	<input type="checkbox"/> Progress Metting	<input type="checkbox"/> Team meeting		
Milestones type	<input type="checkbox"/> Deliverable	<input type="checkbox"/> Incoming	<input type="checkbox"/> Key date		
Notifications type	<input type="checkbox"/> ALERT	<input type="checkbox"/> WARNING	<input type="checkbox"/> INFO		
Opportunities type	<input type="checkbox"/> Contractual	<input type="checkbox"/> Operational	<input type="checkbox"/> Technical		
Organizations types	<input type="checkbox"/> Department	<input type="checkbox"/> Unit	<input type="checkbox"/> Location		
Products type	<input type="checkbox"/> software	<input type="checkbox"/> service			

Fig. 46: Restrict types for the project

Displays element type names where a restriction is applied

Reminder : It means too, no restriction for remaining element types on each dedicated screen.

4.9.3 Element types

Actions types

Action type is a way to define common behavior on group of actions.

Table 1: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Activities types

Activity type is a way to define common behavior on group of activities.

Table 2: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Default planning mode	Default planning mode for type.
Priority	Defined the priority of the activity type. It will be automatically applied in the activity management screen.
Color	Defined the default color for this activity type.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Asset types

Question type is a way to define common behavior on group of questions.

Table 3: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Budget types

Budget types are a way to define the best budget for each project/activity.

Estimated budget, cash, investment, sale ...

Table 4: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Call for tender types

The types of calls for tenders make it possible to define the best procedure for launching calls with respect to the organization of your company:

the open, restricted tender, with minimum capacity requirements or pre-selection;

Table 5: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Catalog types

Catalog types allow you to define what type of item you produce or sell to your customers: products, services ...

Table 6: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Change requests types

The change request type is a way to define common behavior on a group of particular requests.

Several types are pre recorded: recurring problems, technical and functional improvement, regulatory constraint and process and quality.

Table 7: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Client Bills types

Bill type is a way to define common behavior on group of bills.

Table 8: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Client contract types

Client contract types are a way of defining the type of contract with a client.

Types of contract are already pre-registered: management assistance, hosting, technical improvement or Maintenance and support

Table 9: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Client order types

Client order types allow you to define common order behaviors, such as billing

Table 10: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Client payments types

customer payment type defines how the customer will pay the bill

Table 11: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Client quotations types

Customer quote types allow you to define common behaviors on a quote group, such as the type of billing that will be applied

Table 12: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Components types

Component type is a way to define common behavior to group of component.

Table 13: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Component version types

Component version type is a way to define common behavior to group of Component version.

Table 14: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Contexts types

Context types are used to define the environmental context to describe ticket or test case.

Only three context types exist, corresponding to the three selectable fields: Environment, OS and Browser.

You can only rename the types, not add nor remove any.

Note:

- Only the name of the context types can be changed.
 - No new context type can be added.
 - No context type can be deleted.
-

Table 15: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Description	Description of the type.
<i>Closed</i>	Box checked indicates the type is archived.

Customers types

Customer type is a way to define different kinds of customers (prospects or clients).

Table 16: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Decisions types

Decision type is a way to define common behavior on group of decisions.

Table 17: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Documents types

Document type is a way to define common behavior on group of documents.

Table 18: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Expenses details types

Expense detail type is a way to define common behavior and calculation mode on group of expense details.

Table 19: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
Value / unit	Define calculation mode for the detail type.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Note: Field **Value / unit**

If unit is set and not value, this line will be imputable.

If both unit and value are set, the line will be read only.

Result cost will be the multiplication between each of the three non empty line values.

Field	Description
Individual expense	Details type of individual expense.
Project expense	Details type of project expense.

Individual expenses types

Individual expense type is a way to define common behavior on group of individual expense.

Table 20: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Issues types

Issue type is a way to define common behavior on group of issues.

Table 21: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Meetings types

Meeting type is a way to define common behavior on group of meetings.

Note: Meeting type is also used for periodic meetings definition.

Table 22: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Messages types

Message type is a way to define common behavior on group of messages (appearing on today screen).

Table 23: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Color	Display color for messages of this type.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Milestones types

Milestone type is a way to define common behavior on group of milestones.

Table 24: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Default planning mode	Default planning mode for type.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Opportunities types

Opportunity type is a way to define common behavior on group of opportunities.

Table 25: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Order to Provider types

Vendor order types categorize the subject of the request: service or product

Table 26: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Organization types

The type of organization allows you to define a common behavior on organizations.

Management of *Organizations* allows to edit the structure of the company in the frame of organizations

Table 27: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the project type.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Payments to provider types

Payment type is a way to define common behavior on group of payments.

Table 28: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Planning poker session type

Planning poker session type is a way to define common behavior on group of planning poker.

Table 29: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Products types

Product type is a way to define common behavior to group of product.

Table 30: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Product version types

Product version type is a way to define common behavior to group of Product version.

Table 31: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Project expenses types

Project expense type is a way to define common behavior on group of project expense.

Table 32: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Projects types

Project type is a way to define common behavior on group of projects.

Code of the project type

Some important behavior will depend on code of the project type.

OPE	Manual billed
OPE	Forfait
OPE	Régie
OPE	Régie forfaitisée
OPE	Interne
ADM	Administratif
TMP	Modèle
PRP	Proposale

OPE: Operational project

In ProjeQtOr, operational projects can be associated with a billing type.

This association allows financial documents (invoices, quotes, purchase orders, etc.) to be automatically adapted to the billing method specific to the project type in question.

Depending on the billing type defined, specific shortcuts will appear in financial documents.

These shortcuts facilitate the automatic retrieval of relevant data (time spent, expenses, costs, etc.) related to the project, thus optimizing financial monitoring.

ADM: Administrative project

Type of project to follow non productive work : holidays, sickness, training, ...

All new types are created with **ADM** code.

Every resource will be able to enter real work on these projects, without having to be allocated to the project, nor assigned to project activities.

Assignments to all project task will be automatically created for users to enter real work.

These projects are not visible on Gantt type screens.

Some sections and fields are not visible or do not work on administrative projects like Paused, Fix planning or the minimum threshold.

TMP: Template project

These projects will not be used to follow some work.

They are just designed to define templates, to be copied as operational projects.

Any project leader (profile) can copy such projects, without having to be allocated to them.

All new types are created with **TMP** code.

PRP: Proposal project

These projects will not be used to follow some work.

This type of project makes it possible to define whether a project is strategically interesting to carry out.

All new types are created with **PRP** code.

Table 33: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the project type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
Billing type	Will define billing behavior (see: <i>Incomes</i>).
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Provider bill types

There is a wide variety of invoice types. Each one is used in specific circumstances and requires the respect of protocols concerning their constitution and their emission.

You can create as many invoice types as you need.

Table 34: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Provider tender types

Quote types allow you to organize and categorize the different offers received by your suppliers

Table 35: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Providers types

Provider type is a way to define different kinds of providers.

Table 36: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Questions types

Question type is a way to define common behavior on group of questions.

Table 37: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Requirements types

Requirement type is a way to define common behavior on group of requirements.

Table 38: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Risks types

Risk type is a way to define common behavior on group of risks.

Table 39: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Supplier contract types

Supplier contract types are a way of defining the type of contract with a supplier.

Types of contract are already pre-registered: management assistance, hosting, technical improvement or Maintenance and support

Table 40: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Test cases types

Test case type is a way to define common behavior on group of test cases.

Table 41: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Test sessions types

Test session type is a way to define common behavior on group of test sessions.

Table 42: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Default planning mode	Default planning mode for type.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Tickets types

Ticket type is a way to define common behavior on group of tickets.

Table 43: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Translation item types

Translation lines also have the possibility of being typed. You can more easily compartmentalize your requests.

Assign a different workflow and behavior for each type of line.

Table 44: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

Translation request types

You define the types of translation that you will use in your business.

This allows you to apply a different workflow and behavior for each type.

Table 45: Required fields

Field	Description
<i>Id</i>	Unique Id for the type.
Name	Name of the type.
Code	Code of the type.
Workflow	Defined the workflow ruling status change for items of this type (see: <i>Workflow</i>).
Sort order	Number to define order of display in lists.
<i>Closed</i>	Box checked indicates the type is archived.
Description	Description of the type.

4.10 List of Values

Each screen in List of values allows to define your own values.

Then you will be able to select them in corresponding screens.

Note: By default, some lists are not visible on their corresponding screen like Languages in Product and Component screen.

To use them you must enable their parameter in global parameters.

4.10.1 Budget orientation

The orientation of the budget

Table 46: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
█ Name	Name of this value.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.2 Budget Category

The orientation of the budget

Table 47: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
█ Name	Name of this value.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.3 Categories of project

Define your categories of project and you are able to select one in Project screen.

Table 48: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
█ Name	Name of this value.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.4 Criticalities

The criticality is the importance of an element to its context.

Note: The criticality for Risk and Opportunity designs the level of impact the risk or opportunity may have to the project.

The criticality for ticket is the estimated impact that the subject of the ticket may have for the product.

Table 49: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of criticality.
Color	Color to display the criticality in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.5 Deliverable status

Define your deliverable status list and select it in Deliverable screen.

Table 50: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of deliverable status.
Color	Color to display the deliverable status in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Add dates on deliverables to follow dates : initial, planned, real, validation

4.10.6 Deliverable weights

Define your deliverable weights list and select it in Deliverable screen.

That is useful to calculate weighting between different parameters in Reports->KPIs->KPI-deliverable-for-project screen.

Table 51: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of deliverable weights.
Color	Color to display the deliverable weights in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.7 Delivery modes

The mode of delivery.

Table 52: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Add dates on deliveries to follow dates : initial, planned, real, validation

4.10.8 Efficiencies

The efficiency measures the result of an action.

Table 53: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Color	Color to display the efficiency in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.9 Feasibilities

The feasibility defines the first analysis of implementation of a requirement.

Table 54: Required fields

Field	Description
<i>Id</i>	Unique Id for this status.
Name	Name of this status.
Color	Color to display the feasibility in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this status is archived.

4.10.10 Functions

The function defines the generic competency of a resource which can be linked to a cost.

The costs entered here will not be taken into account directly in the functions table on the resources screen.

These are costs which are proposed by default but which can be modified when creating the function on the resources screen.

To modify the functions and costs on the resource screen you must go through the update resource cost function.

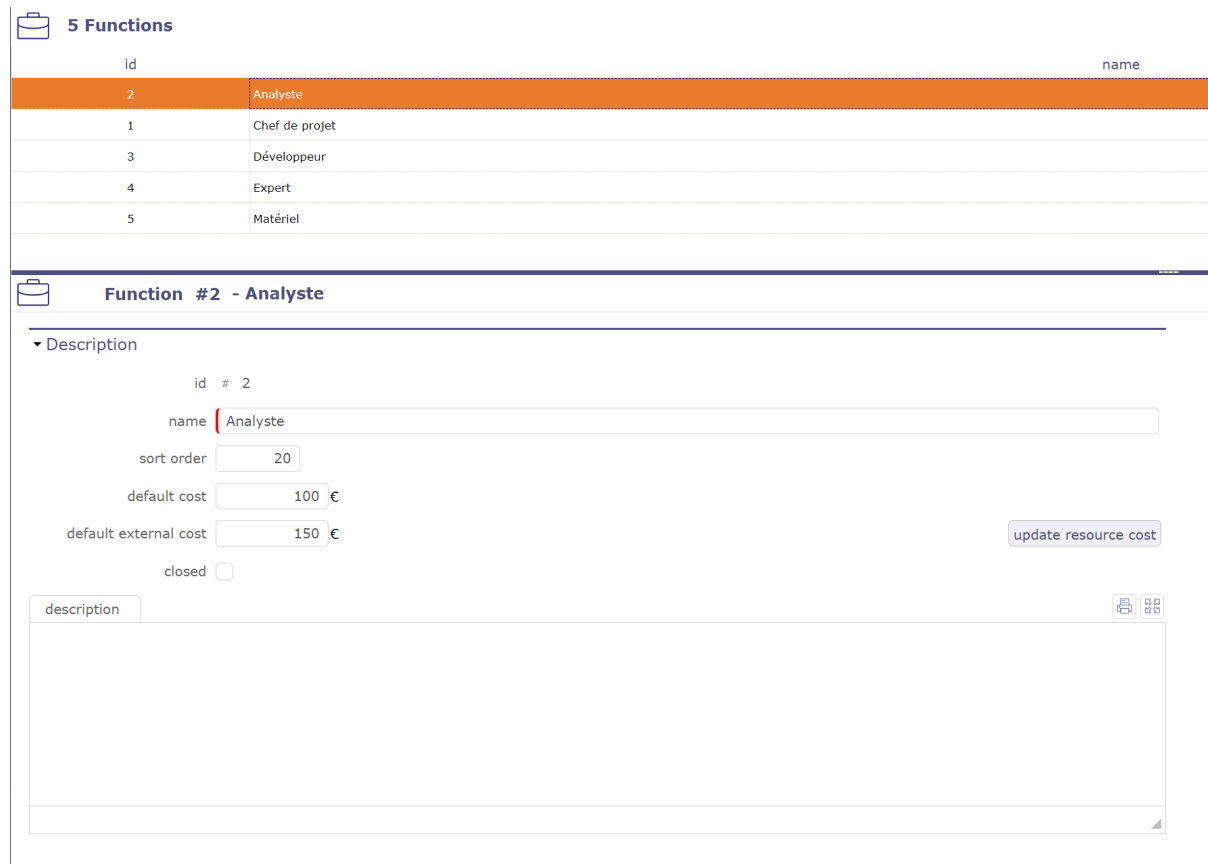


Fig. 47: Functions screen

Table 55: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
Default cost	Default cost of the function. Typically the cost to the business.
default external cost	Default external cost of the function. Typically the cost to the outsourced resource.
<i>Closed</i>	Flag to indicate this value is archived.
Description	Complete description of this value.

Internal and external cost

You can define two costs per function, one internal (existing) and one external (new).

When defining the cost of a resource, the proposed default cost should depend on whether the resource is external or internal:

If “is outsourced” is checked for the resource, the external cost will be assigned. Otherwise, it will be the internal cost

Update resource cost

You can roll up current costs to all resources from the cost of the function taking into account the external or internal criterion of the resource.

Click the **Update Resource Costs** button

Update resource cost [X]

Update options choices

Add new cost from date []

This option allows you to create a new cost for the resources whose value starts on the given date

Assigned cost of activities : unchanged
 Actual cost of activities : takes into account the new cost from the given date
 Remaining cost of activities : from the new cost

Replace existing cost

This option allows you to simply replace the current cost of the resource (the last cost if this amount has varied over time)

Assigned cost of activities : unchanged
 Actual cost of activities : from new cost
 Remaining cost of activities : from new cost

Replace initial assignment cost

This option allows you to replace the current cost of the resource (the last cost if this amount has varied over time) while forcing the initial assignment cost (for unclosed assignments) to this new cost

Assigned cost of activities : from new cost
 Actual cost of activities : from new cost
 Remaining cost of activities : from new cost

[Cancel] [OK]

Fig. 48: Update resource cost

You have 3 options to perform this treatment. This will determine how assignments and activity costs will be updated.

Add new cost from date

This option allows you to create a new cost for the resources whose value starts on the date entered.

- The cost of assigned activities remains unchanged.
- The real cost of activities takes into account the new cost from the date you entered
- The left cost of activities takes the new cost.

Replace existing cost

This option allows you to simply replace the current cost of the resource (the last cost if this amount has varied over time)

- The cost of assigned activities remains unchanged
- The real cost of activities takes into account the new cost
- The left cost of activities takes the new cost

Replace initial assignment cost

This option allows you to replace the current cost of the resource (the last cost if this amount has varied over time) while forcing the initial assignment cost (for unclosed assignments) to this new cost.

- The cost of assigned activities takes the new cost
- The real cost of activities takes the new cost
- The left cost of activities takes the new cost

Note: In order to keep the initial functioning of the solution, during the migration, the external cost will be initialized with the same value as the internal cost.

Similarly, when entering the internal cost, the external cost will be initialized to the same value if it is empty. In order to allow the entry of an external cost at zero, this will only be done when entering it on the screen (no systematic update on the server side).

4.10.11 Health status

The health status is a manual indicator for the health of a project.

It defines in a visual way the global health of the project.

It is displayed on Today screen, for each project, as a Red / Amber / Green traffic light.

Table 56: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Color	Color to display the health status in element lists and on today screen.
Icon	Icon that can be displayed for this health status.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Note: If no icon is defined, color is used.

You can define your own icons list (see: administration guide)

4.10.12 Incoming status

Define your incoming status list and select it in Incoming screen.

Table 57: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of incoming status.
Color	Color to display the incoming status in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Add dates on incomings to follow dates : initial, planned, real, validation

4.10.13 Incoming weights

Define your incoming weights list and select it in Incoming screen.

Table 58: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of incoming weights.
Color	Color to display the incoming weights in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Tip: That is useful to calculate weighting between different parameters in:

Reports -> KPIs -> KPI-incoming-for-project

4.10.14 Intervention modes

Allows you to define and create your own list of interventions mode.

These values are used in the *planned interventions* screens and *view interventions*.

Table 59: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Letter	Letter displayed on the intervention schedule and which refers to the corresponding intervention mode
Sort order	Number which defines the display order of intervention modes on the planned interventions and view interventions s
<i>Closed</i>	Flag to indicate this value is archived.

4.10.15 Languages

Allows to define and create your own languages list.

Then in Product or Component screen you can select your languages values.

Warning: You have to active **display language** in *Product/Component* in global parameters.

Table 60: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of deliverable status.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.



4.10.16 Languages skill level

You set the value for the skills of your translators.

These values will be applied to each of the languages known to the translator.

Warning: You have to active **display language** in *Product/Component* in global parameters.


Table 61: Required fields 

Field	Description
<i>Id</i>	Unique Id for this value.
 Name	Name of this value.
 Value	Value of deliverable status.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.17 Likelihoods

The likelihood is the probability of a risk or an opportunity to occur.

Table 62: Required fields 


Field	Description
<i>Id</i>	Unique Id for this value.
 Name	Name of this value.
Value	Value of likelihood.
% value	Value in percent.
Color	Color to display the likelihood in element lists
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Note: The % value field is used to calculate a reserve amount according to the likelihood of risk or opportunity.

4.10.18 Locations

Allows you to define and create your own list of locations, Sites, Cities, Countries ... for the management of your IT infrastructure.

Table 63: Required fields 

Field	Description
<i>Id</i>	Unique Id for this value.
 Name	Name of this value.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.19 Measure units

The measure units.

Table 64: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Plural of name	Plural form of name.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.20 Overall progress

The overall progress is a manual indicator for global progress of a project.

It defines in a visual way the global progress of the project, independently from work progress.

It is displayed on Today screen, for each project.

Table 65: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.21 Payment deadlines

The payment deadline is stated on the bill.

Table 66: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Number of days	Delay in payment (in days).
End of month	Flag to indicate that delay for payment is set at the end of month.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.22 Payment methods

The mode of payment.

Table 67: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.23 Periods

Allows you to define and create your own list of periods. These are used to define the intervention periods in customer and supplier contracts.

Table 68: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.24 Predefined situation

Table 69: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Element	Type of element affected
Type	Name of the <i>Brands</i>
Sort order	Number which defines the display order of the financial elements
Financial situation	The financial situation which will be taken into account
<i>Closed</i>	Flag to indicate this value is archived.

4.10.25 Priorities

The ticket priority defines the order to treat different tickets.

Table 70: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of priority.
Color	Color to display the priority in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.26 Quality levels

The quality is a manual indicator for the conformity of a project to quality processes.

It defines in a visual way the global conformity of the project.

Table 71: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Color	Color to display the quality level in element lists and on today screen.
Icon	Icon that can be displayed for this quality level.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Note: If no icon is defined, color is used.

You can define your own icons list (see: administration guide).

4.10.27 Renewal

Allows you to define and create your own renewal type list. These values are used in the customer and supplier contract management screens.

3 values are pre-registered by default: never, tacit and Express

Table 72: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
<i>Closed</i>	Flag to indicate this value is archived.

See also:

incomes

4.10.28 Resolutions

Allows to define different kinds of resolution for tickets.

Table 73: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Solved	Box checked indicates the ticket will be automatically marked as “solved” when this resolution is selected.
Color	Color to display the resolution in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.29 Risk levels

The risk level measures the technical risk of implementation of a requirement.

Table 74: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Color	Color to display the risk level in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.30 Severities

The severity designs the level of negative or positive impact the risk or opportunity may have for the product.

Table 75: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of severity.
Color	Color to display the severity in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.31 Status

The status is an important element of items lifecycle.

It defines the progress of the treatment of the element.

Some automations are implemented, depending on status definition, to set on items.

See also:

Workflow.

Assigned status

This status indicates that you have assigned a resource to an activity.

This can trigger the automatic status change when you assign a resource for the first time on a schedulable element of ProjeQtOr if the global parameter is activated.

If the assignment is already present or if you use the automatic assignment of the project team then the change of status will not be effective

In progress status

This status specifies that the treatment of item is supported.

A *responsible* can be determined or required.

Paused status

This state indicates that item processing is in a paused state.

Used for the processing of certain elements (activity, tickets ...)

Allows you to exclude and purge the calculation from the schedule

Recording these break times allows you to get more accurate treatment information

Done status

This status specifies that the treatment of item is done.

A *result* can be specified or required.

It is possible to require a result when the status change to “done”.

Closed status

This status indicates that the item is closed.

This article is archived and will no longer appear in the lists.

You can display these items by checking the “closed” option at the top right of the screen

Cancelled status

This status specifies that the item is cancelled.

Table 76: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
In progress <i>status</i>	Defines whether ‘In progress’ flag is automatically set for this status.
Done <i>status</i>	Defines whether ‘done’ flag is automatically set for this status.
Closed <i>status</i>	Defines whether ‘closed’ flag is automatically set for this status.
Cancelled <i>status</i>	Defines whether ‘cancelled’ flag is automatically set for this status.
Color	Color to display the status in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Consolidation of status changes

We have a parameter which allows to auto set parent item status.

It depends on children item status and available status in the workflow.

Note: Select YES **auto set parent activity status** in global parameters to use it.

- If an activity changes to a “In progress” status, all parents move to the first “In progress” status available in the workflow.
 - If an activity changes to a “done”, “closed” or “canceled” status, moving of each parent to the first “done” or “closed” status according to the status of all its children.
-

Warning: If parents items status has not been changed auto, please check your controls like required fields.

4.10.32 Story point

Values for planning poker session cards are based on the Fibonacci sequence but with rounded values.

You can determine a number of cards and a value for each of them.

Each value is associated with a number of charging days.

This charge will be postponed after the vote on the element used for the user story (ticket, requirement, activity)

4.10.33 Tender status

Allows to define or create your own tender status list.

Tender status displayed on Tenders screen and in the table Submissions of tenders

Table 77: Required fields |

Field	Description
<i>Id</i>	Unique Id for this value.
 Name	Name of this value.
Color	Color to display the status in element lists.
Waiting tender	Status information.
Tender received	status information.
Tender not selected	status information.
Tender selected	status information.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.10.34 Trends

The trend is a manual indicator for the global trend of project health.

It defines in a visual way the health trend of the project.

It is displayed on Today screen, for each project.

Table 78: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Color	Color to display the trend in element lists and on today screen.
Icon	Icon that can be displayed for this trend.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

Note: Field Icon

- If no icon is defined, color is used.
- You can define your own icons list.

4.10.35 Urgencies

The ticket urgency is an element given by the requestor to indicate the quickness of treatment needed for the ticket.

Table 79: Required fields

Field	Description
<i>Id</i>	Unique Id for this value.
Name	Name of this value.
Value	Value of urgency.
Color	Color to display the urgency in element lists.
Sort order	Number to define order of display in lists.
<i>Closed</i>	Flag to indicate this value is archived.

4.11 Automation

The menu “controls and automatisms” allows to manage and parameterize efficiently and finely the triggering events as well as all that ensues from it... automatically.

Sending mails, changes of status, status, loading of notes ...

4.11.1 Workflow

Concepts

- Profiles definition

A workflow defines the possibility to go from one status to another one, and who (depending on profile) can do this operation for each status.

Once defined, a workflow can be linked to any type of any item.

It is possible to define some mandatory fields on some status change (in the definition of type of item or through the Screen Customization plugin).


If a field is required for the transition from one status to another then you will be automatically redirected to the required field.

Regardless of the layout and presentation of your screens.

The screenshot displays the '9 Workflows' management interface. At the top, a list shows workflow configurations with columns for 'id', 'name', 'order', and 'closed'. Below this, the 'Workflow #1 - Default' configuration is shown in detail, including a description field and a 'Workflow Diagram' section. A large table titled 'Authorization to change from one status to another' is visible, detailing permissions for transitions between statuses like 'recorded', 'qualified', 'accepted', 'reopened', 'assigned', 'prepared', 'in progress', 'done', 'verified', 'delivered', 'validated', 'closed', 'submitted', 'accepted', 'rejected', and 'cancelled'. The table uses checkboxes to indicate which user profiles (e.g., Administrator, Supervisor, Project Lea, External Pr) are authorized for each transition.

Fig. 49: Workflow screen

Select status

Click on  to display the status list.

Choose the statuses to keep or hide by clicking on the checkboxes

select status to show or hide
✕

- recorded
- qualified
- accepted
- re-opened
- assigned
- prepared
- in progress
- done
- verified
- delivered
- validated
- closed
- Submitted
- Accepted
- Rejected
- cancelled

check / uncheck all
Cancel
OK

Fig. 50: Select or hide status

Section List of types using this workflow

List of all elements and objects related to this workflow

▼ list of types using this workflow

Action	Activity	Asset	Client Invoice	Budget	Call for tender	Change request	Client	Client contract	Client order	Component	Component Version	Delivery	Document	Issue
Project	Development	Software	Partial bill	Initial	by mutual agreement	recurring problem	business prospect	management assistance	Fixed Price	specific on the shelf	Major Version	document	Need expression	Technical issue
Internal	Evolution	Computer	Final bill	Additional	adapted procedure	functional improvement	customer	hosting	Per day		Minor Version	software	General Specification	Process conform
Customer	Management	Printer	Complete bill		open call for tender	technical improvement		technical improvement maintenance & support	Per month		Patch	hardware	Detailed Specification	Quality r conform
	Phase	Server			restricted call for tender	regulatory constraint			Per year				General Conception	Process applicabil
	Task	Licence				process and quality							Detail Conception	Custom complai
		Device											Test Plan	Delay nc respect
													Installation manual	Resource manage
													Exploitation manual	issue
													User manual	Financial
													Contract	
													Management	
													Meeting	
													Review	
													Follow-up	
													Financial	

Fig. 51: List of types using this workflow

Section Workflow Diagram

The workflow diagram presents a visual representation of the workflow displaying all possible transitions (independently to profile rights).

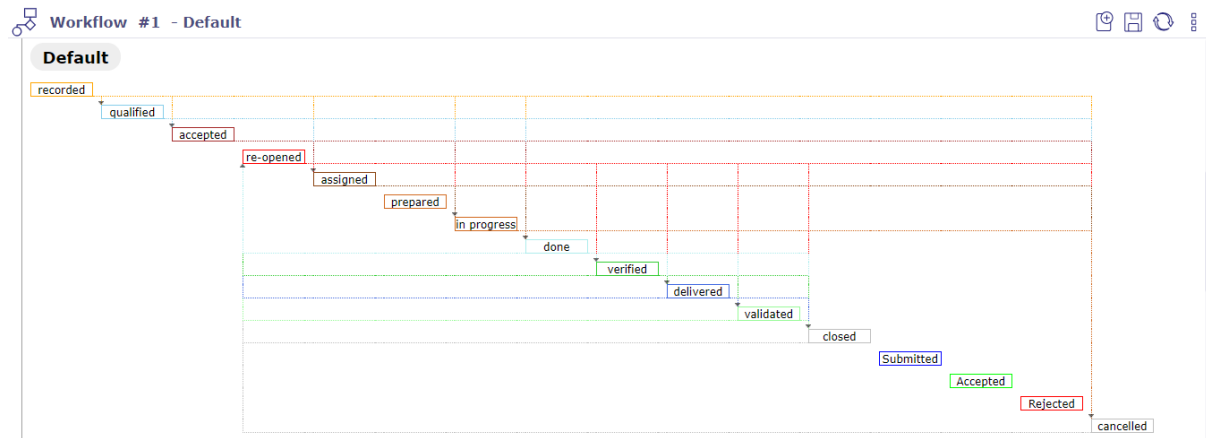


Fig. 52: Workflow Diagram

Section Habilitation to change from a status to another

The habilitation table helps defining who can move from one status to another one.

Each line corresponds to the status from which you want to be able to move.

Each column corresponds to the status to which you want to be able to go.

It is not possible to go from one status to itself (these cells are blank).

Just check the profile (or “all”) who is allowed to pass from one status to the other.

Make sure that it is still possible to transfer an item from one status to another. Because it is possible to get stuck on a status.

Check the links so that there is still an outlet.

• Authorization to change from one status to another

from \ to	recorded	qualified	accepted	re-opened	assigned	prepared	in progress	done	verified	delivered	validated	closed	Submitted	Accepted	Rejected	cancelled		
recorded	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input checked="" type="checkbox"/> Supervisor <input checked="" type="checkbox"/> Project Lea <input checked="" type="checkbox"/> Project Mer <input checked="" type="checkbox"/> External Pn <input checked="" type="checkbox"/> External Pn <input checked="" type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input checked="" type="checkbox"/> Call <input checked="" type="checkbox"/> Administrat <input checked="" type="checkbox"/> Supervisor <input checked="" type="checkbox"/> Project Lea <input checked="" type="checkbox"/> Project Mer <input checked="" type="checkbox"/> External Pn <input checked="" type="checkbox"/> External Pn <input checked="" type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input 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type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus 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[Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer <input type="checkbox"/> External Pn <input type="checkbox"/> External Pn <input type="checkbox"/> Project Gus <input type="checkbox"/> [Trainee]	accepted
reopened	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	<input type="checkbox"/> Call <input type="checkbox"/> Administrat <input type="checkbox"/> Supervisor <input type="checkbox"/> Project Lea <input type="checkbox"/> Project Mer	reopened

Fig. 53: Habilitation table

4.11.2 Email Templates

The user is able to format mails that are sent automatically on events.

When using template, the standard email formatting is replaced with selected one.

Just define your templates, and select it on the “Mail on Events”

See also:

Notifications on event.

Note: Field element updated and type

If not set, the template is valid for every type of the element

If element is set, only these elements will be able to select the template

If **element** and **type** are defined, only elements of the corresponding type will be able to select the model of mail

Specifics Tags on email template

In the model, the user can use any property of the subject and display it in the mail using specific tags.

You just need to use the tag **\$(projectName)** for the name of the project to appear and **\$(idproject)** to display the identification number of this one.

Tip: For properties referencing an external element, such as idXXXX, use **\$(nameXXXX)**

Other tags are available as parameters for email titles

See also:

Global Parameters

Tip: Some specific tags can also be used

- **\$(item)** : class of the item
- **\$(dbName)** : display name of current instance

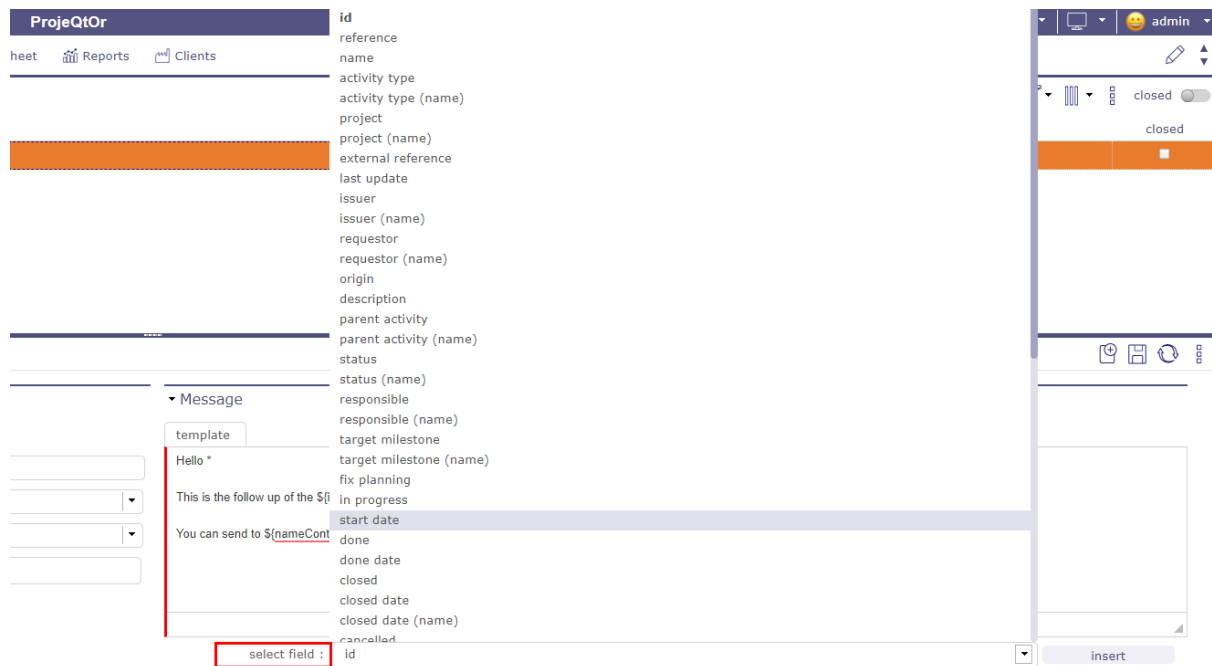


Fig. 54: Specific tags

- `{responsible}` : synonym for `{nameResource}`
- `{sender}` : name of user sending the email
- `{project}` : synonym for `{nameProject}`
- `{url}` : url to get the direct link to the item
- `{goto}` : display Class and Id of item, clickable to have direct link to the item

Attached files

- `{allAttachments}` : allow to add to your template all the attached files of the element
- `{lastAttachment}` : allow to add the last attached files to the element

Important: When sending all the files, the software retrieves the files one by one and this, in the order of insertion, from the most recent to the oldest attached file.

If the maximum size allowed does not allow all files to be sent, then the software will stop until the maximum size is reached.

If the last attached file saved in the software alone exceeds the maximum authorized size, then no file is sent.

Warning: This tags are available except in the mail title because they display a table

- `{HISTORY}` : displays the last change of an object.
- `{HISTORYFULL}` : display all the modifications
- `{LINK}` : list linked elements to the item
- `{NOTE}` : lists the element’s notes in tabular form
- `{NOTESTD}` : list notes in default format

the Tags selector

A tag selector is available under the text fields.

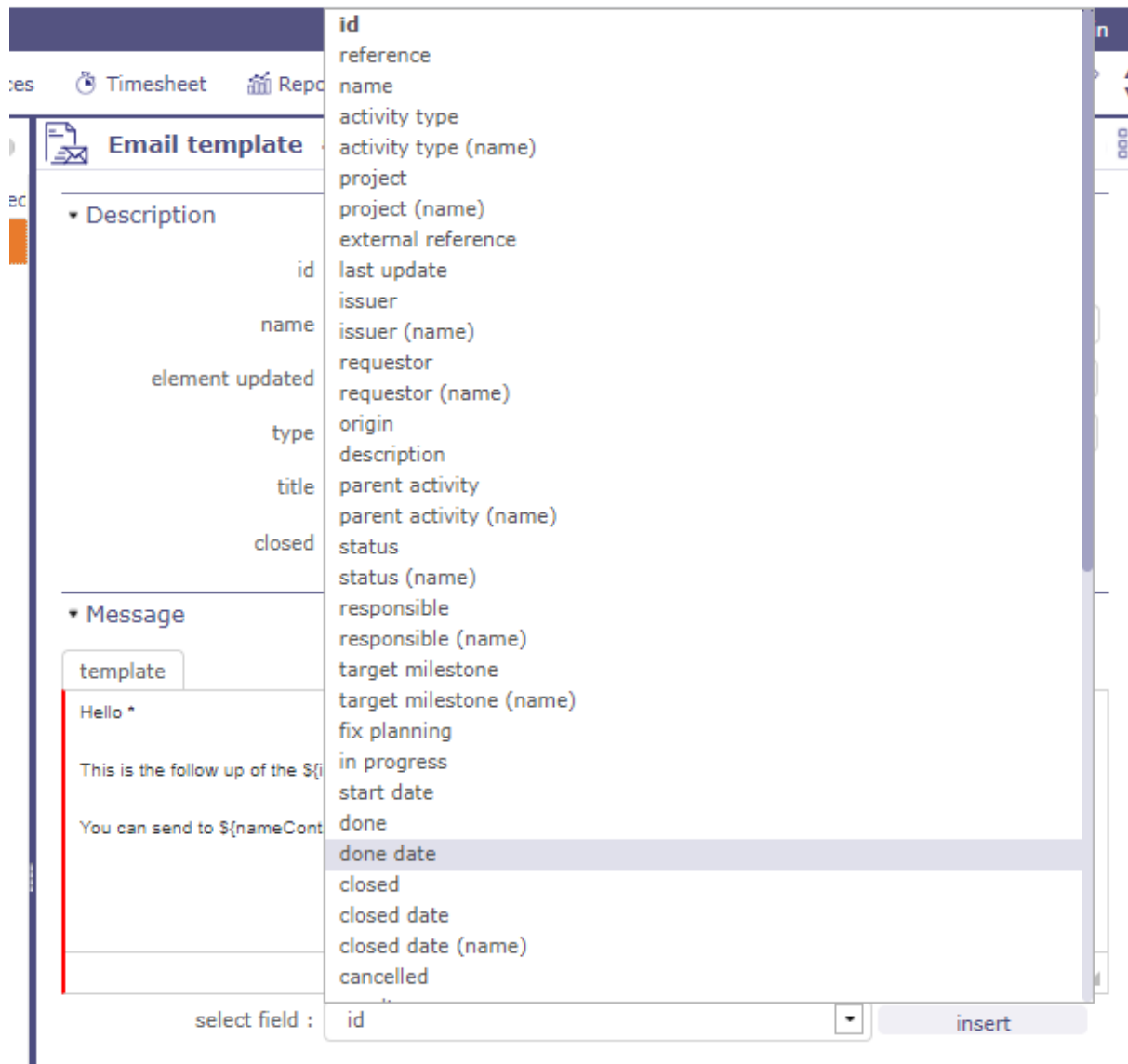


Fig. 55: Insert specific tags

- Choose the tag you want to insert.
- Click on insert
- The tag appears in the body of the text

4.11.3 Delays for tickets

6 Delays for tickets closed

id	ticket type	urgency	value	unit	closed	project
6	Anomaly / Bug	Urgent	2.000	open days	<input type="checkbox"/>	
5	Anomaly / Bug	Blocking	4.000	open hours	<input type="checkbox"/>	
4	Support / Assistance	Blocking	4.000	open days	<input type="checkbox"/>	
3	Support / Assistance	Blocking	1.000	open days	<input type="checkbox"/>	
2	Incident	Urgent	1.000	open days	<input type="checkbox"/>	
1	Incident	Blocking	2.000	open hours	<input type="checkbox"/>	

Delay for tickets #6 closed

▼ Description

id # 6

ticket type

urgency

project

value

closed

ticket status

Fig. 56: Delays for tickets screen

It is possible to define a default delay for tickets, for each ticket type, each ticket urgency and for each status.

Note: On creation, the due date will automatically be calculated as creation date + delay.

Tip: You determine what the status of the ticket will be for the timeframe you create.

For the same ticket, you can have 2 days to take charge of it, 1 day to process it and 1 day to close it.

4.11.4 Unit indicators

6 Unit indicators closed

id	element	indicator	reminder	unit	alert	unit	closed	project
6	Milestone	respect of validated end date	1.000	open days			<input type="checkbox"/>	
5	Action	respect of planned due date	1.000	open days	1.000	open hours	<input type="checkbox"/>	
4	Activity	reassessed work compared to validated work	100.000	%	110.000	%	<input type="checkbox"/>	
3	Activity	respect of validated end date	1.000	open days		.000 hours	<input type="checkbox"/>	
2	Ticket	respect of initial due date/time		.000 hours			<input type="checkbox"/>	
1	Ticket	respect of planned due date/time	1.000	hours		.000 hours	<input type="checkbox"/>	

Unit indicator #5 - respect of planned due date closed

▼ Description

id # 5

element

project

indicator

tolerable value

not tolerable value

closed

▼ Mail receivers

requestor

issuer

responsible

project team

global project team project team including parent projects

project leader

project manager

followers

other

▼ Internal alert and warning receivers

requestor

issuer

responsible

project team

global project team project team including parent projects

project leader

project manager

followers

Fig. 57: Indicators

It is possible to define indicators on most elements. You can set the indicators on:

- actions

- activities
- customer invoices
- customer invoice exchanges
- customer orders
- customer quotes
- individual expenses
- issues
- meetings
- milestones
- supplier orders
- projects
- project expenses
- supplier invoices
- supplier offers
- questions
- requirements
- risks
- payment deadlines to suppliers
- test sessions
- and finally the tickets

Depending on type of elements the type of indicators that can be selected in list differs.

Some indicators are based on delay (due date), some on work, others on cost.

For each indicator, a warning value and an alert value can be defined in days or hours (working or not).

Indicator display

On the Today screen, on the item summary lists, a color code is applied to the line if the item is subject to an indicator and is concerned by the alert values entered.



















	maintenance				enregistré	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #3	project one	Facture intermédiaire	test	15/03/2012	en cours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #1	project one - maintenance	Incident	bug: it does not work	02/06/2020	ré-ouvert	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #2	project one	Comité de direction	test #1	04/11/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #3	project one	Comité de direction	test #2	11/11/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #7	project two	Gestion	Management	14/11/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #4	project one	Comité de direction	test #3	18/11/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #3	project one - developement	Tâche	Evolutoin X - Analysis	23/11/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #5	project one	Comité de direction	test #4	25/11/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #4	project one - developement	Tâche	Evolution X - Development	29/11/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #5	project one - developement	Tâche	Evolution X - Tests	02/12/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #6	project one	Comité de direction	test #5	02/12/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #1	project one	Session de tests d'évolutions	Web Application V1 - Main test session	02/12/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #2	project one - developement	Évolution	Evolution X	05/12/2022	en cours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #1	project one - developement	Date clé	Delivery of Evolution X	05/12/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #6	project one - developement	Évolution	Evolution Y	09/12/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #7	project one	Comité de direction	test #6	09/12/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #8	project one	Comité de direction	test #7	16/12/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 #9	project one	Comité de direction	test #8	23/12/2022	enregistré	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fig. 58: Color code applied to lines whose elements are subject to indicators

On the screen of an element subject to the indicators and whose values enter the alert zone, an icon is displayed in front of the description of the element.

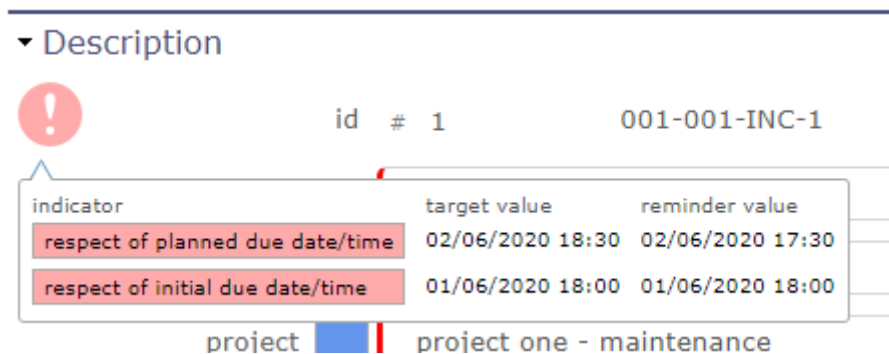


Fig. 59: display of the indicator and the values applied to the element

When you hover over the icon, the raised indicator on that item is displayed along with reminder and alerts values.

Mail receivers

List of addresses of the mails.

The list is not nominative, but defined as roles on the element.

Each addressee will receive mail only once, even if a person has several “checked” roles on the element.

See also:

Receivers list for receivers detail.

Internal alert and warning receivers

List of addresses of the internal alert.

The list is not nominative, but defined as roles on the element.

See also:

Receivers list for receivers detail.

4.11.5 Predefined notes

The predefined note set the possibility to define some predefined texts for notes.

When some predefined notes are defined for an element and / or type a list will appear on note creation.

Selecting an item in the list will automatically fill in the note text field.

4.11.6 Checklists

It is possible to define checklist forms for each element or each type of element.

When a checklist form exists for a given element, the checklist is available only for the element.

A checklist is built from checklist lines.

Each line has a name, an order and up to 5 check choices.

- Click on  to create a new checklist line.

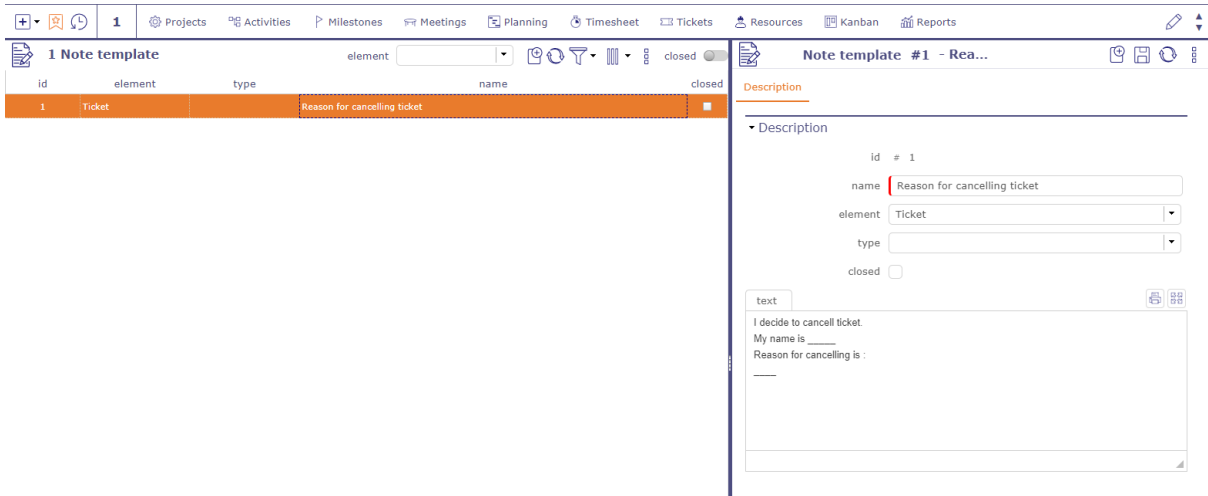


Fig. 60: Predefined notes

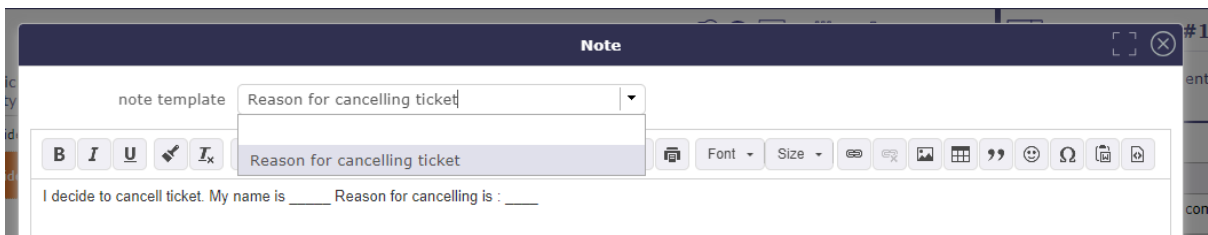


Fig. 61: Predefined notes for ticket

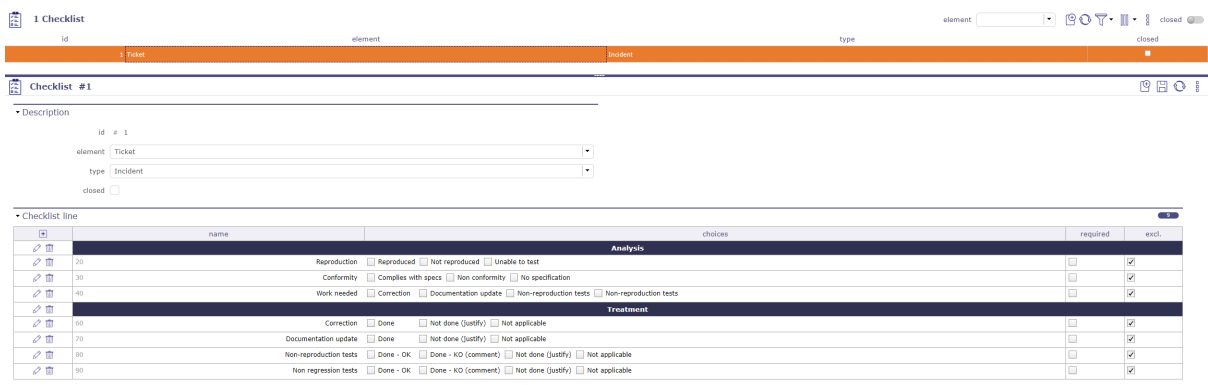




Fig. 62: Checklist screen

- Click on  to update an existing checklist line.
- Click on  to delete the corresponding checklist line.

Choices for the checklist line ✕

name	<input type="text"/>
<i>(tooltip)</i>	<input type="text"/>
sort order	<input type="text" value="100"/>
choice #1	<input type="text"/>
<i>(tooltip)</i>	<input type="text"/>
choice #2	<input type="text"/>
<i>(tooltip)</i>	<input type="text"/>
choice #3	<input type="text"/>
<i>(tooltip)</i>	<input type="text"/>
choice #4	<input type="text"/>
<i>(tooltip)</i>	<input type="text"/>
choice #5	<input type="text"/>
<i>(tooltip)</i>	<input type="text"/>

Fig. 63: Choices for the checklist lines

A line with no check choice will be displayed as a **section title**.

Name and Choices have 2 fields :

1. Displayed caption.
2. Help text that will be displayed as tooltip.

Checks can be exclusive (select one will unselect others) or not (multi selection is then possible).

4.11.7 KPI definitions

A performance indicator or key performance indicator (KPI) is a type of performance measurement. It is possible to define Kpi on incomings and deliverables items.

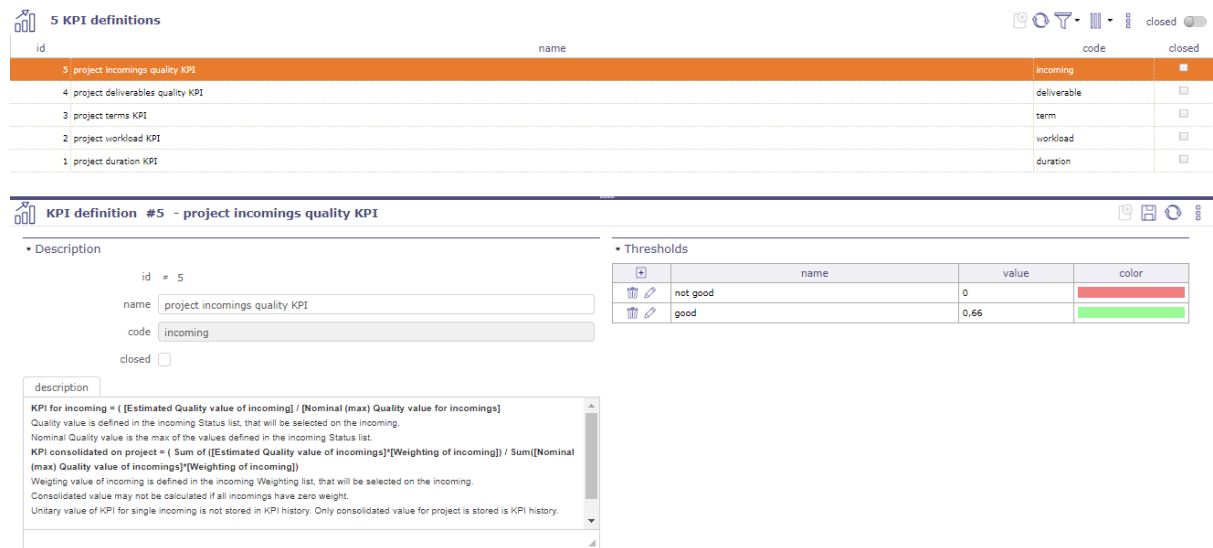


Fig. 64: KPI Definition screen

Warning: Description integrates the formula used to calculate the KPI.

Section Thresholds

It is possible to attributes tresholds lines to KPI.

- Click on to create a new JobList line.
- Click on to update an existing JobList line.
- Click on to delete the corresponding JobList line.

Thresholds			
	name	value	color
	not good	0	
	good	0,66	

Note: Keep in mind KPI is an indicator of performance at project level (opposite to indicator which is calculated at item level).

To display the indicator, use Kpi report. See: *Reports*



Fig. 65: List of KPI Reports

4.11.8 JobList




The JobList can be used for each item or item type

It is generally used to detail an activity or a ticket.

It also acts as an indicator to monitor compliance with date values thanks to the lead time of tasks.

Section JobList lines

A JobList is built from JobList lines.

- Click on  to create a new JobList line.
- Click on  to update an existing JobList line.
- Click on  to delete the corresponding JobList line.

Task anticipation delay .


This deadline is fixed for each step created in the joblist. It works with planned dates. It is not compulsory

These lead times are calculated in calendar days from the last day of the planned item.

A color code allows you to anticipate these dates

- **White:** Without anticipation delay
- **Green:** Check the box to indicate that this step has been completed. The dot turns green.
- **Orange:** You enter the anticipation period
- **Red:** you have exceeded this deadline

When the list is created and displayed on the item screen, you can change the planned end dates to validated end dates.

Click on  to edit the responsible and the validated end date.

Jobs list #1

Description

▼ Description

id # 1

element

type

closed

▼ Job list 4

	sort order	name ↕	task anticipation delay
 	10	<input type="checkbox"/> Preparation	10 d
 	20	<input type="checkbox"/> Conception	8 d
 	30	<input type="checkbox"/> Realisation	6 d
 	40	<input type="checkbox"/> Tests	2 d

Fig. 66: Creation of a job list

▼ Job list

<input type="radio"/>	Analysis		<input type="text"/>
<input checked="" type="radio"/>	Research		<input type="text"/>
<input type="radio"/>	Development		<input type="text"/>
<input type="radio"/>	Test		<input type="text"/>

Fig. 67: Joblist colors anticipation delay

4.11.9 Input mailbox for import

With automatic import mailboxes, you transfer a file to be imported via email.

- Configure an import mailbox that will not insert an item but read the attached file (CSV or XLSX)
- import it as if it had been placed in the automatic import directory.

Note: The attached file will be in the format “Class_XXXXXXXX.xlsx” or “Class_XXXXXXXX.csv”.

Class is the class of the items to be imported.

XXXXXXXX is a timestamp used to distinguish the files (typically YYYYMMDD).

<p>Warning: Unlike automatic import, which is based on a directory, the timestamp will not be used to order the files to be imported; the order in which the emails are received will determine this order.</p>
--

The sending email must be known and correspond to a user who has the right to create items of the class to be imported.

The import must be performed with the rights of this user.

This means that a project manager who imports activities will only be able to create activities on their own projects.

The results of the import will be returned by email to the sender’s address. The format will be identical to the manual import format.

4.11.10 Notifications

You must activate the notifications module to display the corresponding screens

ProjeQtOr offers 2 systems to generate alerts or reminders: definition of notifications and manual notifications from the tools menu

Notification definition in control and automation menu allows you to create notifications about events

Event Notifications

The app is able to automatically send internal emails or notifications when an item is updated.

Events are defined on an element and/or an element type.

If the type field is not defined, the event is valid for each type of the element.

For emails

The email message is formatted to show information about the item.

Selecting a template, will use the formatting from the template instead of the default standard formatting.

Email titles are defined in *Global parameters*.

For notifications

You can use the notifications generated by your browser or the internal notifications of ProjeQtOr.

When opening the application in your browser, you will be offered an authorization message for the display of ProjeQtOr notifications.

After acceptance, notifications from your browser will replace internal notifications.

You will see notifications from your desktop even if you are not directly on the app.

Warning: You must allow notifications from your browser in your operating system settings.
The ProjeQtOr application must be running in the background to continue receiving notifications.

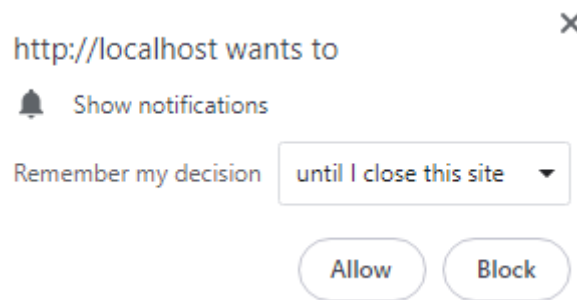


Fig. 68: browser message to allow notifications

Description section

In the description section you will detail what will be the levers to trigger the sending of an email.

Status is one of these levers. Positioning items in the chosen status will generate an email.

Or choose any other event in the drop-down list.

Receivers Section

List of addresses of the mails.

The list is not nominative, but defined as roles on the element.

Each addressee will receive mail only once, even if a person has several “checked” roles on the element.

See also:

Receivers list for receivers detail.

Notifications

You can defined manually notifications in this screen.

You receive notifications as soon as you authenticate on the login screen

When you are logged in, you have a reminder at the top of the screen.

You have the number of unread notifications

Hover over it for the list of notifications to appear

A slight color line in front of the name indicates the type of notification

new status	<input type="checkbox"/>	done
or other event		
email template		
closed		<ul style="list-style-type: none">attachment addnote addnote changeassignment addassignment changeadd allocation to projectchange allocation to projectlink addlink deleteresponsible changedescription changeresult change or responseany changeany change of statuspriority changenew user created

Fig. 69: Events list

▼ Email receivers

- requestor
- issuer
- responsible
- project team
- global project team project team including parent projects
- project leader
- project manager
- assigned resource
- followers
- other

▼ Internal alert and warning receivers

- requestor
- issuer
- responsible
- project team
- global project team project team including parent projects
- project leader
- project manager
- assigned resource
- followers

Fig. 70: Receivers section

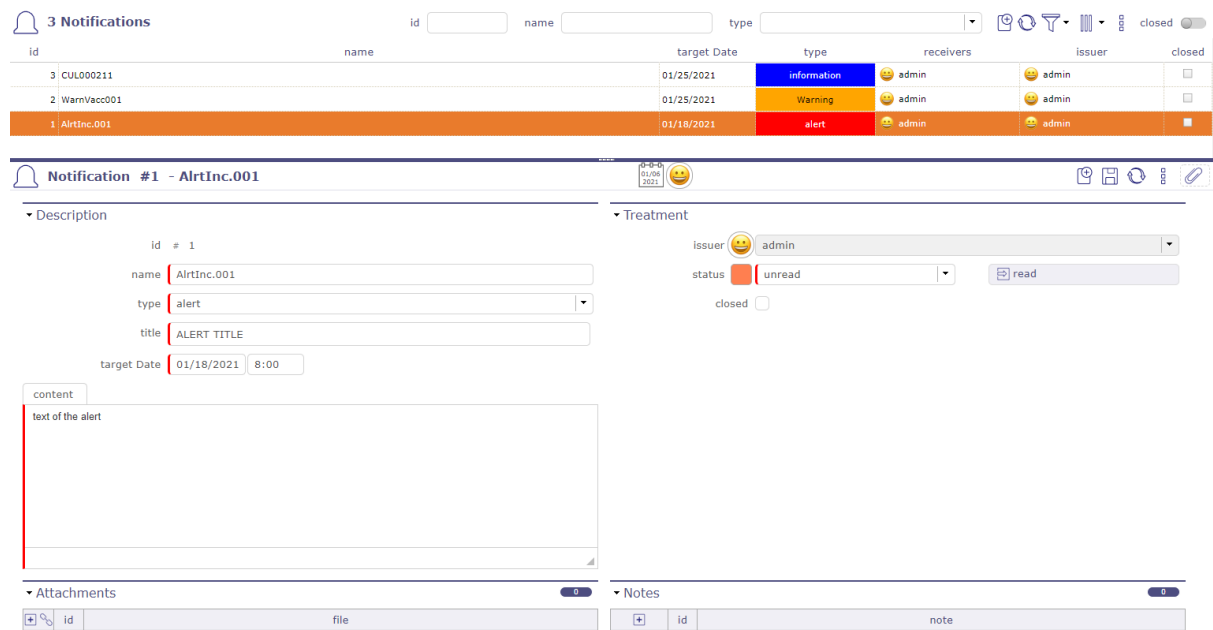



Fig. 71: Notifications

- Red = alert
- Blue = information
- Yellow = warning

you can create as many types as you want and customize the colors to your liking.

Click on the title of the notification to display its detail screen.








Click on the  to make the notification disappear and set it to “read” status.

You can also display the notification in the part below the menu.

See also:

Secondary menu - Notifications section

Click on an unread notification for discover the details.

- The first icon indicates the type of notification.
 -  type information
 -  type Warning
 -  type alert
 -  sum - Records all the type
- The second icon indicates how the notification was created
 - System Notification 
 - Manual Notification 
- The third icon indicates if the notification has a definition.
 - Notification definition 



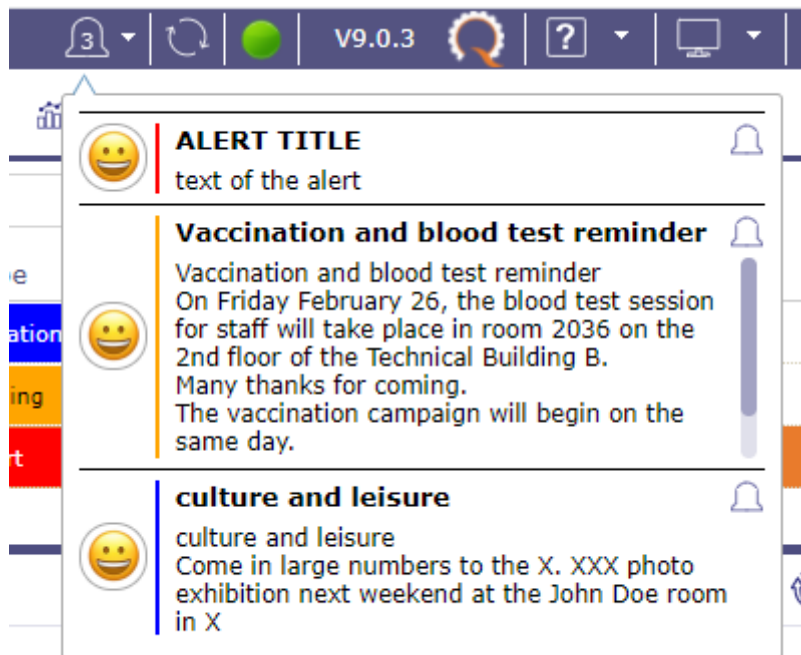


Fig. 72: List of notifications on the information bar

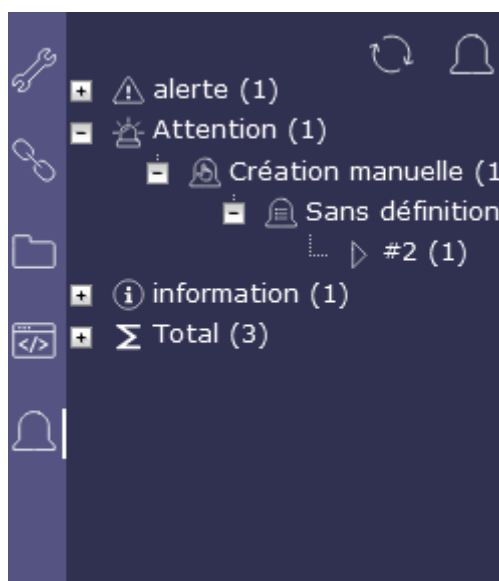


Fig. 73: Notifications

See also:

Notification definition

- Click on the fourth icon for display the detail of the notification

Notification definition

This system allows you to generate notifications or according to very “powerful” rules (defined as “where” clauses). If it is generated by the notification system, it is linked to an element of the system (Action, Invoice, ...).

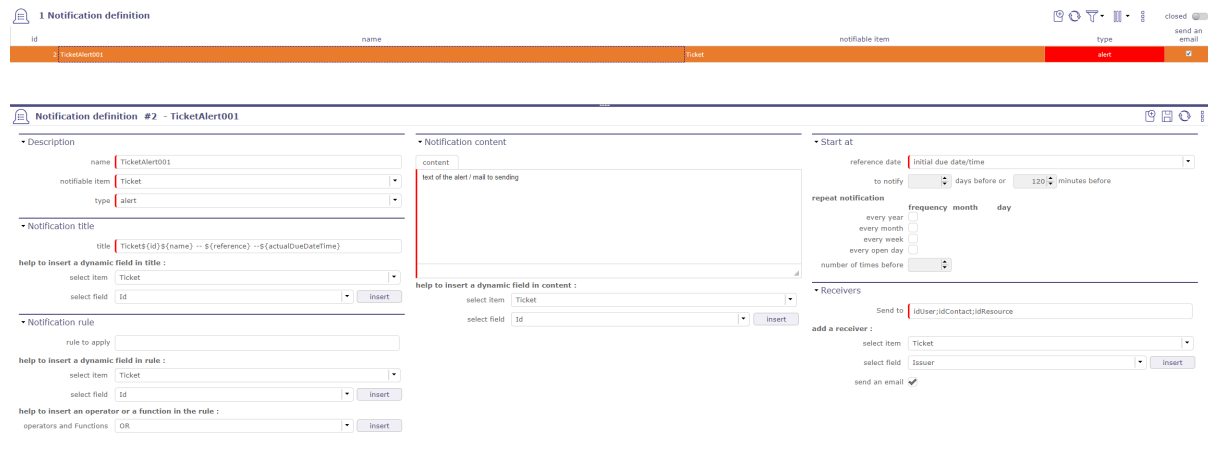


Fig. 74: Notifications system screen

Creation

The definition of notification generation is based on the following:

- The title that can contain the field values of the notifiable element or its sub-elements
- The element of the system that determines the notification, called “Notifiable Element” (notifiable)
- The type of notification (Alert, Warning, Information)
- The notification rule notifying the elements related to the generation of a notification
- The content may also contain the field values of the notifiable element or its sub-elements.
- The date (referred to as the reference date) at which the notification must be generated. This is one of the dates of the notifiable item that is not the creation date.
- The generated notification receivers. Fields of the notifiable element or its sub-elements that refer to users.
- The choice to send, or not, to all the sending of emails at the same time as the notifications.

Notification title

This section allows you to give a title to your notification.

This title will be the object of the programmed mail if you tick the box **send an email** in the receivers section

You can add dynamic fields with **help to insert a dynamic field in the title**

The title of the notification can therefore contain fields of the “notifiable” object and its linked elements via an idXXX.

Where XXX is the name of the linked item.

Select an object and / or a field and click the Insert button so that the dynamic field with the correct syntax fits directly in the title, where the cursor is.

In this case, the syntax must be: *#{the name of the field} ...*

Tip: *#{billId}* - Invoice not paid - Sent on *#{sendDate}* If the rule (see below) of the instruction on the invoice of 'billId' 2019-12-30-0001 whose sending date is 30-12-2019 then the title of the notification will be:

2019-12-30-0001 - Invoice not paid - Submitted on 12-30-2019

Rule to apply

▼ Notification rule

rule to apply

help to insert a dynamic field in rule :

select item ▼

select field ▼

help to insert an operator or a function in the rule :

operators and Functions ▼

Fig. 75: Notifications rules

This rule determines which instance of the item will generate a notification.

The syntax is the one we take for a WHERE clause in an SQL statement.

Tip: Scheduling a notification for all invoices where the amount has been paid = total amount AND project name 'ACME'

#{paymentAmount} < #{fullAmount} AND #{idProject.name} = 'ACME' AND isnull (#{paymentDate}

Note: The rule to apply is not mandatory. If the rule is empty, then only the reference date is used to determine whether or not a notification is generated.

In addition to choosing a dynamic field, you can choose to use an operator or function with the following elements:

Notification content

This section is mandatory.

You can also add dynamic fields with **help to insert a dynamic field in content** in the same way as in the description section.

Section Start at

▼ Start at

reference date

to notify days before or minutes before

repeat notification

	frequency	month	day
every year	<input type="checkbox"/>		
every month	<input type="checkbox"/>		
every week	<input type="checkbox"/>		
every open day	<input type="checkbox"/>		

number of times before

Fig. 76: Start as section

this section allows you to program the frequency of the notification display

The reference date

- Date on witch will be generate the notification (minus the number of days or minutes programmed before)
- Notify before: This is a number of days before the notification date for which the notification is to be generated
- This field is mandatory

Tip: Example “delivery expected date” is selected.

For all deliverables that do not follow the previous rule, a notification will be generated if the delivery date is not respected.

Every year

- If the year is checked, the generator is a notification every year to the month and the day of the reference date
- If the year is checked, the month and day filled, then it is a birthday. The reference date will not be used.

Every month / Week / Open day

- Is selected, responsive notifications will be generate monthly / weekly or each open day

Receivers

In this field, enter the recipients who will receive the generated notification. The list of recipients must be separated by a semicolon. (Ex: idUser; idContact)

You can also directly choose some of the participants of your elements in the proposed lists. Choose the proposed element in the list of objects, the following list adapts according to the latter, select the right contact. The information of the latter will be retrieved on the right project and element when generating the notification.

If **Email sent** is checked, an email will be generated even if the notification for each type of person has been defined.

See also:

Global Parameters *Management of automated service (CRON)*

Gives in seconds, the time interval between two generations of notification (and the Cron system is active) and between two the refresh of notifications on the HMI.

Note: The authorizations

The access rights for the 'notification' menu were given to the 'standard' projeqtor profiles (idProfile = 1 to 7) with the CRUD rights reader only

The access rights for the 'notification definition' menu have been given for the administrator profile (idProfile = 1)with the CRUD rights modifiers

Notification and the IHM

After logging in, a message generated after "Login accepted" that tells you that you have unread notifications:

Display of unread notifications

It is done at 2 levels on the main screen:

A notification icon appears as soon as a notification is not intended for the user.


Clicking on the icon gives direct access to the notifications screen.


And in the secondary menu.

A tree whose title indicates the number of unread notifications intended for the user.

This tree has the following levels:

- **Level 1:** The types of notifications
- **Level 2:** The trigger for notifications
- **Level 3:** The Notification Definition to Product Notifications
- **Level 4:** The id of the element that generated the notification. Allows direct access to the item.

The icon  allows you to refresh notifications without waiting for the scheduled update.

The icon  provides direct access to the notifications screen.

Numbers indicate the number of unread notifications

Receivers list

Receivers can receive email and alert.

A description of receivers below.

Requestor

The contact defined as *requestor* on current item; sometimes appears as "contact" (on quotation and order, for instance) and sometimes have no meaning (for instance for milestone).



Fig. 77: Notification on the login screen

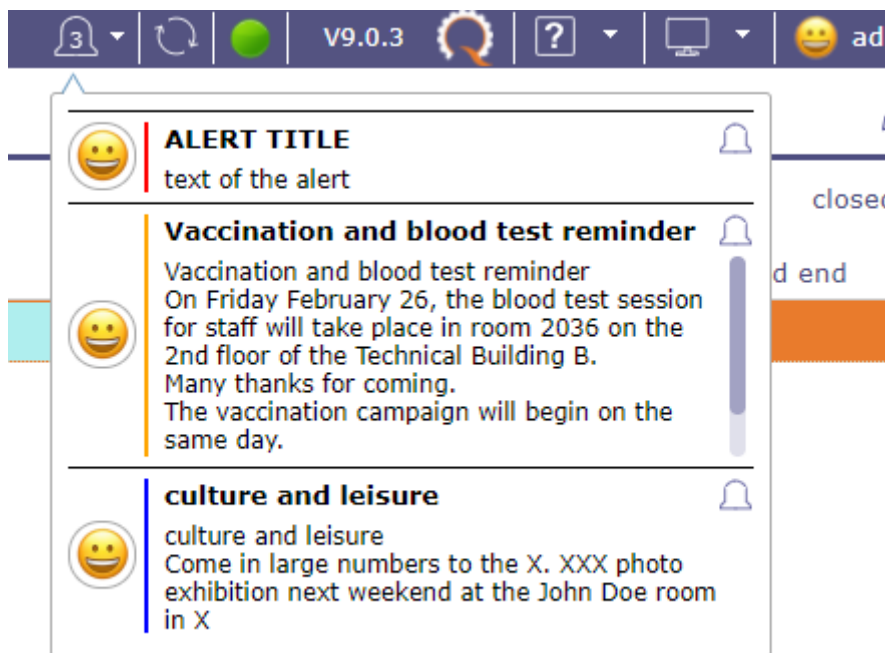


Fig. 78: Notifications

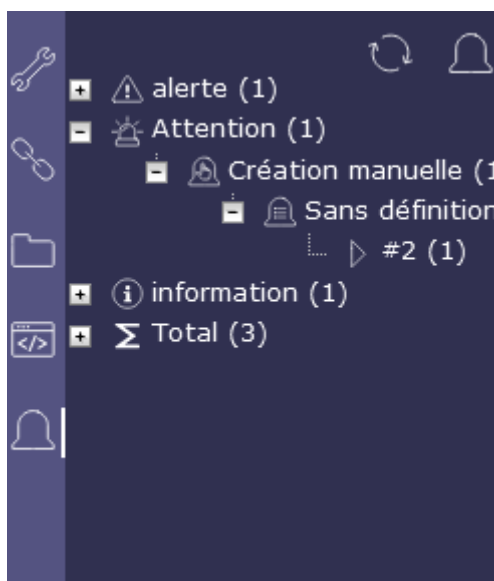


Fig. 79: Notifications

Issuer

The user defined as *Issuer*.

Responsible

The resource defined as *responsible*.

Project team

All resources allocated to the project.

Global project team

All the resources allocated to the project and those of the parent projects.

Project leader

The resource(s) allocated to the project with a “Project Leader” profile.

Project manager

The resource defined as the manager on a project.

Assigned resource

All resources assigned.

Other

Provides an extra field to manually enter email addresses.

If “other” is checked, an input box is displayed to enter a static mail address list.

Several addresses can be entered, separated by semicolon.

4.12 Tools

4.12.1 Emails sent

Users can have a look at the list of the automatic emails sent.

All the information about the email, including the status showing whether the email was correctly sent or not.

You can see in the activity feed of the item the trace of the sending of the corresponding email with the subject and the text of the message.

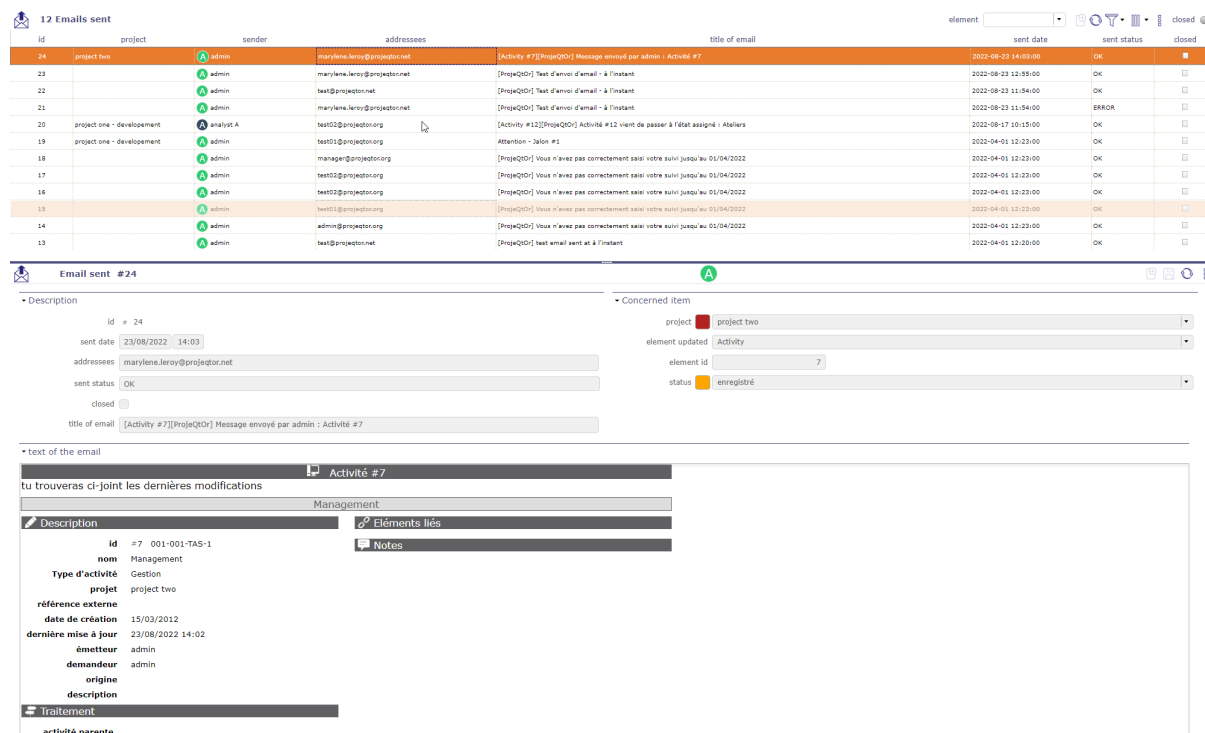


Fig. 80: emails sent screen

4.12.2 Emails to send

You must enable the Activate email grouping option in the *global parameters*

The programmed emails will be grouped in this screen before their automatic sending based on the period entered in the global parameters

4.12.3 Scheduled report

In reports, you can schedule sending emails for accurate reports.

You can get the list and details of this programming on this screen

Click on Button  to cancelled the programmation

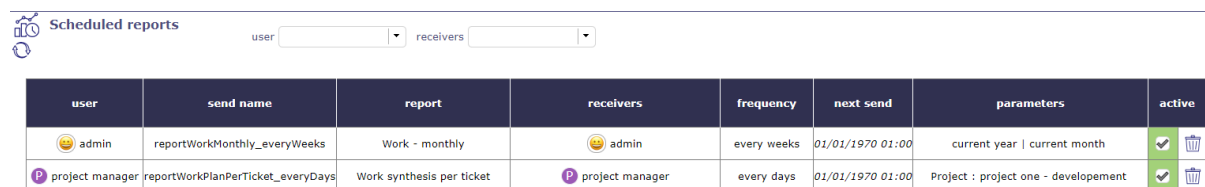


Fig. 81: Scheduled report screen

See also:

Report Sending programmation

4.12.4 Alerts

Users can have a look at the alerts sent.

By default, administrators can see all the alerts sent, and other users only see their own alerts.

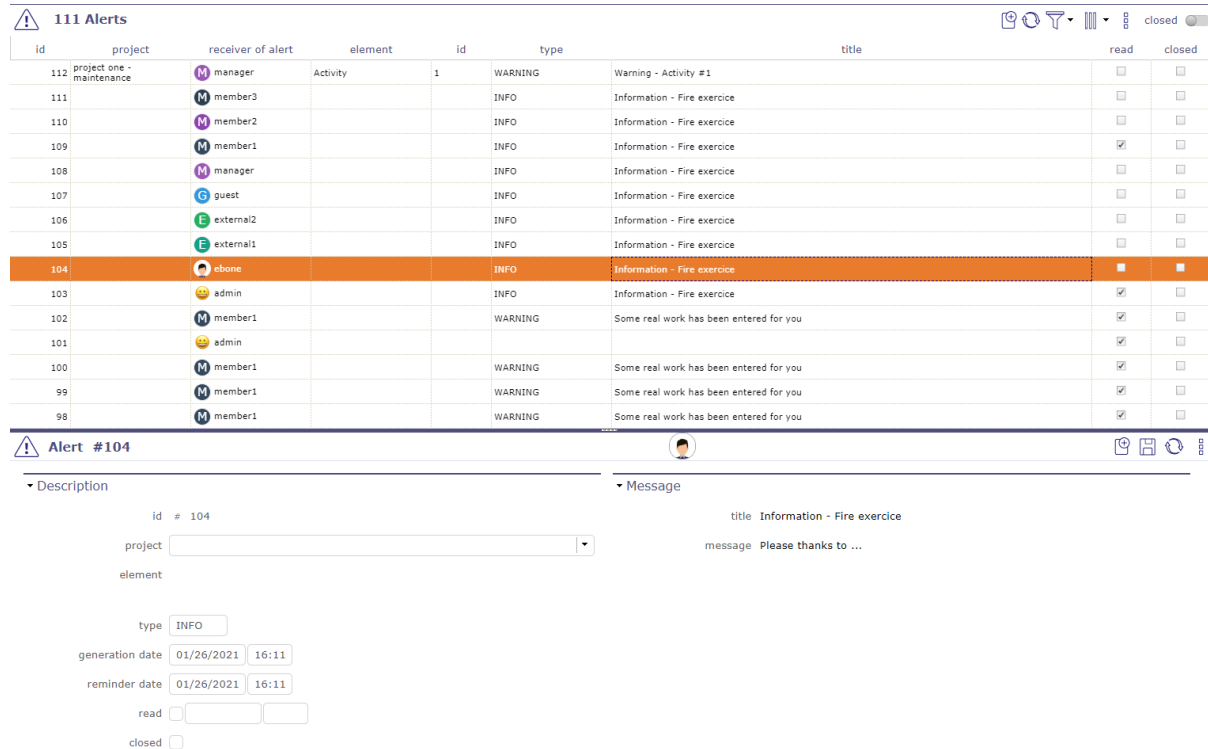


Fig. 82: Alert screen

The button **Mark as read** is available if the user alert is not tagged “read” yet.

4.12.5 Messages

You can define some message that will be displayed on the login and today screen.

Check the **show on login screen** box to see your message on the login screen.

4.12.6 Legal notice

The General Data Protection Regulation (GDPR) governs the processing of personal data in the territory of the European Union.

Above all, this involves informing people about what you do with their data and respecting their rights. As a data controller, or as a processor, you must take measures to ensure that this data is used that respects the privacy of the persons concerned.

You can define a “legal” message that will be displayed when you log in from the home screen.

For this message to disappear, it must be scrolled to the read confirmation button.

This allows you to have a real-time follow-up of the users who have confirmed the reading of this message.

Note: What is the GDPR?

The abbreviation GDPR stands for “General Data Protection Regulation” (GDPR). The GDPR governs the processing of personal data in the territory of the European Union.

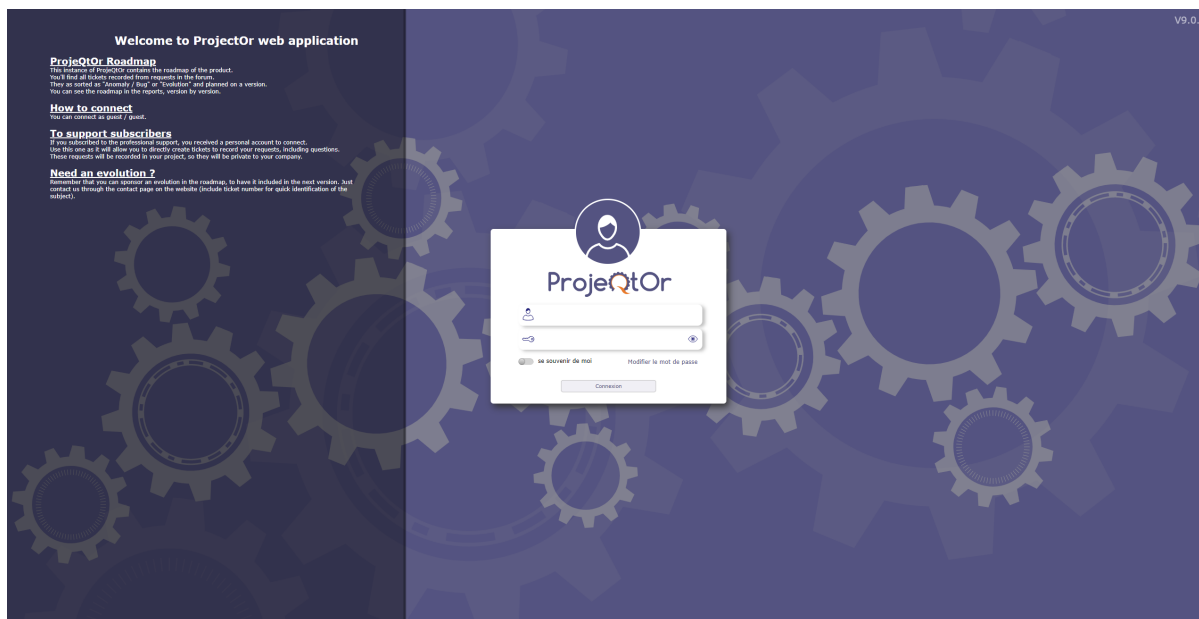


Fig. 83: Login screen with message

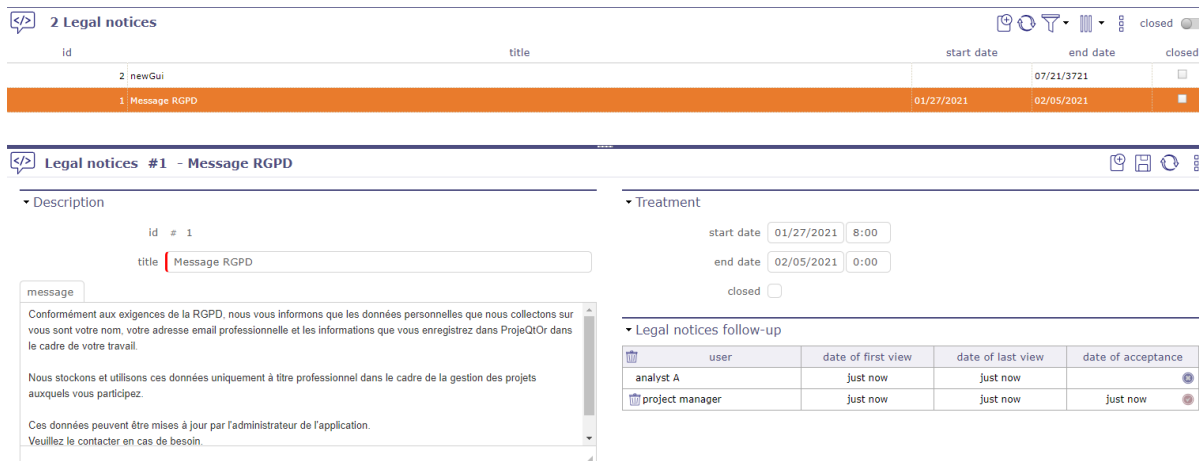


Fig. 84: Legal notice screen

Legal notices follow-up

user	date of first view	date of last view	date of acceptance
analyst A	just now	just now	<input type="checkbox"/>
project manager	just now	just now	<input checked="" type="checkbox"/>

Fig. 85: Legal notice screen

The legal context adapts to follow developments in technologies and in our societies (increased use of digital technology, development of online commerce, etc.).

This new European regulation is a continuation of the French Data Protection Act of 1978 and strengthens the control by citizens of the use that may be made of data concerning them.

It harmonizes the rules in Europe by offering a unique legal framework to professionals. It helps to develop their digital activities in the EU based on the trust of users.

Visit the CNIL web site [here](#)

4.12.7 Import data

Imports data from CSV or XLSX files.

- Select the element type from the list.
- Select file format (CSV or XLSX).
- Select the file.
- Click on **Import data** button to start importing.

Report of the import

Data that is not imported because not recognized as a field appear in grey text in the result table.

Data that are voluntarily not imported (because must be calculated) appear in blue text in the result table.

Import users

The password field must be cut and pasted from the database because it is encrypted.

If you enter some readable password, the users will not be able to connect.

Warning: If you want to create new users **don't put any id** because if id already exists, it will be overridden by the new (with possibility to erase admin user...).

Always keep in mind that your import may have some impact on administrator user.

So be sure to keep an operational admin access.

Importing document versions

Two ways to import document versions, by describing only the version with its standard fields and by describing the document and the version (the name of the fields of the version will be followed by '(DocumentVersion)', or its translation into the current language).

The CSV import file may also include the importFile field that will give the link to the version.

The target field that can be set to delete, the file to be imported is deleted after import or a directory name. The file to be imported is moved to this directory after import) or nothing (the file to be imported is not modified).

File format

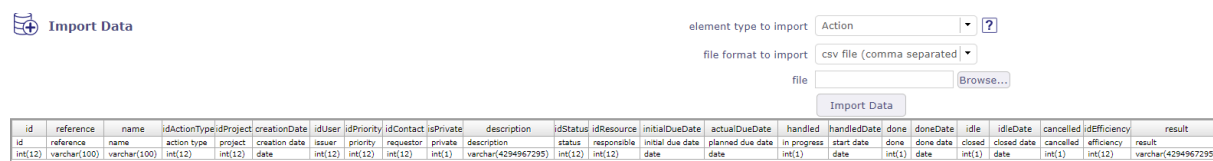



Fig. 86: Import file format

The content of the imported file must fit the element type description.

To know the data that may be imported, click on the  button.

Names of columns

The first line of the file must contain the name of the fields.

Names of columns can contain spaces (to have better readability).

The spaces will be removed to get the name of the column.

Tip: Look into the model class. The names are the same.

Date format

Dates are expected in format “YYYY-MM-DD”.

Data import process

Operations are performed, depending on whether the element type, the column or the column value.

Column id

You may add an “id” column in the file.

The import will try to update the corresponding element, and will fail if it does not exist.

The import will create a new element from the data.

Linked tables

For columns corresponding to linked tables (“idXxxx”), you can indicate as the column name either “idXxxx” or “Xxxx” (without “id”) or the caption of the column (as displayed on screens).

If the value of the column is numeric, it is considered as the code of the item.

If the value of the column contains non numeric value, it is considered as the name of the item, and the code will be searched for the name.

In any case, columns with no data will not be updated. Then you can update only one field on an element.

To clear a data, enter the value “NULL” (not case sensitive).

Important: Do not import the value of “real work” on tickets, even if it is specified in the import file.

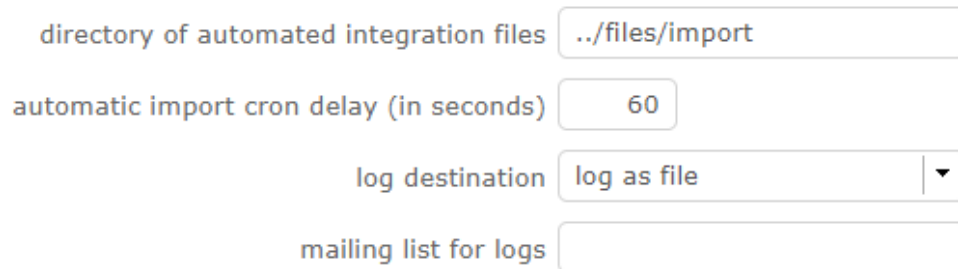
Automatic import

Imports can be automated. Files placed on a defined directory will automatically be imported.

Automatic import parameters must be set in *Global parameters*.

Background task must be started by *Administration Console*.

▼ Automatic import of files



directory of automated integration files

automatic import cron delay (in seconds)

log destination ▼

mailing list for logs

Fig. 87: Automatic import files

The files must respect some basic rules.

File name format is: “**Class**”_”**Timestamp**”.”**ext**”: Example: Ticket_20241231_235959.csv)

Timestamp defined to be able to store several files in the directory.

Format is free. The recommended format is “YYYYMMDD_HHMMSS”.

File extension representing its format. Valid extensions are CSV and XLSX.

File format

The files must follow the ProjeQtOr *File format* and must be full and consistent.

Tip: The files should not be directly created in the import folder.

They must be created in a temporary folder and moved afterwards.

Import process

Correctly imported files are moved to a “done” sub folder of the import folder.

If an error occurs during import of a file, the full file is moved to “error” sub-folder of the import folder, even if there is only one error over many other items correctly integrated.

You can get the result as a log file and/or email summary.

4.12.8 Cloned Environmentment

You can duplicate the complete environment (data and code) to form a simulation environment.

Important: The CRON program must be started and running so that the simulation request can be taken into account and can be generated.

The cloned Environment management

user	name	version	origin	request date	availability date	deletion request	remaining daily creation requests : 3/5	
admin	SimPXY-2021021	V9.0.3		less than half an hour ago	just now		cloned environment active	
project manager	Sim-ProjectOne+1	V9.0.3		less than 15 minutes ago	just now		creation of cloned environment requested	
admin	Sim-ProjectOne+1	V9.0.3		less than half an hour ago	just now		Error cloning data - Can't create files under target folder	
project manager	SimPXY-2021021	V9.0.3		less than 15 minutes ago	just now		cloned environment deletion requested	

Fig. 88: Cloned environment management

This screen allows you to manage your queries for new simulation environments, to follow them or to request the deletion of a particular simulation.

You can also track requests from other users based on your profiles and your rights.

Click on to request the creation of a new simulation area, a pop up will appear allowing you to make your request.

data cloning - add request
✕

user

name

planned date

remaining daily creation requests : 3/5
remaining environments : 10/10

Fig. 89: Add request

Identify the profile making the request, name your space and confirm your request by clicking on OK.

Note: The simulated databases will always have a name prefixed by simu_ followed by the name of the simulation.

Color code

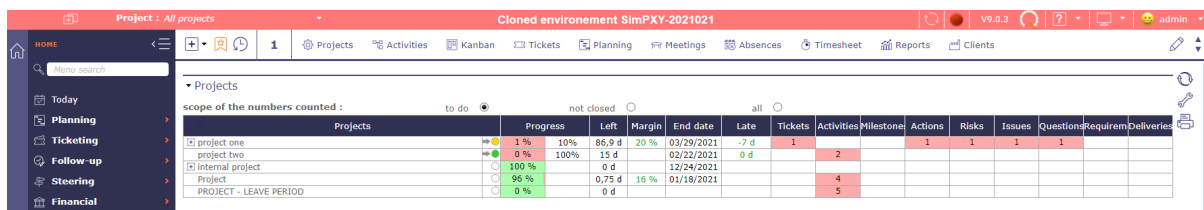
- **Blue:** Request being created
- **Orange:** Warning (delete request)
- **Red:** Error creating the environment (path, rights ...)
- **Green:** Environment creates

Go to the cloned Environment

When your simulation is ready, green status, you can open your cloned environment.

Click on  to launch the environment.

A new tab opens with a new ProjeQtOr session. Authenticate yourself, you can start working in your environment.



Projects	Progress	Left	Margin	End date	Late	Tickets	Activities	Milestone	Actions	Risks	Issues	Questions	Require	Deliveries
project one	1%	10%	86.9 d	20%	03/29/2021	-7 d	1		1	1	1			
project two	0%	100%	15 d		02/22/2021	0 d		2						
internal project	100%	0 d			12/24/2021									
Project	96%	0.75 d	16%		01/18/2021									
PROJECT - LEAVE PERIOD	0%	0 d												

Fig. 90: Cloned environment session

The **instance area** turns red when you are in a simulation space.

Not all screens or functions will be accessible in this space.

For example, you will not be able to request and create a new simulation space in your cloned environment.

Copy and delete a cloned Environment

You did a successful simulation on one of your cloned environment and you want the copy to run other tests but without touching the simulation.



Just copy this environment. The origin of the copy will then be indicated in the list with a shortcut to access it.

Deletion requests are stored in the simulation table. They are processed in the same process as creations, but always with priority to free up space before allocating new resources to new instances.

Tip: To avoid overly broad rights management and server invasion problems, all simulations (code) will be placed in a “simulation” directory outside of the main ProjeQtOr directory.

Thus, if the main instance is accessible via the url “projeqtOr.xxx.fr”, the simulations will be accessible via the url “projeqtOr.xxx.fr/simulation/nom_de_simulation”.

Administration of simulation requests

 Environment cloning parameters 

Management of rights and limitations per profile

	Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest	[Trainee]
access to cloned environments management screen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
management of cloned environments	All resources	Himself only	His teams (Res)	No resource	No resource	No resource	No resource	No resource
max number of cloned environments per user	10	1	3	0	0	0	0	


Global parameters

frequency for treatment of creation requests: at a fixed frequenc

daily limit of number of creation requests:

Fig. 91: Cloned environment parameters

This parameters are also be accessible from simulated environments.

Click on  on the Simulation management screen. You can limit the number of total simulations per profiles.

This limitation can have some advantages:

- Avoid saturating the server.
- Force users to clean up their files.
- Limit performance degradation caused by the creation of a simulated environment

The removal requests are decremented. If the limits are reached, the request screen to create a simulated environment is blocked.

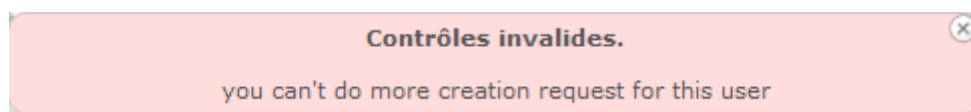


Fig. 92: Example of a invalid request due to too much creation request.

The time required to create a simulation space may vary. Depending on your database, your servers or even if several requests are generated simultaneously.

It is an operation which can take time. That is why you can set frequencies for creation requests.

Fixed frequency

Analyzes creation requests at regular intervals and starts the generation of simulation environment as soon as a request is encountered.

At a given time

In order to avoid any slowing down of the database, you can program the generations of the spaces at a specific time of the day. This allows these to be programmed outside working hours.

The creation of a simulation instance is a heavy process for the server: duplication of code, duplication of data, that's why when generating your simulation space, not all data is copied. Lik archived data (closed), update history, attached documents and files, all automation email and notifications.

GRAPHICAL USER INTERFACE

ProjeQtOr provides a very rich user interface.

It may be frightening at first glance because of the very numerous elements it provides, but once you'll get familiar to the structure of the interface you'll discover that it is quite simple as all screens have the same frames and sections always have similar structure and position.

5.1 Graphical User Interface

ProjQtOr interface is divided into several areas.

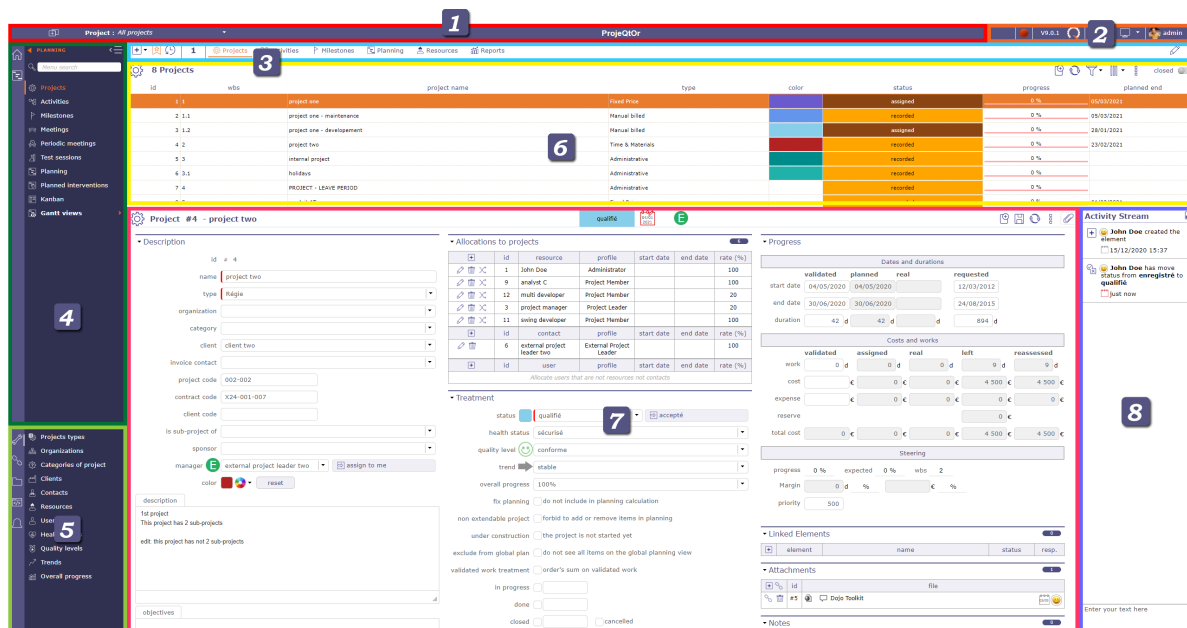


Fig. 1: Overview graphical user interface screen

Interface areas:

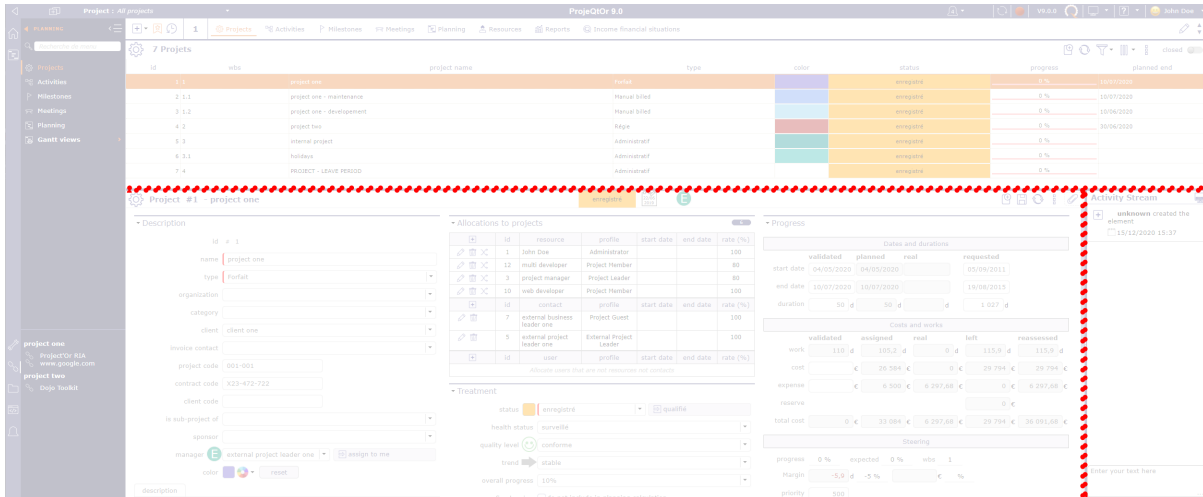
- 1 Top bar
- 2 Infos bar
- 3 Custom Menu
- 4 Menu
- 5 Secondary menu
- 6 List Area
- 7 Details area
- 8 Activity Stream

The splitters allow resizing areas in the interface. Their position is saved and retrieved on each connection.


5.1.1 Top bar

Interface areas:

- 1 Navigation buttons
- 2 New tab
- 3 Project selector and favorites
- 4 Instance name




Navigation buttons

The navigation buttons  give access to previous and next pages in the history.

The Ajax technology used by ProjeQtOr makes it possible to refresh the data while preserving the structure of the solution.

This is why you will lose the session to projector if you use the navigation of your internet browser.

Button New tab

The tab button  allows to open a new tab within the same session.

Your browser tabs recognize your ProjeQtOr session.

You can open a new tab without ending or disrupting the process.

A new tab will therefore remain in the same session as the original tab and will be completely independent of the others.

You can therefore have a different project selected in the selector on each tab, apply different filters, but still remain within the same session.

Project selector

Interface areas:

Project selector parameters

Format selector

Favorites project

Other



Fig. 2: Project selector

The selector allows you to select the project to work on by limiting the visibility of all screens to the items in the selected project, including sub-projects if any.

When you create a new item, this sets the field of project automatically.

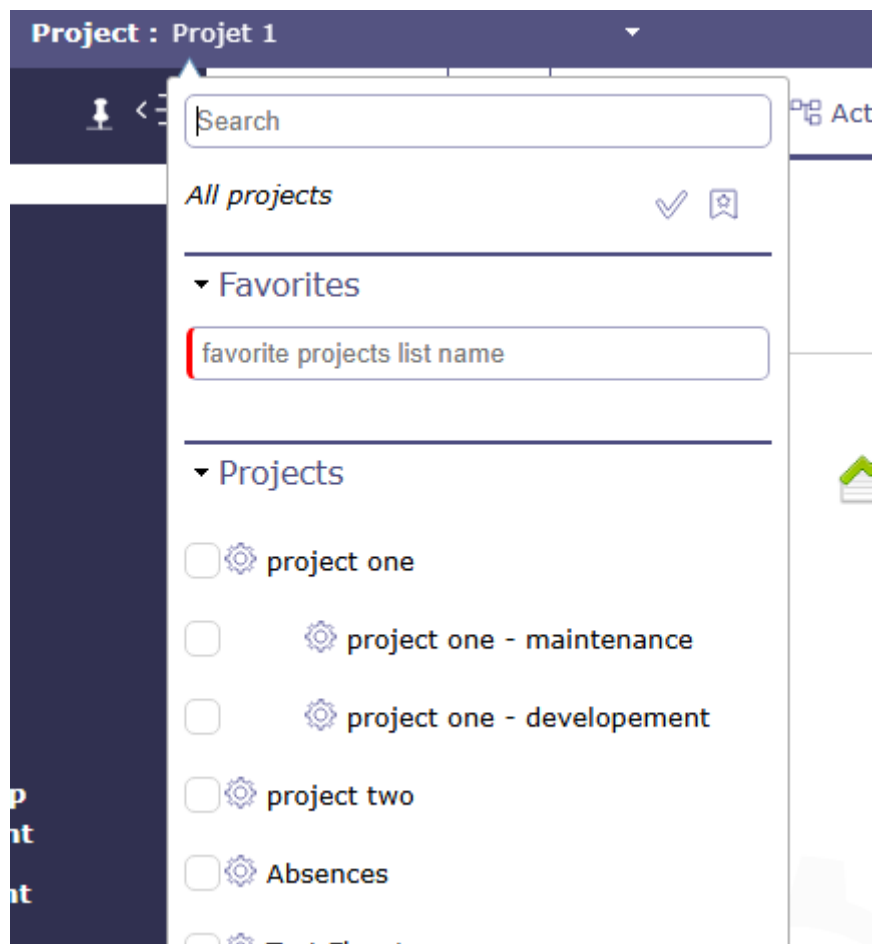



Fig. 3: Project selector

Note: In the **User parameters** the **default project** Defines the project that will be selected and display by default into the project selector.

See also:

User parameters

Project selector parameters

Click on  to display the project selector parameters dialog box.

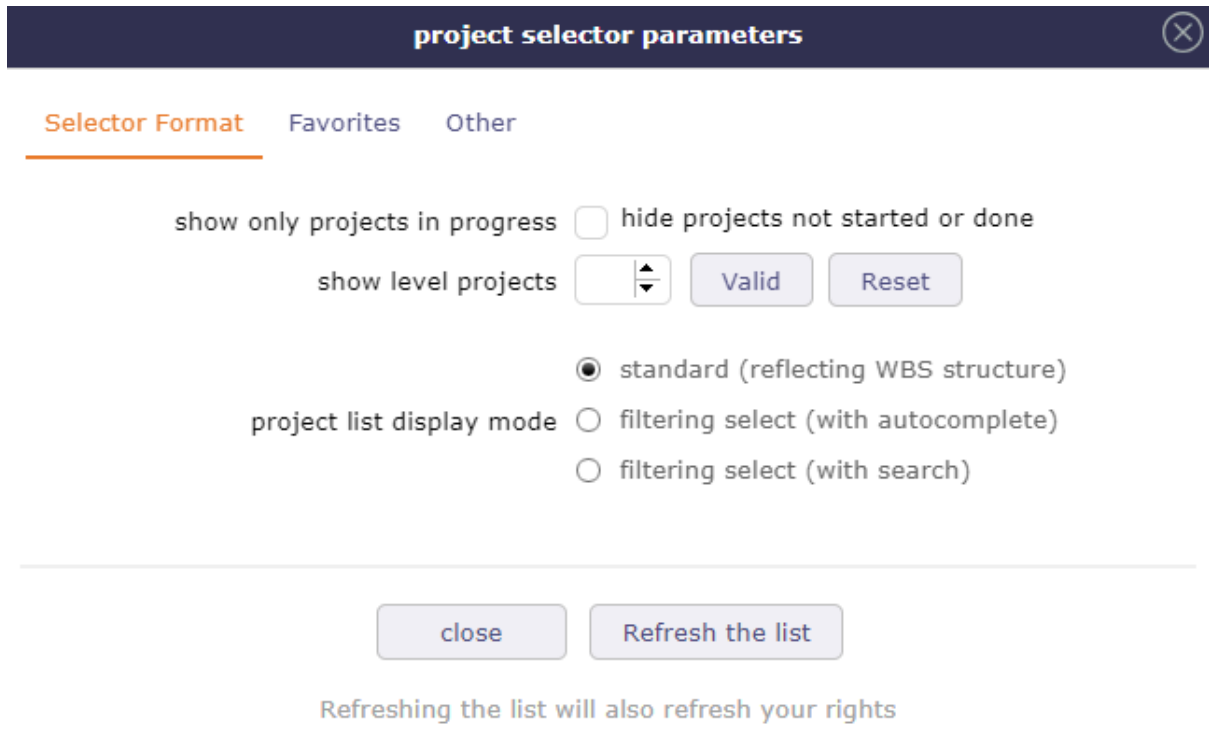


Fig. 4: Dialog box - Project selector parameters

3 tabs allow you to adjust certain aspects of the selector:

- Selector format
- Favorites
- Other

Format selector

In the **format selector**, you choose how the elements are displayed in the list, an option to display only projects with the macro state in progress.

You choose the number of sub-projects displayed in the project selector. The number by default is 2 levels.



Fig. 5: Projects Selector with level display

In addition to a search field in the selector directly, you can display the list of projects in different ways.

A search field integrated into the list can allow you to quickly search through all your projects.

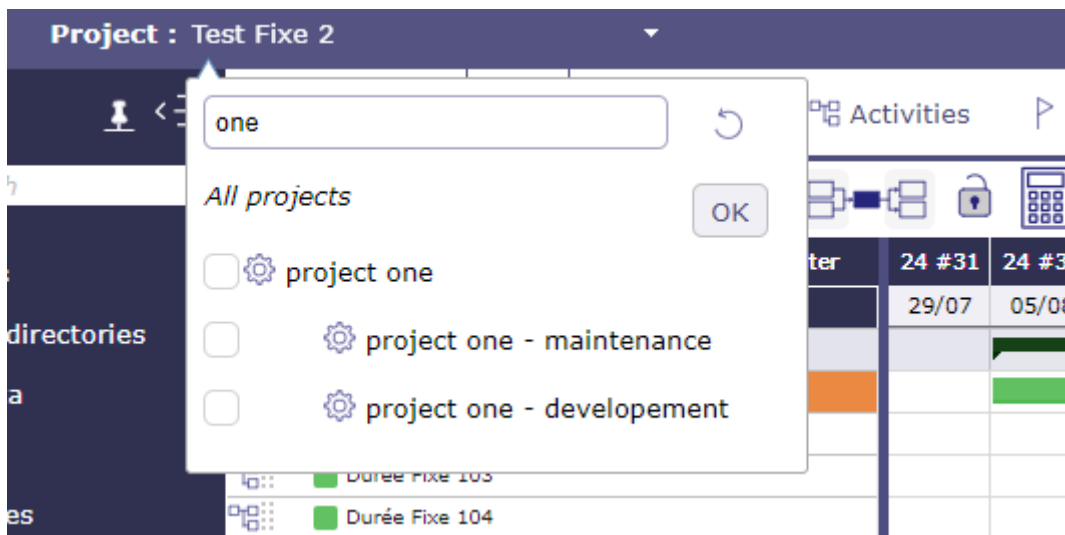


Fig. 6: Search in project's selector

Standard reflecting WBS structure

- List of project and sub-project are displayed according to WBS structure.
- This is the only presentation mode where you can create favorites lists.
- You can choose to display multiple projects by checking the corresponding boxes.

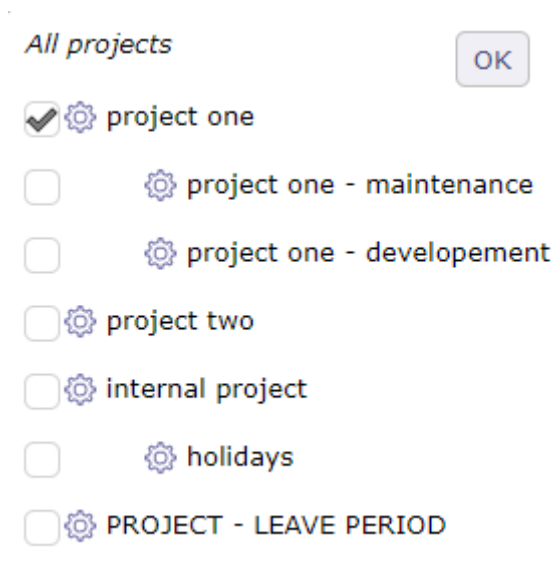


Fig. 7: Project list display mode standard

Filtering select with autocomplete

- List of project and sub-project are displayed according to entered text.
- Search criteria works in a “starts with” mode
- Autocompletion is active
- Compatible with favorites, but you can no longer create a list.

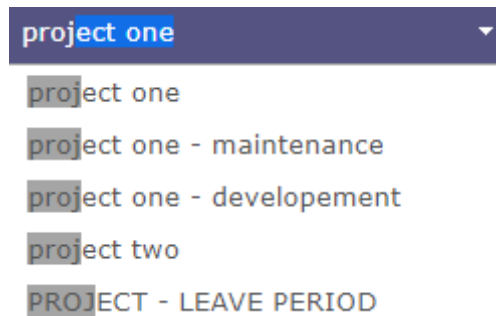


Fig. 8: Filtering select with autocomplete

Filtering select with search

- List of project and sub-project are displayed according to search criteria.
- Search criteria works in a “contains” mode
- Autocompletion is **not** active
- Compatible with favorites, but you can no longer create a list.

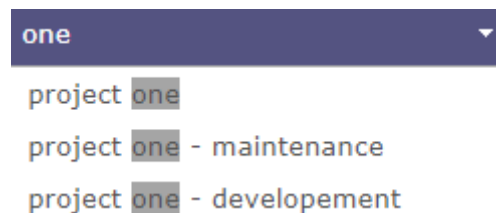




Fig. 9: Filtering select with search

Note: With the new search box integrated directly into the picker list, these three options will soon be obsolete.

Selector of the current item

- Click on the button  to select current project in the project selector.
- Click once, from any element to display in the selector the project linked to the element.
- Double click to display all projects again

Project selector search

Click on  to search projects and sub-projects from any screen with the same search functions as on the projects screen

Detail of element							
8 Projects							
id	wbs	project name	type	color	status	progress	planned end
1	1	project one	Fixed Price		assigned	0 %	05/03/2021
2	1.1	project one - maintenance	Manual billed		recorded	0 %	05/03/2021
3	1.2	project one - developement	Manual billed		assigned	0 %	28/01/2021
4	2	project two	Time & Materials		recorded	0 %	23/02/2021
5	3	internal project	Administrative		recorded	0 %	
6	3.1	holidays	Administrative		recorded	0 %	
7	4	PROJECT - LEAVE PERIOD	Administrative		recorded	0 %	
8	5	produit AT	Fixed Price		recorded	0 %	01/02/2021

Fig. 10: Project selector search window

Refresh the list

Click the refresh the list button to immediatly update the list of displayed projects.

Creating a new project may not be displayed immediatly in your collaborators' interface, the display time depends on your connection.




Some application settings can be refreshed using this button without having to disconnect/reconnect your account.

Favorites project

You can create multiple lists of favorite projects in the project selector.

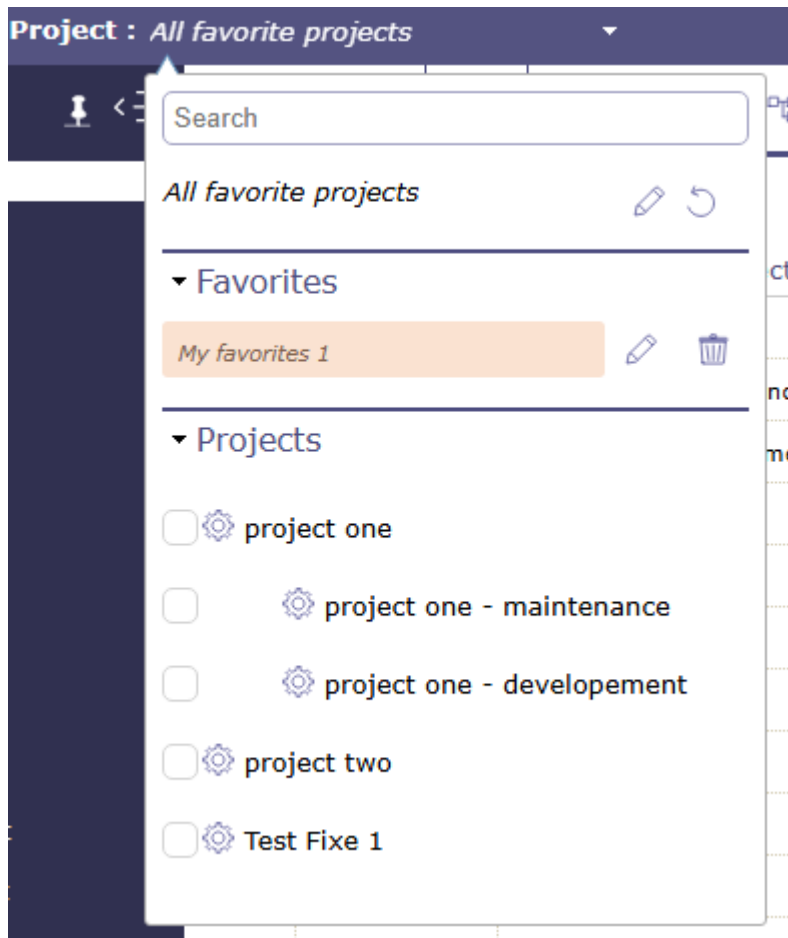
Select one or more projects from the project list in the selector. When at least one box is checked, the favorites section displays a field allowing you to save this selection.

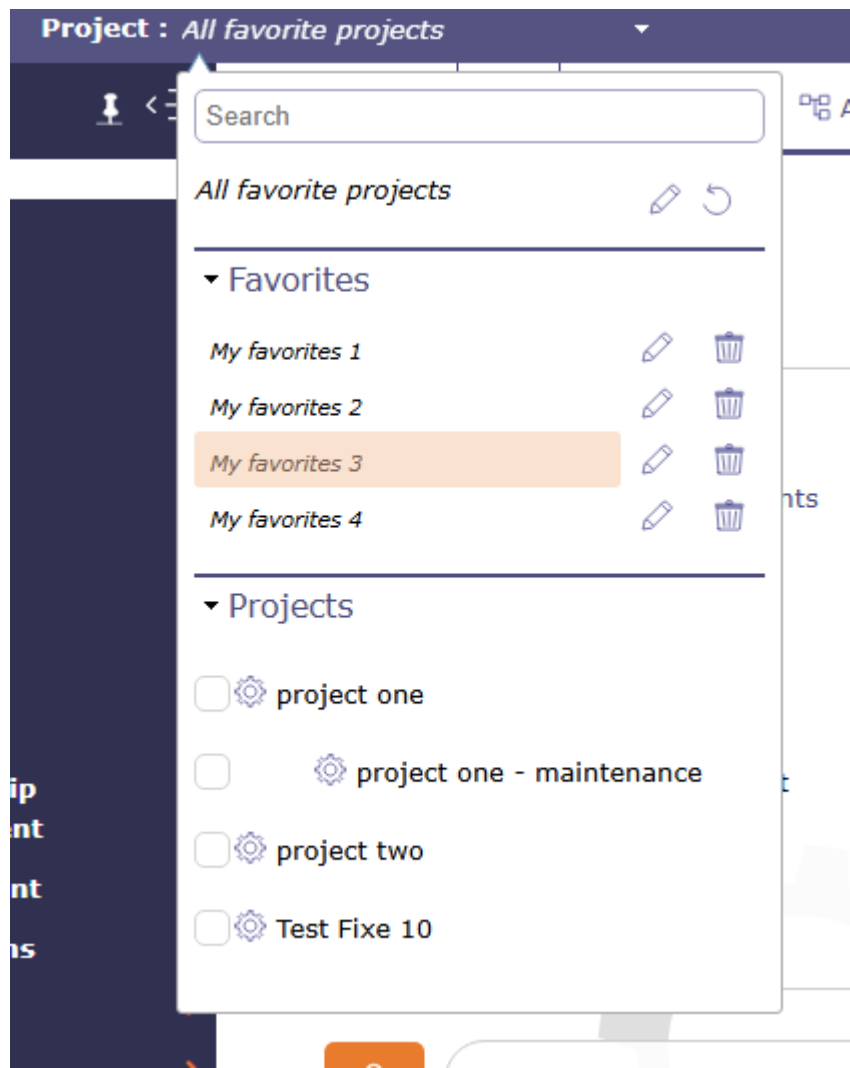
Create a List - Drop-down menu



- Check the boxes of the projects you want to add to your favorites.
- Name the liste of favoris and click on 
- Click on  to save your list
- Your list is displayed
- Click on  to clear the last selections and the name entered

Tip:

- When you select a subproject as a favorite, you automatically see its parent. Even if it has not been selected.
- On favorite 1, the parent is selected. The subprojects are displayed.
- On favorite 3, one of the subprojects is selected. The parent is displayed.





- Click on  to edit your favorites.
- The list of all projects is displayed again and the projects in the list to be edited are in secondary color.
- You can add projects by checking the boxes
- Click on  to save the updated list.

See also:

It is possible to create a list of project favorites from the filters.

The advanced filters

Other

Enter the Archive Mode option allows you to show te closed items.

When archive mode is active, then icon  is displayed in the top bar. Click on it to stop the process.

Archive mode allows you to see closed projects in the project selector.

To display closed projects in the list area of the projects screen switch the button “closed”.

Only the administrator can see this button permanently.



When Archive mode is active, Projects lists on report parameters show closed projects.

Instance name

you can rename the name of the ProjeQtOr instance via the global parameters in the View tab.

See also:

Tab Display

5.1.2 Infos bar



Interface areas:

- *Notifications*
- *CRON button*
- *Version button*
- *About menu*
- *Screen layout*
- *Session menu*

CRON button

The CRON activation button allows you to quickly see if your CRON is launched or not.

The button is only visible for Administrator profile.



the CRON is running



In request for closure. The next refresh turns it red.



the CRON is stopped

Click on the button to start or stop CRON in the same way as on the Administration page.

See also:

Background tasks

Version button

Displays the version of ProjeQtOr installed

Click on the button to access the site of ProjeQtOr.org

About menu

This menu allows you to have access to real-time information with a notification system for news.

The button



sends you to the forum of the ProjeQtOr site in order to post the possible anomaly.

Links

The links indicated allow you to display:

- the software manual,
- the manual page concerning the keyboard shortcuts taken into account in ProjeQtOr,
- the version information on the external libraries used in ProjeQtOr.

News

Find all the information about ProjeQtOr in real time.

Hover over the desired information with the mouse to preview it.

Click to view full information.

A navigation system allows you to consult all the information.



Fig. 11: About menu

Access

Access ProjeQtOr's plugin store and forum summary with just one click.

Screen layout

The layout of the screens allows you to choose how you want to display the ProjeQtOr interface

The arrangement not chosen appears in gray



Fig. 12: Screen layout

Many modes are available!



switched mode

Allows to enable or disable switched mode that allows to switch between list and detail windows. Window selected is displayed in “full screen” mode.

Hidden window are replaced by a gray bar. Click on the gray bar to switch between windows.



Horizontal layout - vertical layout

You have all the screens of the application in horizontal or vertical mode.

You can uniquely arrange your screens by using the display icon in the *list box*

Horizontal mode shows the list box at the top of the screen and the details box at the bottom.

Vertical mode shows the list box on the left of the screen and the details box on the right.



Mode List

Column mode corresponds to the historical presentation of ProjeQtOr, where the different parts making up the details area are displayed in one, two or three columns




Mode Tab

The sections present in the columns are dispatched under tabs with the tab mode.

 **Show/Hide Activity Stream**

Show or hide globally (on all screens), the notes area for each element.

To display notes only on a specific screen, choose  from the details area toolbar.

See also:

Activity stream - Tools details area

 **Full screen mode**

With this mode, you make your browser invisible, the menus, navigation bar, buttons ... are hidden. You can enjoy your ProjeQtOr instance in full screen mode.

Session menu

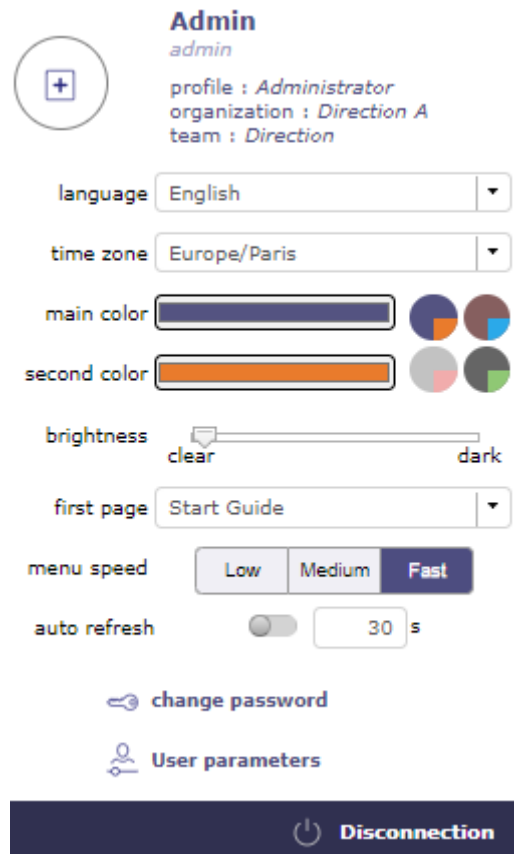


Fig. 13: Session menu

The connection window offers some settings and information at user level.

Profile

The profile section tells you:

- Your name in the software
- The connection identifier
- The profile assigned in the software with this account
- The organization to which the user belongs
- The team to which the user belongs

Tip: You can assign a profile picture in the *user parameters*.

interface Parameters

This section allow you to choose and modify at your leisure:

- the language of your personal session
- the time zone is automatically entered according to the settings of your computer
- the colors of your personal interface
- the brightness level for the background of the screens
- the home page which will be displayed when you log in
- the speed of the main menu animation
- the time in seconds for automatic list refreshing
- the link to change your password
- the link to user settings page
- the disconnect button.

Important: All theses changes only impact your session and will apply over the global settings defined by your administrator.

5.1.3 Custom Menu

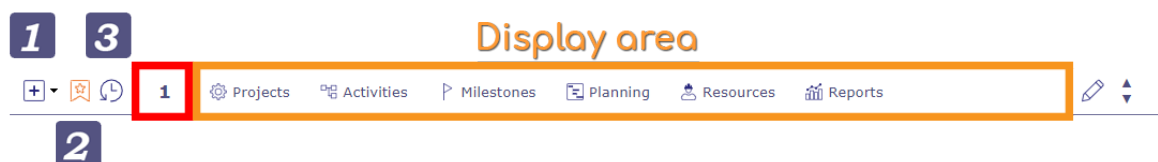


Fig. 14: Bookmarks Bar

Interface areas:

- *New element*
- *Bookmarks*
- *Recents*

New element

This button allows you to quickly create a new element from any screen.

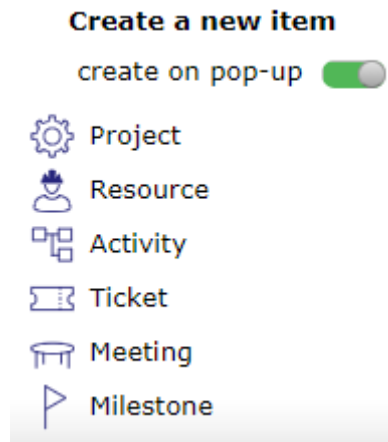


Fig. 15: Create a new element

You can create:

- a project
- a resource
- an activity
- a ticket
- a meeting
- a milestone

The switch button “create on pop-up” allows you to define how to initiate the creation.

If the button is activated, a pop-up opens over the current screen on the screen of the element you want to create.

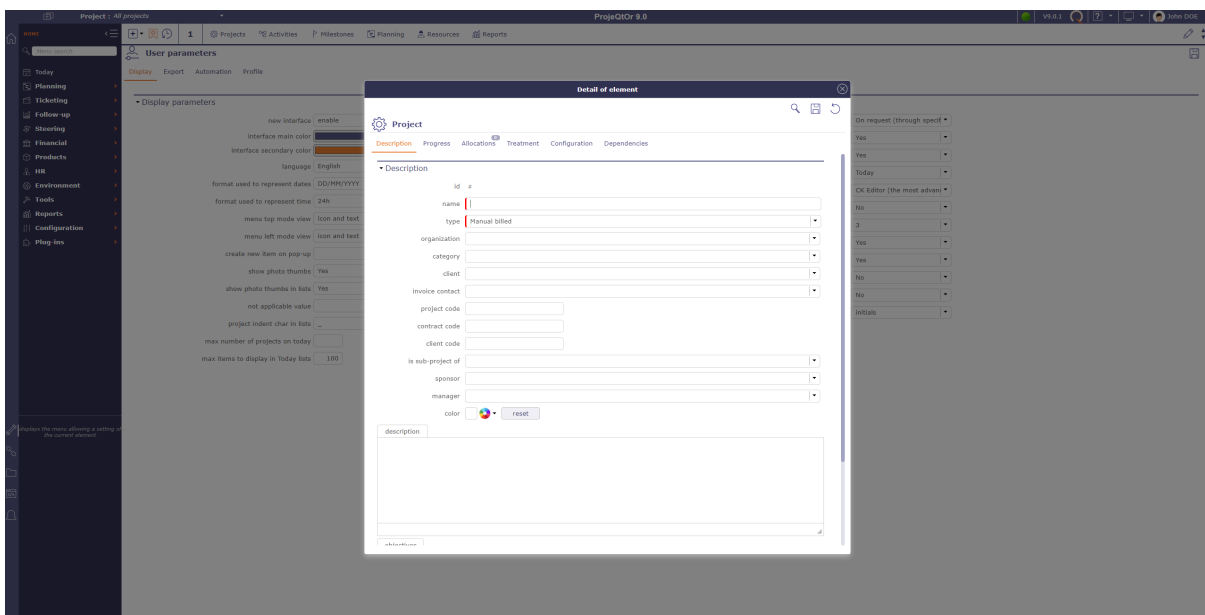



Fig. 16: Create a new element

If the button is disabled, you go directly to the screen of the element you want to create.

Bookmarks

You can mark certain screens and organize them in the favorites bars to create a personalized menu.

You can create up to 5 favorite bars.

Click on  to display in the display zone the list of screens of the elements that you have put in favorites.

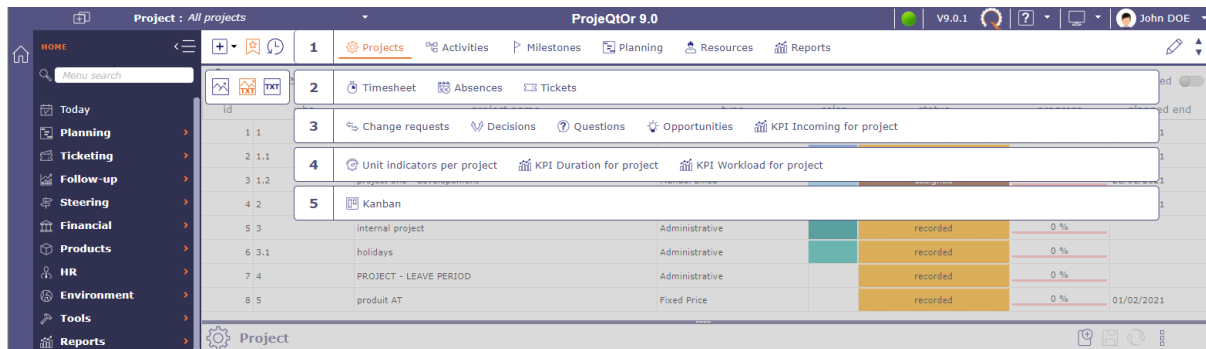


Fig. 17: Display bookmarks

Right clicking on the display area allows you to display and organize the 5 favorite bars and choose how to display them.

You have 3 ways to view your favorites:


-  **Bookmarks text:** You view bookmarks in text mode only




Fig. 18: Favoris

-  **Bookmarks icon:** You display bookmarks in icon mode only



Fig. 19: Favoris

-  **Bookmarks icon and text:** You display bookmarks with icon and text

The number displayed corresponds to the number of the favorites bar on which you are.

To change bookmarks bar, You can use several ways to display a particular bar :

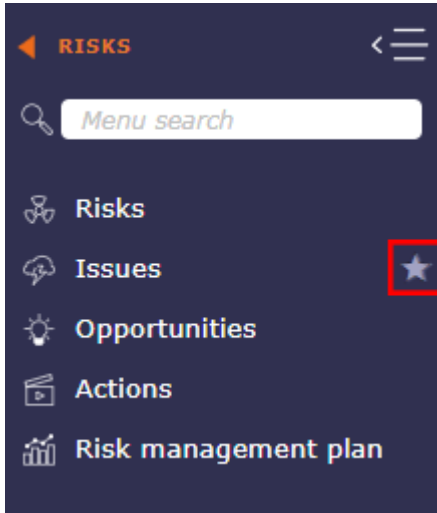
- Your mouse wheel when you are positioned on the bar.
- Click on the up and down navigation arrows at the right end of the bar.
- Click on the bar number to display all the bars and select the one you want by clicking on the corresponding number.
- You can display an empty bar.



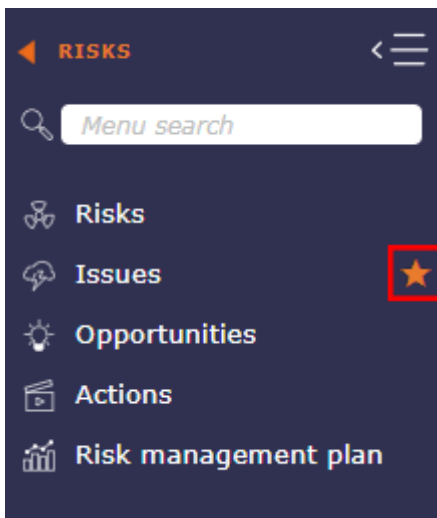
Fig. 20: Favis image


Add, Organize and remove bookmarks

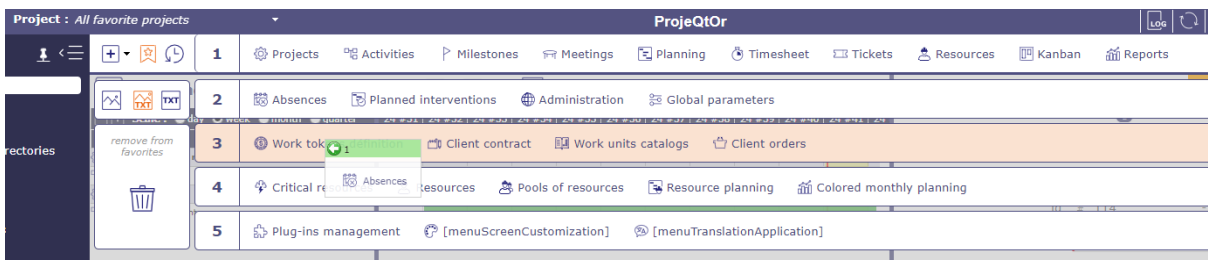
To add a bookmarks, click on the star to the right of each menu screen



The star is filled with the secondary color of your interface once added to the favorites bar

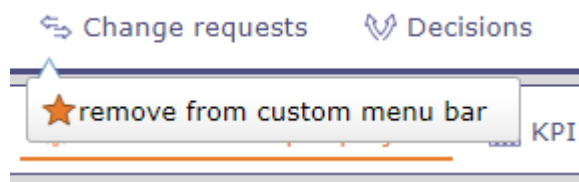


To organize your favorites, right click on the bar or click on  to display your 5 bars, then click and drag and drop the screens to the desired bars.



A green bar tells you that you can drop the favorites from your screen, a red bar tells you that it is impossible.

To remove a bookmark, right click on the bookmark and click on the button remove from the custom menu bar



You can put the same bookmark on several bars. **Ctrl click** on the favorite and drag and drop to another bar. The favorite will be duplicate.

Recents bar

The recent screens bar allows you to keep in memory the screens you have browsed since the connection. It acts like a kind of limited history.



Fig. 21: Recent bar

Indeed, the number of recent screens depends on your screen resolution. for example: between 12 and 16 screens displayed for a 2K screen and between 6 and 10 for an HD screen.

5.1.4 Menu

Interface areas:

- 1 *Main menu*
- 2 *Section indication*
- 3 *Breadcrumb*
- 4 *Show / Hide menu*
- 5 *Search menu*

Main menu

The menu takes up the overall scope of project management. Each section represents a part of this perimeter.

The menu is designed to highlight the main screens in each section. These are often the screens most used by project management professionals.

The secondary screens appear under sub-menus and the navigation is deeper.

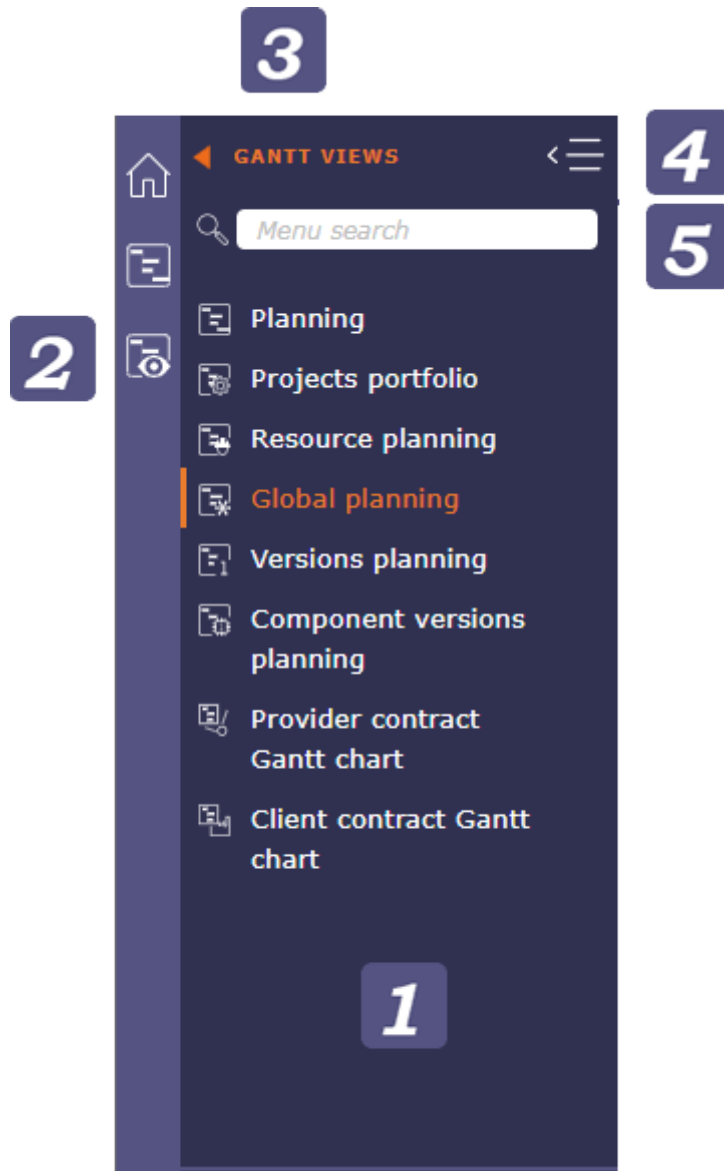


Fig. 22: Menu

Section indication

When browsing, each time you select a section or subsection, the icon corresponding to the latter is displayed in this area.

Breadcrumb


Breadcrumb generally refers to the breadcrumb trail of website navigation.


This item tells the user where they are in the menu hierarchy.



In ProjeQtOr, the Breadcrumb shows you the previous section of the one where you are.


By clicking on the breadcrumb, you return to the mother section, until you reach the reception.

Show/Hide menu

Click on  to hide the menu

Click on  to bring up the menu

Click on  to anchor the menu, after you click on the icon then turns into a .

Click on  to hide the menu and reopen it on mouse hover.

Search menu

You have the possibility to do a search directly in the menu.

The search takes into account the name of the element screens, but also certain tags, which do not know how to be enriched.

The search also allows you to display the reports related to the keywords entered in a separate section.

When you click on a screen resulting from your search, the screen is displayed but you do not change the section in the menu, which allows you to return at any time to the screens of the section where you were.

To return to your section after a search, click the reset icon in the search field.

5.1.5 Secondary Menu

The secondary menu can be seen as the right hand side of the menu.

It allows you to display a lot of information about your project, your navigation or your organization.

Interface areas:

- *Parameters*
- *Links*
- *Repertory and Document*
- *Console*
- *Notifications*
- *A little coffee*

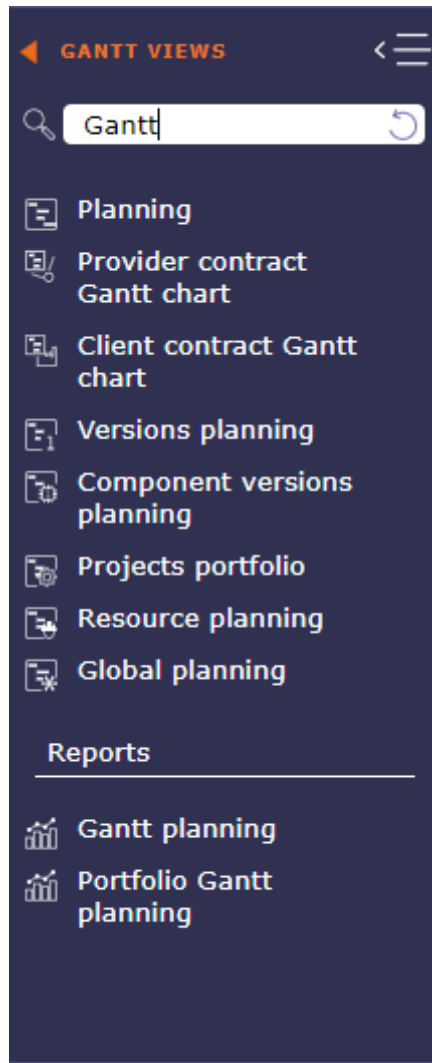


Fig. 23: Search performed with the tag GANTT

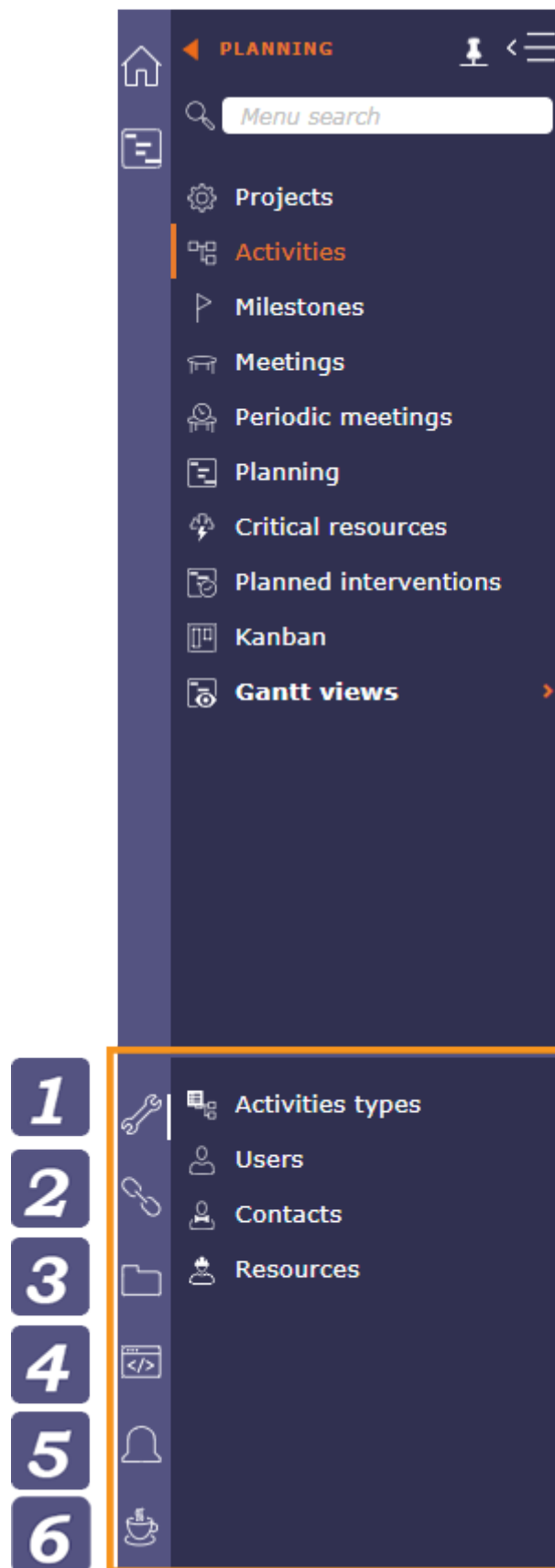


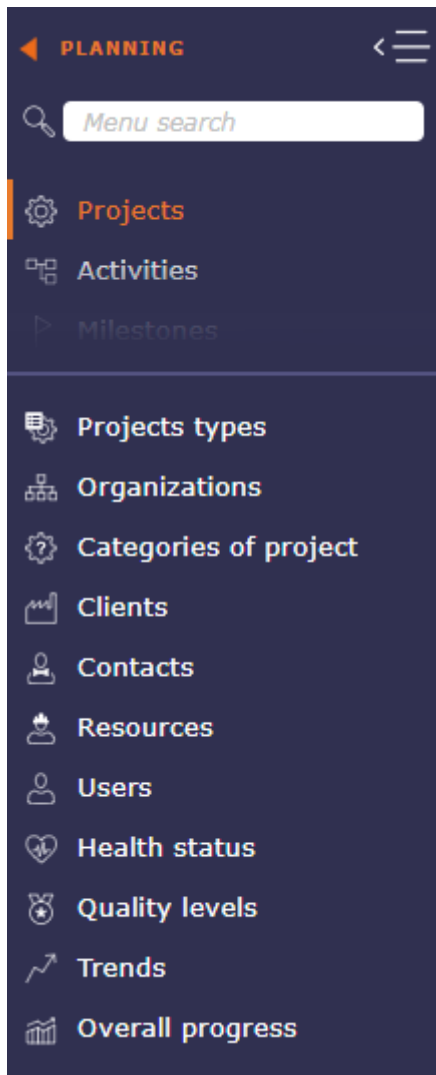
Fig. 24: Menu

Parameters

the parameters displayed in the secondary menu are linked to the selected screen.

In the example above, the user selected the Activity screen. We then see that the parameters are in direct correlation with the activities.

If the user selects the project screen, then the parameters will be adapted for those.



Links

Display hyperlinks to remote web pages.

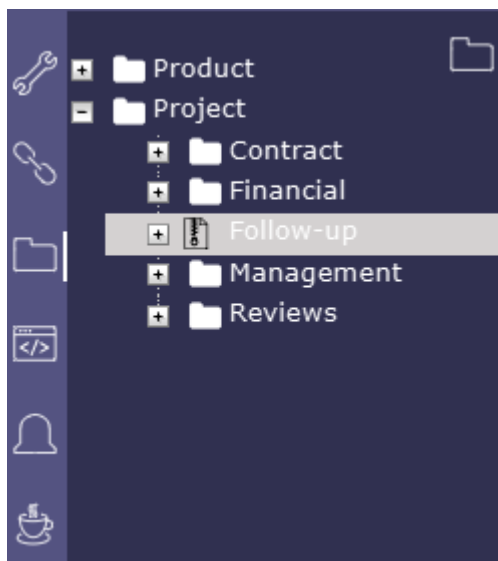
These links are defined as hyperlink attachments on projects.

Links displayed here depend on the selected project.



Repertory and Document

Document directories give direct access to documents contained in the directory.



when you click on the icon with the zip, a pop up offers you to extract the application directory in archive mode in .zip format.

See also:

Document directory screen.

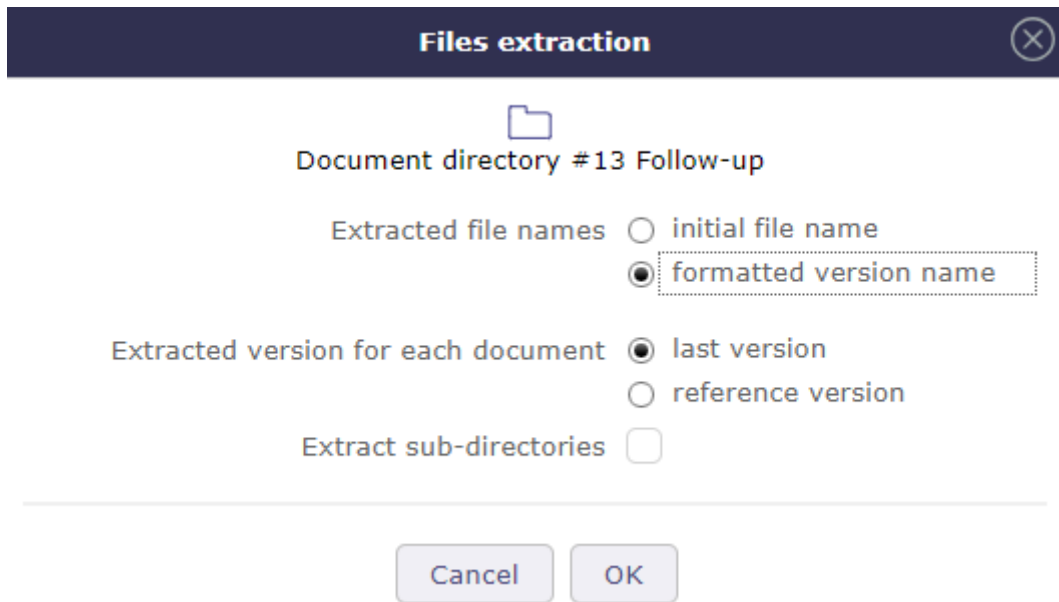
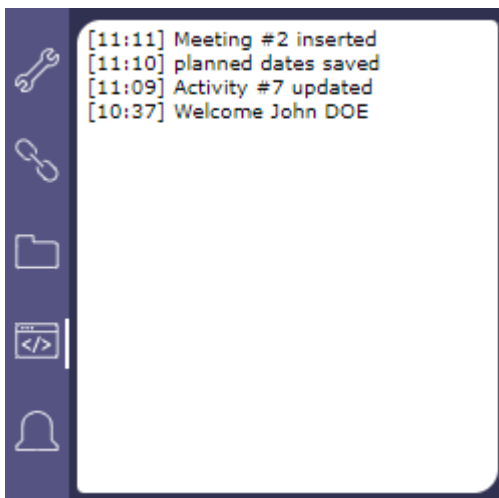


Fig. 25: Files extraction

Console

Displays information about main actions: insert, update, delete.

The timestamp indicates when the action was done.



Warning: Messages displayed here are not stored and will be flushed when user logout.

Notifications

In the secondary menu

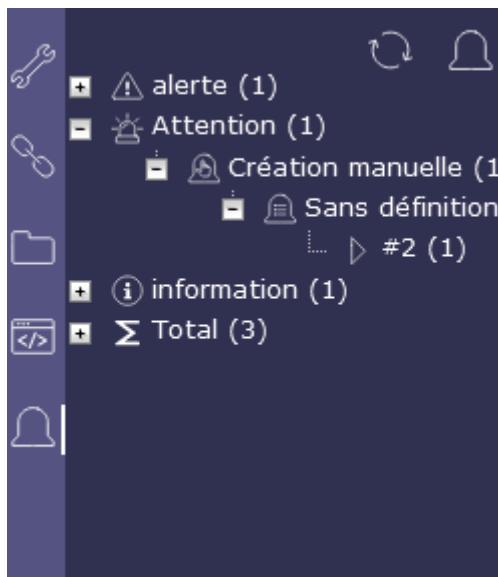


Fig. 26: Notifications

See also:

Notifications for more details.

A little coffee

Find in this section some news concerning ProjeQtOr

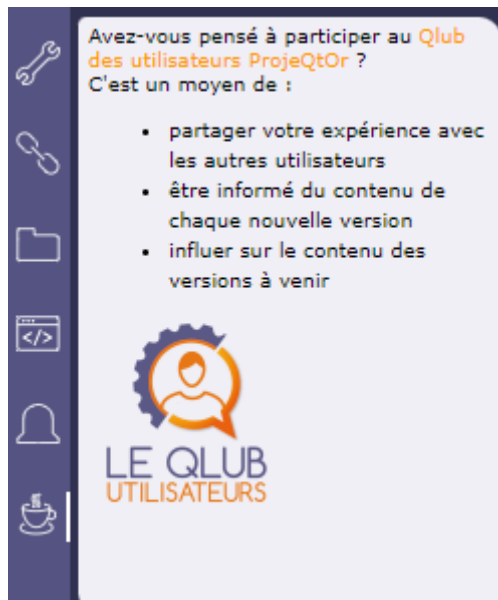
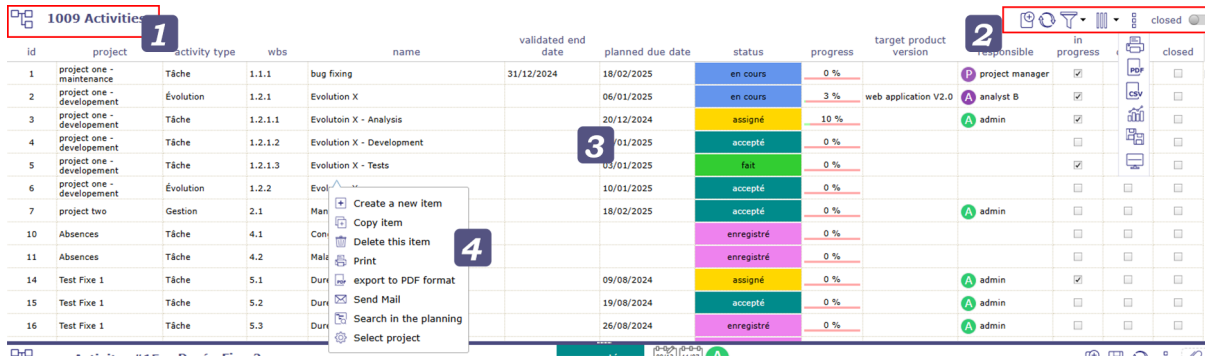


Fig. 27: Notifications

5.1.6 List Area



Interface areas:

- *Element identifier*
- *Tools*
- *Items list*
- *Context Menu*

Element identifier

Displays the element name and the count of items in the list.

Each element is identified with a distinctive icon.

Click a column header to sort the list on that column (first ascending, then descending).

Sorting is not always on the name displayed.

If the sorted column is linked to a reference list with sort order value, the sorting is executed on this sort value.







Sorting on the “Status” allows to sort values such as defined in the workflow.






Click on a line (any column) will display the corresponding item in the detail area.

[BACK]

Tools



- Click on  to create a new element
- Click on  to refresh the list
- Click on  to automatically refresh the list
- Click on  filters
- Click on  to organize the columns
- Click on  to open the sub-menu

- Click on  to print the list area as it appear on the window
- Click on  to export the list area to PDF
- Click on  to export the list area to CSV
- Click on  to open the multiple update
- Click on  to display this screen vertically or horizontally only

Swith the button clos to make appear all the In progress element

[BACK]

Automatically refresh the list

Item list boxes can refresh automatically.

Choose in the connexion menu how often list boxes are automatically refreshed.

See also:

Session menu

[BACK]

The filters

The filters popup offers different levels of filters. Simple filters, permanent or not, advanced filters with the possibility of adding many criteria.

[BACK]

You can choose to always display them in the toolbar of the list box by activating the switch button.

You can choose to always display them in the toolbar of the list box by activating the switch button.

You can restrict the display for each of these criteria or combine them to make sorting more complex:

- by ID
- by name
- by type

[BACK]

The Quick search

The quick search field is very powerful. It performs a search in almost all editable fields of the screen you are on.

Whether in descriptive fields, such as the result, description or SWOT matrix, notes or external references...

Click on the reset button to clear your search and restore the original display.

Important: Accents are not taken into account.

The quick filter ignores other filters and does not stack. It overrides all other display filters.

[BACK]

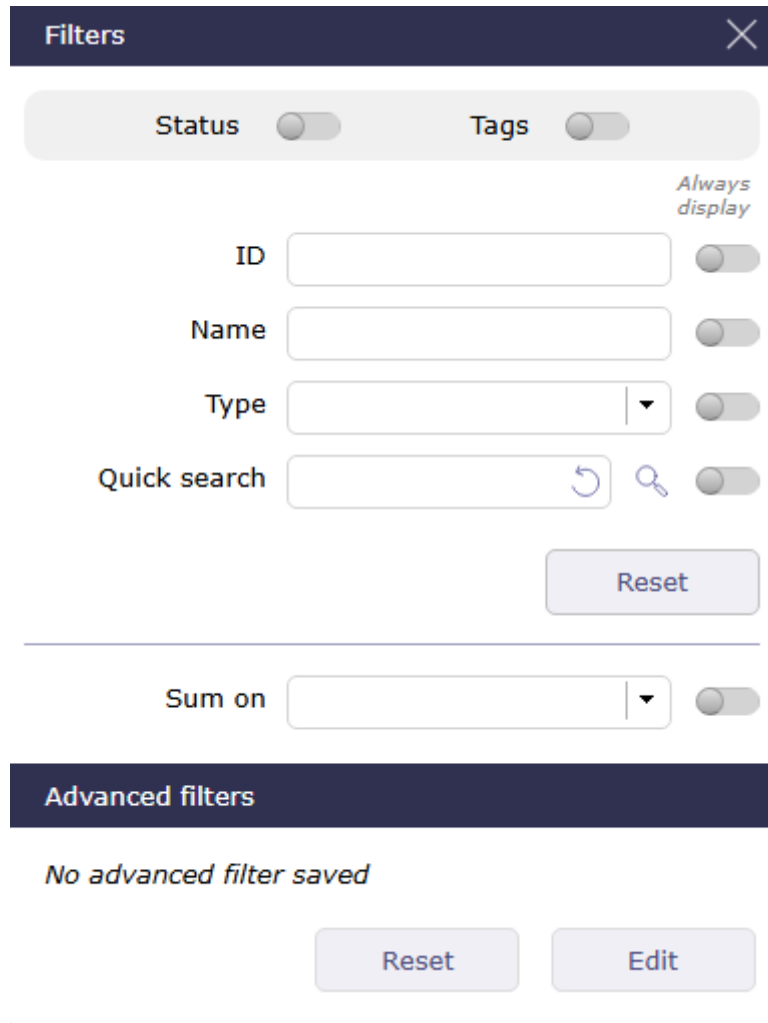


Fig. 28: Filters windows

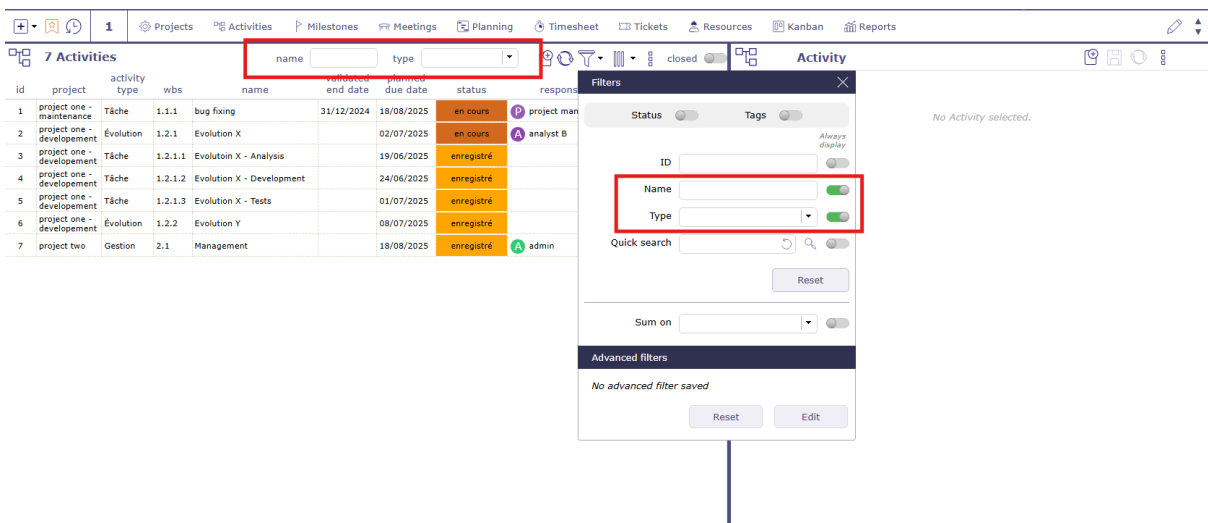


Fig. 29: Filters always visible

Status filters

Switch the button to display direct status filters. The display of new statuses is not direct and requires refreshing the page.

The screenshot shows the '3 Activities' section with a status filter set to 'en cours'. The table below displays the filtered results:

id	project	activity type	wbs	name	planned due date	status	progre	responsible
123	Test Fixe 2	Tâche	6.10	Durée Fixe 110	14/10/2024	qualifié	0 %	A admin
127	Test Fixe 2	Tâche	6.14	Durée Fixe 114	13/11/2024	qualifié	0 %	A admin
134	Test Fixe 2	Tâche	6.21	Durée Fixe 121	03/01/2025	en cours	0 %	A admin

Fig. 30: Status filter

Only existing status are visible if their are used.

Choice one of them and the item list will be filter.

This is a quick filter list by status.

[BACK]

Tags filters

Switch the button to display direct tags filters. The display of new statuses is not direct and requires refreshing the page.

The screenshot shows the '16 Projets' section with a tags filter set to 'important'. The table below displays the filtered results:

id	wbs	nom du projet	type	couleur
1	1	project one	Régie	
3	1.2	project one - developement	Régie	

Fig. 31: Tags filter

Only existing status are visible if their are used.

You have the option to restrict the list of tags by project.

Choice one of them and the item list will be filter.

This is a quick filter list by status.

[BACK]

Sum on

With this feature you display at the top of the list box the sum of the category you have chosen in the drop-down list.

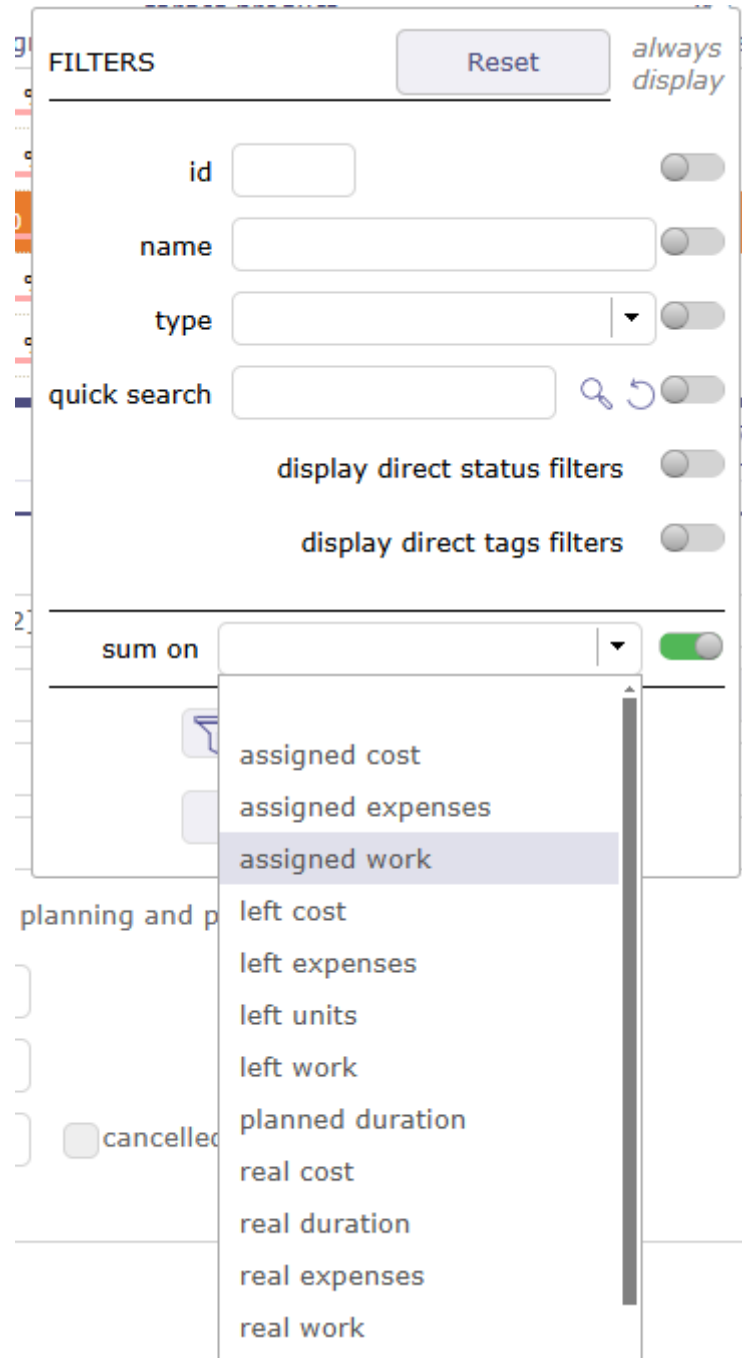


Fig. 32: Sum on

Important: This feature does not take into account parent activities even if they themselves contain load.

[BACK]



Fig. 33: Sum on display

The advanced filters

Click on edit to open the advanced filters window.

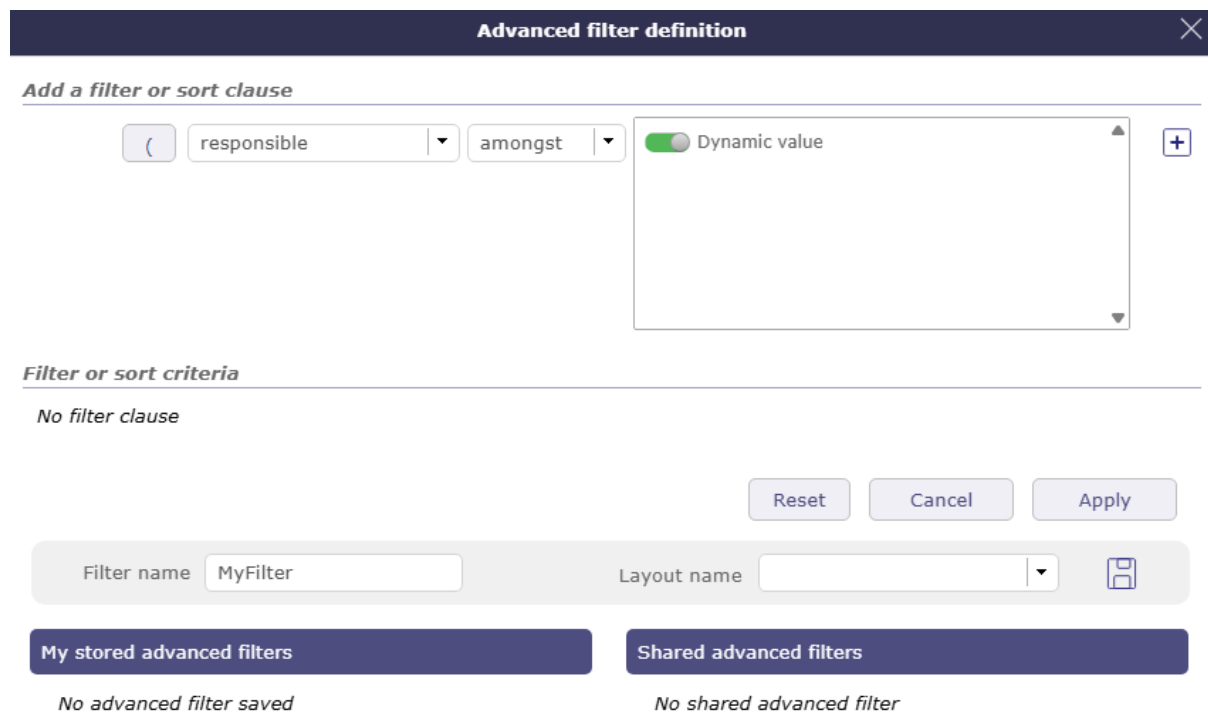


Fig. 34: Advanced filters definition

Active filter

- Define the clauses of filter or sort in “Add a filter or sort clause”.
- Select the name of the field, the operator and the value to the clause.
- You can open .
- The button changes if a group is open with and/or based on criteria.
- Click on to add additional criteria.
- Name the filter to save.
- Choose a particular layout in the recorded layout’s list to apply the filter. The chosen layout will be displayed with the filter applied directly.
- Click on for later use.
- The filter is stored immediately in the saved filters.

Advanced filter definition ✕

Add a filter or sort clause

AND ▾
(
planned due date/time ▾
<= ▾
18/06/2025 ▾

Dynamic value
 Compare values

+

Filter or sort criteria

(ticket type amongst 'Incident'	✎ ✖
OR ticket type amongst 'Anomalie')	✎ ✖
AND (status amongst 'ré-ouvert'	✎ ✖
OR status amongst 'en cours')	✎ ✖
AND planned due date/time <= '18/06/2025 23:59:59'	✎ ✖

→

Reset
Cancel
Apply

Filter name
Layout name ▾ 📄






My stored advanced filters

- ⋮ Responsible B
🔖 ☆ ⚙️ ⏪ ✖
- ⋮ V2.0
🔖 ☆ ⚙️ ⏪ ✖
- ⋮ Fait
🔖 ☆ ⚙️ ⏪ ✖
- ⋮ Notes & Fichiers v2.0
🔖 ☆ ⚙️ ⏪ ✖

Shared advanced filters

- ⋮ MEMBER1 - Avancement
📄

Fig. 35: creating a filter

- Click on  to create a list of favorite projects from the filter selection (only applicable to projects).
 - Click on  to select the filter that will be applied by default to each connection.
 - Click on  to shared shared in common for all profiles.
 - Click on  to shared the filter with your collaborators.
 - Click on  to delete the filter.
- You can select the filter from the list or click on **apply** to activate the filter.
 - Click on **Cancel** to return to the item screen..
 - Click on **Reset** to cancel the creation of the current filter.

Logical operator

Ability to select the logical **AND** operator and the logical **OR** operator in the criteria.

The logical AND operator is applied by default.

Dates management

Many criteria are available for dates in addition to standard mathematical symbols.

There are $< = >$, but also date systems $+ x \text{ days / months / years}$.

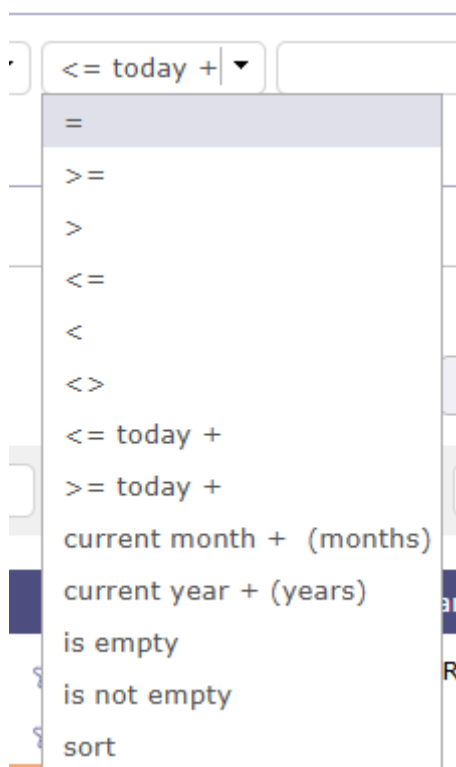


Fig. 36: Mathematical symbols and criteria for dates




Dynamic value

When the selected value is dynamic, then you do not select anything in the list.

The value will then be entered when the filter is called and will be fully activated when the filter is chosen.

Saved filters

This section allows to manage saved filters.

- Click on a saved filter to retrieve its definition.
- Click on  from a saved filter to delete it.
- Click on  to reorganize the filters.
- Click on  to shared a filter with your employees

When your collaborators share filters, they appear below the list of saved filters.

Click on the list to display all filters and their author.

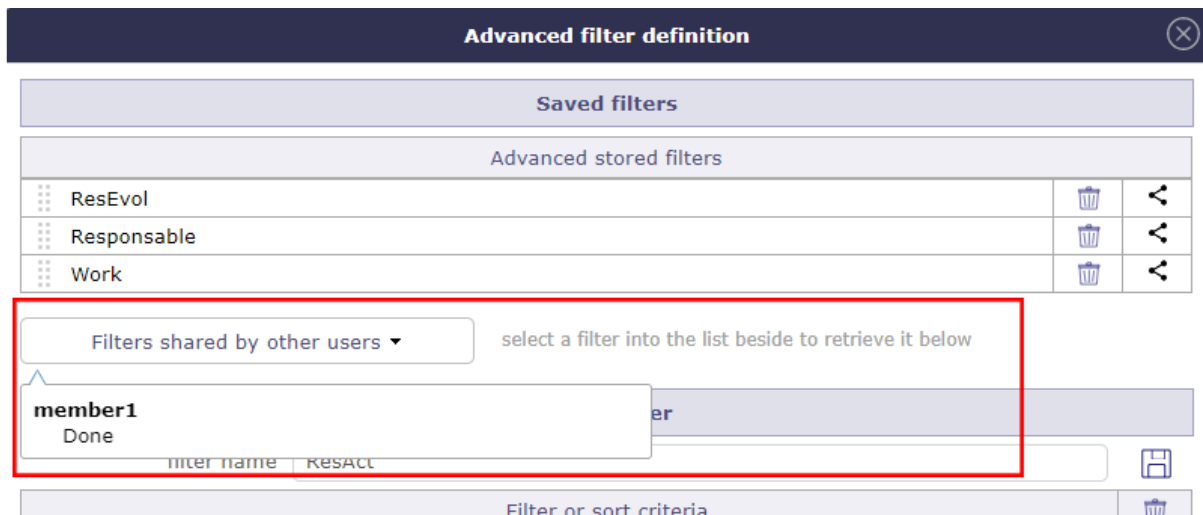


Fig. 37: Shared filters

List of filters

The filters list allows to select a stored filter.

To see the filter list, move the cursor over the advanced filter icon.

- Click on the filter name to apply.
- Click on **no filter clause** to reset the filter.

[BACK]

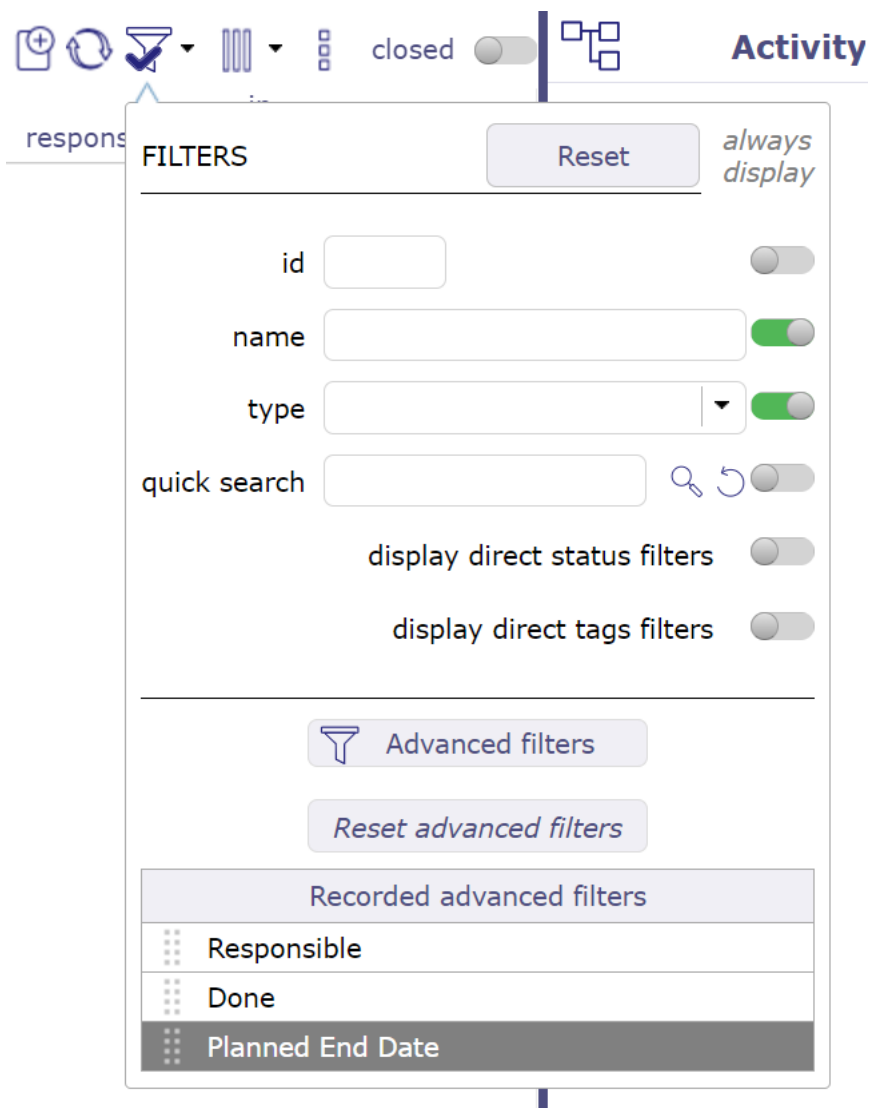


Fig. 38: List of filters

The columns

You can define which columns you want to display in the list area for the selected item.

Column Name	Visible	Width
id	<input checked="" type="checkbox"/>	5
wbs	<input checked="" type="checkbox"/>	10
project name	<input checked="" type="checkbox"/>	30
type	<input checked="" type="checkbox"/>	15
color	<input checked="" type="checkbox"/>	5
status	<input checked="" type="checkbox"/>	15
progress	<input checked="" type="checkbox"/>	10
planned end	<input checked="" type="checkbox"/>	10
cancelled	<input type="checkbox"/>	5
allow reduction	<input type="checkbox"/>	5
overall progress	<input type="checkbox"/>	10
expected	<input type="checkbox"/>	5
validated work treatment	<input type="checkbox"/>	5
category	<input type="checkbox"/>	10
client	<input type="checkbox"/>	10

Fig. 39: Columns Organizer

The identifier and the name of the selected element are mandatory fields. They cannot be removed from view. The display of columns can be defined by and for the user or it can be applied by default for a particular user.

- Use the checkboxes to select or deselect the columns to display.
- Click on OK button to apply changes.
- Click on Reset button to reset the list to its default format.
- Click on “ To Manage” button to save column layouts.

The applied definition will be automatically retrieved at the next connection.

In the item list, you can add an “Attachments” column, which will display an icon:

- if the item contains attached files
- if the item contains notes
- if the item contains linked items



Fig. 40: Column attachments

Column order

You can move columns using the handles in front of the column name. Click drag to where you want to drop it.

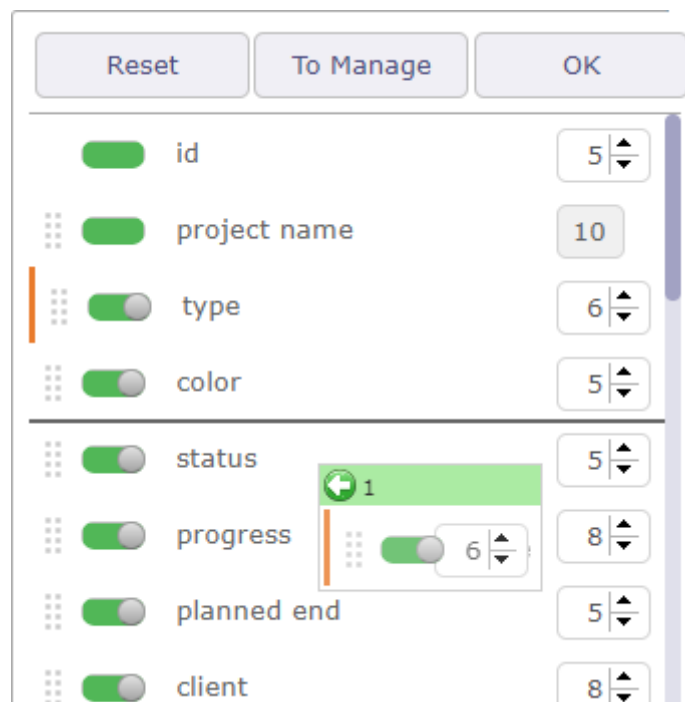


Fig. 41: Drag and drop to move columns

You can move columns directly from the list area.

Click on the column to move and drag and drop where you want it. The icon shows you with an arrow where the column will be placed

type	color	status	progress	planned end	client	color category	requested star
administratif		enregistré			internal		
fait		enregistré		10/01/2023	client one		05/09/2011
partiellement facturé		enregistré		10/01/2023	client one		05/03/2012
partiellement facturé		enregistré		09/12/2022	client one		05/09/2011
projet		enregistré		14/11/2022	client two		12/03/2012

Fig. 42: Dragged and dropped on list area columns

Column size

Use the arrows to the right of the column name to increase or decrease the column width.

The width is in % of the total width of the list. The width of the field is automatically adjusted so that the total width of the list is 100%.

The minimum width is 10% and the maximum width is 50%.

You can also position your mouse between two columns and drag to change the width of the selected column.

Important: Total width greater than 100%

- The total width should be limited to 100% maximum.
 - The overrun will be highlighted next to the buttons.
 - This may cause strange display, across page width, list, reports and PDF export, depending on the browser.
-

Columns layout

You can save different column layouts according to your needs for the same element.

- Start by selecting the columns you want to put in one of the saved layouts.
- Then, click on the “To manage” button to open the pop-up to save the current layout.
- Name the layout and click on to save your layout to the list of advanced stored layouts.
- Click on to delete a layout.
- Click on to share the saved layout.
- Click on the name of the layout to select it and display the columns relating to it in the list area.



Fig. 43: Layout Management window

Shared layout

Shared layouts will be visible in the layout management pop-up.

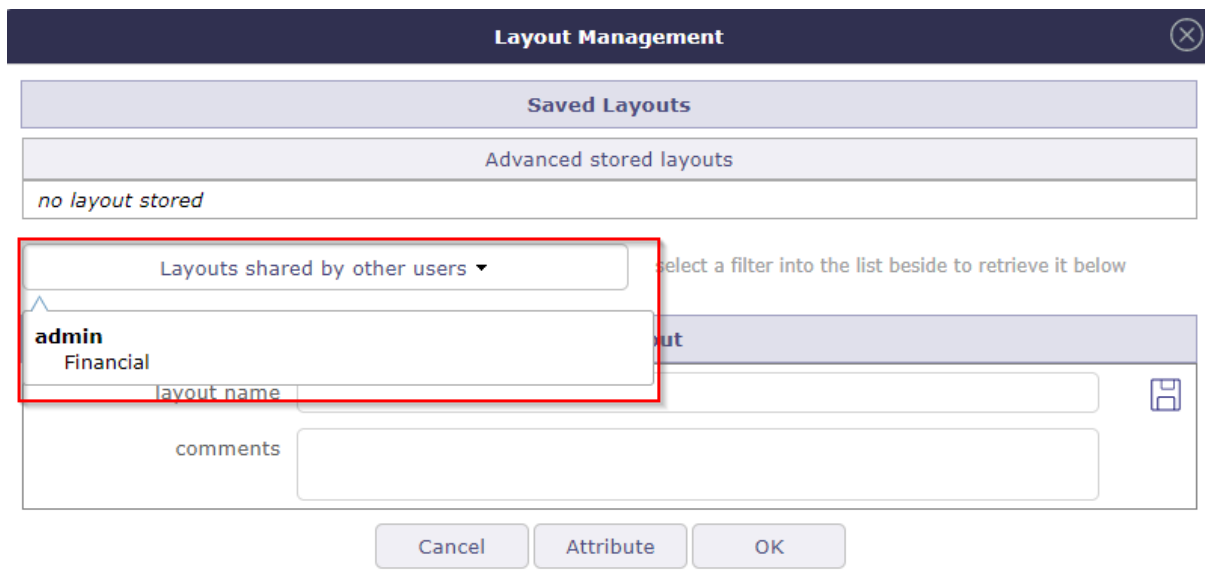


Fig. 44: Shared layout drop-down list

Each layout is presented under the name of the user who created and shared it.

Assign layout

You can assign a layout to one or more users depending on your rights.


Select the layout you want to assign by clicking on the handle in front of the name.


Click on the “attribute” button to assign a layout to a user.

Drag and drop from left to right the users who will be assigned the layout.

It is possible to register selected users in a group.

Name the group in this dedicated field “save a group”.

Click on  to save the group.

Click on  to delete the group.

Once saved, you can retrieve the groups from the “remind group” dropdown.

Switch the options you are interested in to reapply this layout to each new connection or to assign the selected layout to each new user.

See also:

The *access right*

[\[BACK\]](#)


Exportation

Export to PDF format

Allows to export data of list to PDF format.

Export contains all details and links between tasks.

Export can be done horizontally (landscape) or vertically (portrait) in A4 and / or A3 format with high quality of details

- Click  to expand the pop up to full screen

[\[BACK\]](#)

Export to CSV format

This functionality allows to export data of list in a CSV file.

The fields are regrouped and presented in the order as they appear in the item description.

- Click on **OK** button to export data.
- Click on **Cancel** button to close the dialog box.

The export definition is defined for each user.

The same definition can be applied in the next export.

- Use the checkbox to select or unselect all fields.
- Click on **Select list columns** button to restrict selected fields to the ones that are currently displayed in the list.
- For fields that reference another item, you can select to export either the id or the clear name for the referenced item.
- Box checked indicating that HTML tags in a long text field will be kept during export.

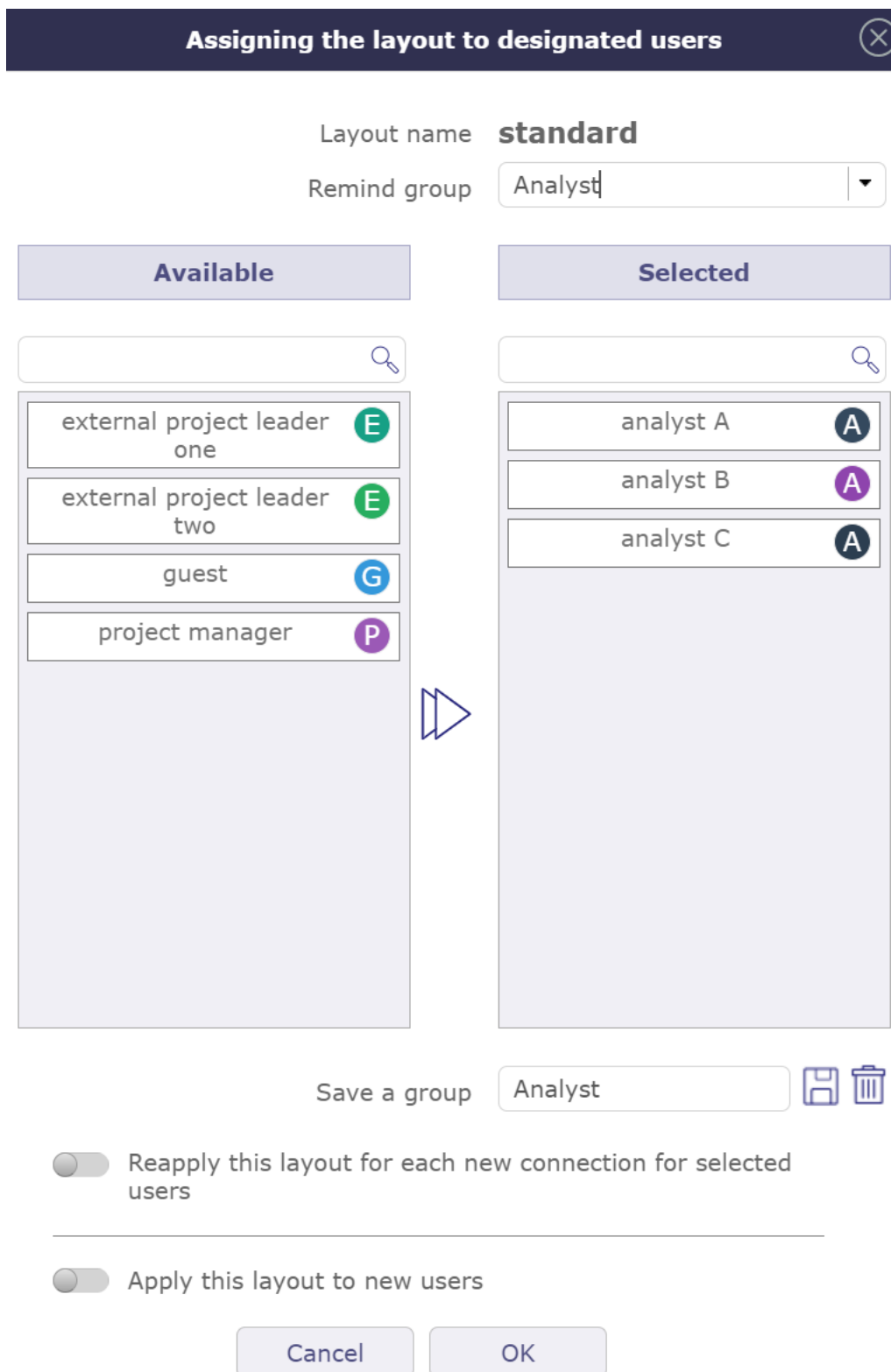


Fig. 45: Assignment popup for a layout

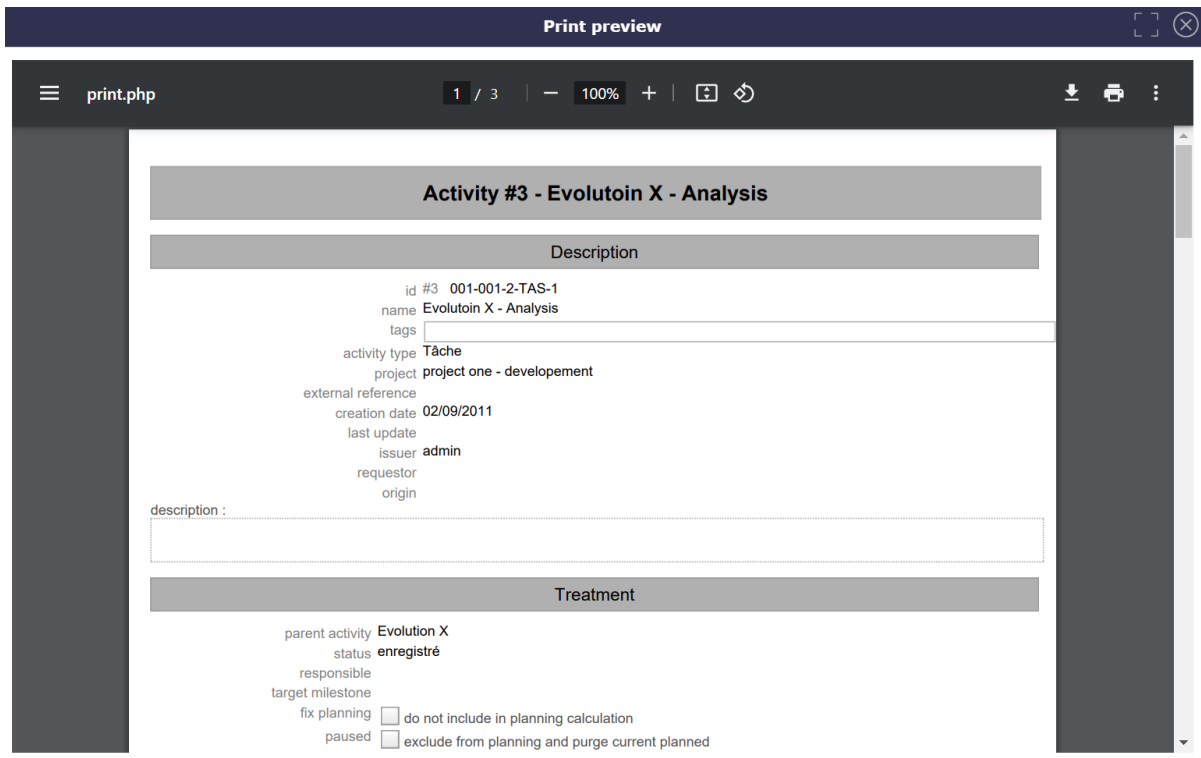


Fig. 46: Pop Up Print PDF

Note: Import Datas

The active filter defined will be applied to export data.

The CSV exported files can directly be imported through the import functionality.

See also:

Import data

[BACK]

Multiple update

Allows to update several items in one operation.

Click the items in the list box to select them.

- Shift click to select consecutive items
- Click ctrl to select non-consecutive elements
- The fields that can be updated depends on the selected element.
- The editable fields are sorted in alphabetical order.



Fig. 47: Dialog box - Export

id	project	activity type	wbs	name	validated end date	planned due date	status	progress	responsible	in progress	done	closed
1	project one - maintenance	Task	1.1.1	bug fixing	03/30/2022	04/01/2022	in progress	0 %	project manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	project one - development	Evolution	1.2.1	Evolution X	10/06/2021	12/24/2021	in progress	52 %	analyst B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	project one - development	Task	1.2.1.1	Ateliers	09/14/2021	12/24/2021	assigned	100 %	analyst B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	project one - development	Development	1.2.1.2	Evolution X - Analysis	09/27/2021	12/03/2021	assigned	100 %	admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	project one - development	Development	1.2.1.3	Evolution X - Development	09/30/2021	12/08/2021	recorded	0 %		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	project one - development	Development	1.2.1.4	Evolution X - Tests	10/05/2021	12/13/2021	assigned	100 %	admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	project one - development	Evolution	1.2.2	Evolution Y	10/12/2021	01/14/2022	in progress	0 %	admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	project one - development	Task	1.2.2.1	Administrative		01/14/2022	assigned	0 %	admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	project two	Management	2.1	Management	12/31/2021	12/31/2021	qualified	0 %	project manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Absences	Task	4.1	Congés			in progress	0 %	admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Absences	Task		Maladie			recorded	0 %		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Multiple mode 1 Number of selected items : 3

For the field
 activity type 2
 replace value with

Task
 Development
 Evolution
 Management
 Phase

#3 : Activity #3 updated
 #4 : Activity #4 updated
 #5 : Activity #5 updated 4

Fig. 48: Multiple mode item selection

■ Number of selected item

Indicates the number of objects selected in the list area.

■ Fields choices

Choose in the list the field which must be modified on the selected objects.

When the control is chosen, a list of choices corresponding to the field is displayed.

Then choose the new value of the field.

Click on  to apply the new value.

Tip: Tags don't work exactly the same way, you can only add new tags. The list of tags already created is not visible

- Target milestones can be modified with “multiple update” tickets and activity screens
- You can bulk close items that do not have status (assigned, closed, recorded ...) as resources
- The passwords of all users can be reset at the same time:
- On the users screen, In the update area, click on the Reset button.
- An email will be send to the selected users.






■ Items list

View in this list the operations carried out.

In green the operation is successful and the modification is applied.

In red, an error has occurred, the modification is not applied.

■ Buttons

- Click on  to select all the element in the list area
- Click on  to unselect the selected element in the list area
- Click on  to apply the modifications
- Click on  to access the deletion
- Click on  to quit the multiple update mode

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Item list

The list displays all items in the same categories and are clickable.

Most of the detail fields of the selected item can be displayed as a column in the list box.

The order and size of the columns can be customized.

Click on an element to display its detail.

[BACK]

Context menu

Right click on an element to access the element's context menu.

The tools that are displayed in the context menu are the same as the details area.

[BACK]

5.1.7 Details Area

Interface areas:

- *Item identifier*
- *Creation information*
- *Buttons*
- *Sections*
- *Special fields*

1.4	Evolution X - Tests
2	Evolution Y
1	test
	Management
	Congés
	Maladie









-  Create a new item
-  Copy item
-  Delete this item
-  Print
-  export to PDF format
-  Send Mail
-  Search in the planning
-  Select project

Fig. 49: Element's context menu

The screenshot shows the 'Ticket #1 - bug: it does not work' details. The 'Description' panel (1) contains fields for name, ticket type (Incident), project (project one - maintenance), urgency (Urgent), and requestor. The 'Treatment' panel (2) shows the status as 're-opened', assigned to 'project manager', with a priority of 'Low priority'. It includes a table for dates (due, estimated, real, left) and buttons for 'Start work', 'dispatch', 'done', 'closed', 'solved', and 'cancelled'. The 'Linked Elements' panel (3) displays a table with columns for element, name, status, and resp. The table contains entries for 'Activity #1', 'Heading #1', 'Document #1', and 'Document version #3'. The 'Attachments' panel (5) shows a file named 'readme file'. The 'Notes' panel (4) contains a note: 'New comment for testing...'. A '6' callout points to the 'assign to me' button in the Treatment panel.

Fig. 50: Details Area

Item identifier

Identifies the item with the element type and the item id and name.

Each element is identified with a distinctive icon.

Creation information

You can see at a glance the status, update and creation information of the element.

- First calendar shows the date of update.
- Second calendar indicates the creation date of the element.

Calendars appear in red when the modified or created date is today's.

They appear in yellow when this date is yesterday.

and in gray when the date is older

The thumbnail corresponds to the creator of the element

Administrator can change the issuer and the informations date.

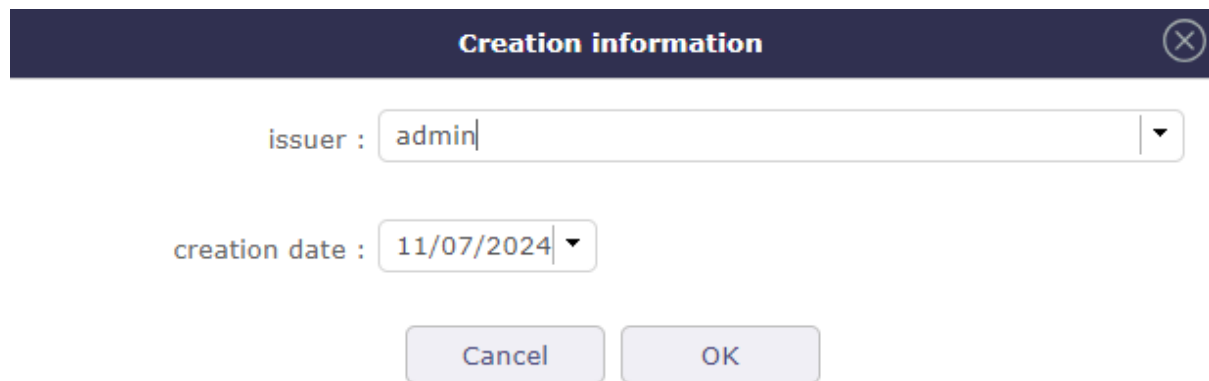









Fig. 51: Edit creation informations










See also:

Thumbnails

Buttons

Details windows buttons

-  *Hide Details element*
-  *Create new item*
-  *Save the changes*
-  *Refresh the display*
-  *Copy the current item*
-  *Delete the item*
-  *Search in the planning*

-  *Cancel changes*
-  *Print the details*
-  *Export to PDF format*
-  *Export to PDF and attach file*
-  *Send details*
-  *Subscribe detail*
-  *Activity Stream*
-  *Show history*
-  *Show checklist*

Some buttons are not clickable when changes are ongoing.

When changes are ongoing, you cannot select another item or another menu item.

Save or cancel ongoing changes first.

Hide details

This icon is visible on the views of the gantt chart in order to hide the details when it is set to vertical display.

Create a new item

Depending on the screen of the selected item, create a new item in that category.

Save the changes

Save the changes of the current item.

Or use shortcut key `ctrl + S` to save the changes on the current item.

Refresh the display

Allows you to refresh the details windows of the selected element

Copy item

The copy tool allows you to copy an element with multiple options.

You can select only certain information, such as the structure of the project, the meetings, the links or even the attached files and certain elements of the scope...

The information to be copied is different depending on the item selected.

The copy element with a field with the “unique” attribute automatically adds the extension (1) to respect uniqueness. The number increments with each copy of the same element.

The options displayed in dialog box depends on whether the element is simple or complex.

Copy element ✕

Type of project

Copy name

project code

is sub-project of

Copy project structure (activities & milestones)

Copy project structure (meeting & periodic meeting & test sessions)

Copy sub-projects

Copy allocations to the project (and sub-projects)

Copy assignments to activities (with assigned work)

Copy versions linked to the project

Copy requirements

Copy Risk/Opportunity

Copy Activity Price

Also copy links

Also copy attachments

Directly move to status "enregistré"

Fig. 52: Copy project

Note: Recorded status

The new item has the copied status by default.

You can copy the project with the “recorded” status directly.

In the global settings, **planning tab > automation section** you can set this option definitively for each copy. If yes, the box will be automatically checked with each copy.

Important: When copying the project, the data of the closed resources are not copied.

The copy options will then be offered to you when you make a new copy of the same type.

If **link copy to source** is checked, the options for synchronize items are displayed.

Simple element

Simple element (environment parameters, lists,...) can only be copied “as is”.

Complex element

Complex element (projects, tickets, activities, financial documents . . .), it is possible to copy them into a new kind of elements.

For instance, it is possible to copy a Ticket (the request) into an Activity (the task to manage the request) or meeting, periodics meetings as well as test sessions.

For Projects and Activities, it is also possible to copy the hierarchic structure of activities (sub-projects, sub-activities and plannable elements).

Activities also allow copying dependencies.

If you want to retrieve only successors or predecessors, click the corresponding checkboxes.

In case you want to retrieve all dependencies, select the last box. In this case, successors and predecessors will become read-only.

**Delete the item**

To delete the selected element.

Basically, some items cannot be deleted. For example, if actual work has been saved on an activity. The latter, as well as the project on which it depends, cannot be deleted.

To be able to delete these elements, go to the *Acces rights* menu in the *specific access* and choose YES in can force the deletion of the actual work in the “specific update rights” section.

Copy element ✕

Copy as new

Type of copied element

Copy name

Copy to project

Copy the whole structure (sub-activities & milestones)

Copy assignments to activities (with assigned work)

 Add current element as origin of copied element

 Link current element to copy

 Also copy links

 Copy with todo list

 Also copy attachments

 Also copy notes

 Also copy result

 Directly move to status "enregistré"

 Also copy predecessors

 Also copy successors

 Add dependency withcopy

Fig. 53: Copy an activity

Search in the planning (Gantt view)

When you are on a planning item (ticket, activity, milestone, etc.) you can target it on the planning view.

Click the button to automatically access the planning view by targeting the previously selected item and centering it on the view.

If the item is closed on the Gantt view then the view will automatically open the parent activity or sub-project.

The project of the targeted item will be automatically selected in the project selector.

Undo the change

The button is clickable only when changes are ongoing.

Allows you to undo changes made to the current element

Print the details

To obtain a printable version of the details of the current element.

Export to PDF format

To get a printable version of the details in PDF format.

Export to PDF format and attach files

Allows to export the data of the selected element in PDF format and once generated, attaches the file in the section of the attached files of the element.

The export contains all the details and the links between the tasks.

Export can be done horizontally (landscape) or vertically (portrait) in A4 and/or A3 format with high quality details

Email detail

Allows to send an informative email to defined recipients list.

The list is defined according to the role of the recipient.

The message text can be formatted before sending.

You can add attached files.

You can reduce the pop up to set it aside for later.

Click on the reduce button.

The window will be put on standby in the bottom right corner of the screen, allowing you to perform further actions.

Click the minimized email at the bottom of the screen again to reopen the pop-up.

See also:

ProjeQtOr roles

Flag on the role checkbox to define the recipients list.

Checkbox other

Flag on the checkbox other to manually enter email addresses.

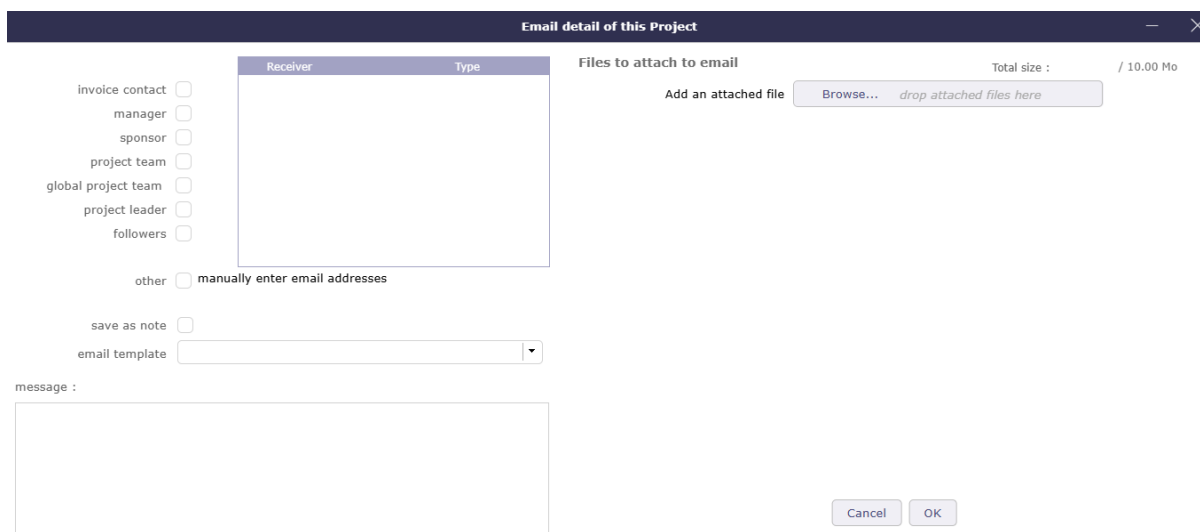


Fig. 54: Email details dialog box

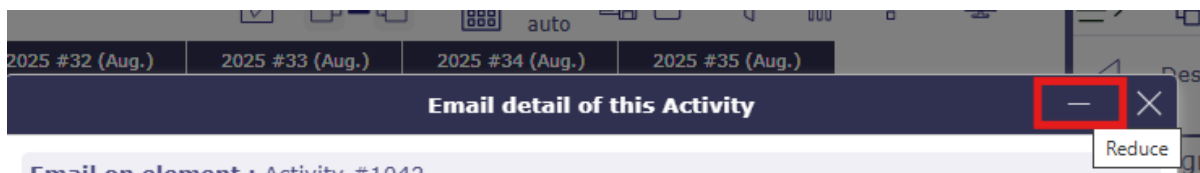


Fig. 55: minimize email sending

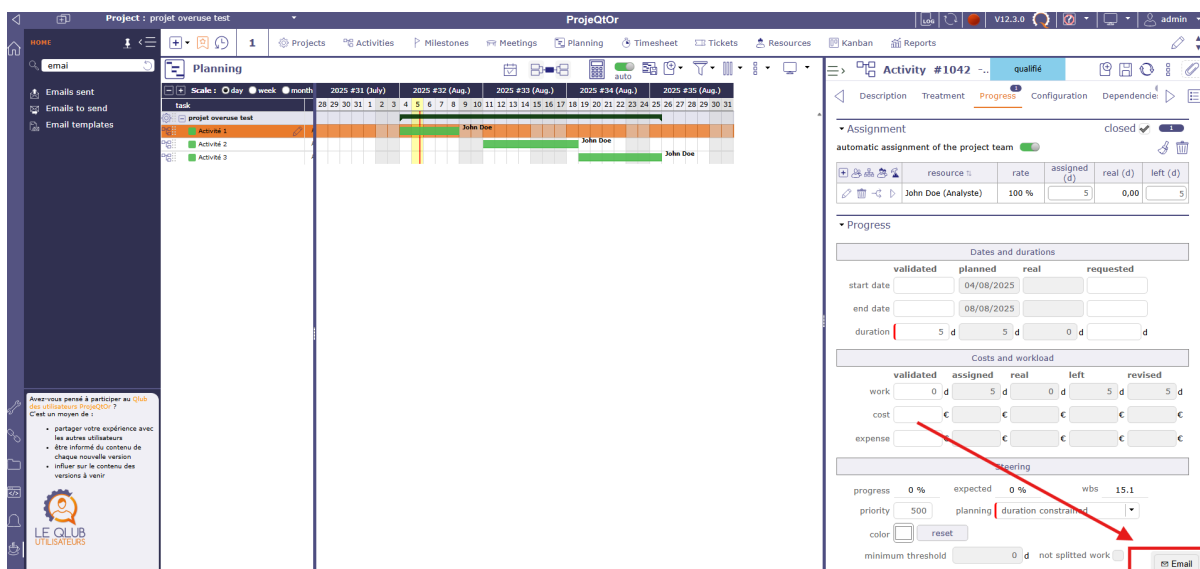


Fig. 56: minimize email sending

When sending an email, the address (es) entered in “other” remains in memory and will be proposed during the next mailing

Use commas or semicolons to separate addresses.

Message

The message that will be included in the body of the email, in addition to a complete description of the item.

Save as note

Flag on to indicate the email message will be saved as a note.

Email Template

You can choose an email template even without having predefined it in the settings.

To create and view templates.

See also:

Email Templates.

Files to attach to email

Attachments for the item appear in the attachment table. If the item has no files attached then the table is not visible.


The maximum size of attached files must be entered in the global parameters in the Mailing tab. The size indicated is in bytes unless you indicate otherwise. see: *Global parameters*

When you check a file to send the size of the latter is displayed at the top right of the table.

- If several files are selected, then the total size of these files is calculated and displayed.
- If the total size

 **Subscribe detail**

Allows to subscribe to tracking of an item.

This icon is checked when you subscribed .

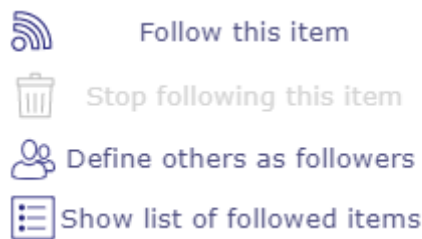


Fig. 57: Subscribe detail

When a user “subscribes” to the project, he will receive notifications “to subscribers” for all elements of the project

You can subscribe a third party user to the tracking of an element (according the acces rights).

Click on **Define others as followers**

Drag the name of selected ressources and drop them on the right column for subscribe them.

You can view the list of followed items in two ways:

- Click on the button “View the list of subscriptions” in the subscription menu
- In the user settings of the *Automation section*, click on the “show list of followed items” button.
- You can see the items followed by your contacts

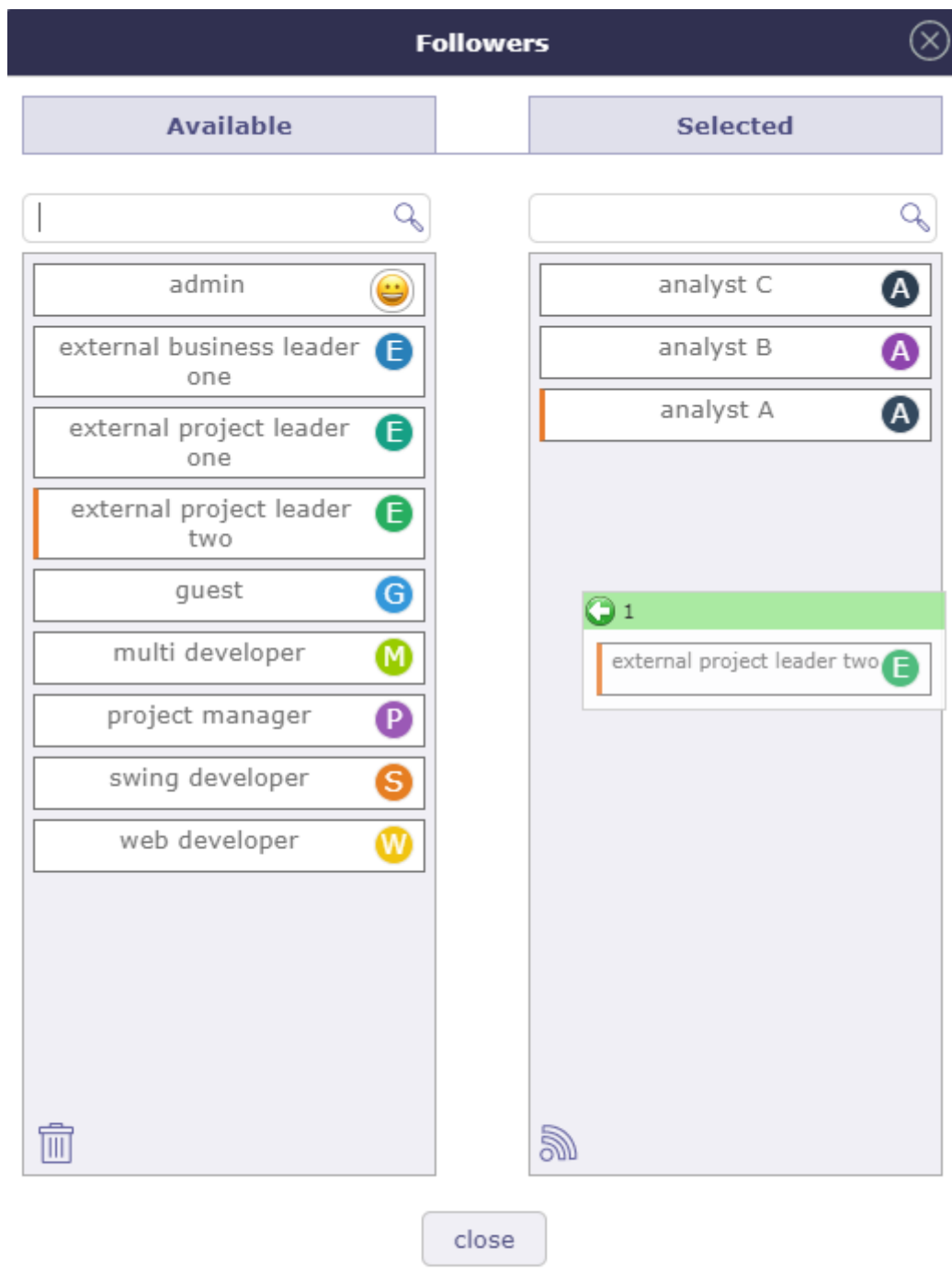


Fig. 58: Subscribe for other

close

List of followed items			
element	status	subscription	
Activity #5 Evolution X - Tests	recorded	👍👍👍👍	🗑️
Test session #1 Web Application V1 - Main test session	recorded	👍👍👍👍	🗑️
Decision #1 Go for deployment	recorded	👍👍👍👍	🗑️
Project #1 project one	assigned	👍👍👍👍	🗑️

close

Fig. 59: Display list of followed items

See also:

Contacts

 **Activity Stream**

This icon allows you to display the Stream activity in a unique way on the selected element.

Unlike the Activity Stream icon in the Display layout menu which activates it globally on all screens.

The last position of the activity stream is always saved.

See also:

Activity Stream


 **History of changes**

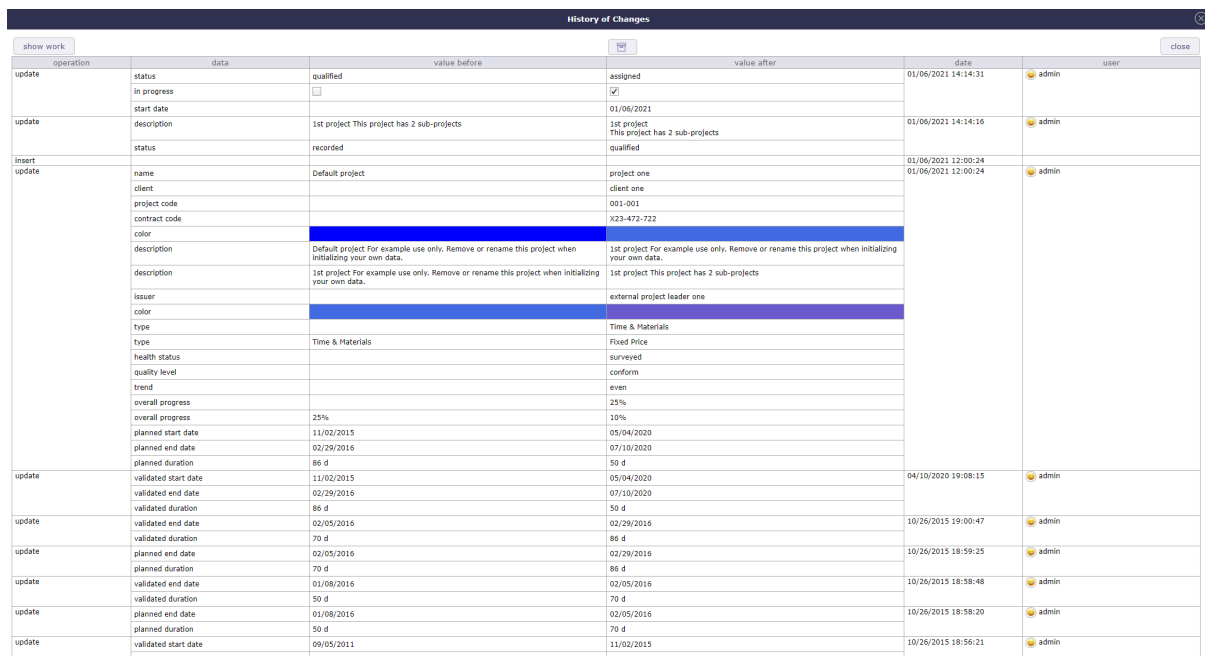
All the changes items are tracked.

They are stored and displayed on each item.

On creation, just an insert operation is stored, not all the initial values on creation.

Displaying the history of changes

- The user parameter “Display history” allows to define whether the history of changes appears in a section or in a dialog box.
- If the value “On request” is set, the button  appears on the detail header window.
- Click on to display the history of changes.
- If the value “Yes” is set, the “Change history” section appears in the detail window.



operation	data	value before	value after	date	user
update	status	qualified	assigned	01/06/2021 14:14:31	admin
	in progress	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
	start_date		01/06/2021		
update	description	1st project This project has 2 sub-projects	1st project This project has 2 sub-projects	01/06/2021 14:14:16	admin
	status	recorded	qualified		
insert				01/06/2021 12:00:24	admin
update	rname	Default project	project one	01/06/2021 12:00:24	admin
	client		client one		
	project code		001_001		
	contract code		X23-472-722		
	color				
	description	Default project For example use only. Remove or rename this project when initializing your own data.	1st project For example use only. Remove or rename this project when initializing your own data.		
	description	1st project For example use only. Remove or rename this project when initializing your own data.	1st project This project has 2 sub-projects		
	issuer		external project leader one		
	color				
	type		Time & Materials		
	type	Time & Materials	Fixed Price		
	health status		surveyed		
	quality level		conform		
	trend		even		
	overall progress		25%		
	overall progress	25%	10%		
	planned start date	11/02/2015	05/04/2020		
	planned end date	02/29/2016	07/10/2020		
	planned duration	86 d	50 d		
update	validated start date	11/02/2015	05/04/2020	04/10/2020 19:08:15	admin
	validated end date	02/29/2016	07/10/2020		
	validated duration	86 d	50 d		
update	validated end date	02/05/2016	02/29/2016	10/26/2015 19:00:47	admin
	validated duration	70 d	86 d		
update	planned end date	02/05/2016	02/29/2016	10/26/2015 18:59:25	admin
	planned duration	70 d	86 d		
update	validated end date	01/08/2016	02/05/2016	10/26/2015 18:58:48	admin
	validated duration	50 d	70 d		
update	planned end date	01/08/2016	02/05/2016	10/26/2015 18:58:20	admin
	planned duration	50 d	70 d		
update	validated start date	09/05/2011	11/02/2015	10/26/2015 18:56:21	admin
	validated end date	08/19/2015	01/08/2016		

Fig. 60: Dialog box - History of changes

Show/Hide work

- This button allows to show or hide work changes done in “Real Work Allocation”.

- For section “Change history” the display of work is defined in user parameter “Display history”.

Show / hide the checklist

This button is only displayed if the “display checklist” parameter in the user settings is set to “on request” status

See also:

Checklists

Drop file area

This area allows to add an attachment file to the item.

- Drop the file in the area.
- Or click on the area to select a file.

Text editors

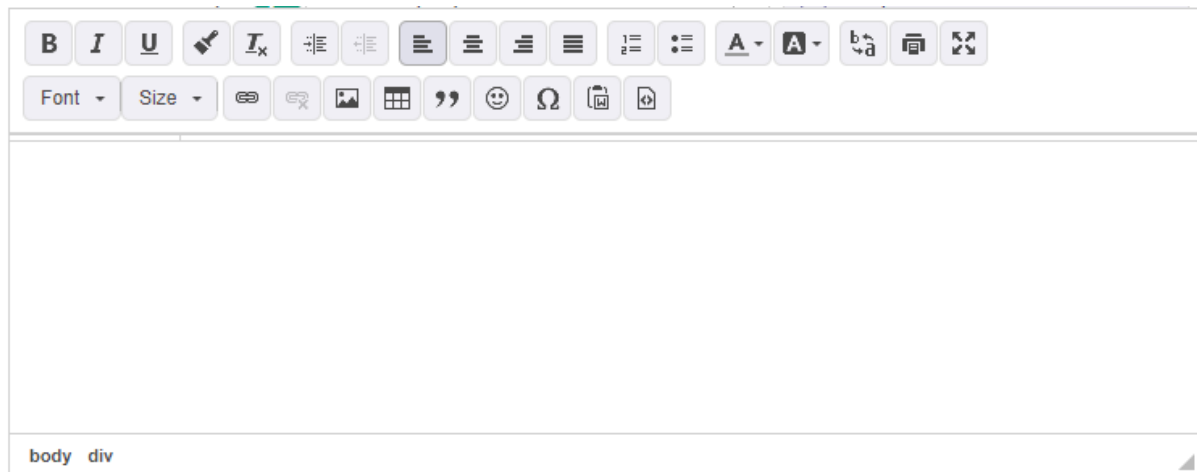
Text editors are available for editing of long text fields like description, results, notes, ...

Selection of text editor can be done in User and Global parameters screens.

CK Editor

The most advanced web editor.

Spell checker available with this text editor.



CK Editor - Ability to resize the CK Editor height, the size is saved

Possibility to deactivate the SCAYT spell checker. It can be modified by each user in user parameters.

CK editor inline

As CK Editor.

Activated only when needed.

Note:

- CK editor inline height, keep the size of CK editor.
 - Click on the text zone to display toolbar.
 - Can not use it in fullscreen mode.
-

Plain text editor

- Conventional text input.
- Text zone is extendable.

Sections

- The fields are regrouped under a section.
- All sections can be folded or unfolded, clicking on the section title.

Columns

The sections are organized in columns.

Number of displayed columns can be defined in user parameters.

Common sections

Some sections are displayed on almost all screens. (See : *Common sections*)

Item count in the list

When the section contains a list, the item count is displayed at right of the header.

▾ Attachments

2

Fig. 61: Header section

Thumbnails on items in the list

Thumbnails are displayed on item row to present field values in graphical format.

See also:

Thumbnails.

Go to selected item

In a list, possibility to go directly to an item by clicking on its fields.

Cursor change to  on clickable fields.

5.1.8 Special fields

Tags Management

This is a way to display a list of tags allowing rapid filtering of project, activity and ticket elements

You can enter as many tags as necessary on the dedicated line under the element name.

Fig. 62: Tags area

- To validate the entry, click on the enter key.
- An autocompletion system is available if the tag already exists or if the entry contains the same letters as an existing tag.
- Click the down arrow on your keyboard to display the full list of existing tags
- switch to the enable position to display the tags in the list box.
- You can display the existing tags on the list area
- Use tags to filter the list display based on the selected tags.

FILTERS Reset *always display*

id

name


type

client

quick search

display direct status filters

display direct tags filters

 Advanced filters

Advanced stored filters

no filter clause

Fig. 63: Filter to display tags

1 Project closed

tags : important short

id	wbs	project name	type	color	status	progress	planned end
1	1	project one	Forfait		enregistré	0 %	31/12/2024

Fig. 64: Tags displayed

Special Buttons

Accelerator buttons

ProjeQtOr provides you with shortcut buttons allowing you to more easily and quickly manage the information in the fields.

Move to the next status

This button allows to skip to the next status without having to open the list. The next status is defined by the workflow linked to the type of element.



Fig. 65: Move to next status

The mouse tracking over this colored button allows to show the workflow.

It is possible to define events when a state passes.

If a field is required for the transition from one state to another then you will be automatically redirected to the required field.

Regardless of the layout and presentation of your screens

Assign to me button

This button allows to set the current user in the related field.









Combo list field

Combo list field allows to search, view or create item associated with the field.

The access to view or create item depends on your access rights. Some buttons can be not available.




Fig. 66: Combo list

- Click on  will directly go to the selected item.
- Click on  to display the details of the selected item.
- Click on  to directly add a new element corresponding to the selected field.
- Click on  to search for an element among those existing corresponding to the selected field.
- Click on  to re-select an item.
- Click on  to close the dialog box.

Detail of element						
7 Projects types						
id	name		code	order	workflow	closed
75	Manual billed		OPE	0	Default	<input type="checkbox"/>
48	Fixed Price		OPE	10	Default	<input type="checkbox"/>
49	Time & Materials		OPE	20	Default	<input type="checkbox"/>
50	Capped Time & Materials		OPE	30	Default	<input type="checkbox"/>
51	Internal		OPE	40	Default	<input type="checkbox"/>
52	Administrative		ADM	80	Default	<input type="checkbox"/>
53	Template		TMP	90	Default	<input type="checkbox"/>

Fig. 67: Dialog box - Item search

- Click on  to filter the items list

Some elements is possible to select several items, use Ctrl or Shift.

Origin field

The origin of an element has no impact on it.

This is a memo, pure information.

It can be filled in automatically during a copy or manually.



origin 

Fig. 68: Origin field

This field allows to determine the element of origin.

The origin is used to keep track of events (ex.: order from quote, action from meeting).

The origin may be selected manually or automatically inserted during copying an element.

- Click on  to add a orgin element.
- Click on  to delete the link.
- Choose the type of element from the drop-down list.
- Select the item from the corresponding list

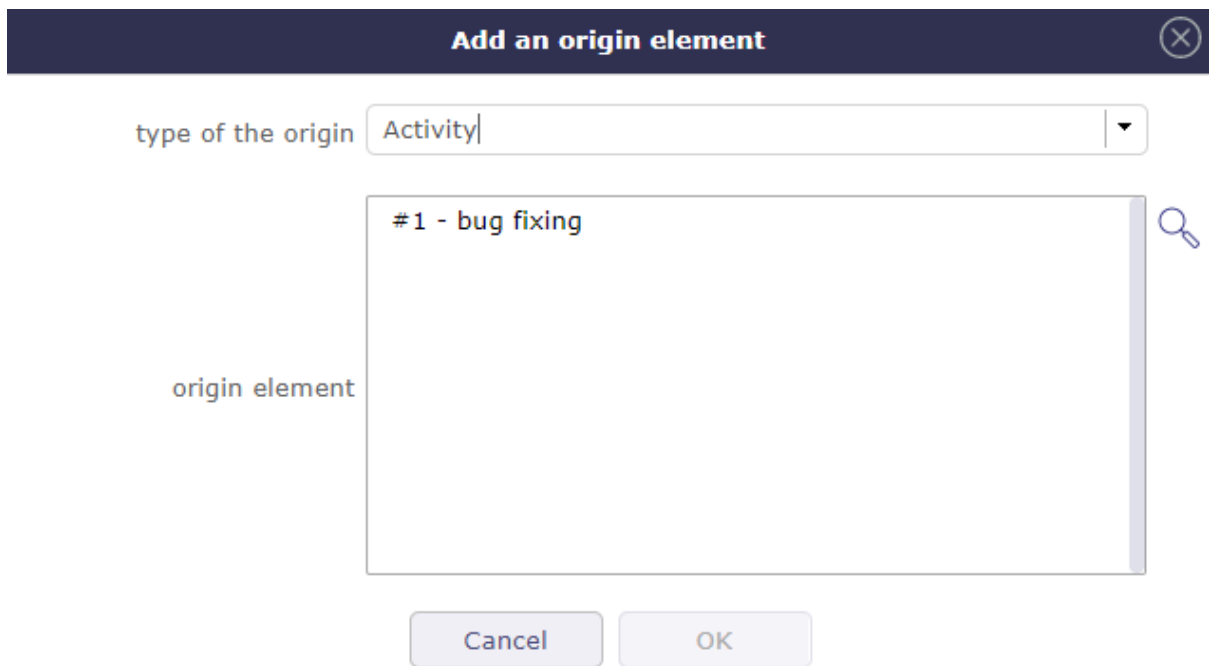


Fig. 69: Add an origin element

Set color field

- This field allows to set the color of an item.
- Used to differentiate items in list or report.
- Click on list of colors to select.
- Click on “Reset” button to erase.



Fig. 70: Set color field

- Displays a colored circle for field colorable.
- Some list of values has a field to define a color.
- A color is defined for each value.

Thumbnails

Thumbnails are a graphical representation of the field value.

- Displays the date of creation or update of the item.
- Move cursor over thumbnail to display the date.

Dates



The Item have been created or updated today.



The Item have been created or updated recently.



Default view.

User

- Portrait of the user. Displays if it has created or updated an item.
- If no photo is saved, an icon will automatically be generated.
- The letter is chosen according to the real name. This is his initial.
- Move the cursor over the thumbnail to display the user's name and photo in its original size.
- The user who does not have a photo automatically obtains a thumbnail with the first letter that makes up the real name.











 8 Users				
id	user name	photo	profile	
9	member3		Project Member	analyst C
8	member2		Project Member	analyst B
6	external2		External Project Leader	external pri
5	external1		External Project Leader	external pri
4	member1		Project Member	analyst A
3	manager		Project Leader	project mar
2	guest		Project Guest	



Fig. 71: list of users without personal photo

Comments

-  Indicates a comment or description is defined.
-  to add a new note or comment
- Move cursor over thumbnail to display text.

Privacy

Indicates the visibility level defined in a note or attachment.

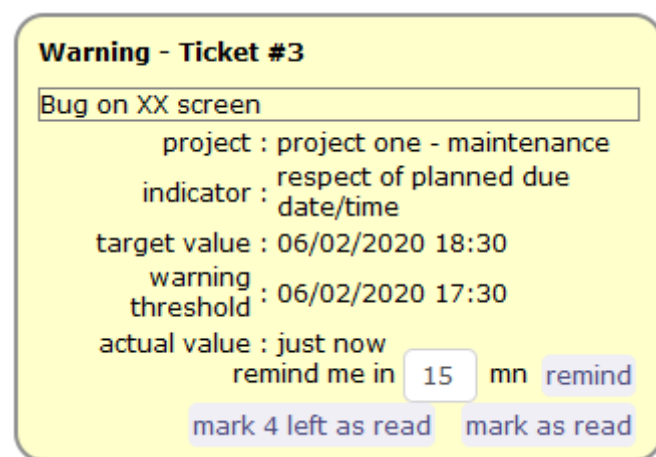
-  Private contents.
-  Visible to team.

Message pop-up

Users may receive messages pop-up, displayed on the bottom right corner of the screen.

Three kinds of message may be displayed:

- Information
- Warning
- Alert



Three possible actions:

- Select to remind you in a given number of minutes (message will close and appear again in the given number of minutes).
- Mark it as read to definitively hide it.
- Mark as read all remaining alerts (the number appears on the button).

you can also use your browser notifications instead of those generated in the application.

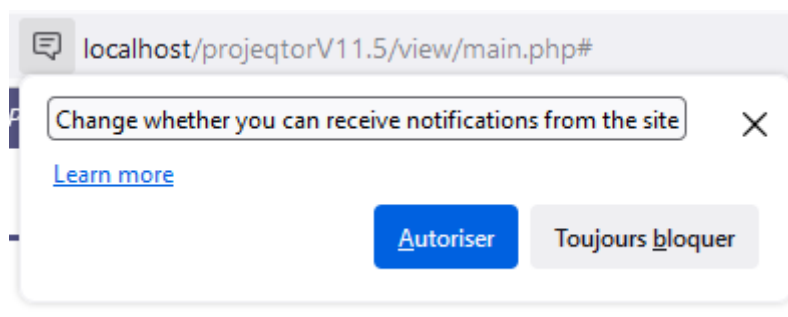


Fig. 72: Define the method of displaying notifications.

When you connect to the application, in the URL address bar, in front of the application address, click on the “notification” icon corresponding to your browser (different depending on the browser) your browser offers you to authorize the support of notifications or to always block them.



Fig. 73: browser generated notifications.

Note: On *Alerts* screen, the user can read the alert messages marked as read.

Alert on detail window

On indicatorable items, you may see a small icon on top left of the detail of the item.

Just move the mouse over the icon to display, which indicator has been raised.

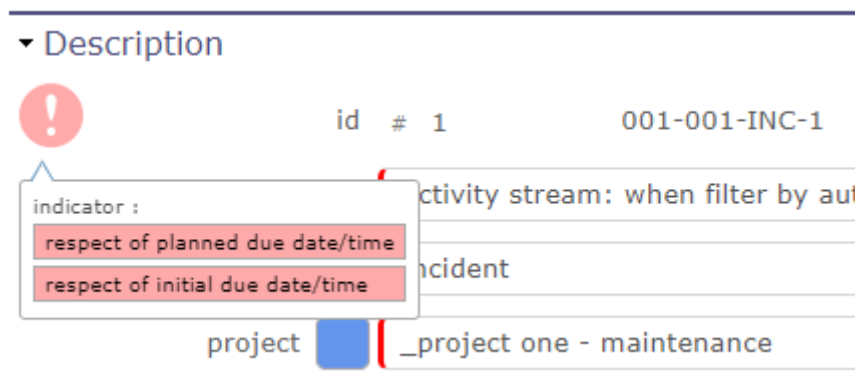


Fig. 74: Alert on detail window

Alert on Today screen

Just move the mouse over the red line to display, which indicator has been raised.

#2	project one - development	Technical	DeployInformations
#2		Functional	field "2" must be numeric
#1	project one	Contractual	Performance
#3	project one	Partial bill	test
#1	project one - maintenance	Incident	Activity stream: when filter by author give possibility to show answer of notes
#5	project one - development	Task	Evolution X - Tests
#14	holidays	Task	Exceptional leaves
#2	project one	Incident	Enter some quotes on filed names : error Message
#2	project one	Steering Committee	CommitteePX
#4	project one	Steering Committee	test 2
#3	project one	Steering Committee	Test

Fig. 75: Alert on Today screen

5.2 Common sections

Some sections are displayed on almost all screens in the detail area.

All manipulations on an element must be saved to move to another element.

Those sections allows to set information or add information to an item of the element.

The screenshot displays the ProjeQtOr interface for a project detail view. The interface is organized into several sections, each with a numbered callout:

- 1 Description:** Fields for name, type, organization, category, client, invoice contact, project code, contract code, client code, is sub-project of, sponsor, manager, and color.
- 2 Allocations to projects:** Tables showing resource and contact allocations with columns for id, resource/contact, profile, start date, end date, and rate (%).
- 3 Treatment:** Settings for status, health status, quality level, trend, overall progress, and various project planning options.
- 4 Working hours:** Input fields for start and end times for Morning and Afternoon.
- 5 Products linked to this project:** Table with columns for product, start date, end date, and closed status.
- 6 Sub projects:** List of sub-projects with checkboxes for selection.
- 7 Predecessor/Successor element:** Tables for defining dependencies between project elements.
- 8 Progress:** Summary of dates and durations, costs and works, and steering metrics.
- 9 Linked Elements:** Table of related elements with columns for element, name, status, and resp.
- 10 Attachments:** List of files and links attached to the project.
- 11 Notes:** List of notes with columns for id, name, and note.

Fig. 76: A view of ProjeQtOr's global interface

Interface areas:

- 1 Description section
- 2 Allocations section
- 3 Assignment section

- 8 Treatment section
- 4 Configuration
- 6 Sub-Project and Sub-Activity
- 6 Predecessor and Successor
- 7 Progress section
- 8 Linked Elements section
- 9 Attachments section
- 10 Notes section

5.2.1 Description section

This section allows to identify items of the element.

Each element has its own description section. The description fields are not the same depending on the element or even its type.

Most of the fields available for each element offer the possibility of having a search view and an accelerator to access other elements.

Status filters

Switch the button **display direct status filters**

id	project	activity type	wbs	name	planned due date	status	progre	responsible
123	Test Fixe 2	Tâche	6.10	Durée Fixe 110	14/10/2024	qualifié	0 %	A admin
127	Test Fixe 2	Tâche	6.14	Durée Fixe 114	13/11/2024	qualifié	0 %	A admin
134	Test Fixe 2	Tâche	6.21	Durée Fixe 121	03/01/2025	en cours	0 %	A admin

Fig. 77: Status filter

Only existing status are visible if their are used.

Choice one of them and the item list will be filter.

This is a quick filter list by status.

Tag management

For project, activity and ticket elements, you can use a tag system.

This involves being able to enter keywords which will allow you to restrict the display of your lists by clicking on the desired tags.

Open the filters to allow the display of tags directly on the element title bar.

Click on the field to display the existing tags.

Tip: You can also use the up and down arrows to display and move through the drop-down list of already existing tags.

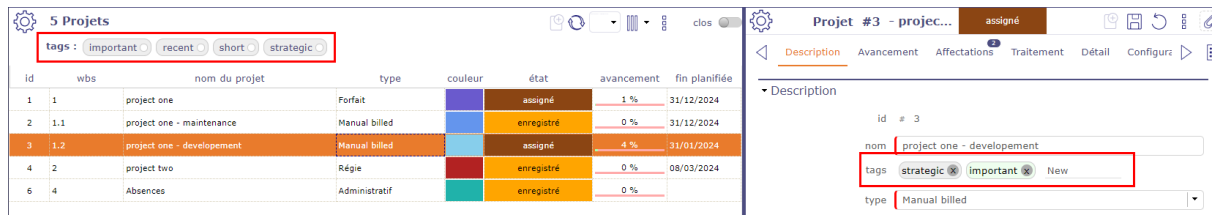


Fig. 78: Tags management

You can restrict tag creation and usage per project in global settings.

See also:

Combo list fields

Tag parameter

Recording of manipulations

If you do not save them, a message asks you to confirm either the saving, to cancel the modifications, or to continue the modifications on this same element.

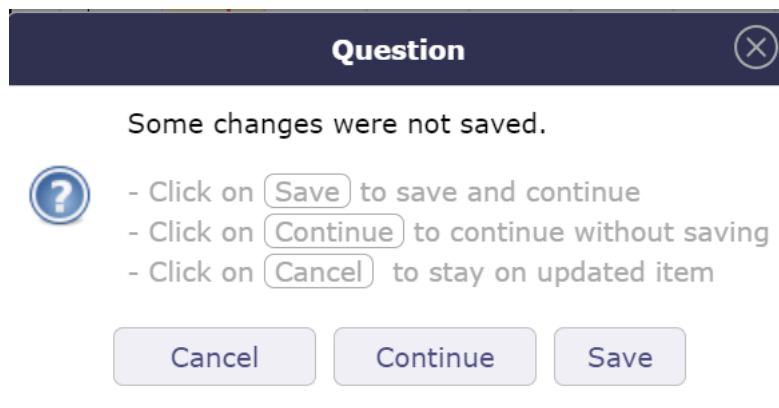


Fig. 79: Back up, cancel or continue on your data



- The “enter” key will save the changes
- The “esc” key will cancel the message and you will continue editing on the current element

5.2.2 Allocations section

This section allows to manage resource allocation to projects.

Concepts

- *Profiles definition*
- *Allocation to project*

- Click on  to create a new allocation.
- Click on  to allocate a team

▼ Allocations to projects

8







































  	id	resource	profile	start date	end date	rate (%)
  	13	POOL ABC 				100
  	1	admin	Administrator			100
  	4	analyst A	Project Member			100
  	8	analyst B	Project Member			100
  	9	analyst C	Project Member			100
  	3	project manager	Project Leader			80
  	id	contact	profile	start date	end date	
  	7	external business leader one	Project Guest			
  	5	external project leader one	External Project Leader			
  	id	user	profile	start date	end date	
<i>Allocate users that are not resources not contacts</i>						

Fig. 80: Allocation section

- Click on  to allocate an organization
- Click on  to update an existing allocation.
- Click on  to delete the corresponding allocation.
- Click on  to *replace resource* on the corresponding allocation.

An alert is generated when deleting self allocation.

The contact and users sections only display those who only have this role.

A special icon is placed on resource rows representing a pool of resources.

Click on the resource name to go directly to the selected resource.










  	8	analyst B	Project Member		
  	9	analyst C	Project Member		
  	3	project manager	Project Leader		

Fig. 81: Closed allocation

Closed allocation are indicated with a gray background.

Allocation rate

The allocation rate on the resource calculates the percentage of allocation to be taken into account for the planning according to the calendar of the resource.

For example, if the resource has a standard France calendar, then the resource works 5 days a week.

- His assignment rate on the project is 100%, the resource can be scheduled without a ceiling and can possibly work on this project up to 5 days a week.
- His assignment rate on the project is 50%, so the resource can be scheduled for a maximum of 2.5 days per week on this project.
- His assignment rate on the project is 20% so the resource can be scheduled for a maximum of 1 day per week on the project

Replace resource

- Replace resource on an allocation: all tasks assigned will be transferred to the new resource with assigned and left work.
- Work done on tasks still belongs the old resource.

Fig. 82: Replace allocation dialog window

5.2.3 Assignment section

Concepts

- *Resource function and cost*
- *Period & Rate*

This section allows to manage assignment of resources to tasks.

Assigning a resource to a task allows you to define its function on the latter and its daily cost (if defined when creating the resource) according to the workload you assign to it.

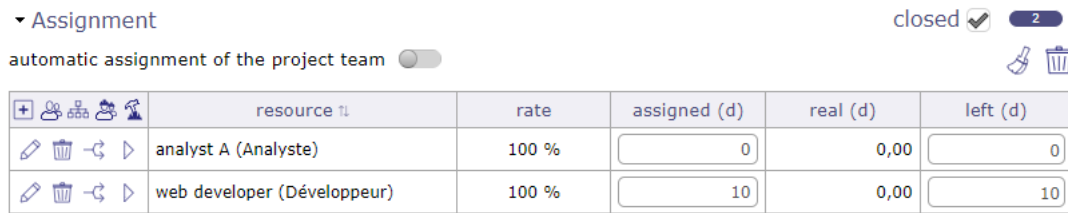


Fig. 83: Assignment section

The responsible is added in the assignments automatically if no resource is assigned.

If actual work exists for a mission, it cannot be deleted by default. It is possible to delete it by assigning *specific access* on deletion.

An icon is placed on resource rows representing a pool of resources.

A resource can be assigned in the table without having a workload.

A resource that defers a task because it does not have the necessary availability and its planned assignment date is greater than the committed date then the remaining assigned work field turns red for this resource.

You can sort the list of resources alphabetically.

Assignment management

- Click on to delete the assignments without assigned work
- Click on to delete all the assignments
- Click on to assign a new resource.
- Click on to assign an entire team to the activity
- Click on to assign an entire organization to the activity
- Click on to assign a pool of resources to the activity
- Click on to modify the assignment.
- Click on to delete the assignment.
- Click on to divide the assignment (two equal parts between two resources)
- Click on to go directly to the allocation sheet for this resource. You may have this button at the top of the assignment area if you are assigned to the item yourself.
- Click on the name of the resource to access the details on the resource screen.

Automatic assignment

When you toggle the button **switch automatic assignment of the project team**, the project allocations are automatically added to the assignment table.

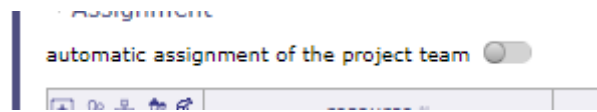


Fig. 84: Switch automatic assignment of the project team

If a new allocation is made later, then the list of assignments is updated automatically.

Attention: If there are no assignments on the first project level, the automatic assignment will not retrieve the assignments from the parent project. You will need to click on the + to assign resources from the parent projects.

Closed assignment

The closed assignments are displayed on a gray background.

▼ Allocations to projects 7

	id	resource	profile	start date	end date	rate (%)
	1	admin	Administrator			100
	4	analyst A	Project Member			100
	8	analyst B	Project Member			100
	9	analyst C	Project Member			100

Fig. 85: Assignment closed

When you close a resource that is used on at least one project, a message appears asking for confirmation and whether you want to replace the assignments for that project.

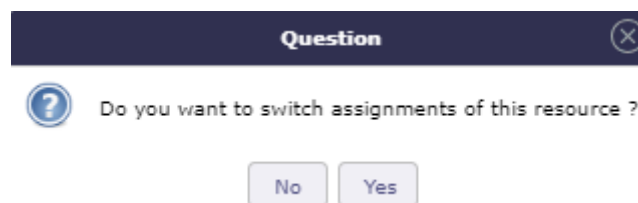


Fig. 86: Closing message

If yes, a pop-up window will appear so you can determine the date from which the resource will be replaced and by which other resource.

Switch assignments or resource ✕

start date

	project	replace with new resource
#1	project one	project manager <input type="text" value=""/> 🔍

This operation will replace the resource with the selected resource on each project
 - on project allocation
 - on activity assignments
 (only for work scheduled after the date if provided)
 - as responsible for objects of the project
Attention, the replacement process will be executed as soon as this form is validated by [OK]

Cancel
OK

Fig. 87: Switch assignment or resource

Assignment screen

A screen dedicated to assignments is available to display all assignments combined.

12 Assignments
🔍 🔄 📄 🗑️ closed

id	resource	project	type of item	element id	rate (%)	assigned work	function	
26	analyst C	project two	Activity	13	100	5 d	Analyste	
25	analyst testout	Projet	Activity	12	100	2 d	Analyste	
24	analyst A	project one - developement	Activity	2	100	0 d	Analyste	
19	admin	Absences	Activity		11	100	0 d	Chef de projet
18	admin	Absences	Activity		10	100	0 d	Chef de projet
7	web developer	project one	Test session	1	100	2 d	Développeur	
6	analyst C	project two	Activity	7	100	0 d	Analyste	
5	analyst B	project one - developement	Activity	5	100	15 d	Analyste	
4	analyst B	project one - developement	Activity	4	100	10 d	Analyste	
3	analyst B	project one - developement	Activity	3	100	5 d	Analyste	
2	web developer	project one - maintenance	Activity	1	50	75,2 d	Développeur	
1	project manager	project one - maintenance	Activity	1	20	10 d	Chef de projet	

Assignment #24
🔍 🔄 📄 🗑️

• Description

id # 24

project

element

resource 👤 assign to me

function

new daily cost c

rate (%)

comments

closed

• Progress

Dates

	planned	real
start date	<input type="text" value=""/>	<input type="text" value=""/>
end date	<input type="text" value=""/>	<input type="text" value=""/>

Costs and workload

	assigned	real	left	revised
work	0 d	0 d	0 d	0 d
cost	€	€	€	€
	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

Fig. 88: Assignment screen

New assignment

Assignment rate

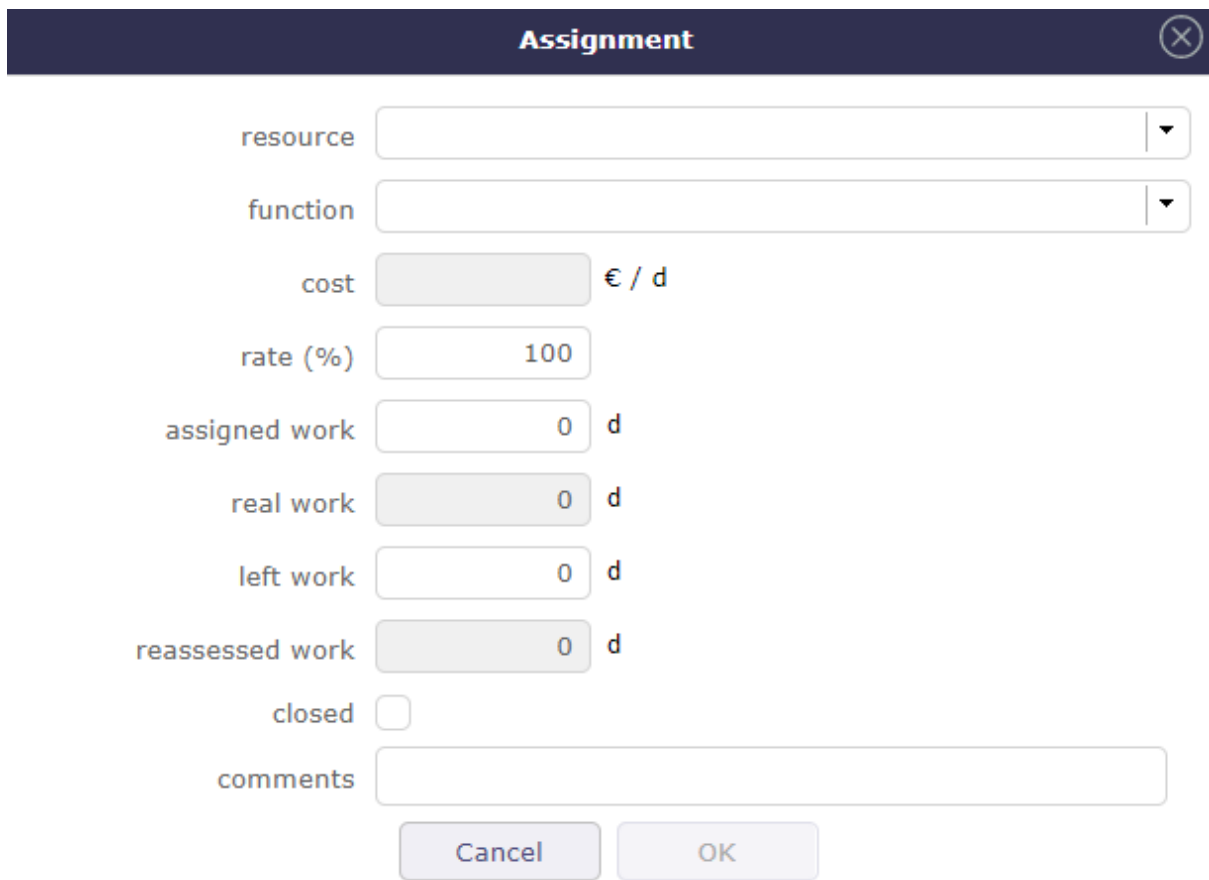
The assignment rate on the resource calculates the percentage of assignment to take into account for the planning according to the FTE of the resource.

For example, if the resource has an FTE of 1 then the resource works the whole day.

- Its assignment rate on the activity is 100%, the resource may be planned without a ceiling and may possibly work full days on this project.
- Its activity assignment rate is 50%, so the resource can be planned for a maximum of 0.5 per day.
- Its assignment rate on the activity is 20% so the resource can be planned 0.2 per day at most.

5.2. Common sections

275



The image shows a dialog box titled "Assignment" with a close button in the top right corner. The dialog contains several input fields and a checkbox:

- resource**: A dropdown menu.
- function**: A dropdown menu.
- cost**: A text input field followed by the unit "€ / d".
- rate (%)**: A text input field containing the value "100".
- assigned work**: A text input field containing the value "0" followed by the unit "d".
- real work**: A text input field containing the value "0" followed by the unit "d".
- left work**: A text input field containing the value "0" followed by the unit "d".
- reassessed work**: A text input field containing the value "0" followed by the unit "d".
- closed**: A checkbox that is currently unchecked.
- comments**: A large text area for entering notes.

At the bottom of the dialog are two buttons: "Cancel" and "OK".

Fig. 89: Assignment dialog box

Multiple assignment to a task

- A resource can be assigned more than once to a task.
- Allows to assign the resource to the same task with a different function (different daily cost).
- Allows to add extra work without modifying initial assignment.

Automatic assignment to a task

You can automatically assign the entire project team (all the resources assigned to the project) to a given activity.

This assignment is dynamic, when you add a resource to the project it is automatically added to the activity.

- Switch the button to automatically assign the resources of the project to the activity.
- The entire project team will be added to the assignment table.
- We only take into account the resources assigned directly to the project of the activity, not the parent project,
- The allocation must not be closed
- The assignment function is the default function of the resource
- Rated load is zero
- Assignment rate is 100%

Important: Only Resources assigned to the project are assigned, not users or contacts who are not also resources.

- If you remove a resource from the assignment, that resource is not removed from the project.
- Automatic assignment does not generate duplicates. If a resource already exists in the assignments, its assignment is not duplicated.
- On the other hand, if the assignment is closed it will be reopened (if the activity is not itself closed).
- If the allocation of the resource on the project is deleted or closed then the assignment on the activity is automatically closed so that resources can no longer be attributed to the activity even if the resource has work remaining.

Note: When this option is unchecked, the assignments will not be deleted (there is no way to know if the assignment was generated dynamically or manually). Only the automation for newly assigned Resources will be disabled.

Recurrent mode assignment

The recurring planning mode is the only mode that, by default, covers the entire duration of the project.

If the project is lengthened, then the task in recurring mode will lengthen accordingly.

During the assignment, you distribute the workload of your resource on a weekly basis.

You can enter a different value for each day of the week.

The copy is an accelerator to copy the entered value on Monday every other day.

The total load will be calculated after validation according to the duration of your project and the assigned times.

Warning: It is a priority planning method.

Using this mode can add a significant workload!.

Assignment ✕

resource

function

cost € / d

rate (%)

closed

comments

Weekly recurring repartition

Mo	Tu	We	Th	Fr	Sa	Su
<input style="width: 40px;" type="text" value="0,2"/>	<input style="width: 40px;" type="text" value="0,5"/>	<input style="width: 40px;" type="text" value="0"/>	<input style="width: 40px;" type="text" value="0"/>	<input style="width: 40px;" type="text" value="0,6"/>	<input style="width: 40px;" type="text" value="0"/>	<input style="width: 40px;" type="text" value="0"/>

unit for workload = days

Fig. 90: Recurring assignment



Planned Interventions assignment

The assigned workload is no longer determined but will be entered on a calendar which can be clicked, per half-day.

See also:

Planned interventions assignment

Manual planning calendar

- Click on  to add a new assignment.
- To see the workload distribution table, select the resource and confirm. Then click on the edit button.
- If the assignment already exists, click directly on the .
- The calendar will then be displayed in the assignment window..
- The display starts in the current month and spans the next six months.
- Each box is divided into two half days. The assigned work is then automatically the sum of the selected half-days.

Assignment
✕

resource

function

cost € / d

assigned work d

real work d

left work d

reassessed work d

closed

comments

Months	Monthly repartition																															
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
January 2021																																
February 2021																																
March 2021																																
April 2021																																
May 2021																																
June 2021																																

Fig. 91: Assignment with the Manual planning mode

The workload saved in this window will be displayed to the *planned interventions* screen.

Distribution of the workload for a new assignment

- click on a box to enter a workload.
Depending on the *global parameter*, this workload will be either planned work or real work.
- Each day is represented by two half-days (am and pm)
- You can plan for the 6 months following the date of the assignment
- The half-days filled in will be visible on the screen of planned interventions
- Save this data with the save button

5.2.4 Activity on real time

When you check the activity option at the time spent on an activity then several fields will no longer be accessible and a recalculation of the load will be carried out:

- Recalculation of the rated load = revised load when modifying the remainder to be done
- Recalculation of the remainder to be done = rated load - actual load when changing the assigned load. This is the existing operation in all cases
- Prohibition to modify the assigned load to a value lower than the actual load. You will then have a blocking message

5.2.5 Treatment section

This section contains information on the treatment of articles, ie on the life and progress of the element.

It usually contains status information, macro reports, situations or those responsible for the work of this element.

▼ Treatment

status recorded ▶ 🔍 + 🔍 qualified

health status surveyed ▼

quality level 😊 conform ▼

trend ➡ even ▼

overall progress 10% ▼

fix planning do not include in planning calculation

paused exclude from planning and purge current planned

non extendable project forbid to add or remove items in planning

under construction the project is not started yet

exclude from global plan do not see all items on the global planning view

validated work treatment order's sum on validated work

in progress

done

closed cancelled

Fig. 92: Treatment section for project


Depending on the item, this section may display different fields.

All the lists in this section are customizable.


Project tracking settings


This part of the section allows you to follow your project in a more visual way.

▼ Treatment

status  recorded ▶ 🔍 + 🔍 qualified

health status surveyed

quality level  conform

trend  even

overall progress 10%

Fig. 93: Project tracking settings

On the Today screen, you can see this informations in the scope of the numbers counted in the Project Section.

▼ Projects

scope of the numbers counted : to do not closed all



















Projects		Progress	Left	Margin	End date	Late	Tickets	Activities	Milestone	Actions	Risks	Issues	Questions	Requirem	Deliveries
<input checked="" type="checkbox"/> project one	  	0 %	10%	115,9 d	-5 %	16/08/2021	402 d	1		1	1	1	1		
project one - maintenance	  	0 %	10%	85,2 d	15 %	16/08/2021	402 d	1	1						
project one - development	  	0 %	50%	28,7 d	-187 %	15/07/2021	400 d		5	1					
project two	  	0 %	100%	9 d		03/08/2021	399 d		1						
<input checked="" type="checkbox"/> internal project	  	0 %	0 d												
holidays	  	0 %	0 d												

Fig. 94: scope of the numbers counted in the project section on Today screen

Macro status

The macros states work thanks to levers.

Several states are populated directly based on the information you record.

in progress

The field is filled in when you fill in the first charge on your timesheet.

Please note, the date recorded in the in progress field is the date on which the charge is entered and not the day on which it is entered.

Done

The field is filled in when you fill in the last charge on your timesheet.

The remaining time MUST therefore be at 0 for this field to be completed.

Closed

The field is filled in when you close an element.

On activities, meetings, test sessions, and poker sessions that are closed, the “show closed” option for the assignment is always considered enabled.

Cancelled

The field is filled in when you cancel the element via the status of your workflow

Other options

ProjeQtOr offers you several options to build your projects, protect them, or even pause them depending on the hazards you may encounter.

Fix planning

- The project is never re-calculated.
- It means the planning will always be the same whatever you do on other projects.

Important: This may lead to dependencies inconsistency.

Paused

- Available on projects and activities.
- The planning is never recalculated.
- Unlike “fix planning”, the current planning for the project is erased.
- This is used to postpone the project to an undetermined date.

Non extendable project

- You can't add new elements to this project,
- You can't delete elements from this project.
- You can't move elements from/to this project.

Under construction

- The resource don't see it on timesheet.
- The alerts are not generated
- Emails are not sent.

Exclude from global plan

- Do not show the **not plannable** items for this project on the global planning view.
- This means that only “standard” planning items will be displayed. Excluding actions, decisions, deliveries...

Validated work treatment

- Activates treatment of the validated work based on the sum of the work of the project orders.
- Otherwise it will be calculated on the sum of the validated work of the activities

5.2.6 Working hours

▼ Working hours

	start	end
Morning	<input type="text"/>	<input type="text"/>
Afternoon	<input type="text"/>	<input type="text"/>

Fig. 95: Working hours section for the project

Section visible if you have enabled the global setting to apply working hours to projects.

You can enter different times for each project.

These times will then be used for the automatism using the delays.

See also:

Global parameters

Delay for tickets

5.2.7 Configuration section

▼ Products linked to this project

	product	start date	end date	closed
	web application			<input type="checkbox"/>

▼ Versions linked to this project 5

	version	start date	end date	closed
	web application V2.0			<input type="checkbox"/>
	web application V1.0			<input type="checkbox"/>

Fig. 96: Configuration section

You can view the products and product versions related to this project.

Click on the product name or product version to go to their respective screens.

See also:

Configuration Management

5.2.8 Progress section

This section allows all at once, define planning and follow-up the progress.

All planning elements have a progress section.

▼ Progress

Dates and durations

	validated	planned	real	requested
start date	<input type="text" value="01/18/2021"/>	<input type="text" value="01/01/2021"/>	<input type="text" value="01/18/2021"/>	<input type="text" value="09/05/2011"/>
end date	<input type="text" value="04/05/2021"/>	<input type="text" value="04/07/2021"/>	<input type="text" value=""/>	<input type="text" value="08/19/2015"/>
duration	<input type="text" value="56"/> d	<input type="text" value="69"/> d	<input type="text" value=""/> d	<input type="text" value="1 027"/> d

Costs and works

	validated	assigned	real	left	reassessed
work	<input type="text" value="110"/> d	<input type="text" value="117,7"/> d	<input type="text" value="3"/> d	<input type="text" value="127,4"/> d	<input type="text" value="130,4"/> d
cost	<input type="text" value=""/> €	<input type="text" value="30 254"/> €	<input type="text" value="600"/> €	<input type="text" value="32 864"/> €	<input type="text" value="33 464"/> €
expense	<input type="text" value=""/> €	<input type="text" value="6 500"/> €	<input type="text" value="6 297,68"/> €	<input type="text" value="0"/> €	<input type="text" value="6 297,68"/> €
reserve				<input type="text" value="0"/> €	
total cost	<input type="text" value="0"/> €	<input type="text" value="36 754"/> €	<input type="text" value="6 897,68"/> €	<input type="text" value="32 864"/> €	<input type="text" value="39 761,68"/> €

Technical progress

progress % ▼ ▼

Steering

progress % expected % wbs

Margin d % € %

priority **Need replan**

Revenue

revenue € command's € invoices €

Revenue mode ▼

Fig. 97: Progress section for a project

Description of the different sections is grouped by the planning elements that have common fields and behavior.

Progress data are displayed in the same format, **but according to the planning element, fields can have another meaning or behavior.**

Below is the definition of the different columns that make up the Progress section.

Dates and duration

The dates and durations section allow you to record and display different time information on your element.

Click on the field to display the calendar.

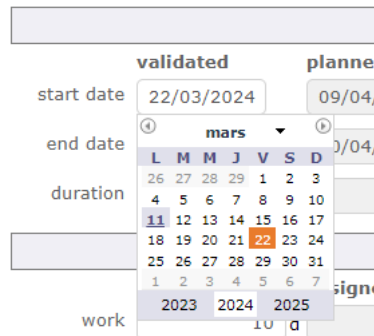


Fig. 98: Display the calendar

When you hover over a filled date field, then a cross on the upper right side of the field allows you to erase its contents.

When the field is empty, nothing is displayed.

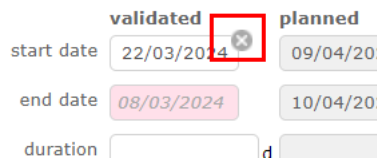


Fig. 99: Erase the date

Validated

Define the input parameters according to the selected planning mode

Define the initial due dates as a reference in order to check any drifts in your project.

Set a deadline by which the work must be completed. You will be able to compare your validated dates with the planned dates of the software to follow the possible drifts of your projects.

Directly on the project screen, without any other constraint, determines the start of planning for it.

Are inherited from successors or parents when the *task prioritization* option is selected and indicated in italics

See also:

Planning mode

Planned

The planned dates can be initialized with validated dates or requested dates (whether validated dates are not specified). They are determined during the planning calculation.

The planning calculation is done according to tasks assigned to resources and their predecessors.

These dates are calculated according to the many constraints that you have defined (FTE, Rates, Dependencies, Charges, priorities, availability ...).

If the dates entered in the validated dates are lower than the dates calculated by the software - the planned dates, then the planned end date box is red as well as the bar of the Gantt chart corresponding to the element then reflects a possible delay.

▼ Progress

Dates and durations				
	validated	planned	real	requested
start date	01/18/2021	01/01/2021	01/18/2021	09/05/2011
end date	04/05/2021	04/07/2021		08/19/2015
duration	56 d	69 d		1 027 d

Fig. 100: The planned dates are greater than validated dates

Important: The planned dates are calculated by the software. You do not have the possibility to change these dates manually.

Real

These are the dates of work actually carried out. The work actually charged

The real start date is set when work began (In progress).

The real end date is set when no more remaining work (done).

Note: The real start date will be propagated to parent elements up to project.

The real end date for parent element will be initialized, when all sub-element have been completed.

The real work is actually being done. It is filled via the timesheet screen.

The items containing actual work cannot be deleted.

To enable this, you must first remove the actual work or configure the forced deletion in the *specific access*.

Requested

Allows you to define forecast dates. These are generally the dates agreed with your client or the beneficiary of your activity..

Unless they are the only indicated, these dates have no impact on the planning.

If no validated date is specified and no constraints are applied then they can initialize the planned dates.

Duration

The durations correspond to the number of days between the start and end dates.

These are always integer values, without decimals!

They are calculated automatically.

But you can also enter a start date and a number of whole days, the end date will be automatically calculated.

Costs and workload

The cost of resources is calculated thanks to the workload allocated to each resource on the tasks.

You must fill in a function associated with a daily cost for your resources.

See also:

Function and cost on the resources screen

Validated

Allows to define planned work and budgeted cost of resources.

This work value is used for calculation of the expected progress and project margin (work).

The cost value is used for calculation of project margin (cost).

Note: Project

The values of work and cost can be initialized with the sum of total work and amount of all project orders.

See also:

Incomes

Assigned

Sum of planned work assigned to resources and estimated cost.

Real

Sum of work done by resources and cost incurred.

Left

Sum of estimated remaining work to complete tasks and ensuing costs.

Left work should be re-evaluated by resource while entering the real work on real work allocation screen.

Left work can also be changed on assignment, at project management level.

Reassessed

Sum of resource total work that will be needed from start to end and the ensuing costs.

$[\text{Reassessed}] = [\text{Real}] + [\text{Left}]$

Work on tickets

- Sum of work done on tickets and costs is included in work of activity linked through the “planning activity” of tickets.
- Sum of work done on tickets that don’t link to any activity will be integrated in the work of the project.

Expense tracking

This section is used by Project.

See also:

Project reserve

Validated (Expense)

Allows to set the budgeted cost of project expenses.

This value is used for calculation of project margin (cost).

Assigned (Expense)

Project expenses planned.

Sum of “planned amount” for all expenses on project.

Real (Expense)

Project expenses committed.

Sum of “real amount” for all expenses on project.

Left (Expense)

Project expenses not committed yet.

Sum of “planned amount” for expenses for which “real amount” is not defined yet.

Reassessed (Expense)

Spending projections.

Sum of Real + Left

Left (Reserve)

Project reserve.

Note: Total is the sum of resources cost, expenses and reserve of their corresponding column.

Technical Progress

The Technical Progress section allows you to display an advancement in units of work.

Technical progress					
	to delivered	to realise	realised	left	
nbre units	<input type="text" value="20"/>	<input type="text" value="30"/>	<input type="text" value="4"/>	<input type="text" value="26"/>	
progress	<input type="text" value="13,33"/> %	<input type="text" value="calculated"/>	<input type="text" value="30"/>	<input type="text" value="unity of work"/>	

Fig. 101: Technical progress section

Warning: To display the technical progression section, which corresponds to an advancement in Unit of Work, you must position the option in the global parameters.

See also:

Global Parameters

The section technical progress is displayed on **Project** and **Activity** screen.

You determine the number of units of work to be performed on the activity.

The progress and the rest will be consolidated towards the father project and / or the mother activity.

You can display the progress of completing your work units directly on the Gantt bars in the same way as the actual work.

See also:

Other options: checkbox for display

Number of units

As for the dates and durations, you can enter several values for the realization of your units of works.

To delivered

Number of units to be delivered.

To realise

Number of units to be produced.

Realised

Number of units actually produced.

Progress

For advancement in unit of work, you can choose the way so it will be evaluated.

Calculated

Progress as a percentage is calculated by software.

Manual

You define yourself the progress of the realization of your units of works.

Weight

The weight defines a certain importance on the realization of these units.

It determines how the calculation of the progress of the work units will be calculated and consolidated.

If items have weight = 0, instead of not calculating consolidate technical progress, calculated with weight = 1 for all items.

Manual

You enter a value manually according to the unit of work to be done.

Unity of work

It is the number of units to deliver or to realize.

5.2.9 Steering

Progress

Percentage of actual progress.

Calculated by the sum of the work done divided by sum of work reassessed.

$$\begin{aligned} [\text{Progress \%}] &= [\text{real work}] / [\text{reassessed work}] \\ &= [\text{real work}] / ([\text{real work}] + [\text{left work}]) \end{aligned}$$

Expected

Percentage of expected progress.

Calculated by the sum of the work done divided by scheduled work.

$$[\text{Expected \%}] = [\text{real work}] / [\text{validated work}]$$

Priority

Allows to define priority to a project or activity.

By default, the value is set to “500” (medium priority).

1 being the highest priority and 999 the lowest priority.

See also:

Planning priority.

Steering section for activity

Steering section Activity

Advancement

You can monitor the effectiveness of the progress of your project based on the data entered upstream on the validated dates.

Planning mode

Used by Activity & Test session.

Depending on the planning mode selected, the calculation of your planning will not be executed in the same way.

See also:

Concepts Planning modes

Steering

progress	15 %	expected	15 %	wbs	1.2.1.1
priority	<input type="text" value="500"/>	planning	<input type="text" value="as soon as possible"/>		<input type="button" value="▼"/>
color	<input type="color" value="#000000"/>	<input type="button" value="reset"/>			
minimum threshold	<input type="text" value="0"/>	d	not splitted work		<input type="checkbox"/>
fix planning		<input type="checkbox"/>	do not include in planning calculation		
paused		<input type="checkbox"/>	exclude from planning and purge current planned		
	number	estimated	real	left	
ticket	<input type="text" value="2"/>	<input type="text" value="1"/>	d	<input type="text" value="1,2"/>	d
				<input type="text" value="0,8"/>	d <input type="button" value="👁"/>
planning activity	<input checked="" type="checkbox"/>				
activity on real time	<input type="checkbox"/>				

Fig. 102: Steering section on activity screen

Minimum threshold and indivisible work

When this value is set, the activity will only be scheduled on the day that the daily availability will be greater than or equal to this threshold.

You also have the option to add a new property to a “not splitted work” task.

This will require defining the minimum work to be allocated each day and thus filling in the minimum threshold field.

Planning will require finding consecutive days with at least the given value possible.

See also:

Minimum threshold

Fix planning

Fix planning will avoid the recalculation of planning for an activity.

See also:

Treatment section

Paused

When an activity is paused, it is never recalculated.

Unlike **fix the planning**, the current schedule for the project is purged.

This amounts to postponing the activity to an undetermined date.

When this option is checked, the option **fix the planning** is automatically checked.

Activity on real time

When you check the option **possibility of managing activities on real time** in the *global parameters* then the validated load becomes read-only and the calculation of the validated load equals the revised load.

The option can be disabled manually even if it has been set to the activity type.

The option is incompatible with activities managed by “Work Units” (turnover module).

The field will then not be visible and the “Unit of work”, “complexity” and “quantity” fields will be hidden if the “activity over time” option is activated.

It will therefore be necessary to deactivate the option to make these fields reappear.

Planning activity

Planning activity field allows to link the ticket with a planning activity

Steering

progress 0 % expected 0 % wbs 1.1.1

priority 500 planning regular between dates

color reset

minimum threshold 0 d not splitted work

fix planning do not include in planning calculation

paused exclude from planning and purge current planned

planning activity

Fig. 103: Planning activity

An option is available to identify all activities as planning activities.

If the option is enabled then the checkbox disappears from the activity interface and all activities can be selected from the ticket drop-down list.

Ticket

	number	estimated	real	left
ticket	3	5 d	1,7 d	3,3 d

planning activity

Fig. 104: Attached tickets

Allows tracking of tickets attached to the activity through the “planning activity” field of tickets.

The Estimated field will be highlighted when the sum of estimated work on the tickets is higher than the planned work on the activity.


	number	estimated	real	left
ticket	4	35 d	11,7 d	23,3 d

planning activity

Fig. 105: Estimated time greater than the time to book for the activity

The Left field will be highlighted when the sum of remaining work on the tickets is higher than the remaining planned work on the activity.

Show tickets attached

- Click on  to show ticket list attached to the activity.
- Click on a ticket name to directly move to it.




List of tickets						
element	name		estimated	real	left	status
<input type="checkbox"/> Ticket #1	Activity stream: when filter by author give possibility to show answer of notes		0,3 d	0 d	0 d	cancelled
<input type="checkbox"/> Ticket #3	Bug on XX screen		0,5 d	0 d	0 d	done
<input type="checkbox"/> Ticket #4	Performance down		0,8 d	0 d	0 d	done

Fig. 106: List of tickets

Steering section Project

Steering

progress expected wbs

Margin d %

priority

Fig. 107: Steering section on Project screen

Margin

The margin is only displayed in the control section of the project screen.

Used by Project.

Calculated by the scheduled work minus the sum of work reassessed.

$$[\text{Margin}] = [\text{Validated work}] - [\text{Reassessed work}]$$

$$[\text{Margin}(\%)] = ([\text{Validated work}] - [\text{Reassessed work}]) / [\text{Validated work}]$$

Margin (cost)

Calculated by the budgeted cost (resource & expense) minus the total of reassessed cost.

$$[\text{Margin}] = [\text{Validated cost}] - [\text{Reassessed cost}]$$

$$[\text{Margin}(\%)] = ([\text{Validated cost}] - [\text{Reassessed cost}]) / [\text{Validated cost}]$$

5.2.10 Progress section Milestone

▼ Progress

	validated	planned	real	requested
due date	<input type="text" value="02/10/2021"/>	<input type="text" value="02/10/2021"/>	<input type="text"/>	<input type="text"/>
planning	<input type="text" value="floating milestone"/> ▼		wbs	<input type="text" value="1.1.2"/>
color	<input type="text"/> ▼		<input type="button" value="reset"/>	

Fig. 108: Steering section on milestone screen

This section allows to define planning and follow progress on a milestone.

The requested dates allows to define the initial due date for the milestone. They have no impact on planning.

The validated dates allows to define the due date at which the milestone must be completed.

Actual dates are determined when the milestone status is “done”.

Fixed milestone

- Planned due date is the value from validated due date field.
- The milestone will not move, and may have successors.

Floating milestone

- Calculation of planned due date takes into account dependencies with tasks.
- The milestone will move depending on predecessors.

Note: A milestone has no duration, so there are no start and end dates for a milestone, just a single date.

5.2.11 Progress section Meeting

▼ Progress

	validated	assigned	real	left
work	<input type="text" value="0"/> d	<input type="text" value="0,75"/> d	<input type="text" value="0"/> d	<input type="text" value="0,75"/> d
cost	<input type="text"/>	<input type="text" value="242,5"/> €	<input type="text"/>	<input type="text" value="242,5"/> €
color	<input type="text"/> ▼		<input type="button" value="reset"/>	

Fig. 109: Steering section on meeting screen

This section allows to define priority and follow progress on a meeting.

Validated

Allows to define scheduled work and budgeted cost.

Used to consolidate validated work and cost to the project.

Assigned

Sum of planned work assigned to attendees and the planned cost.

Real

Sum of work done by attendees and the cost.

Left

Sum of planned work remaining and the remaining amount.

Color

You can set a color on a meeting.

This color will be displayed on the bars of the Gantt chart.

5.2.12 Sub-Project and Sub-Activity

On the projects screen, this section allows you to display the sub-projects and their status linked to the selected one.

Click on the name of the sub-project to access its dedicated screen.

▼ Sub projects

 project one - maintenance enregistré
 project one - developement en cours

Fig. 110: Display of sub projects

In the same way, you can display on the activities screen, the sub-activities linked to the selected activity.

Click on the name of the sub-activity to access its dedicated screen.

▼ Sub-activities




id	name	progress	status
 #3	Evolutoin X - Analysis	0 %	assigned
 #4	Evolution X - Development	10 %	assigned
 #5	Evolution X - Tests	0 %	recorded

Fig. 111: Display of sub activities

5.2.13 Todo list


You can create subtasks or steps for the selected items.

▼ Todo list done closed

name	priority / due date	responsible	status
Use stored filters opportunity to select stored filter on ticket or activity or action Then list will be reduced to items corresponding to filter	Critique 23/03/2025	analyst B	in progress
On login screen, give possibility to connect using keyboard "enter" key	Moyenne 24/03/2025	project manager	done
From email is received from, click on Link on mobile device and go to mobile application : no direct access. Moreover, if user is already connected with mobile app, he is directed to standard application (already connected)	Bas 10/03/2025	analyst B	closed

Fig. 112: Todo list

- For each completed line, a new line appears after. You can register up to 4000 characters
- You can specify the urgency, the due date, the person in charge and the state of the point to be treated.

- You can close a point to be addressed. It disappears from the lists. Display it again using the “closed” switch button.
- You can reorganize the list using the handles  in front of the name of the point to be processed.

To delete a line, completely delete the text and validate after the deletion popup.

If the element has a manager defined, then it is automatically filled in as manager for each line created

If the behavior of the item type was defined with the parameter “todo list required on done status” then the change of status to done is impossible if the items of the to-do lists are not all set to “done”.

The todo list is an element who can be copied in the copy options of an activity.

A screen dedicated to the point to be treated is available in the steering menu.

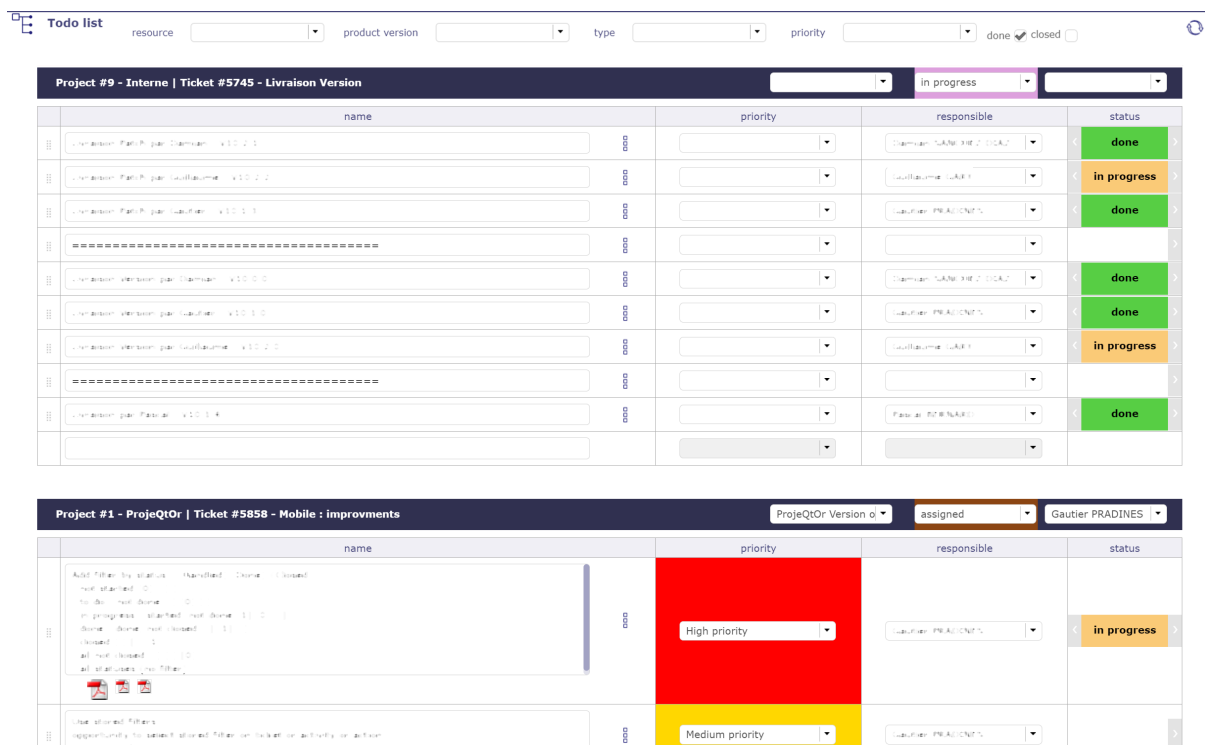


Fig. 113: Todo list screen

You then have access to all your lists, all elements included.

Filters are available to restrict the display of these. including the direct display of the version in the form of a listbox, with the possibility of changing the value of the element

Important: To-do lists are not displayed on pop-up screen layouts. For example, to-do lists will not be displayed when editing a Kanban tile.

5.2.14 Predecessor and Successor

This section allows to manage dependency link between elements.

A dependency can be created from the predecessor and/or successor element.

The dependency link can be created in the Gantt chart.

Only dependencies to schedulable elements are displayed in the planning view.

Dependencies to non-schedulable elements are graphically visible on the overall planning.

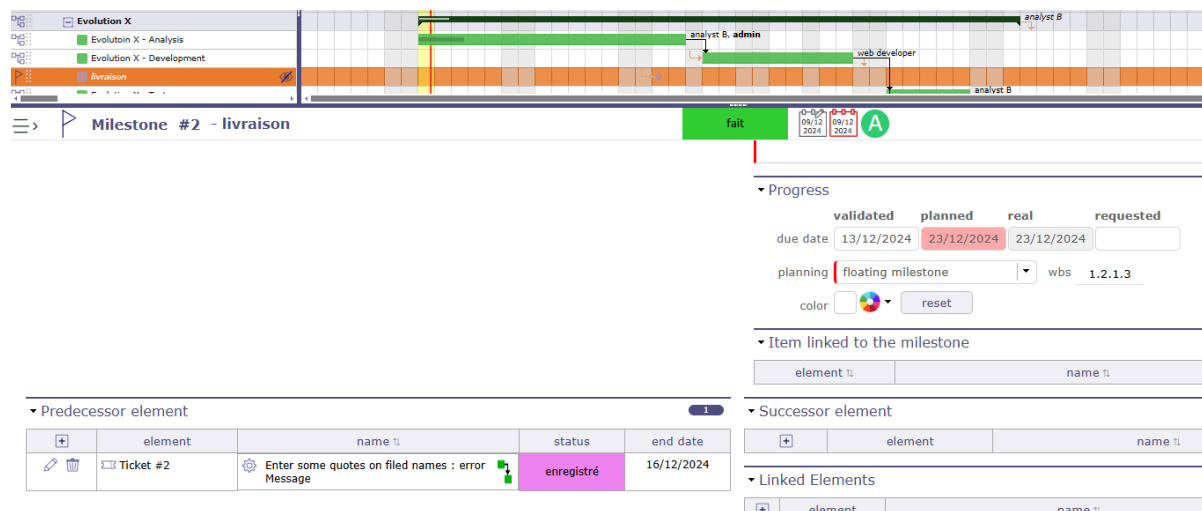


Fig. 114: Milestone Predecessor Ticket Ticket is not visible on Gantt chart. Ticket is visible in Successor/Predecessor table. Ticket date impacts milestone date

Non-schedulable elements linked by dependencies are still visible in the predecessor and successor tables.

These non-schedulable elements can have an impact on the schedulable elements of your project.

Click on the name of a predecessor or successor to go directly to the element.

See also:

Dependencies

Milestones

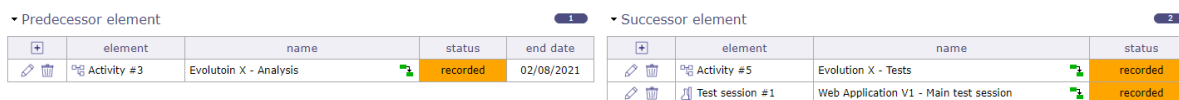


Fig. 115: Predecessor and Successor section

- Click on to add a dependency link.
- Click on to edit the dependency link.
- Click on to delete the dependency link.

In the NAME field, icons are displayed to indicate the type of dependencies

- End End dependency
- End start dependency
- Start start dependency

Hover over the links present so that the information popup is displayed

Predecessor element					Successor element				
+	element	name	status	end date	+	element	name	status	
	Activity #3	Evolutoin X - Analysis	recorded	02/08/2021		Activity #5	Evolution X - Tests	recorded	
						Test session #1	Web Application V1 - Main test session	recorded	

Fig. 116: Popup information of the predecessor and successor section

More information regarding the type of link is displayed

To modify a dependency, click on the arrow which turns orange, a pop up is displayed allowing you to modify the type and one to add a possible delay.

The delay can be positive or negative. Negative delay allows overlapping of certain tasks

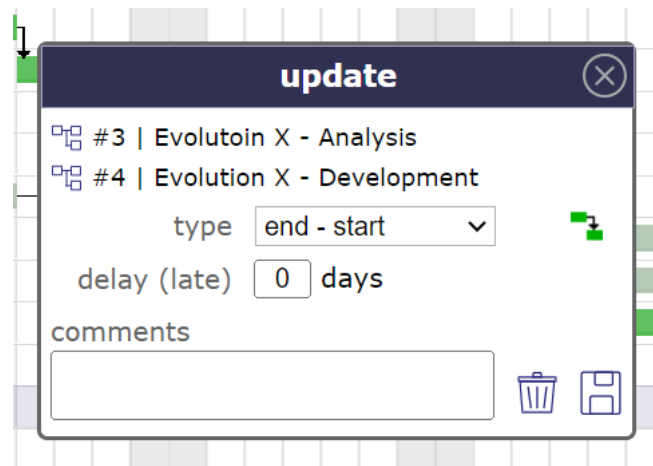


Fig. 117: Dependencies dialog box

Strict mode for dependencies

The strict dependency mode forces the successor planning element not to start on the same day as the same predecessor but the next day. Even if the task is finished before the end of the day.

To have the successor start on the same day or before the end of the predecessor task, select NO for strict mode or you can also put a negative delay.

The strict dependency mode is a *global parameter*.

By default, the strict dependency mode is set to YES.

Dependencies and delays

+	element	name	status	end date
	Activity #4	Evolution X - Development	assigned	03/01/2021
	Question #2	DeployInformations	recorded	02/22/2021

Fig. 118: highlighting the date

Highlighting the date that will most constrain the next activity.

Elements of different projects

It is possible to link items from different projects.

▼ Predecessor element 0				
+	element	name	status	end date
▼ Successor element 1				
+	element	name	status	
	Activity #7	Management		enregistré

project two

Fig. 119: Dependency between two elements of two different projects

When you pull a dependency between two items from two different projects, the table displays the project icon next to the dependency name

and when you hover over the icon, the tooltip gives you the name of the project whose depends on the element.

Only predecessor/successor of an element

On the Gantt view you can display only the predecessors or all the successors of a particular item.

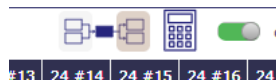


Fig. 120: Show all successor/predecessor of an element

Note: Recursive loops are controlled on saving.

5.2.15 Linked Elements section

This section allows to manage link between ProjeQtOr elements.





▼ Linked Elements 4				
+	element	name	status	resp.
	Document #1	ARD - Architecture Dossier	validated	
	Ticket #1	Activity stream: when filter by author give possibility to show answer of notes	cancelled	
	Activity #4	Evolution X - Development	assigned	
	Incoming #1	Technique Specifications		

Fig. 121: Linked element section

You associate items on different elements in the same project.

A project can be linked with other.

Click on an item name to directly move to it.

- Click on  to create a new link.
- Click on  to delete the corresponding link.
- Click on  to download the document
- Click on  to edit the comment linked to the element

Link information

Hover over the links present so that the information popup is displayed.


























▼ Linked Elements 4					
	element	name ↑↓		status	resp.
 	 Activity #2	Evolution X	 11/09 	en cours	
 	 Project #2	<div style="border: 1px solid #ccc; padding: 5px;"> <p> project one - developement</p> <p>Type : Évolution</p> <p>Planning mode : as soon as possible</p> <p>Planned end date : 30/08/2024</p> <p>Responsible : analyst B</p> <p>Left work : 25.00 days</p> <hr/> <p> web application V2.0</p> <p>WBS : 1.2.1 Progress : 0 %</p> </div>	 11/09 	enregistré	
 	 Constraints #1		 11/09 	enregistré	
 	 Milestone #1		 11/09 	enregistré	

Fig. 122: Pop up on the Linked element section

More information regarding the type of link is displayed.

Relation / Synchronization

If Item A is linked to Item B, Item B is automatically linked to Item A.

A default link between items has no impact on their processing. But you can synchronize the two items.

So when a change, such as a status change, occurs on one of the two items, then the other one makes the same change.

Click on the Synchronize linked item button.

When the item is synced, the  icon appears after the name.

Synchronization will synchronously change status, responsible, project, name, product, product version, component, component version

Important: Only one synchronisation is possible on a given item.

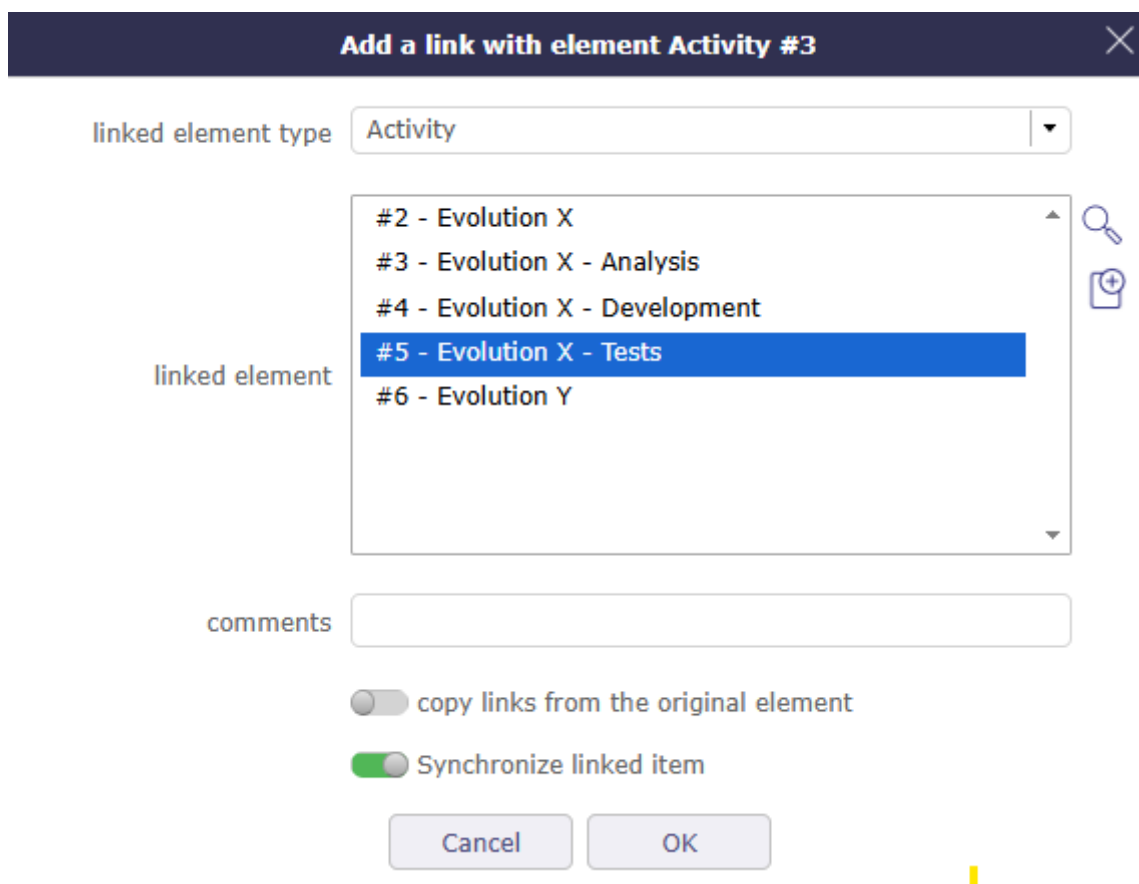



Fig. 123: Synchronise the elements

Linked element list of values

By default, the list of values shows items of the same project.

But, it is possible to link items from different projects.

Click on  to get the list of elements of all projects.


Link with Document

When a link to a document is selected. The document version can be selected.



Add a link with element Project #000003 ✕

linked element type: Document

linked element: #1 - ARD - Architecture Dossier 

version: [empty]

comments: V1.0, V1.1

copy link from the original element

Cancel OK

Fig. 124: The document version is available

Linked documents are available directly in linked elements list.

Specified version

A link with a document element offer the possibility to select a specific version.

A direct link to version of the document is created.

Not specified version

If the version is not specified, the last version will be selected.

The download will transfer always the last version of the document.

5.2.16 Attachments section

This section allows you to attach files or hyperlinks to the selected item.

▼ Attachments				3
	id	file		
	#11		Pictos choice	01/20
	#10		2_f107168f-ec24-4e41-9432-70ebb81bf137.pdf	01/19
	#9		https://www.google.fr	01/19

Fig. 125: Attachment section

You can attach all types of files

There are several ways to add a file.

- Click on to add an attachment file to an item.
- Click on to add a hyperlink to an item.

In the attached files area in the toolbar of the details area

Directly on the detail area of the element by dragging and dropping

Attachment ✕

file





description

public team private

Fig. 126: Add an attachment file window

Filled in the description to give a name to the document will be attached.

Hover over the icon to see the exact name of the document. Otherwise, the exact name of the document will be displayed.

- Click on  to remove an attachment.
- Click on  to download the attached file.
- Click on  to access the hyperlink.
- Click on  to edit the comment attached to the element

You can select one or more files of different types with the shortcuts CTRL when the files are not consecutive or SHIFT for those that follow.

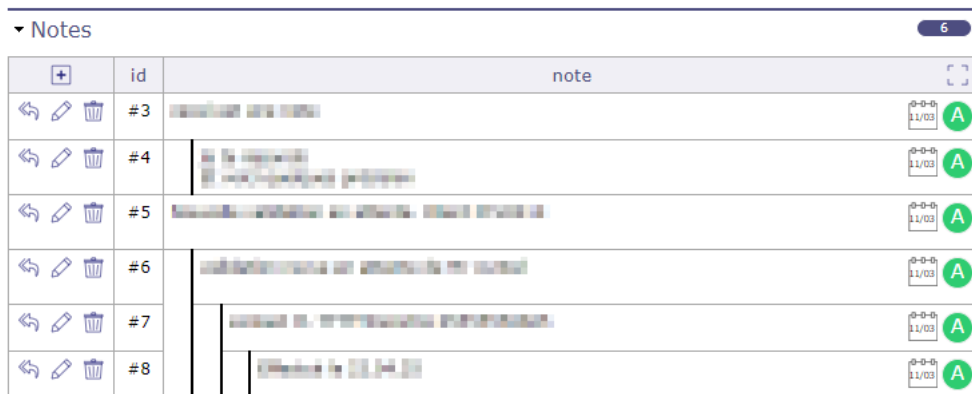
Attachments are stored on the server side. The attachment directory is defined in *Global Settings*.

5.2.17 Notes section

This section allows to add notes on items of elements.

Notes are comments, that can be shared to track some information or progress.

The display order for notes, whether in discussion mode or not, starts with the last one at the top. The last item in the discussion must be the date of the last reply.









































▼ Notes		6	
	id	note	
  	#3	comment on note	 1/1/03  A
  	#4	comment on note	 1/1/03  A
  	#5	comment on note	 1/1/03  A
  	#6	comment on note	 1/1/03  A
  	#7	comment on note	 1/1/03  A
  	#8	comment on note	 1/1/03  A

Fig. 127: Notes

- Click on  to switch notes to full screen mode.
- Click on  to return standard pop up notes.
- Click on  to add a note to an item.
- Click on  to respond to the previous note.
- Click on  to edit the note.
- Click on  to delete the note.

You can add note on a closed or a read-only element.

See also:

Specific update rights

Note management

When you write a note on an item, you can minimize it to put it on hold to retrieve information on other items for example and reopen the note without having lost what it contained.

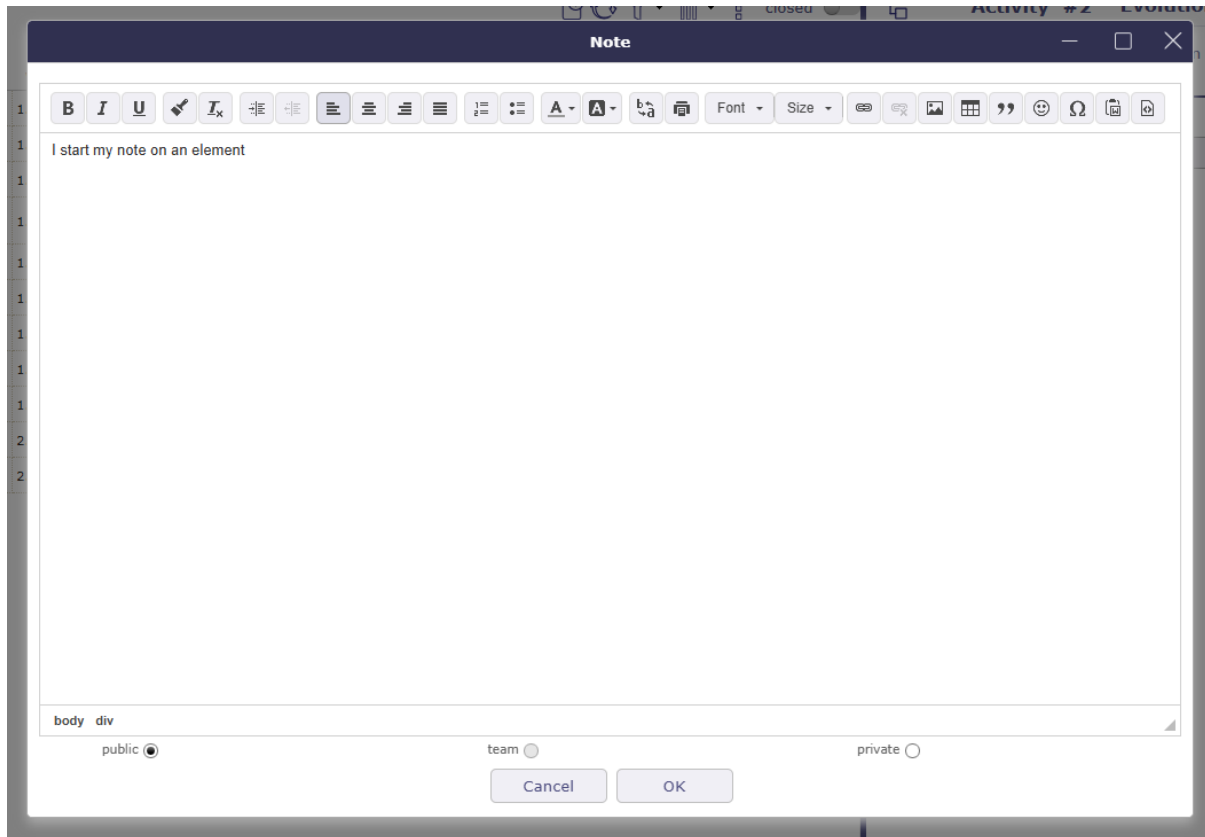


Fig. 128: Add a note

The note is reduced to the bottom right of the page.

You can navigate to other screens, the note is superimposed.

Predefined note

The list of values appears whether a predefined note exists for an element or an element type.

Selecting a predefined note will automatically fill in the note text field.

Predefined notes are defined in *Predefined notes*.

Note visibility

- **Public:** Visible by all members assigned to the project.
- **Team:** Visible to every member of the creator's team.
- **Private:** Visible only to the creator.

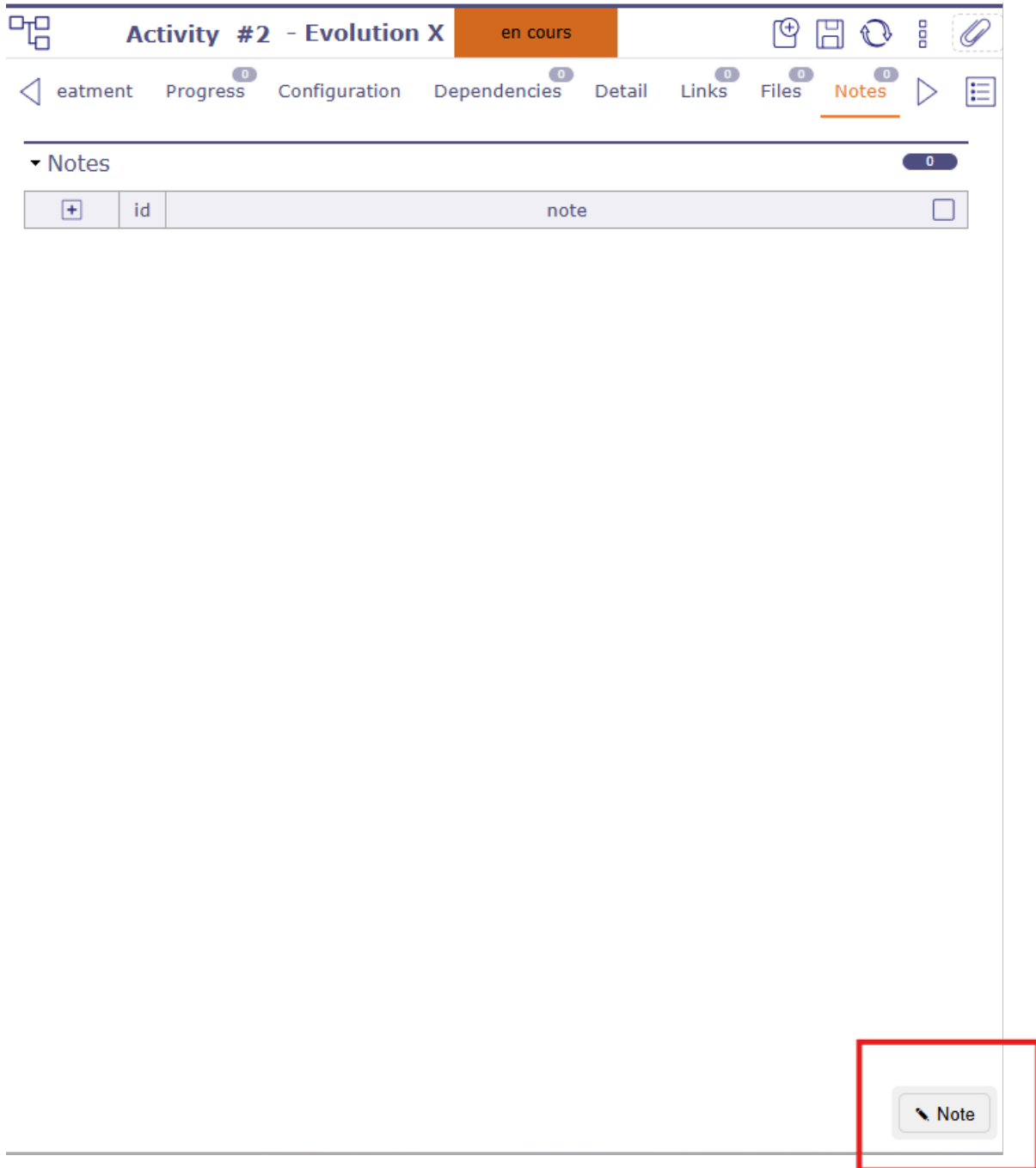


Fig. 129: standby note

5.2.18 The history

Most manipulations and modifications are recorded in the history, such as validated and assigned dates, information on assignments to projects, assignments to activities, durations, but also all personalization information.

The history will not trace the creation and configuration of indicators, connection audits or the entry of work (imputation sheet).

On the other hand, in the case where the entry of the work leads to modifications on elements such as dates, durations... then this information will be well updated.

History of Changes					
operation	data	value before	value after	date	user
update	validated start date	01/09/2021	04/04/2022	01/04/2022 12:29:09	A admin
	validated end date	06/01/2022	10/06/2022		
	validated duration	92 d	50 d		
update	planned start date	01/04/2022	04/04/2022	01/04/2022 12:25:36	A admin
	planned end date	09/06/2022	10/06/2022		
update	planned start date	01/09/2021	01/04/2022	01/04/2022 12:25:27	A admin
	planned end date	10/01/2022	09/06/2022		
	planned duration	94 d	50 d		
insert				01/04/2022 12:07:01	
update	name	Default project	project one	01/04/2022 12:07:01	A admin
	client		client one		
	project code		001-001		
	contract code		X23-472-722		
	color				
	description	Default project For example use only. Remove or rename this project when initializing your own data.	1st project For example use only. Remove or rename this project when initializing your own data.		
	description	1st project For example use only. Remove or rename this project when initializing your own data.	1st project This project has 2 sub-projects		
	issuer		external project leader one		
	color				
	type		Régie		
	progress	14	13.666987487969		
	validated work	0 d	0 d		
	type	Régie	Forfait		
	progress	14	13.666987487969		
	health status		surveillé		
quality level		conforme			

Fig. 130: Project's history

PLANNING AND FOLLOW-UP

ProjeQtOr provides all the elements needed to build a planning from workload, constraints between tasks and resources availability.

The main activity of Project Leader is to measure progress, analyse situation and take decisions. In order to ease his work, ProjeQtOr provides several reporting tools, from the well know Gantt chart, to many reports.

6.1 Start Guide

The Started Guide helps you start a brand new session that is still empty.

This allows you to add the main elements needed to start planning your projects.

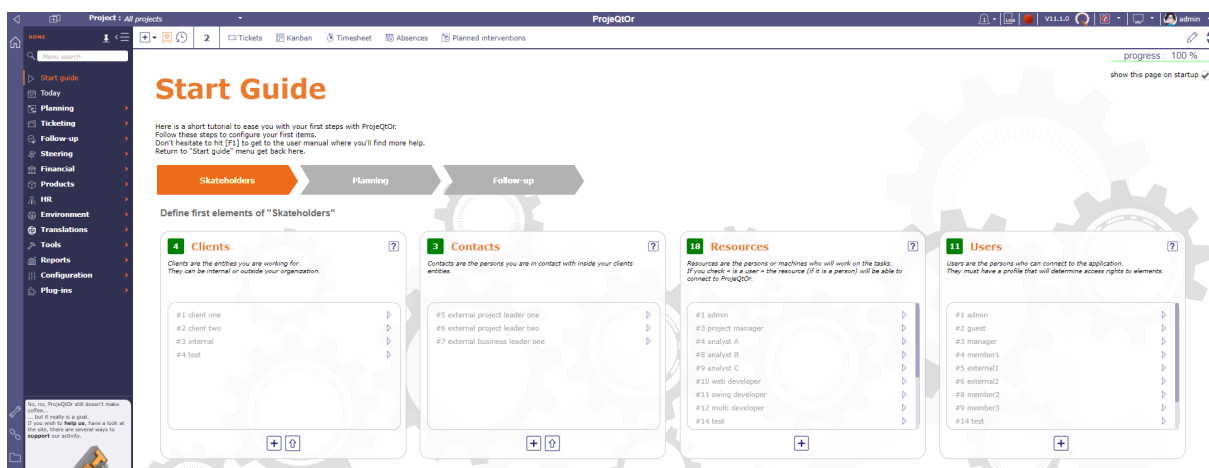




Fig. 1: Start guide screen

When you have not yet added an element, the element blocks are empty and indicate 0 elements

As you start filling in items, the blocks will display the number of items saved and a clickable list of what you have filled in.

- Click on  to add a new element.
- Click on  to import a new element.

each recorded element is clickable and you go directly to the screen dedicated to this element.

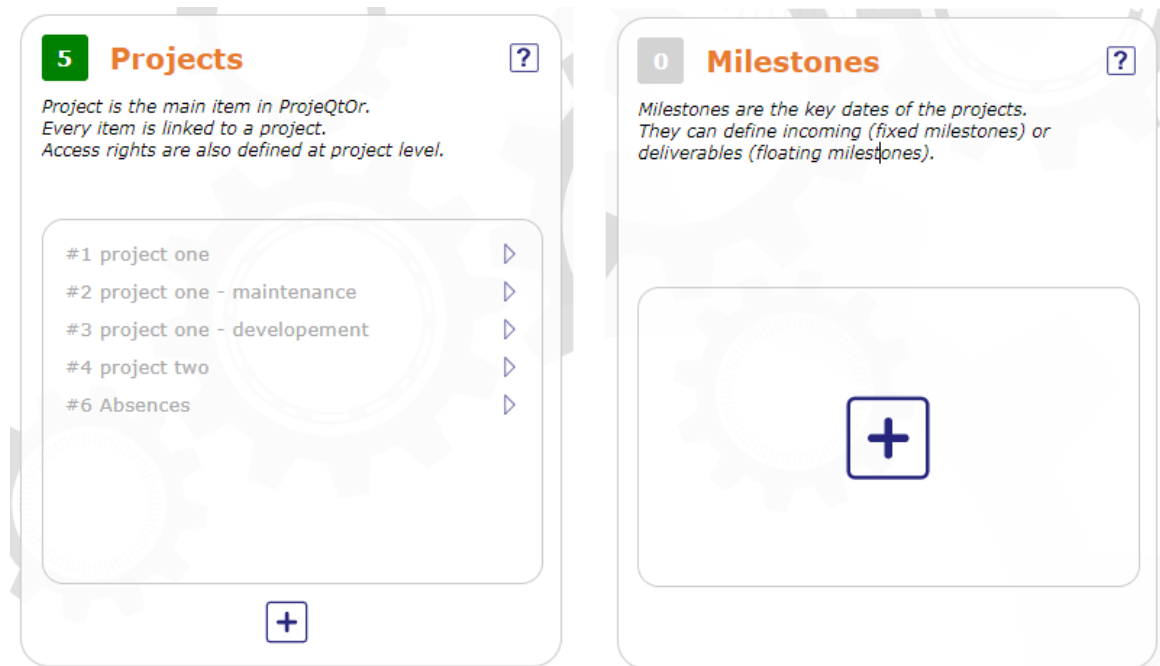


Fig. 2: Filled block and Empty block

6.2 Planning elements

ProjeQtOr provides all the elements needed to build a planning from workload, constraints between tasks and resources availability.

The planning elements *Test sessions* and *Steering* are described in their topics.

6.2.1 Project

The project is the primary entity of ProjeQtOr.

It is also the top-level of visibility, depending on profiles.

Sub-projects

- You can define sub-projects on any project and this unlimited.
- On the parent project screen, you can view the children in the subproject section.
- Then, the projects may not be real projects, but just organizational breakdown corresponding to an organization.

Project type

There are 4 types of projects which are not managed in the same way.

OPE: Operational project

Project to follow. The one you're working on.

All new projects are created with the default code **OPE**.

Operational projects are linked to billing types.

See also:

project types

ADM: Administrative project

Type of project to follow non productive work : holidays, sickness, training, ...

Every resource will be able to enter real work on these projects, without having to be allocated to the project, nor assigned to project activities.

Assignments to all project task will be automatically created for users to enter real work.

These projects are not visible on Gantt type screens.

Some sections and fields are not visible or do not work on administrative projects like Paused, Fix planning or the minimum threshold.

TMP: Template project

These projects will not be used to follow some work.

They are just designed to define templates, to be copied as operational projects.

Any project leader (profile) can copy such projects, without having to be allocated to them.

PRP: Proposal project

These projects will not be used to follow some work.

This type of project makes it possible to define whether a project is strategically interesting to carry out.

See also:

project type

Project traitment

Fix planning

When the "correct planning" box is checked, the project planning will not be recalculated.

- This avoids modifying the expected values.
- Planning will always be the same no matter what you do on other projects.

Warning: This may lead to dependencies inconsistencies

Non extendable project

When project perimeter is fixed you can't:

- add new elements to this project
- delete elements from this project
- move elements to or from this project

Under construction

When a project is under construction, no *automatic emails* will be sent, no *notifications* or *alerts* will be generated for the project elements.

- A project can be under construction as long as it isn't stated. Set to *In progress* status.
- The resources don't see it on *timesheet*.

Exclude from global plan

- Do not show the not plannable items for this project on the global planning view.
- This means that only standard planning items will be displayed excluding:
 - *Actions*
 - *Decisions*
 - *Deliveries*

Validated work treatment

Activates treatment of the validated work based on the sum of the work of the project orders otherwise it will be calculated on the sum of the validated work of the activities.

Manual indicators

- Fields: *Health status*, *Quality level*, *Trend* and *Overall progress* are manual indicators.
- They allow define visual way the general health, conformity, trend and progress of the project.
- Some manual indicators are displayed on the *Today screen*.

Special fields

- The value of the fields the Project name, Sponsor, Project code and Contract code can be used as the substitute value of special fields.
- See: *Special Fields*

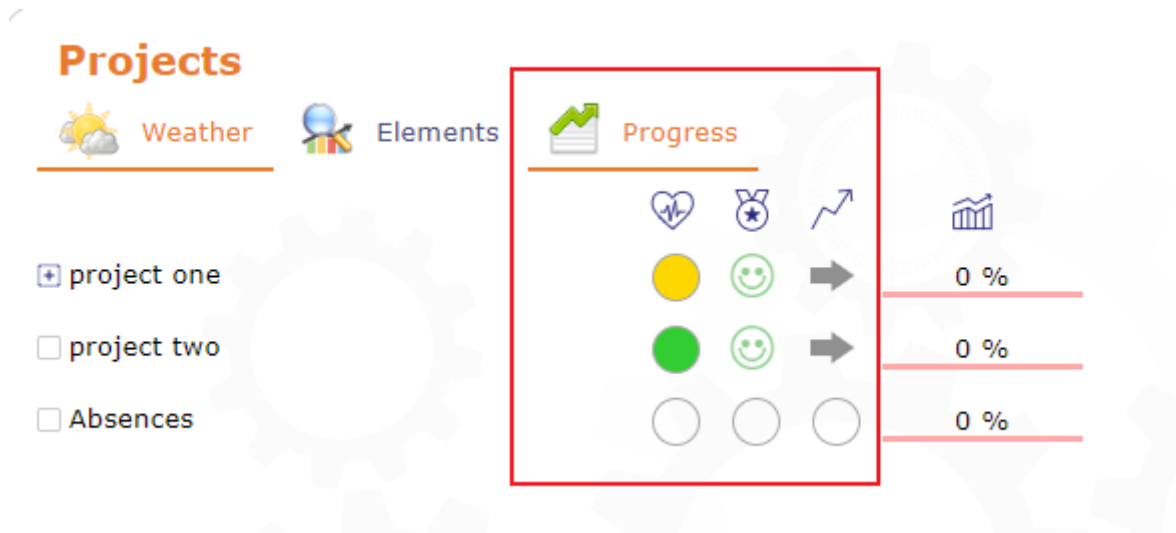


Fig. 3: Manual indicator on the Today screen

Monitoring indicator

- The *indicators* can be defined on the *progress data*.

Do not start project before Validated Start Date

- The schedule should only start from this date, as if there was a fixed milestone preceding the project.
- Resources cannot be charged to the project before the specified date (as with a project under construction).
- This option must be enabled in the *global parameters*.

Project reserve

Project reserve is an amount reserved based on identifying *Risks* and *Opportunity*.

It calculated from contingency reserve of risks minus potential gain of opportunities.

ProjeQtOr uses a technique as “Expected monetary value (EMV)” to convert risks and opportunities into an amount.

The amount of project reserve will be added to remaining amount.

6.2.2 Activity

Other sections

- *Assignment*
- *Progress*
- *Predecessor and Successor*

An activity is a kind of task that must be planned, or that regroups other activities.

Activities can be:

- Development tasks.
- Initialization or conception task.

- Testing task.
- Recurring tasks for maintenance or support.
- Phases that will contain sub-tasks.
- Any planned tasks.

Resources are assigned to activities. During an *assignment*, some work is initially planned on this activity for the resource.

For a resource, assigned activities are tasks in which he can entry the *Real work*

Parent activities

- Activities can have parents to regroup activities or planned tasks.
- Activities can be sorted inside their parent activity, on the *Gantt* planning view, using drag and drop in the list area.
- Parent activity must belong to the same project.
- When a parent activity contains an assignment with a workload then the planning mode applied does not correspond to any of those proposed in the list of planning modes.
- On a parent activity the planning mode is no longer displayed.

Activity planning

- *Tickets* can be linked to an activity (task).
- Work on tickets will be included in the activity.

Assignment of resources to task

- Resources who will work on the ticket doesn't need to be assigned to linked activity before.
- The assignment will be automatically created once that resource has entered the working time (real work) in the ticket.
- The assigned task and the sum of working time entries by resource in tickets will be available in its timesheet.

Traitment

Fix planning

- When box "fix planning" is checked, the activity scheduling won't be remade.
- This will avoid change on planned values.
- The planning will always be the same whatever you do on other projects.

Warning: This may lead to dependencies unconsistancies

Filter on list

Ability to filter activities by data or type, for instance by assigned resources

Monitoring indicator

- The indicators can be defined in the *List of Values*.
- See: *Health status* and *Overall progress*

Test session

This planning element is a specialized activity aimed for tests.

A test session allows to define a set of test case that must be run to meet a requirement.

It can grouped other test sessions or be a task. This allows to define the structure of test sessions.

Dates, works and costs of test sessions (child) are summarized in the test session (parent).

A task is assigned to resources for to be performed.

See also:

Test sessions

6.2.3 Milestone

Other sections

- *Progress*
- *Predecessor and Successor*

A milestone is a flag in the planning, to point out key dates.

Milestones are commonly used to check delivery dates.

They can also be used to highlight the transition from one phase to the next.

ProjeQtOr offers two types of milestone:

Floating milestone

- This milestone will automatically move to take into account dependencies.

Fixed milestone

- This milestone is fixed in the planning, not taking into account predecessor dependencies.
- This kind of milestone is interesting, for instance to set-up start date for some tasks.
- Fixed date is set by validated date.

Monitoring indicator

- The indicators can be defined in the *List of Values*.
- See: *Health status* and *Overall progress*

Section Details

Items related to the milestone (target milestone) are displayed in the table.

element	name	state	resp.
Activity #3	Evolution X - Analysis	enregistré	
Product Version #2	web application V2.0	enregistré	P
Requirement #2	field "2" must be numeric	enregistré	
Ticket #3	ticket1	assigné	A

Fig. 4: Details: item linked

- Contains the list of *product versions*.
- Contains the list of *Requirements*.
- Contains the list of *Tickets*.
- Contains the list of *Activities*.

6.2.4 Dependency

Dependencies allow to define the execution order of tasks (sequential or concurrent).

All planning elements can be linked to others by dependencies.

There are several types of dependencies that allow to start and/or finish before/after another element.

Dependencies can be managed in the Gantt chart and in screen of planning element.

A delay can be defined between predecessor and successor.

Several types are available:

- **Start to Start**: second activity cannot start until the first activity has started.
- **Start to Finish**: first activity must be completed before the second activity can begin.
- **Finish to Finish**: first activity must be completed before the second can be completed.

Anyway, the successor can end before the predecessor. Note that the successor “should” not end after the end of predecessor, but in some cases this will not be respected:

- if the resource is already 100% used until the end of the successor
- if the successor has another predecessor of type “End-Start” or “Start-Start” and the remaining time is not enough to complete the task
- if the delay from the planning start date does not allow to complete the task.

See also:

Dependencies

6.2.5 Meeting

This planning element acts like a fixed milestone, but it's a task.

Like a milestone, a meeting can be a transition point.

But also, like a task because it's possible to assign resources and planned work.

See also:

Steering

6.3 Manage the planning

Project planning is of paramount importance to ensure the success of your objective.

By ensuring optimal management of costs, deadlines and quality, project planning allows you to estimate the necessary resources, establish a realistic schedule and define the expected performance indicators. In the absence of planning, you expose your project to risks of financial losses, delays and inadequate quality.

ProjeqtOr offers a wide choice of control levers to best plan your project and in precise conditions.

6.3.1 Planning codes

The planning modes that you will find in ProjeQtOr are all coded.

Below you will find the list of codes corresponding to the modes.

Code	Planning modes
<i>ASAP</i>	As soon as possible
<i>GROUP</i>	Work together
<i>START</i>	Must not start before validated date
<i>STARR</i>	Must start at validated star date
<i>ALAP</i>	Should end before validated end date
<i>FDUR</i>	Fixed duration
<i>DDUR</i>	Duration driven
<i>CDUR</i>	Duration constrained
<i>REGUL</i>	Regular between dates
<i>FULL</i>	Regular in full days
<i>HALF</i>	Regular in half days
<i>QUART</i>	Regular in quarter days
<i>RECW</i>	Recurring
<i>MAN</i>	Manual planning
<i>PAR</i>	Parent activity in fixed duration

6.3.2 Planning order

The planning is calculated as simply as possible. This means that no complex algorithm is applied.

The principle adopted is simply to be able to reproduce what you could do with a spreadsheet, but this time automatically.

All unrealized work is planned, from the start date to the maximum date depending on the load assigned to the project(s).

Before v12.0

Calculations are performed task by task, according to the following organization from lowest priority to highest priority.

1. **WBS**
2. **The validated end date or inherited end date**
 - *CDUR/ALAP* or if parameter enabled
3. **Priorities of activities**
4. **Project priorities**
5. **Planning modes**
 - *PAR*
 - *ASAP - GROUP - START*
 - *ALAP* (sorted by validated end date)
 - *FDUR - DDUR - CDUR*
 - *STARR* (sorted by validated start date)
 - *Not splitted work* with real already entered (started)
 - *REGUL - FULL - HALF - QUART:ref: `*
 - *RECW*
6. **Dependencies**
7. **Meetings**
8. **Planning Manual and planned interventions**
 - *MAN*

With version 12.0, the planning order has been redesigned and optimized to provide more consistent logic and increased accuracy.

After v12.0

Calculations are performed task by task, according to the following organization from lowest priority to highest priority.

1. **WBS**
2. **The validated end date or inherited end date**
 - *STARR (Validated start date)*
 - end date inherited if setting enabled
3. **Priorities of activities (Intra Project only)**

4. Parent activity

- *PAR (Within the same project)*
- *elementaries (Regardless of the planning mode)*

5. Project priorities**6. Planning modes**

- *ASAP - GROUP - START - - ALAP - FDUR - DDUR - CDUR*
- *STARR (sorted by validated start date)*
- *Not splitted work with real already entered (started)*
- *REGUL - FULL - HALF - QUART:ref: `*
- *RECW*

7. Dependencies**8. Meetings****9. Planning Manual and planned interventions**

- *MAN*

Important: These planning order changes will not impact your existing schedule. In fact, only new instances installed after version 12 will benefit from this new organization automatically.

For previous versions and updates from v12.0, you will need to choose the option that suits you best in the settings.

See also:

Apply calculation priority...

code modes

planning mode

Definition**WBS**

The WBS (Work Breakdown Structure), that is to say the structure or scheduling of your schedule is planned first if no other constraint comes to disturb this order. It is read from top to bottom and from left to right.

The validated end date

It is possible to set the default priority of activities from the finish date posted before the order in the WBS structure.

- This will give higher priority to activities that need to finish sooner, regardless of WBS.
- The planned end date is by default the validated end date.
- If the validated end date is not defined, the planned end date can be retrieved from a successor (e.g. end milestone) or from the parent.
- When the end date is retrieved then it is displayed in pink and is written in gray italics.
- The bar is also displayed in pink.
- If two activities have the same scheduled end date, the WBS is always the last priority criterion.
- This feature can be disabled in Global setting to fetch default WBS criteria only.

Priorities of activities

All activities with the lowest priority value will potentially be scheduled first.

Important: Priority of activities before version 12.0 was inter project.

After version 12.0 with new scheduling rules enabled, priority of activities is intra project

Project priorities

The smallest value (index) is calculated first, this means in particular that if the projects have different priorities, all activities of the project with the smallest priority value will potentially be planned first.

Planning modes

Before v12.0, the modes “F.D.C.DUR”, “STARR”, “REGUL, FULL, HALF and QUART” and “RECW” modes are priority modes compared to the other activity planning modes other than manual planning.

After v12.0 with the new planification mode, the F.D.C.DUR modes are no longer a priority.

Dependencies

If an activity or project has a predecessor, the predecessor is always scheduled first.

Meetings

It is fixed on a given date. Even if not all of the participants are available.

In this case, an alert informs you and the Gantt chart displays the unavailability.

Planning Manual and planned interventions

This highest priority planning mode. The workload assigned with this planning mode can be recorded in planned work or in actual work.

6.3.3 Planning Modes

ProjeQtOr offers several ways to plan your resource’s workload with planning modes.

The order of the planning modes is not random.

The further down the list you go, the more priority the planning modes have and will recover the load on the tasks that can be planned in the previous planning modes.

Some planning modes are reserved for expert users.

If you do not want to keep the modes that you do not use, you can use the dedicated screen which will allow you to close and therefore hide certain modes.

See also:

Planning modes screen

Planning Modes

- *As soon as possible*
- *Work together*
- *Fixed duration*
- *Parent activity*
- *Duration driven*
- *Duration constrained*
- *Must start before...*
- *Must start at validated date*

- *Should end before...*
- *Regular between dates*
- *Regular between dates in full day*
- *Regular between dates in half day*
- *Regular between dates in quarter day*
- *Recurring*
- *Manual planning*

As soon as possible

- The task is planned to be completed as quickly as possible.
- If no assignment is created the bar will automatically be 1 day.
- If the validated duration is entered, it is this duration that is planned.

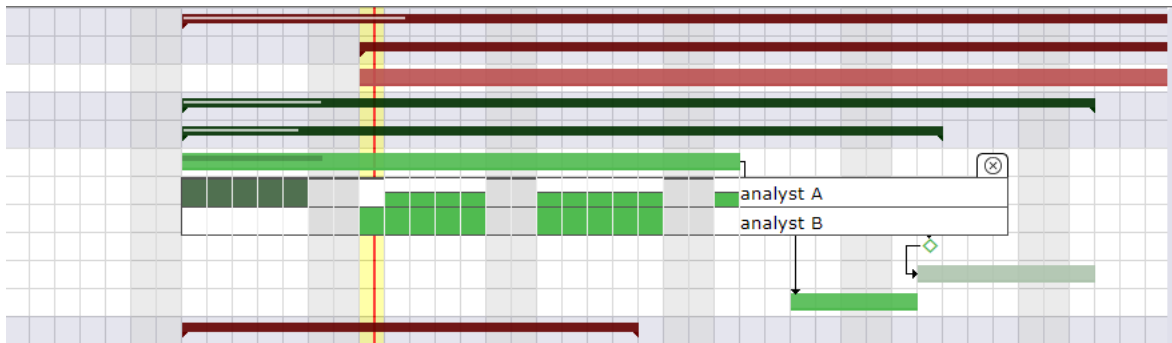


Fig. 5: Planning Mode As soon as possible: the calculation will schedule the resource as soon as it has an available slot

[\[Back to planning modes\]](#)

Work together

- When two or more resources are assigned to the same task, planning tries to find periods where all resources are available to work together.
- Periods are searched “as soon as possible”.
- If only one resource is assigned, this planning mode is exactly the same as “As soon as possible”.
- If one resource is assigned more work than the other, the extra work is planned after working together periods.

[\[Back to planning modes\]](#)

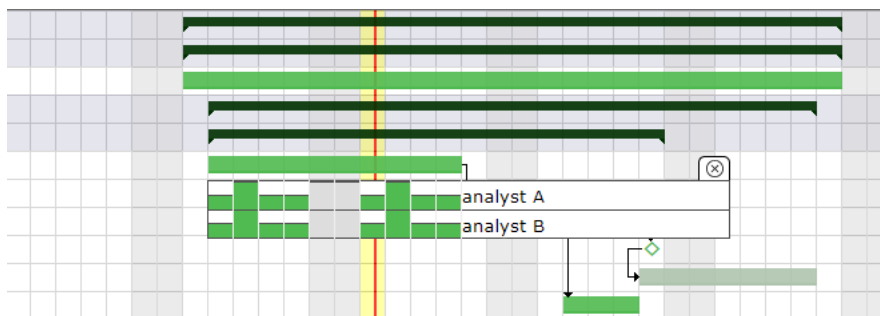


Fig. 6: Planning Mode work together: the calculation will schedule the resources at the same time and as soon as it has an available slot

Fixed duration

- The task is planned by duration. The Validated Duration field is a required field. If you do not fill it out, it will be set to 1 automatically.
- If work is assigned to the task, the scheduling behavior is the same as “Regular Between Dates”.
- Ability to readjust (start and end date) the task with handles directly on the Gantt view bar.
- When the number of assigned work days exceeds the indicated duration, then the days (detail of the Gantt bars) following the validated end date of the activity will be in red.

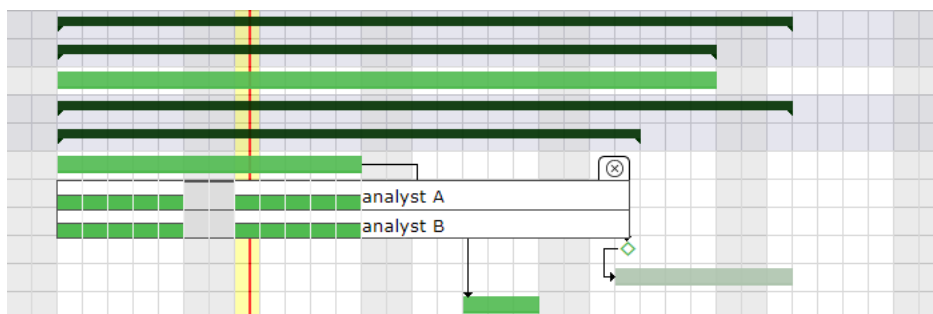


Fig. 7: Planning mode fixed duration with workload

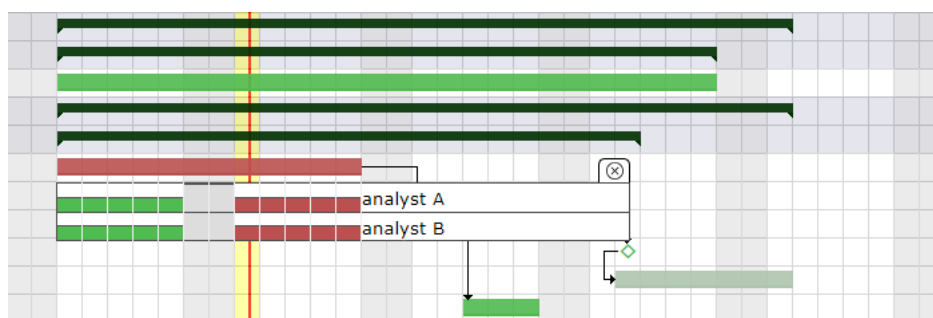


Fig. 8: Planning mode fixed duration with workload and validated end date < planned end date

[Back to planning modes]

Parent activity

- A parent activity can contain workload.
- In this case, the workload is then distributed over the duration of the parent activity.
- It takes into account the workload distributed to the child activities.
- Load distribution corresponds to the fixed duration planning mode.
- This mode is automatically assigned to the parent activities.
- You can change the smoothing behavior on parent activities using a global parameter.

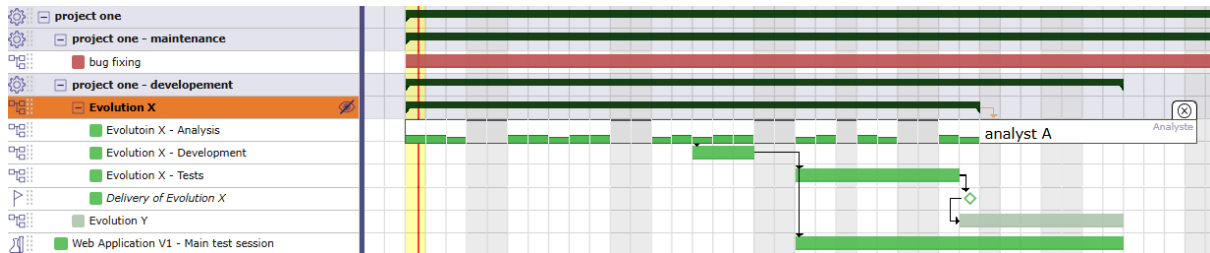


Fig. 9: Workload assigned to a parent activity

planning example

Example with a parent activity with no load and 2 sub-activities with 10 days of load for each of the resources (analyst 1 and analyst 2).

In this case, the parent activity is the result of the sub-activities that compose it.

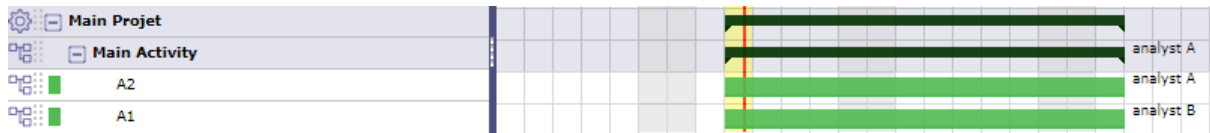


Fig. 10: Mother activity without workload

If workload is entered for a resource on a parent activity, and this resource is also scheduled on child activities, then the total of this workload will be displayed on the parent activity for this resource.

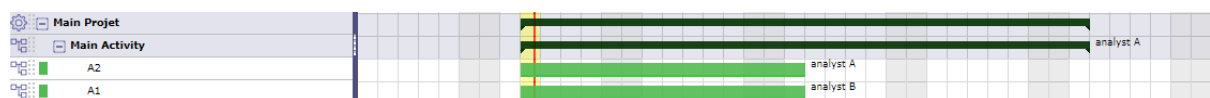


Fig. 11: Mother activity with workload

The dates and durations section display the result

The dates and duration section of the activity shows the overall load for a resource.

20 workload days = 10 workload days for Analyst A for parent activity + 10 workload days for Analyst A for activity A.

The mother activity, even if it has priority in relation to its position in the WBS, will distribute the workload assigned for the resource after the workload on the sub-activities.

See also:

Parent planning mode in global parameters.

[|Back to planning modes|](#)

▼ Assignment closed 1

automatic assignment of the project team

	resource	rate	assigned (d)	real (d)	left (d)
	analyst A (Analyste)	100 %	10	0,00	10

▼ Progress

Dates and durations

	validated	planned	real	requested
start date	<input type="text"/>	13/12/2022	<input type="text"/>	<input type="text"/>
end date	<input type="text"/>	09/01/2023	<input type="text"/>	<input type="text"/>
duration	<input type="text"/> d	20 d	0 d	<input type="text"/> d

Fig. 12: Dates and durations section on parent activity

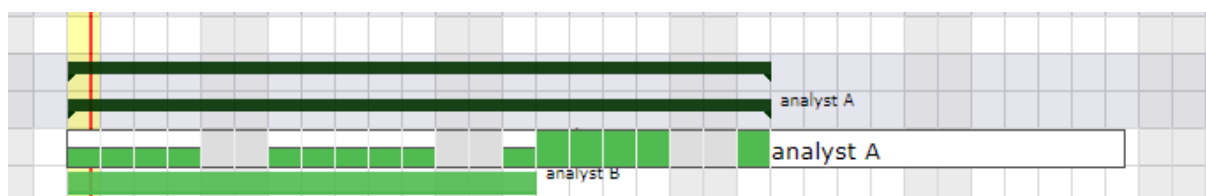


Fig. 13: the load of the mother activity is planned after the sub-activities

Duration driven

- The task is planned by duration which is fixed. If you do not fill it out, it will be set to 1 automatically.
- If the allocation of resources exceeds the set validated duration then the distribution of remaining work becomes overuse.
- When the assigned workload does not exceed the number of days of fixed duration then the planning mode distributes the workload by smoothing it throughout the duration, exactly as with the fixed duration or the regular between two dates.
- In automatic calculation mode, only the activity in this mode will be recalculated.
- Other activities, even those driven by dependencies, will only be recalculated with the full calculation function.
- Ability to readjust and move the task (handles on each side of the bar) directly on the Gantt.
- With the left handle you adjust the full bar without changing the duration.

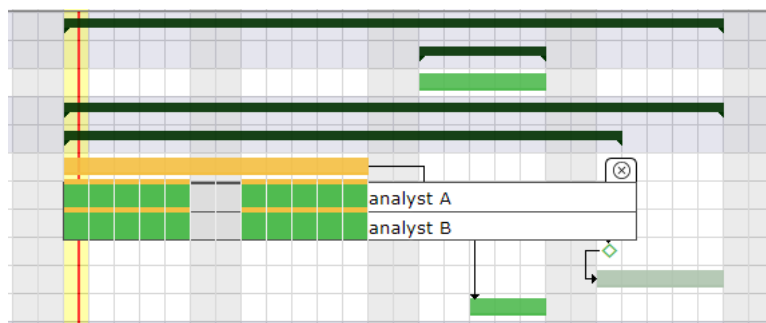


Fig. 14: Planning mode Duration driven: work that exceeds the duration is calculated as overuse

[Back to planning modes]

Constrained duration

This planning mode behaves similarly to the “fixed duration” and “Duration driven” modes with some additional specificities.

The Validated Duration field is a required field. If you do not fill it out, it will be set to 1 automatically.

This is a priority mode compared to the “as soon as possible” or “work together” mode.

It offers the possibility to shift the validated start date and the end date using the handles on each side of the bar.

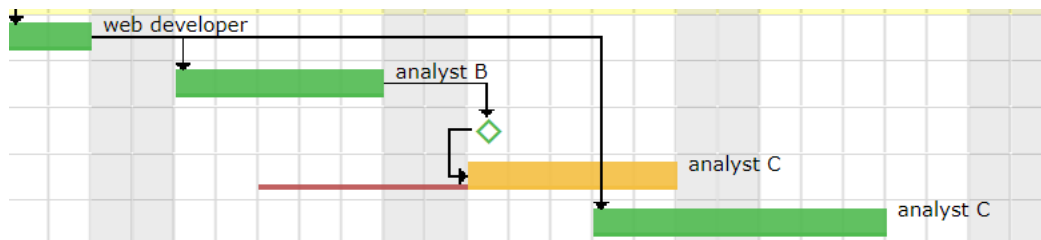


Fig. 15: Activity in constrained duration mode

- Moving the start date fixes the validated start date without affecting the duration of the schedulable task.
- Moving the end date automatically calculates the duration.
- No overbooking within the same project.
- Possible inter-project overbooking.

- Respect of the allocation and the assignment rate by project and activity.

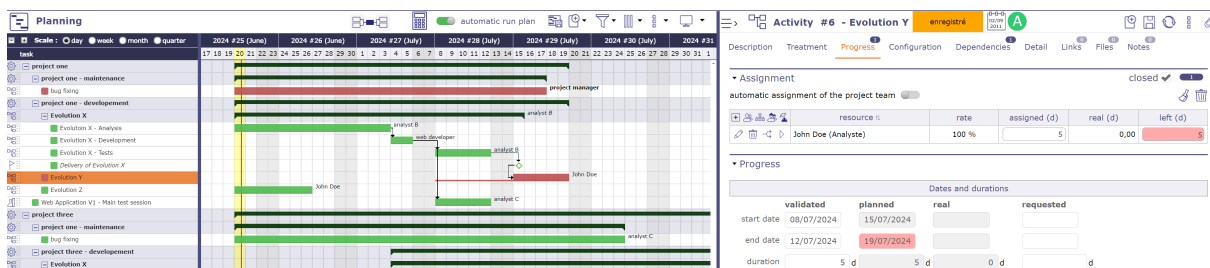


Fig. 16: indication of the start date by a red line

- If the start date is specified, the task takes priority over those of the same priority which do not have one.
- When the start date is entered but not respected, the bar turns red and a red line is displayed at the base of the line to indicate the duration of the drift (validated start date or end date of the predecessor(s)).
- If the duration is not respected, the task is red.

[\[Back to planning modes\]](#)

Must not start before validated start date

- The validated start date field must be set.
- The task must not begin before a specific date.
- If a stronger constraint, such as dependencies or real work, is specified, the planning mode will no longer be respected.
- You can block resource imputations in this planning mode by enabling the global parameters “lock timesheet before validated start date” in *global parameters*

[\[Back to planning modes\]](#)

Must start at validated start date

- The validated start date field must be set.
- The task must not begin before this specific date.
- This planning mode reclaims time from previous planning modes.
- It has priority over the “as soon as possible”, “fixed duration” and “work together” modes.
- The start date is no longer respected if a stronger constraint, such as dependencies or real work, is specified.

You can block resource imputations in this planning mode by enabling the global parameters “lock timesheet before validated start date” in *global settings*

[\[Back to planning modes\]](#)

Should end before validated end date

- The validated end date field must be set.
- The task is planned backward from end to start.
- A validated end date must be defined.

[Back to planning modes]

Regular between dates

- Allows to evenly distribute work between two dates.
- Used for management recurrent activities.
- The validated dates fields must be set.
- Possibility to readjust the task with handles directly on the bar of the Gantt view.

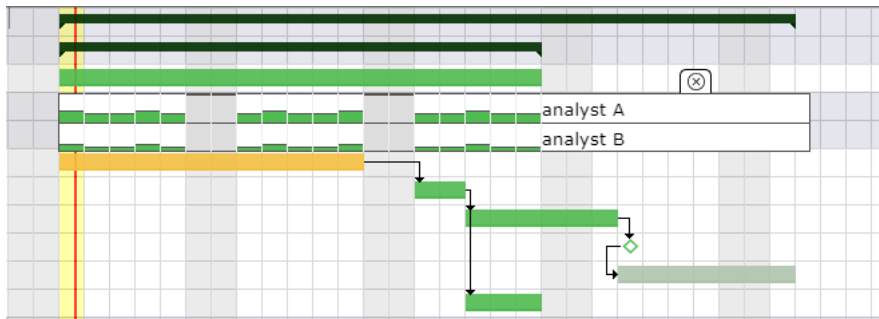


Fig. 17: Regular between dates mode

See also: *Regular modes with excess workload*

[Back to planning modes]

Regular in full days

Work will be distributed on full day between on working days.

Possibility to readjust the task with handles directly on the bar of the Gantt view.

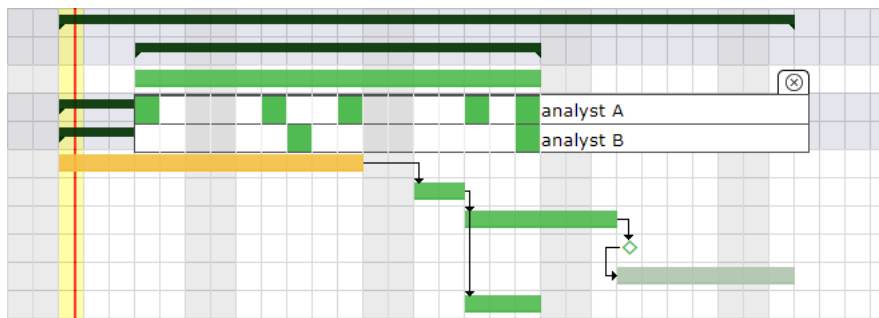


Fig. 18: Planning mode Regular in full days: assigned days are distributed evenly in full days

See also:

Regular modes with excess workload

Regular in half days

The work will be distributed over half of the day between working days.

Possibility to readjust the task with handles directly on the bar of the Gantt view.

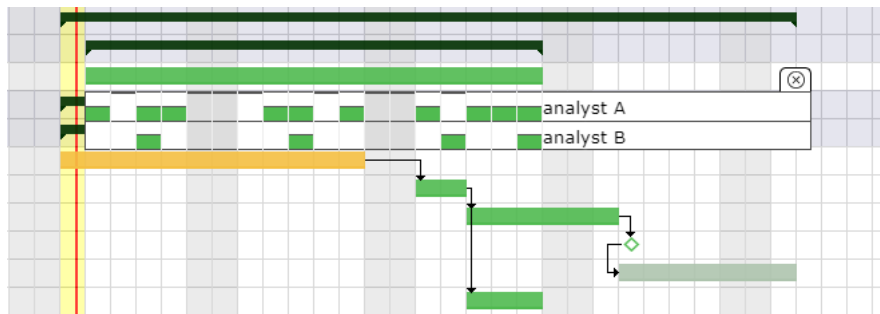


Fig. 19: Planning mode in half day: assigned days are distributed evenly in half days

See also:

Regular modes with excess workload

[\[Back to planning modes\]](#)

Regular in quarter days

Work will be distributed on one quarter of the day between on working days.

Possibility to readjust the task with handles directly on the bar of the Gantt view.

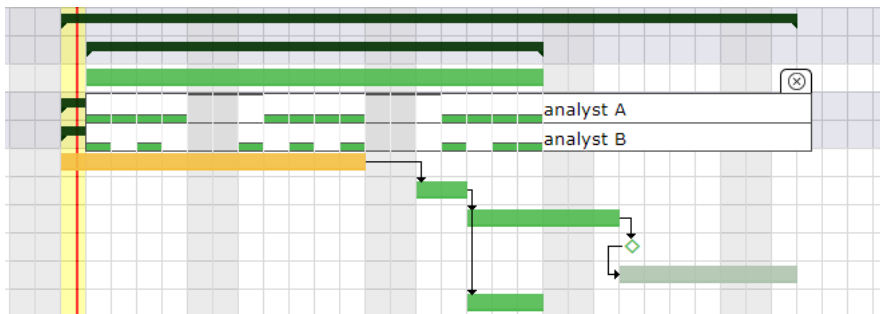


Fig. 20: Planning mode in half day: assigned days are distributed evenly in quarter days

See also:

Regular modes with excess workload

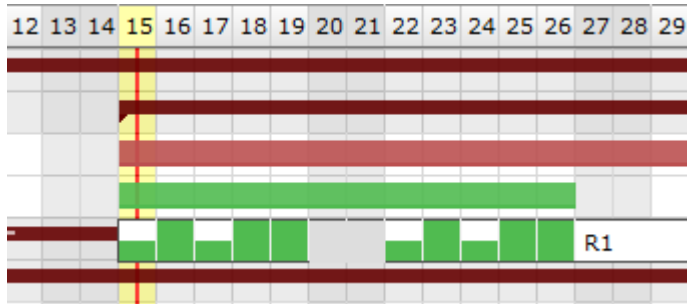
[\[Back to planning modes\]](#)

Regular modes with excess workload

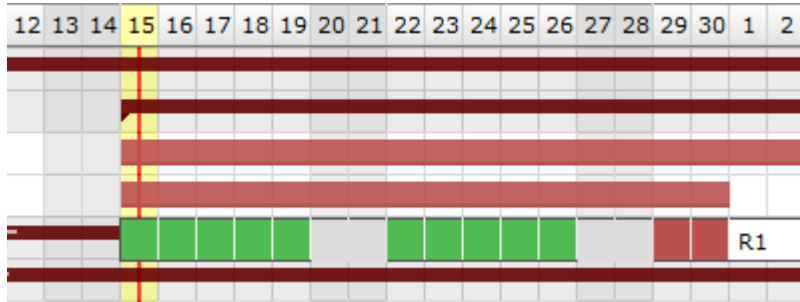
If the dates are too short compared to the assigned load, the excess load will be divided and added in the same way as the chosen mode.

So you can get full days even in regular mode in quarter day or half days.

- Example with 8 days of workload to plan over 10 days with the Regular mode in half days between dates



The load is distributed regularly so as to respect the dates.




If the load is too high to meet the dates, the excess load will be distributed over the whole day after the validated end date and will therefore be late (red color)

[|Back to planning modes|](#)

Recurring (on a weekly basis)

- This mode allows you to plan the workload on a weekly basis which will be distributed each week, for example 1/2 day every Monday, 1 hour every day, etc.
- It automatically adapts to the elements which determines the total duration of the project. If the project falls behind schedule, this mode will continue to adapt and automatically distribute the load for each added day.

Tip: Please note, the project is only an envelope, it is the elements that compose it which will determine its duration. A recurring activity cannot be calculated correctly if it is the only component of the project, even if it has validated dates. Other elements (Activities, milestones, etc.) will be needed for the distribution of this load to be done correctly.

Click  to enter the load for each day of the week.

The work is distributed dynamically according to the load indicated on the assignment table.

If you don't want the recurring activity to fit the project, you can limit it between finish-to-start and finish-to-finish milestones.

See also:

Recurrent mode assignment

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Assignment
✕

resource

function

cost € / d

rate (%)

closed

comments

Weekly recurring repartition

Mo	Tu	We	Th	Fr	Sa	Su
0,2	0,2	0,5	0,1	0,2	0	0

unit for workload = days

Fig. 21: Planning mode in half day: assigned days are distributed evenly in quarter days

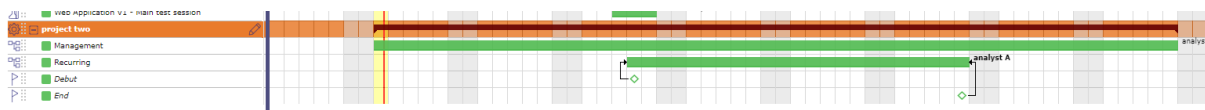


Fig. 22: Planning mode in half day: assigned days are distributed evenly in quarter days

Manual planning

- This is the most priority planning mode and constraint.
- You have the option to save the work as planned or real work.
- Two screens are dedicated to it: *planned interventions* to plan monthly and the *View interventions* for read-only.

Note: The choice of planned or actual work is made in the global parameters in the planning section work tab.

See: *global parameters*.

Planned Interventions

The goal is to make the specifications more flexible to cover broader and more generic needs.

Assignment

The assigned workload is no longer determined but will be entered on a calendar which can be clicked, per half-day.

See: *Planned interventions assignment*

Assignment
✕

resource

function

cost € / d

assigned work d

real work d

left work d

reassessed work d

closed

comments

Months	Monthly repartition																															
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
January 2021																																
February 2021																																
March 2021																																
April 2021																																
May 2021																																
June 2021																																

Fig. 23: Assignment with the Manual planning mode

The workload saved in this window will be displayed to the planned interventions screen.

Planned Interventions screen

The planned interventions screen allow you to manage the manual planning.

This screen is available if at least one activity has a planning mode set to manual planning.

Interface areas

- ▣ *Display zone*
- ▣ *List of Projects and activity*

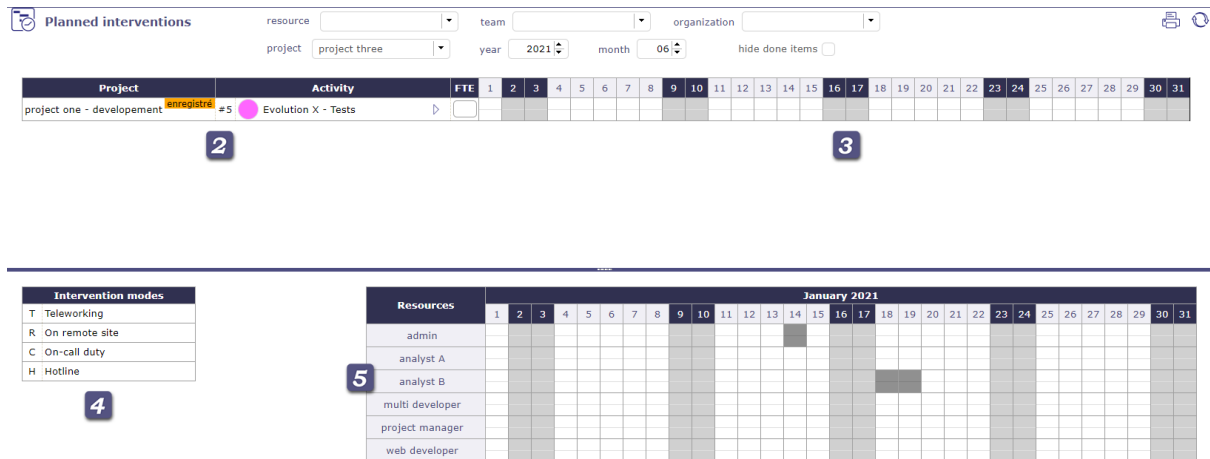


Fig. 24: Planned interventions screen

3 FTE

4 Interventions mode

5 Interventions Calendar

Display zone

The display area allows you to filter the resources you want to display.

The screen is blank until you select the resource, the team or the organization.

The calendar is displayed for the resource or for all members of the selected team or organization.

These parameters are not exclusive, you can select team and organization.

- **Resource:** filter by resource on calendar display.
- **Team:** filter by team on calendar display.
- **Organization:** filter by organization on calendar display.
- **Project:** filter by project on calendar display.
- **Year:** select the year to display.
- **Month:** select the month to display.
- **Hide done items:** you can hide the activities recorded in the “done” state in the displayed list.


Note: The selected parameters, except the month, always set by default to the current month, are saved as a user parameter.

When the user returns to the screen, he therefore finds the last parameters entered

List of Projects and activity

The list of activities displayed are in the planning mode “manual planning”. If no filter is selected (project, resource, organization ...) then the screen does not display any data.

You cannot create new activities in manual planning mode from the intervention screen. You need to access the activities or schedule screen to create the new activity in manual planning mode. The new activity will then appear in the list.

Click on  to access the activity screen and view its detail

FTE

In this calendar, we display graphically if we respect the quantity of people requested on the activity and on the half day.

Fill in an integer value for each activity to check.

If you enter 1, you expect at least one person to perform half a day on this activity.

A check is then carried out and takes into account all the resources assigned to each activity, and not only those selected and visible on the calendar.

If the field is left empty or at 0 then no control is carried out and the calendar will not display any green or red box.

- **Blue box**

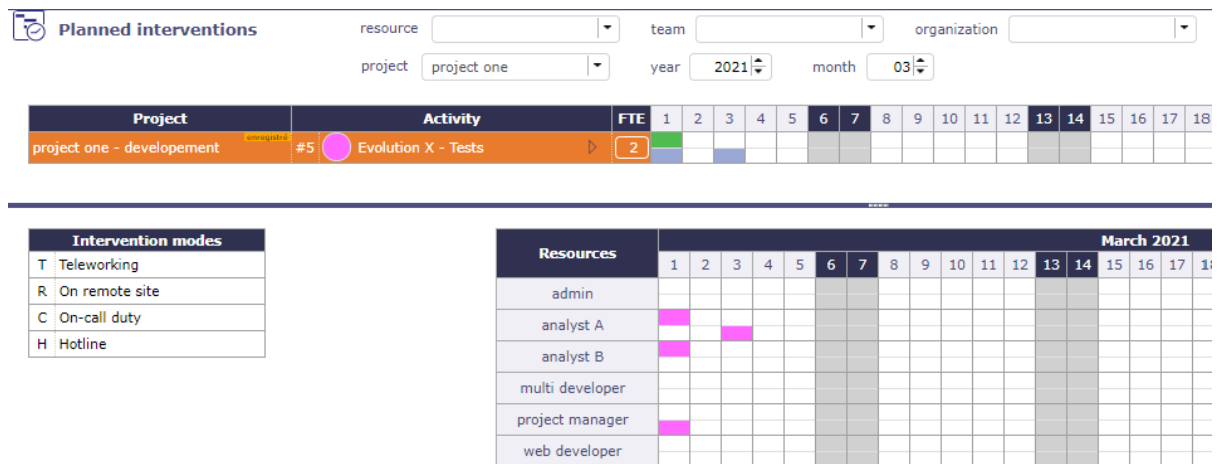


Fig. 25: Do not yet reach all of the expected FTEs

When you start to put in the workload but do not yet reach all of the expected FTEs.

- **Green Box**

If the entry respects the workload constraint expected in FTE the box is green.

Example with a value of 2 in the FTE field for the selected activity.

This FTE value is defined for each half-day.

You must therefore have 2 effective persons planned for each half day whatever the resource or resources that will be provided.

- **Red Box**

If the total entry is greater than the expected workload in FTE the box is red.

The box then turns red: the workload is higher than expected since we expected a person on this half day and on this activity

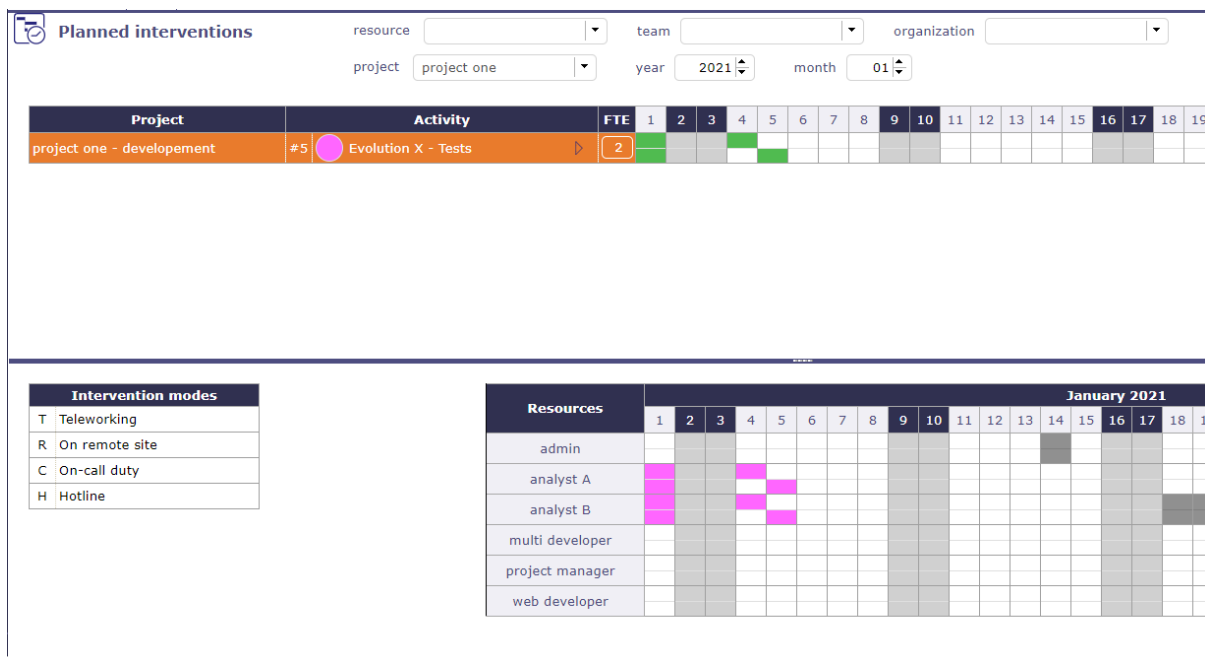


Fig. 26: Workload constraint expected in FTE

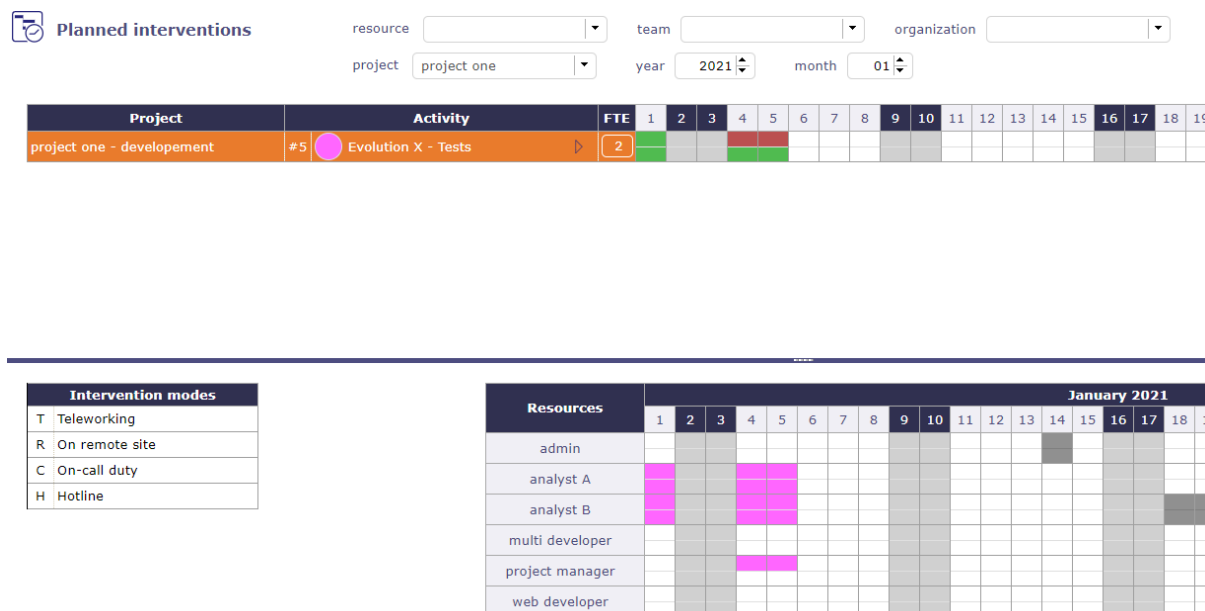


Fig. 27: Greater than the expected workload in FTE

- **Non-colored box**

There is no expected workload.

Interventions mode

The list of possible intervention methods is customizable.

This list can be modified via a setting screen in the *list of values*.

The saved modes will remain fixed for all projects and all teams.

Modalités d'intervention	
T	Teleworking
R	On remote site
C	On-call duty
H	Hotline

Ressources	1	2	3	4	5	6
admin						
analyst A	T					
	H					
analyst B	T					
	R					
multi developer						
project manager						
web developer						

Fig. 28: Intervention mode

You can select an activity or a modality or both.

- If the intervention mode is not selected, the box is colored according to the activity but no letter appears, and vice versa.
- If only the intervention mode is selected, it will be saved without modifying the planned or actual work.

You can however add one or the other after having planned the intervention or the intervention mode.

A second click with the same parameters will delete the assignment.

Ctrl Click allows you to complete the two half days

Interventions Calendar

Click on an activity and / or an intervention modes to plan workload on it.

Click on half a day to plan the workload.

The targeted half day is filled with the color of the selected activity and the letter of the chosen intervention mode.

- **Light Gray color**

The light gray box indicates that the day is inactive on the resource calendar.

It can correspond to a weekend, a public holiday or a non-working day recorded on the resource's calendar.

Resources										
	1	2	3	4	5	6	7	8	9	10
analyst A										
analyst B										
project manager										
web developer										

• **Dark Gray color**

The dark gray boxes indicate reality. It's work actually performed and informed on the timesheet.

When real work is completed for half a day, the box is half gray.

If the full day is completed then the box is completely grayed out.

Resources										
	1	2	3	4	5	6	7	8	9	10
analyst A	T			H						
analyst B	H			H	T					
analyst B	T									
analyst B	H			H						
project manager										
web developer										

• **Blue color**

The blue boxes indicate absences.

Resources										
	1	2	3	4	5	6	7	8	9	10
analyst A	T			H						
analyst A	H			H	T					
analyst B	T									
analyst B	H			H						
project manager										
web developer										

• **Striped box**

The striped boxes indicates that the working time recorded by the resource has been validated.

Resources										
	1	2	3	4	5	6	7	8	9	10
analyst A	T H	/	/	H H	T	/	/	/	/	/
analyst B	T H			H						
project manager										
web developer										

Note: The workload can be recorded as a planned load or as a real load.

This option can be set in the *global settings*.

View interventions

This screen allows you to see your planned interventions.

You cannot modify these interventions or plan another half day on this screen.

It is a bit the equivalent of planning by resource but in manual planning mode

Planned interventions

resource: team: organization:

project: project one - developer year: 2021 month: 01

Project	Activity	FTE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
project one - development	#5 Evolution X - Tests	2																															

Intervention modes
T Teleworking
R On remote site
C On-call duty
H Hotline

Resources	January 2021																														
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
analyst B	T H			H																											

Fig. 29: View interventions screen

[\[Back to planning modes\]](#)

Minimum threshold & not splitted work

When this value is set, the activity will only be scheduled on the day when the daily availability is greater than or equal to this threshold.

You also have the option to add a new property to a “cannot be split” task.

This will require defining the minimum work to be allocated each day and therefore filling in the minimum threshold field.

Be careful with this mode, planning will require finding consecutive days with at least the given value possible, which may never happen.

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6.3.4 Planning Modes screen

You can disable planning modes via the dedicated screen.

In the detail of the selected mode in the list box, check the “closed” box to disable the selected mode.

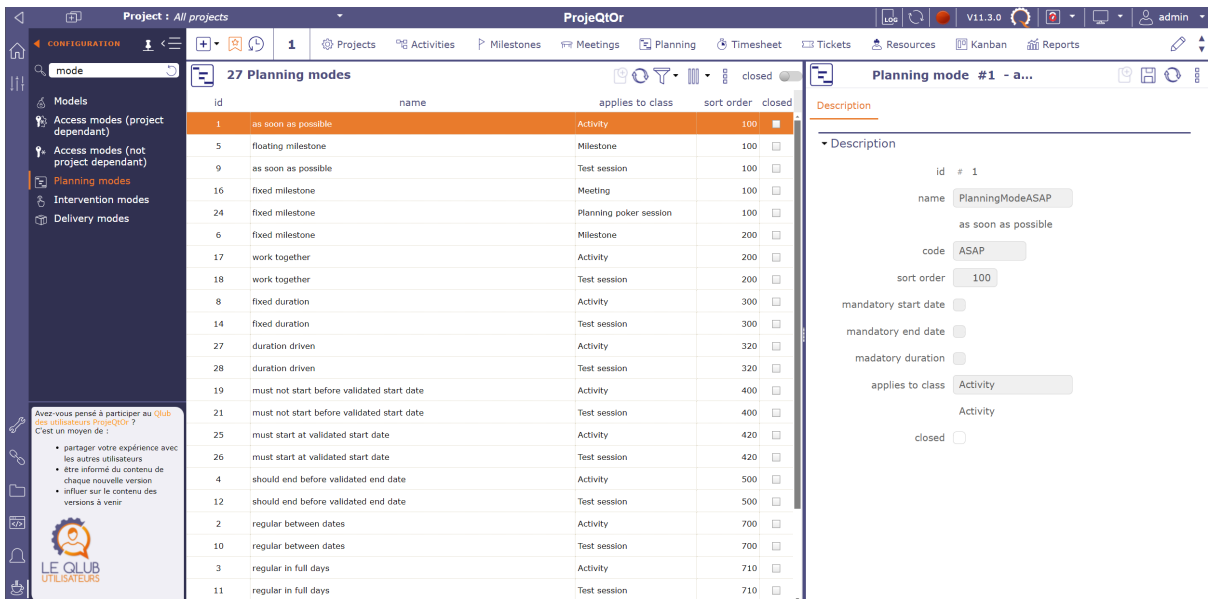


Fig. 30: Planning modes screen

6.3.5 Overuse

By default, the planning calculation is done without overuse, when multiple activities are assigned to the same resource, ProjeQtOr planned them sequentially.

A resource cannot work more than one full day per day, and the planning engine enforces this constraint.

As shown in the example below, since the same resource is assigned to several activities, these tasks are automatically spread out over time.

They are planned one after the other, allowing the resource to complete them at their own pace and within their capacity.

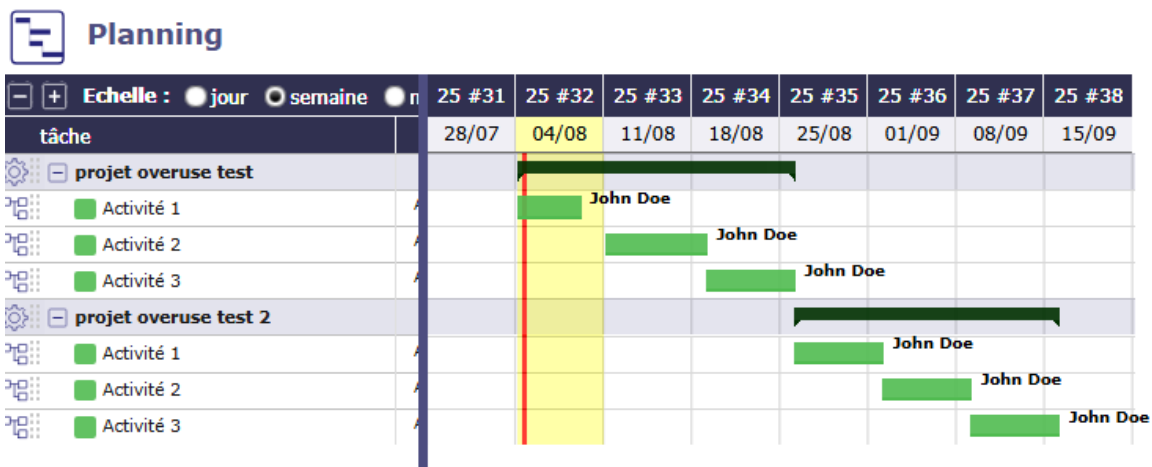



Fig. 31: Plan without overuse

Overuse With the Calculate capacity planning

Click on  and check the box “Plan with overuse (infinite overbooking capacity)” to calculate the planning

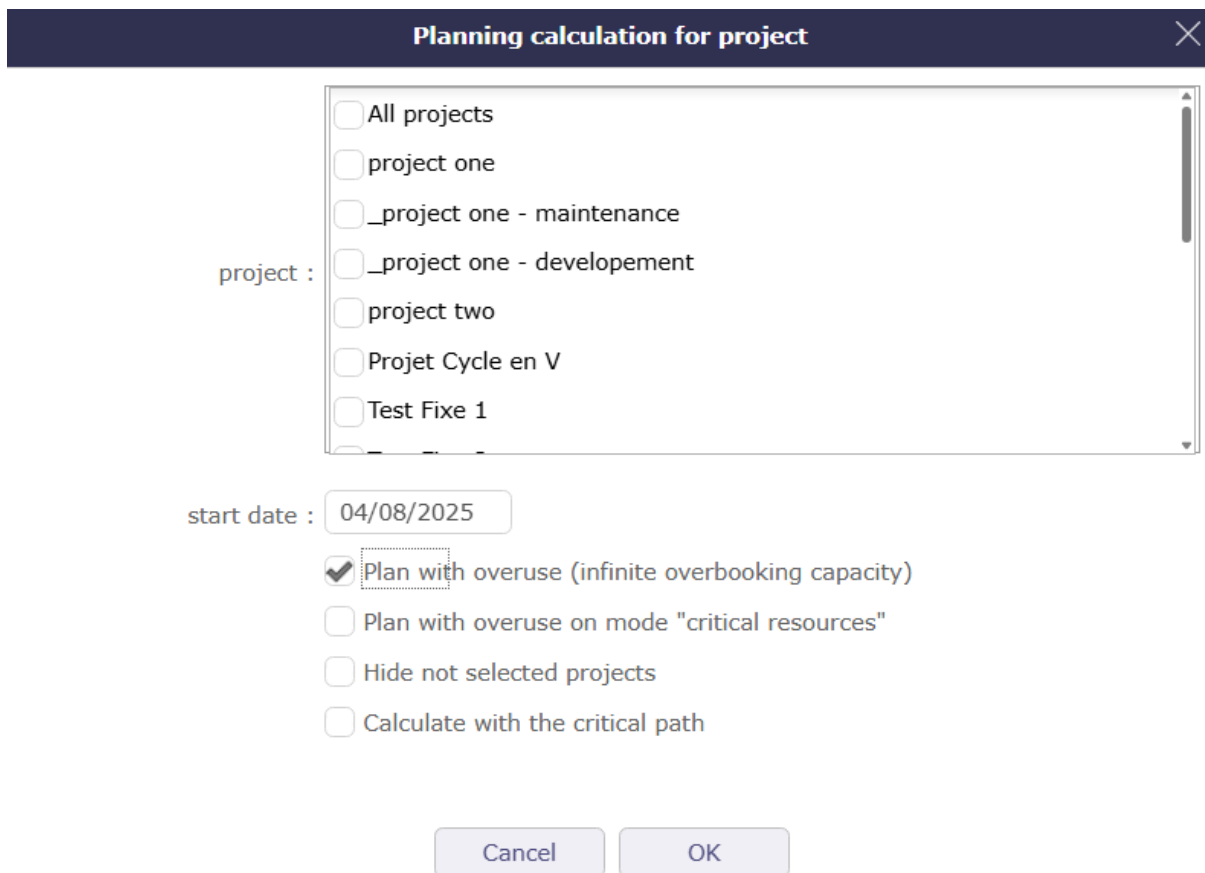


Fig. 32: Calculate planning with overuse

The resource is then allowed to exceed their daily work capacity.

In this case, the same resource can be planned on multiple activities at the same time, even if the total workload exceeds one day.

In other words, ProjeQtOr permits the resource to “work two days in one,” which can be useful for simulations or intentional overbooking scenarios or to identify the criticality of a resource.

This method allows for inter-project overuse.

Overuse With the planning mode

Duration driven planning mode

Some planning methods allow for calculations with overuse directly included.

The *duration-driven* planning mode allows for intra- and inter-project overuse.

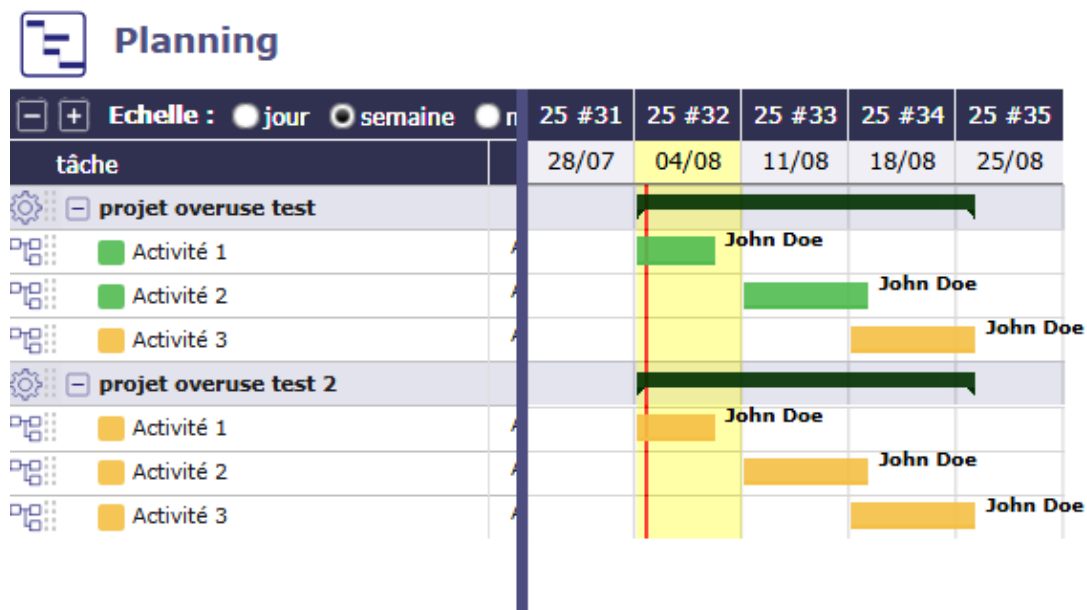


Fig. 33: Plan with overuse

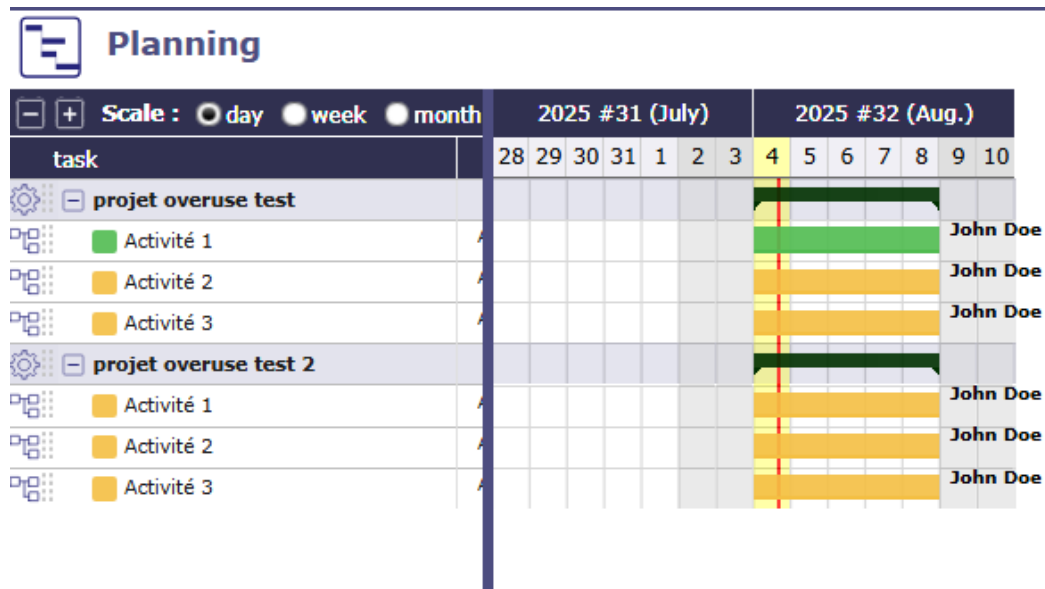


Fig. 34: Plan with overuse with duration driven planning mode

Constraint Duration planning mode

Some planning methods allow for calculations with overuse directly included.

The *duration-driven* planning mode allows for inter-project overuse.

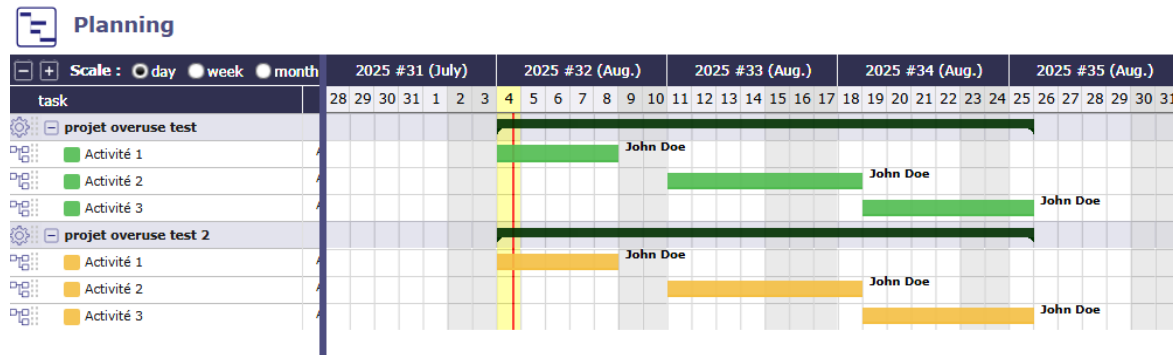


Fig. 35: Plan with overuse with constrained duration planning mode

6.4 Gantt Chart

Project planning is of paramount importance to ensure the success of your objective and allows you to estimate the necessary resources, establish a schedule and define the expected performance indicators.

ProjeQtOr offers a wide choice of control levers to best plan your project and in precise conditions.

The Gantt chart is a tool used in planning and project management to visualize the different tasks that make up a project over time.

Note: For large projects, with many sub-projects and activities, the number of lines to be displayed is limited in order not to deteriorate performance, even if the project selector has already contextualized the display.

The Gantt Chart is composed of six areas

- *Toolbar*
- *Timeline*
- *Task List: WBS structure*
- *Context menu*
- *Gantt chart view*
- *Details area*

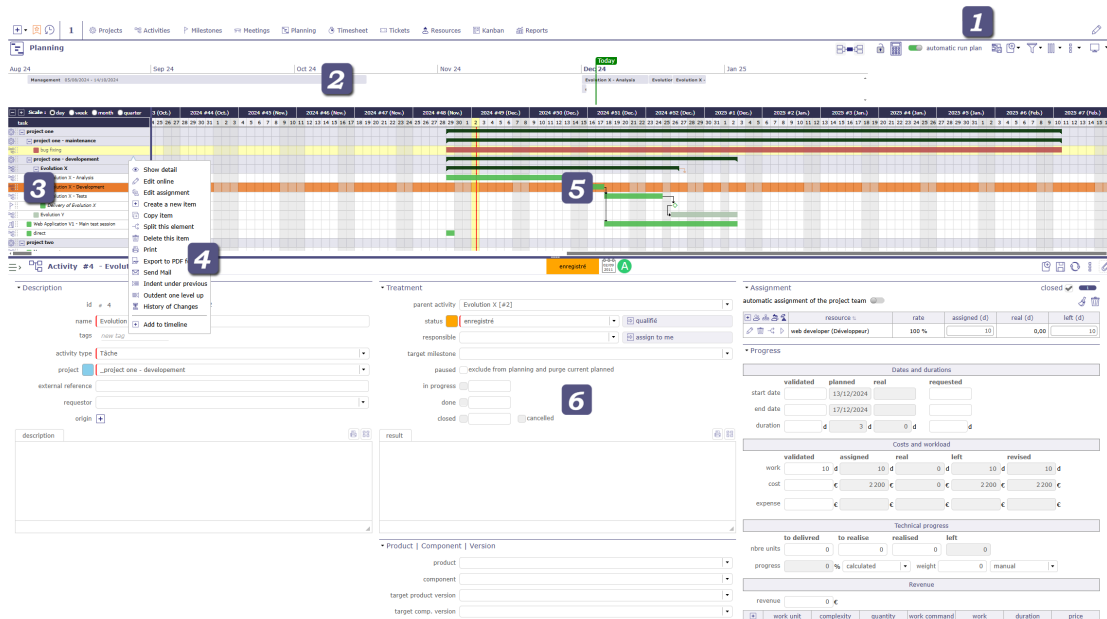


Fig. 36: Six areas of Gantt Chart

6.4.1 Toolbar

The tools are dedicated to the planning view.

Gantchart Toolbar

- 0** *Scroll to today*
- 1** *Predecessor & Successor*
- 2** *Quick mode block*
- 3** *Planning calculation*
- 4** *Automatique run plan*
- 5** *Baseline*
- 6** *New planning element*
- 7** *Advanced filter*
- 8** *Columns*
- 9** *Options*
- 10** *Layout mode*
- 11** *Display*
- 12** *Display options*
- 13** *Planning validation*
- 14** *Timeline*
- 15** *Print and Export*

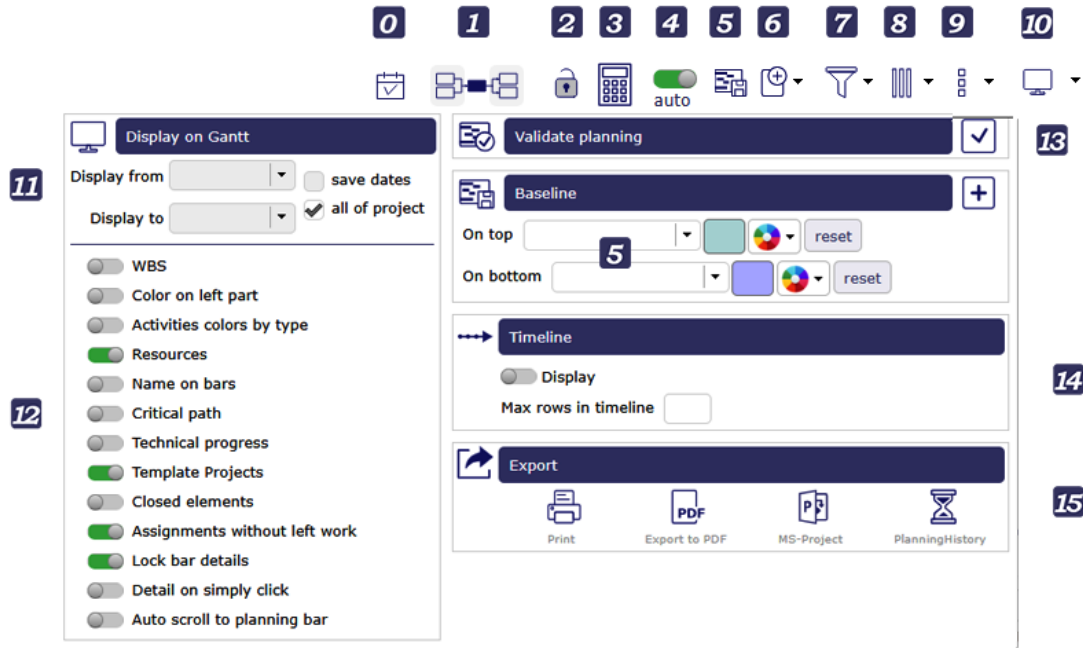



Fig. 37: Gantt chart's toolbar


Scroll to today


By clicking this button, you force the Gantt display to return to the current day.


Predecessor and Successor


This functionality allows you to display the predecessors and/or successors of a plannable element (project, activity, milestone, etc.)

Click once on  to display the first level of predecessors of the selected element

Double-click  to display all predecessors of the selected element

Click once on  to display the first level of successors of the selected element

Double-click  to display all successors of the selected element.

Click on  to clear the selection of the predecessor or successor

[back]

Quick mode block

In automatic calculation mode, changing most fields causes the schedule calculation to be refreshed. This specific blocking mode allows you to not update the schedule automatically each time you make changes.

Warning: Some displays may not reflect the correct values


[back]

Planning calculation

When you make a modification on an element of your project, the project must then be recalculated to take it into account.

You have the option of using the automatic calculation function, which, if you make a modification on the planning screen, and only on this screen, will immediately take this modification into account.

If the modification is made on another screen, even if you have selected automatic calculation then, you will have to restart the calculation on the planning screen.

- Click on  to start the activity planning calculation.
- A popup window appears with the list of projects.
- The check boxes in the list area allow you to select one or more projects to recalculate.

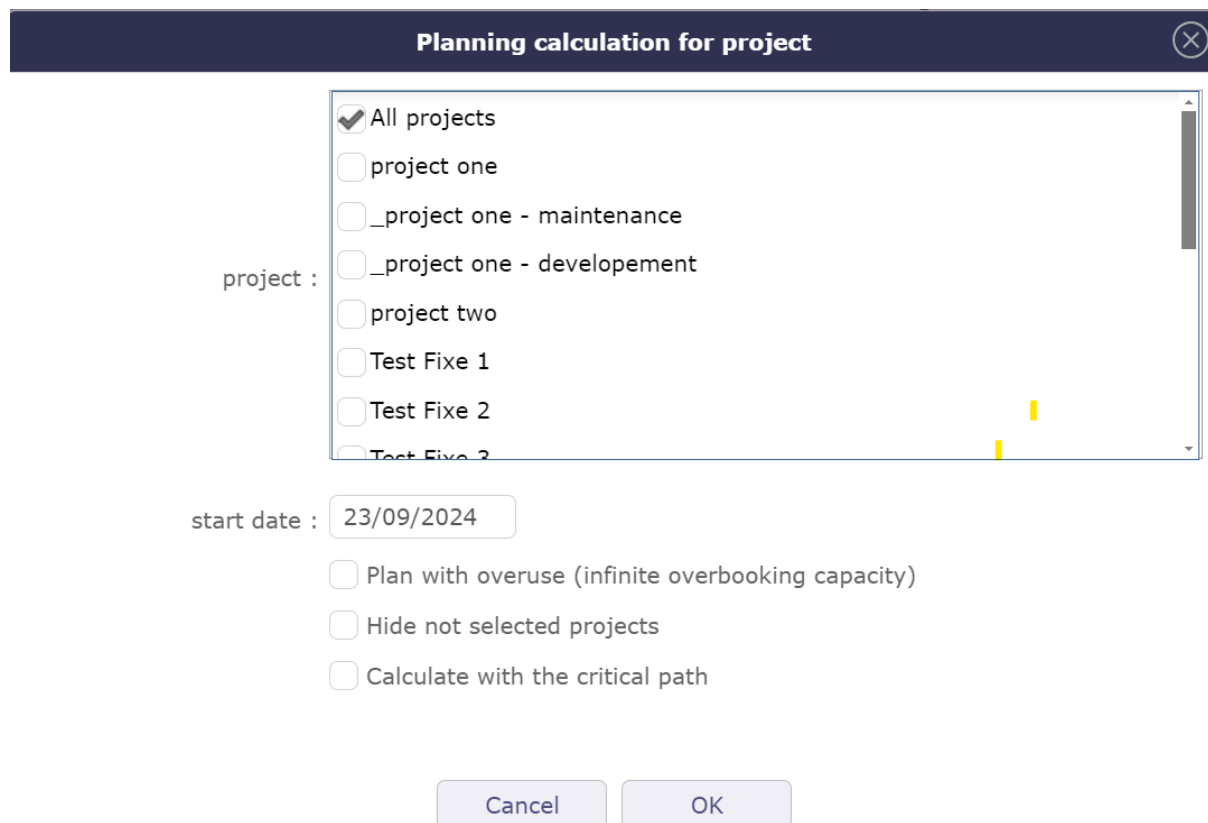


Fig. 38: Project selection popUp for project calculation

If you have selected one or more projects with *Project Selector* then the selected projects will be automatically checked.

Choose the date on which you want to recalculate the project.

By checking the “Hide unselected projects” box, you will only have the projects selected in the project selector and they will be automatically checked.

Important: When the schedule calculation takes a long time, with thousands of activities to be scheduled, the existing scheduled work is deleted, then the calculation is performed, and then the new scheduled work is saved.

During the calculation, users who right-click on the activity do not see the data (the scheduled work is deleted). The idea is to delay the deletion of the scheduled work as long as possible, until just before new values are created.

Automatic run plan

Switch the button to activate automatic calculation on each change.

Only works on the Gantt Planning view.

If the modification of an element is carried out on the dedicated screen of the element, then it is necessary to click again on **BUTTON** to restart the computation

All modifications about assignment (rate, name or numbers of resources, dates...) done are not displayed on the new planning screen until having, for this purpose, activated the planning calculation, either in an automatic run plan or not.

On the contrary, the screen planning will not change even if modifications have been loaded yet.

Automatic calculation

- **Differential calculation** = calculation of projects requiring recalculation after being modified.
- **Complete calculation** = calculation of all projects

The calculations are programmed according to a frequency of CRON type (every minute, every hour, at a given hour every day, at a given time on a given week day, ...)

See also:

Global Parameters into the chapter *Automatic planning Calculation*

[back]

Quick planning

The objective is to be able to perform a quick schedule calculation when the automatic schedule calculation function is deactivated in order to obtain an initial result directly on the modified tasks without having to recalculate the capacity

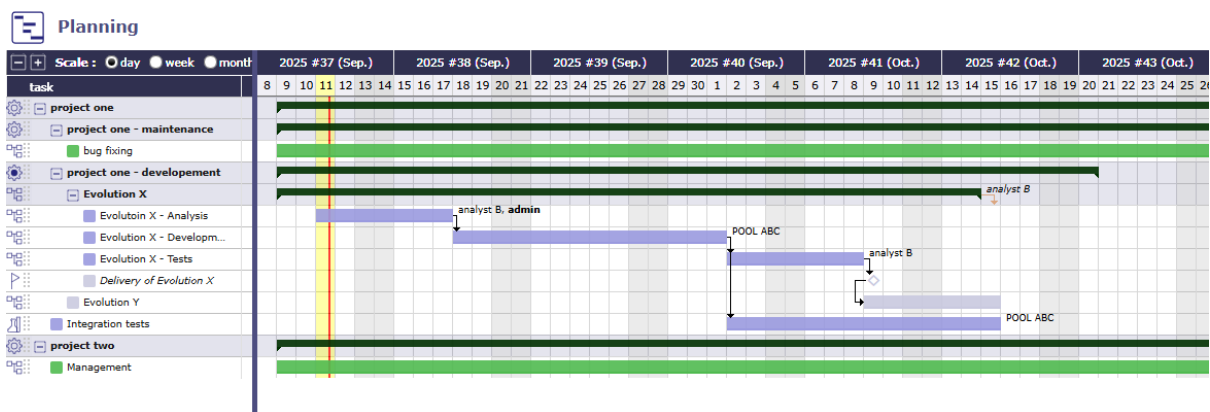


Fig. 39: Quick planning activate

After modifying an activity, the schedule is recalculated locally to redisplay it without having to call the server.

A call to the server is made in the background to save the modified data and the schedule position of each impacted activity.

Only the activity details are refreshed from the server; the schedule is not refreshed using the server's data.

Important: Some modifications will necessarily lead to the recalculation of the capacity (from the server).

Consult the impact table.

Quick planning impacts

Table 1: Triggers

Trigger	NEW	Refresh	OK
Add a line		NEW	Refresh
Delete a line			Refresh
Move a line			Refresh
Indent a line			
Split a line (cut in two)			
Copy a line			Refresh
Change dates "graphically"			OK
Modify a line - inline			OK
Modify a line - detailed			OK
Modify a line - in pop-up			OK
Add a dependency - inline			OK
Delete a dependency - inline			OK
Modify a dependency - inline			OK
Add a dependency - in Gantt (drag & drop)			OK
Modify a dependency - in Gantt (pop-up)			OK
Add a dependency - in table (pop-up detail)			OK
Delete a dependency - in table (detail)			OK
Modify a dependency - in table (detail)			OK
Add an assignment			Refresh
Modify an assignment			Refresh
Delete an assignment			Refresh
Recalculate			OK
Take dependencies into account			OK
Take parents into account for dependencies			OK
Calculate start dates - end of elementary activities			OK
Calculate start dates - end of parent activities			OK
Calculate milestones			OK
Take Finish-to-Start dependencies into account			OK
Take Start-to-Start dependencies into account			OK
Take Start-to-Finish dependencies into account			OK
Take Finish-to-Finish dependencies into account			OK
Save quick calculation dates			OK
Calculate planning dates			OK
Load planning, not started			OK
Load planning, started			OK
Manage bar display			OK
Planning modes			OK
ASAP - as soon as possible			OK
GROUP - common work			OK

continues on next page

Table 1 – continued from previous page

	Trigger	NEW	Refresh	OK
ALAP - finish as late as possible				OK
FIXED - fixed duration				OK
DURATION - duration in hours				OK
WORK - work in hours				OK
DDUR - duration by resource				OK
FDUR - duration by deliverable				OK
FULL HALF QUARTER - regular				OK
RECW - recurring work				OK
RECR - recurring resource				OK
REGU - regular work				OK
NRES - cannot start before validated date				OK
STAR - must start at validated date				OK
FIXED - fixed milestone				OK
FLOAT - floating milestone				OK

Overuse (infinite overbooking capacity)

The overuse option allows you to allocate to all the resources and this, on the projects of your choice, maximum overbooking.

This allows you to see the amount of work that is overused for the resources assigned to the task for each period of time.

The overuse option allows you to allocate to all the resources and this, on the projects of your choice, maximum overbooking.

Warning: This function is dangerous, it does not reflect reality.
For this reason, by default, it is not activated, even for the administrator.

See also:

Specific access in the Planning access rights section

Overuse

Calculate with the critical path


Check the box to enable critical path calculation.

If this box was not checked during the last calculation then the critical path display option in the Gant chart options will not display anything.

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Baseline

The baseline is a record of the planning state at a time T.

Saved a baseline with the button .

Manage planning baselines ✕

Save new Baseline

project All projects ▼

name Baseline Two

date 13/06/2023 ▼

public
 team
 private

Cancel
OK

Existing baselines



id	project	n°	date	name	creator
  #2	All projects	1	12/06/2023	Baseline one	A

Fig. 40: Baseline management

- Enter the project on which to create the baseline.
- You have possibility to save baselines on all projects.
- The list of existing baselines, already registered, is available via this window.
- You can display two baselines on the Gantt chart. Above and below the bars of the Gantt chart.
- You can create as many baselines as you want per day, but you can only save one baseline per day. Each new baseline must replace the previous one.
- You can modify your baseline or delete it to save another one.

An alert message notifies you when a baseline has already been performed on the current day.

You can display two baselines at the same time. The one above the current activity bars of your project. The other below.

Each of them can be personalized with a different color.

This option will be very useful for you to compare possible drifts and explain them.

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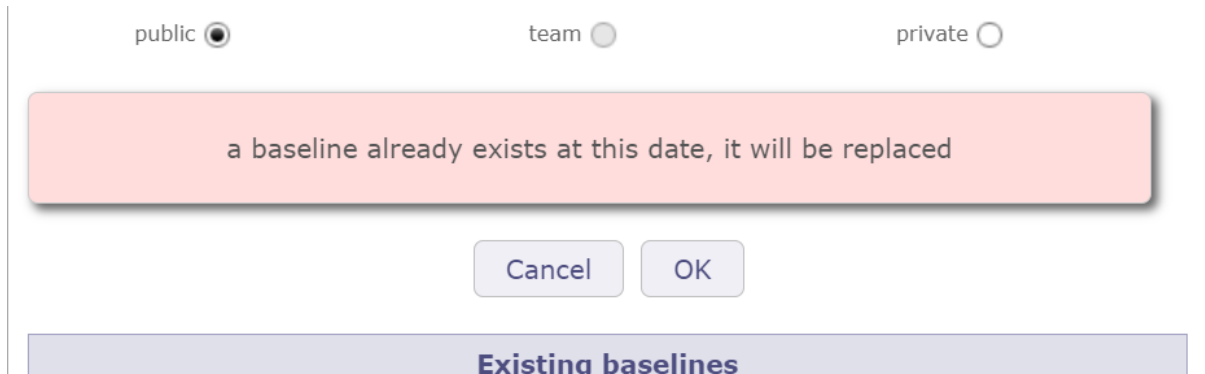


Fig. 41: Error message on baseline management

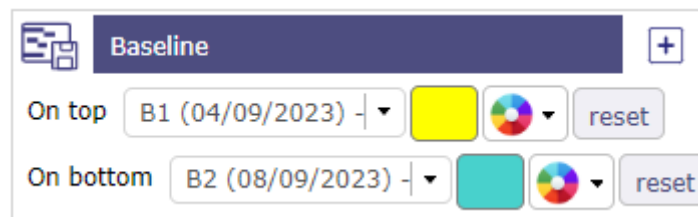


Fig. 42: Display two baselines

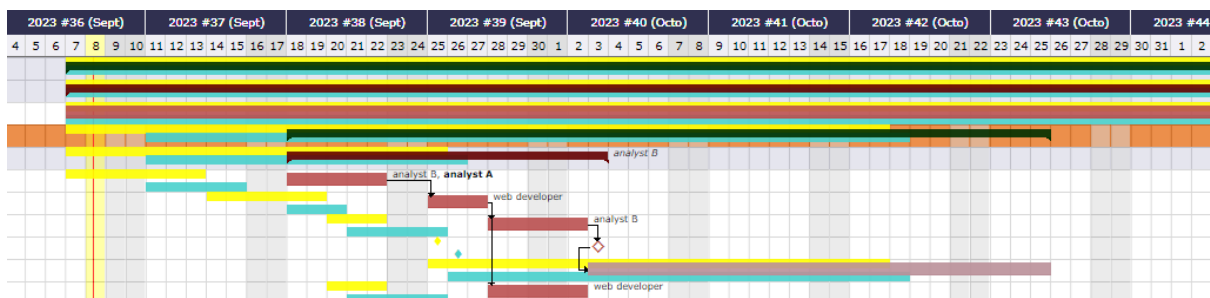


Fig. 43: Baseline display on Gantt chart

Add a new planning element

- Allows you to create a new planning element.
- The element is then added under the previously selected element and with the same level of incrementation
- The element is added to the Gantt chart and the detail area adapts to the content created.
- The details area allows you to complete the entry.

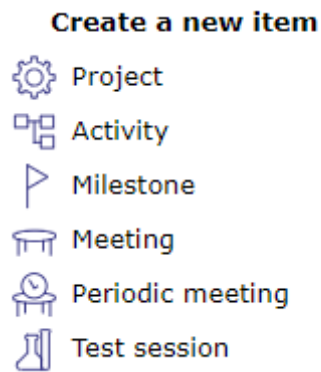


Fig. 44: Popup menu - Create a new item

You can create several elements on the planning view and more on to the *Global planning*.

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Advanced Filter

The advanced filter allows to define clause to filter and sort.

More details: [filters](#)

[\[back\]](#)

Displayed columns

This functionality allows to define columns displayed in the progress data view.

More details: [Display and organize the columns](#).

[\[back\]](#)

Change layout of the screen

You can modify the display of the Planning screen independently of the other screens.

If you choose a vertical display mode globally, you can display the planning view horizontally without modifying the general display.

More details: [Change the layout mode](#)

[\[back\]](#)

Display other options

Clicking the icon will bring up the additional options window with the specific tools for the Gantt.

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Display from... to...

Change the start and / or end date to limit or extend the display of a Gantt Chart.

If the display is truncated because the project is too long, think to change the display scale.

All the project

Check All the project for the Gantt chart to show all project tasks when possible.

Saving dates

Save your dates of display to retrieve them on every connection.

[back]

Other options: checkbox for display

You can display or not, certain information on the Gantt chart.

Show WBS

Click on “Show WBS” to display the *WBS* number before the names.

task	task
<input type="checkbox"/> project one	<input type="checkbox"/> 1 project one
<input type="checkbox"/> project one - maintenance	<input type="checkbox"/> 1.1 project one - maintenance
<input type="checkbox"/> bug fixing	<input type="checkbox"/> 1.1.1 bug fixing
<input type="checkbox"/> project one - developement	<input type="checkbox"/> 1.2 project one - developement
<input type="checkbox"/> Evolution X	<input type="checkbox"/> 1.2.1 Evolution X
<input type="checkbox"/> Evolution X - Analysis	<input type="checkbox"/> 1.2.1.1 Evolution X - Analysis
<input type="checkbox"/> Evolution X - Development	<input type="checkbox"/> 1.2.1.2 Evolution X - Development
<input type="checkbox"/> Evolution X - Tests	<input type="checkbox"/> 1.2.1.3 Evolution X - Tests
<input type="checkbox"/> Delivery of Evolution X	<input type="checkbox"/> 1.2.1.4 Delivery of Evolution X
<input type="checkbox"/> Evolution Y	<input type="checkbox"/> 1.2.2 Evolution Y
<input type="checkbox"/> Web Application V1 - Main test session	<input type="checkbox"/> 1.3 Web Application V1 - Main test session
<input type="checkbox"/> project two	<input type="checkbox"/> 2 project two
<input type="checkbox"/> Management	<input type="checkbox"/> 2.1 Management
<input type="checkbox"/> Projet	<input type="checkbox"/> 5 Projet
<input type="checkbox"/> activité 1	<input type="checkbox"/> 5.1 activité 1

Fig. 45: Task list without and with WBS Display

[back]

Color on left part

You can apply the color of the project or the plannable element on the list (representing the *wbs*) and the Gantt's bars.

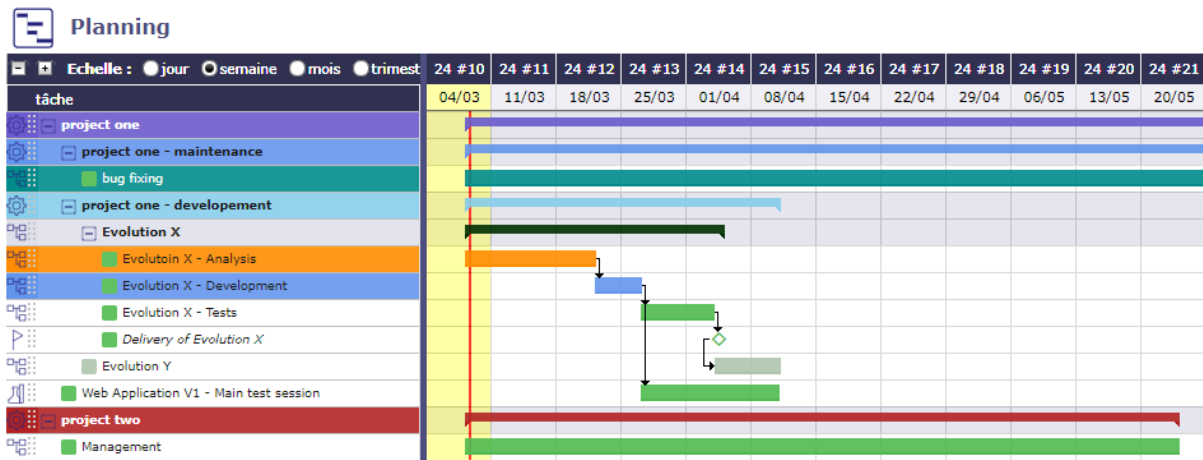


Fig. 46: color applied to the left part of the gantt chart

See also:

Custom color

[back]

Activity colors by type

You can apply the color defined for the *activity types* directly on the Gantt exactly as when you define it in the management section of your activity.

[back]

Resource

The Resource checkbox allows you to directly display the resources assigned to each activity on the Gantt chart.

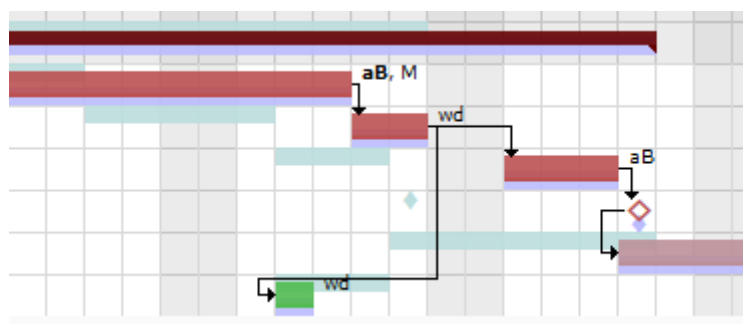


Fig. 47: Display of initials

A user parameter allows you to choose between displaying names or initials.

Choose if you want names, initials or nothing to appear on the Gantt chart.

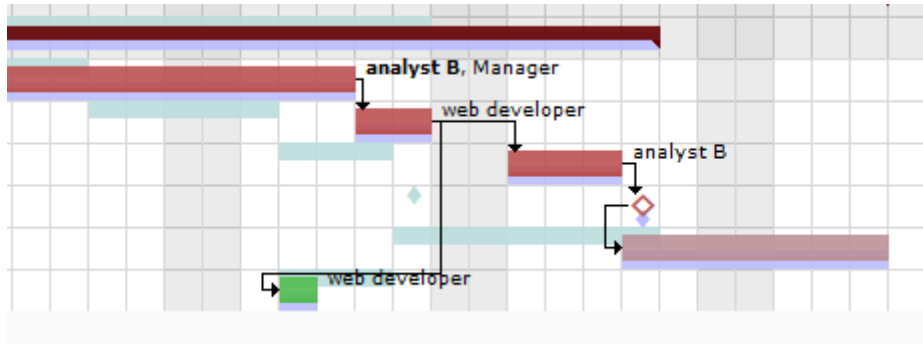


Fig. 48: Display of name

See also:

Tab Display

[back]

Name on bars

You can display the item name directly on the milestone bars including.

A bar that is too small will truncate the name

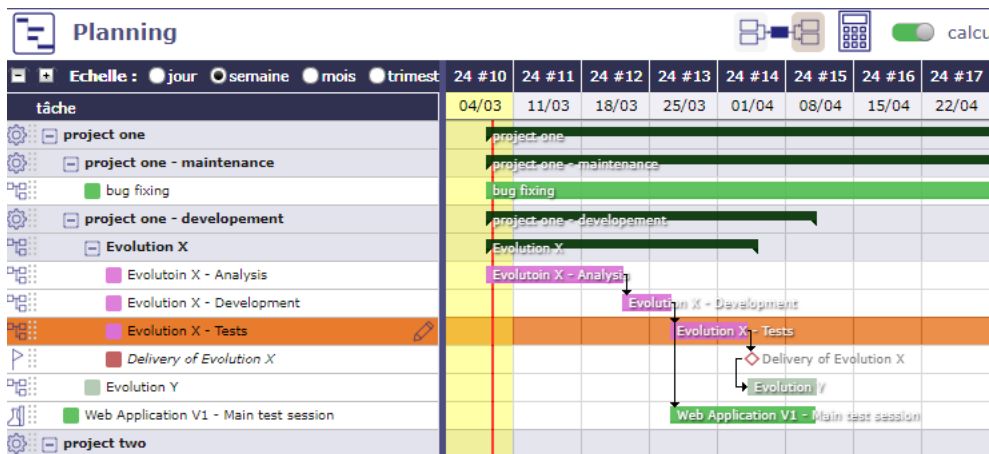


Fig. 49: Bar name

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Critical path

This is the longest sequence of tasks that must be completed for the project to be completed on time.

This is a technique for planning and monitoring deadlines

This Take into account the constraints to determine the duration of the project.

The critical tasks that may impact this duration.

The red net represents the critical path of the project.

ProjeQtOr offers you a critical chain rather than a critical path.

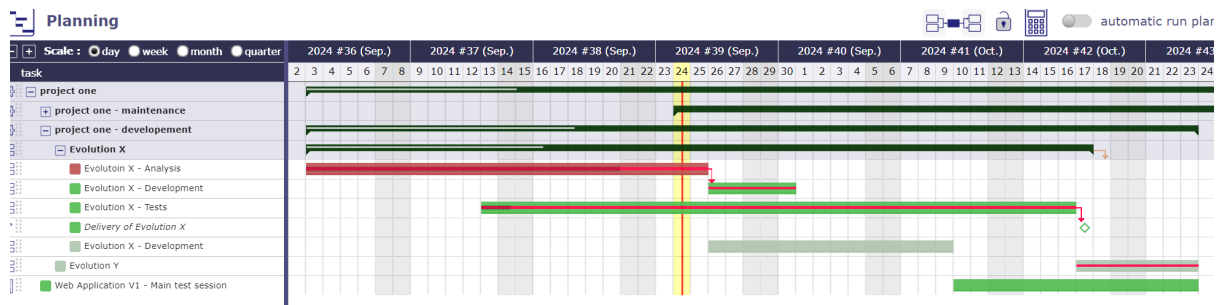


Fig. 50: Display critical Path on the bar

Tip: Calculate your planning with the critical path checkbox enabled if you want to display it on your Gantt chart.

[back]

Technical progress

When this option is activated, you display the production progress of your work units on the Gantt bar in the same way as the actual work.

You can display both progress bars at the same time on the same activity bar.

[back]

Template project

You can display or hide the template type projects in the area list.

[back]

Closed element

Allows to list closed items on the projects.

[back]

Assignment without left work

Assignments that have no more to do will no longer be visible on the detail.

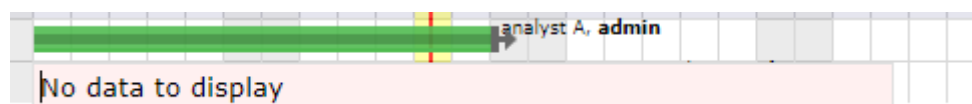


Fig. 51: Hide assignment without left work.

[back]

Lock bar detail

The detail of the bars is visible with a right click directly on the bars.

By default, this detail showing the dispatch of the planned work for the resources, does not remain displayed when you no longer hover over the bar after the right click.

Activate this option so that the detail remains displayed


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Detail on simply click

Single-click detail allows you to click on the lines of the WBS without triggering online editing and display the task detail with a single click.

In this mode, you can double-click on a line to activate inline editing.

When this option is disabled, inline editing is active.

When you click on a line in the WBS structure the icon  appears at the end of the line. Click on it to see the details.

Click on  to close the detail

See also:

[Progress data](#)

[\[back\]](#)

Auto scroll to planning bar

When you click on an item in the list box (WBS) and this item is not displayed/visible directly on the Gantt chart then an auto scroll is executed to this item to visualize it on the chart.

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Planning validation

Allows you to replace the validated dates with the planned dates.

Activate the right in *specific access* > *Planning access right* to see this option.

With this approach, you validate in a way any possible delay on the activities of your project.

Two actions are available: **Always** or **If empty**.

Always

Will overwrite existing values.

If values are entered in the “validated” fields then, they will all be replaced by the planned dates (calculated by the software)

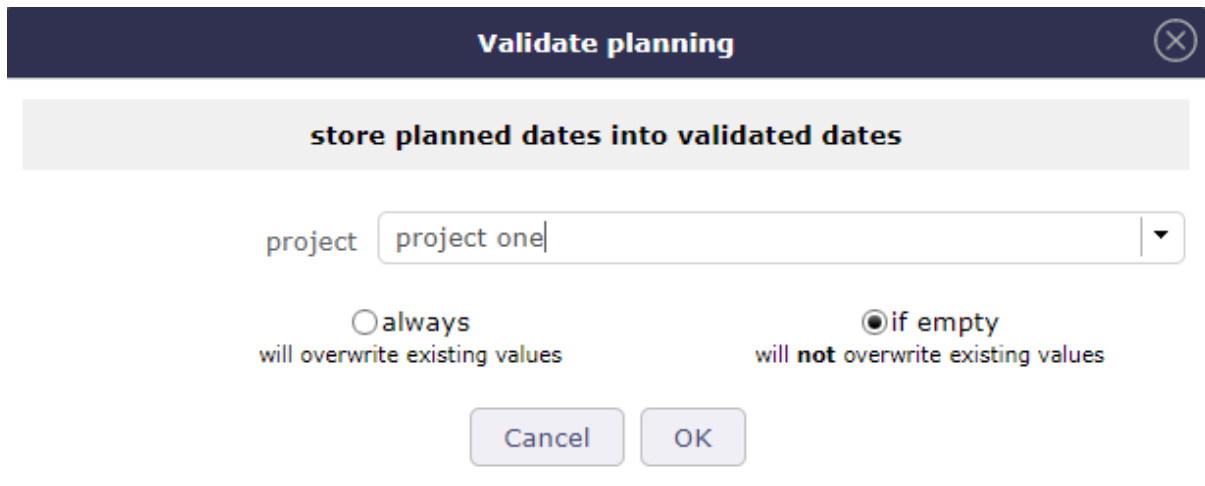


Fig. 52: Store planned dates

If empty

Will not overwrite existing values.

If the “validated” fields are not completed, then these dates will be replaced by the planned dates.

If the “validated” fields are completed then they will be kept.

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Timeline options

Show or hide the timeline and set the maximum number of lines the timeline should be composed of

See also:

project Timeline

[back]

Print and Export the Gantt chart

You can print directly on your printer or export in PDF format or in MS Project format

Print planning

Click on the button  to print the Gantt chart in A4 and / or A3 format.

The print quality, despite printing or exporting on a reduced scale, remains very qualitative and offers very little loss of detail in the diagram.

Export planning to PDF

Allows to export planning to PDF format.

Export can be done horizontally (landscape) or vertically (portrait) in A4 and / or A3 format with great detail even with a zoom

Export contains all details and links between tasks and also include a pagination.

And the option **Repeat Headers** allow you to print or export your planning in multiple pages

Fig. 53: Export planning to PDF

This feature will execute export on client side, in your browser. Thus the server will not be heavy loaded like standard PDF export does.

It is highly faster than standard PDF export.

Warning: This technically complex feature is highly dependent on the browser and is not compatible with all of them. It is compatible with the latest versions of IE (v11), Firefox, Edge and Chrome. Otherwise, the old export function will be used.

Tip: Forced feature activation/deactivation

- To enable this feature for all browsers, add the parameter **\$pdfPlanningBeta='true'**; in parameters.php file.
 - To disable if for all browsers, add the parameter **\$pdfPlanningBeta='false'**; Default (when **\$pdfPlanningBeta** parameter is not set) is *enabled with Chrome, disabled with other browsers*
-

Export planning to MS Project

You have the option of exporting XML for MS Project.

Click on the button  to start the export.

A **user parameter** allows you to enter if you want to add the assignments when exporting the project to MS-Project format.

If not, the name of the resources will not be available in the MS-Project application

See also:

User Parameters

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Planning History

When you perform a calculation on the schedule, you can consult its dedicated history.

In parallel with the history of the elements, you can find the names of the projects that you have recalculated, the duration of the calculation and whether it was completed successfully.

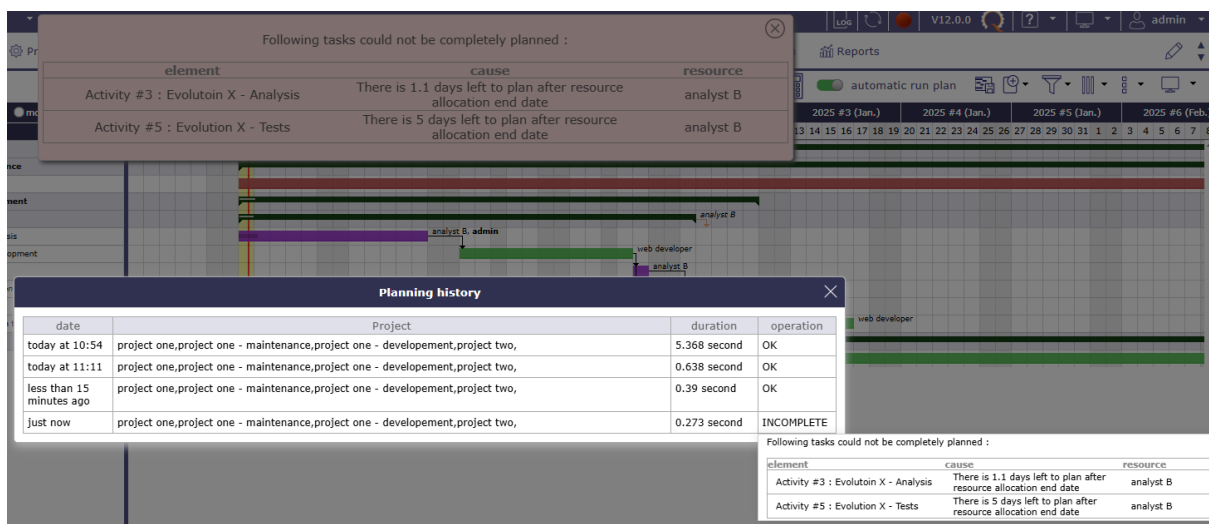


Fig. 54: Timeline

In case of a calculation error, the term incomplete is indicated and the cause of the error is displayed on mouse hover.

6.4.2 Project Timeline

You can view the timeline of your projects in the timeline.

The timeline allows you to have a faster visibility on the progress in time of your projects.

The timeline offers a linear view of some selected tasks.

You can add/remove tasks to the Timeline with a single right click.

- Timeline scale automatically adapts to selected tasks.
- You can hide the Timeline in the Gantt planning view options.
- You can add milestones.

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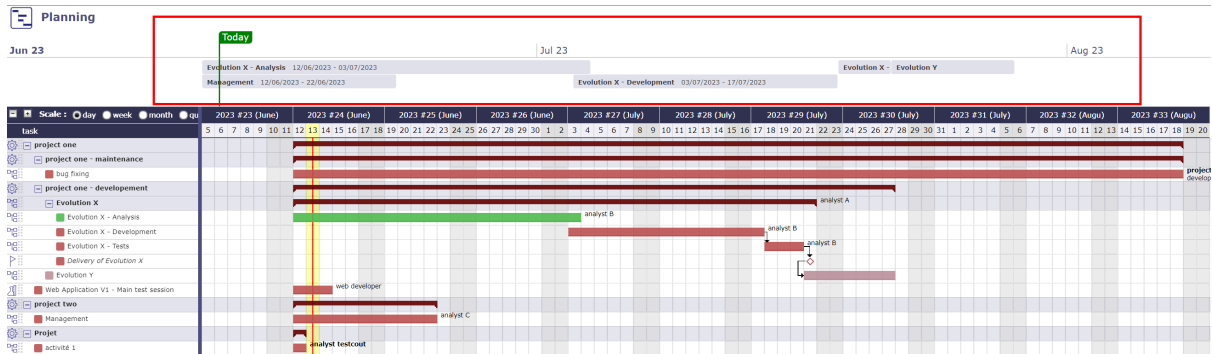


Fig. 55: Timeline

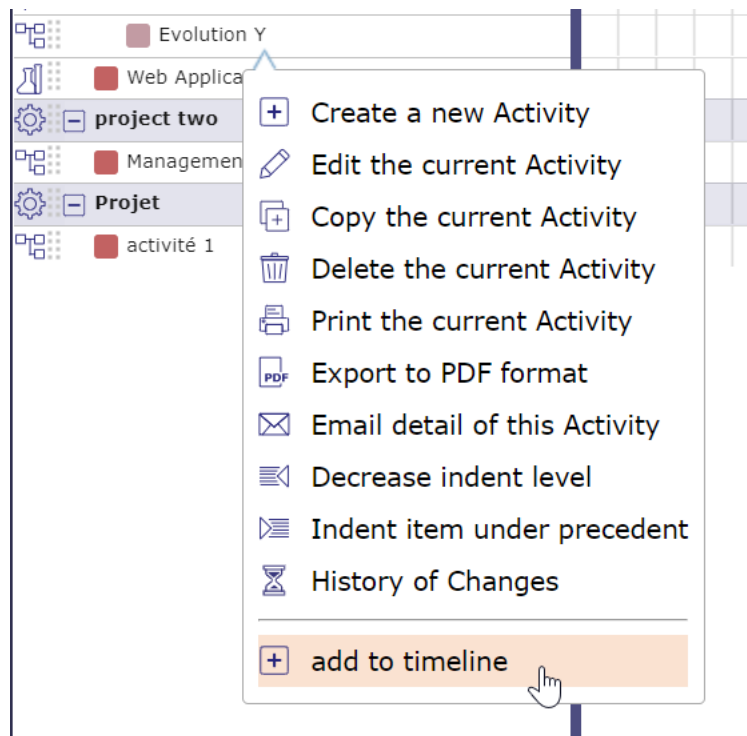


Fig. 56: Add to timeline

6.4.3 Task List: WBS structure

The task list displays the planning elements in hierarchical form by dividing the *WBS*.

Tasks are regrouped by projects and activities.

See also:

The projects displayed depend on the selection made with the *Project selector*

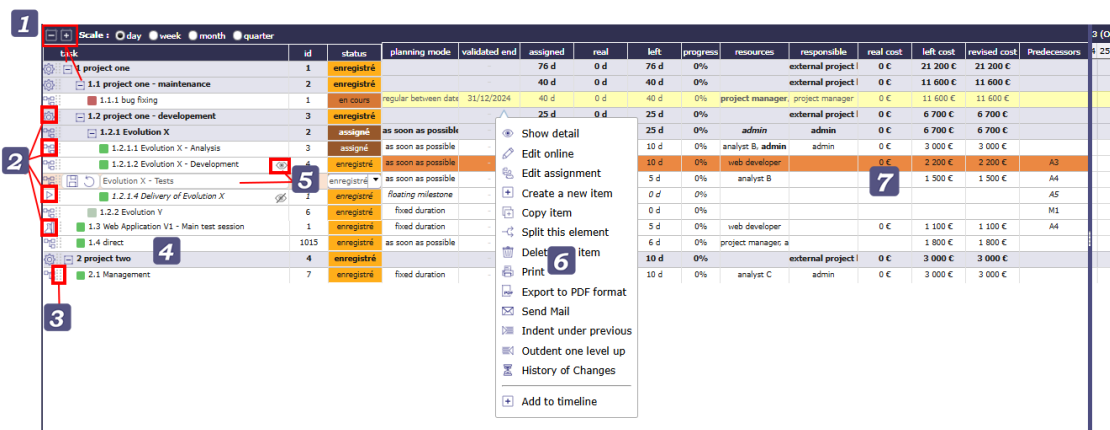


Fig. 57: Task list & progress data view

Interface areas:

- 1 Show or Hide element
- 2 Icon of element
- 3 Reorder Planning elements
- 4 WBS
- 5 Edit online
- 6 Context menu
- 7 Progress data

Show/Hide items









- Click on the plus or minus of the header area to close and open the groups in the list area.
- Click on the icons at the top of the list to expand or collapse all project groups at the same time
- Click on the group row to expand or collapse the group only

See also:

Scale
[back]

Icon of element

A specific icon appears to the left of each item type for faster identification.


-  Project
-  Project to recalculate (the Gantt diagram to display with the latest settings)
-  Project under construction
-  Project fixed in the planning
-  Activity
-  Milestone
-  Meeting
-  Test session

Other items can be displayed in the *Gantt Chart* (action, decision, delivery...)

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Reorder and copy

Reorder the planning

The selector  allows to reorder the planning elements.

Note: Ability to move multiple tasks at one time from one location to another using the key control to select the lines and then dragging and dropping them.

Warning: If you move an activity to a new project, the assigned resource must be allocated to the new project to allow this move.

copy lines

You can click on one or more lines to copy them.

Use the Shift key to select consecutive lines and the Control key to select independent lines.

Right-click the selection and choose where you want to copy these lines.

The lines will then be copied after this location.

If any of the copied elements have successors, then the dependencies will be copied as well.

You can choose to copy assignments to schedulable items as well as copy items to a saved state.

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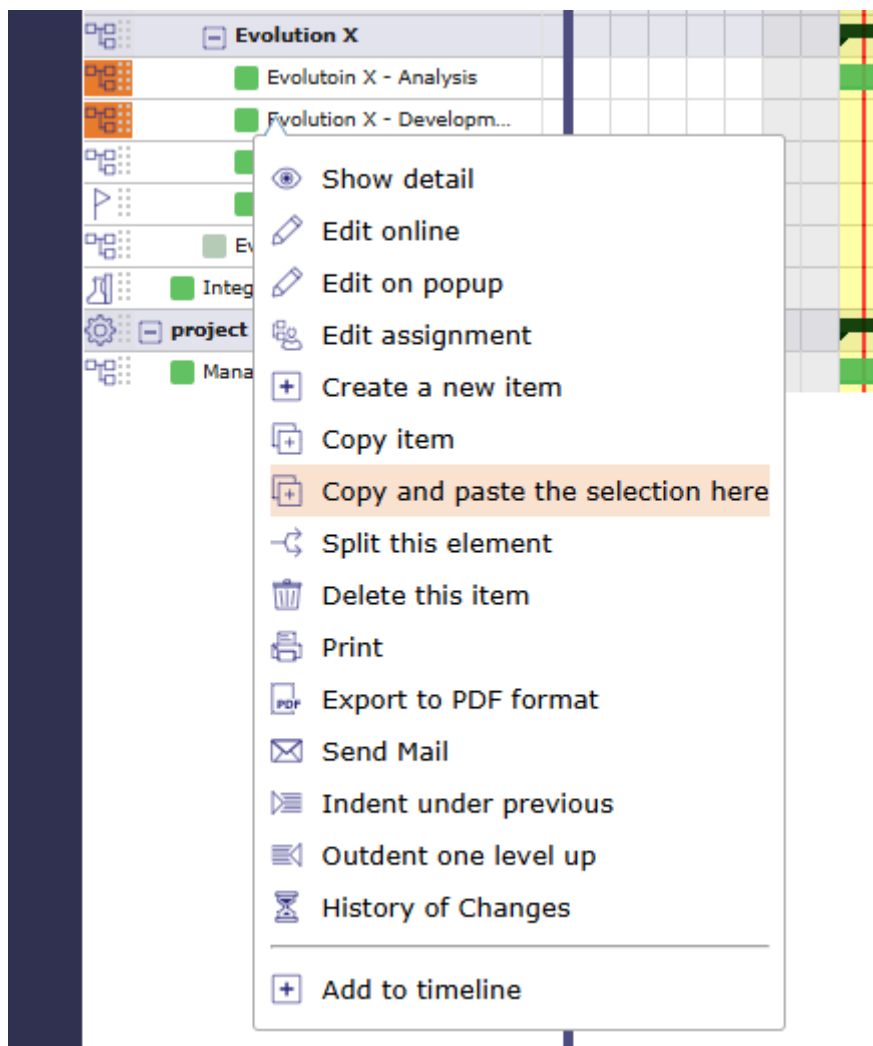


Fig. 58: copy lines from wbs

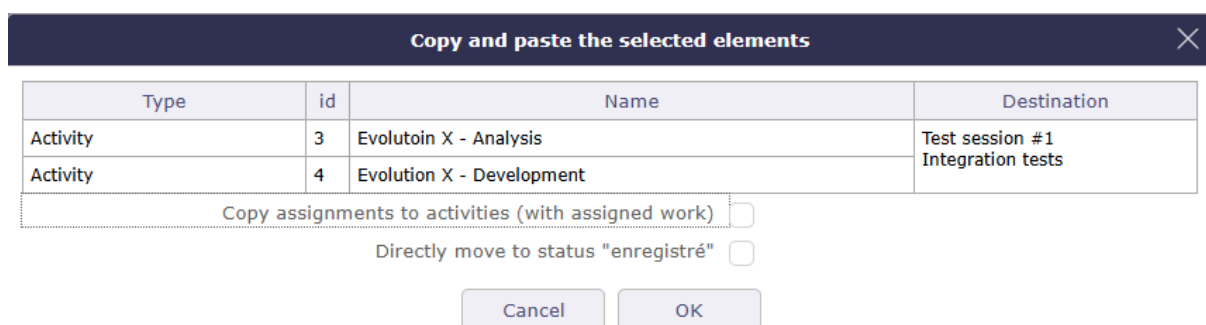


Fig. 59: Past lines from wbs

WBS

Each line corresponds to an element of your project.

This is the structure of your project with all the steps, activities and actions to be carried out to complete it.

In front of each name given to your schedulable element, a dynamic number is assigned.

This number is representative of the level of your element.

If you change the order of the lines by moving elements then these numbers will be automatically updated with all its successors.

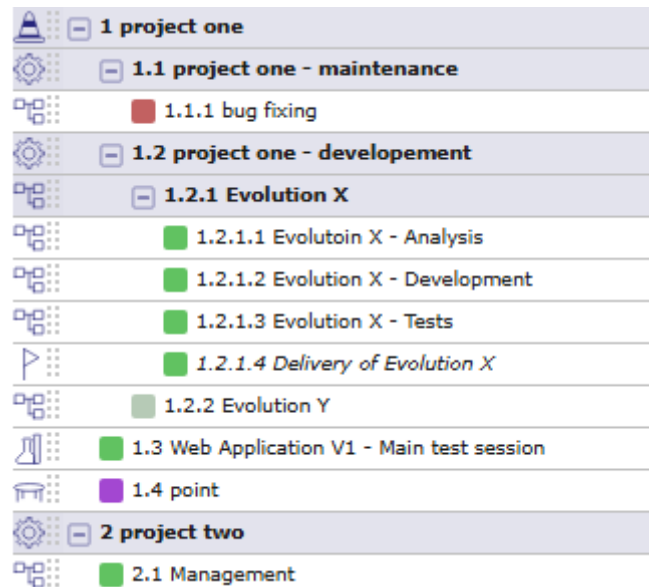



Fig. 60: Structure list of WBS

The colored blocks in front of the WBS task names reflect the colors of the bars.

- They are red/light red when a task is late.
- They are green/light green when the task is on schedule.
- They are purple when a resource is unavailable for the task.
- They are gray when the item is closed or canceled.

Tip:

- If the **Detail on simply click** option is enabled, click on a line to display the detail area
 - If the **Detail on simply click** option is not enabled, then click on  to view the detail.
-

See also:

detail area.

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Edit on line

Most rows and fields in the displayed columns can be edited from this view.

Click the field once if the Single Click Details option is disabled, double-click if the option is enabled.






You can edit these lines directly on the list.

Each row and each column field can be edited from this view.

Evolution Y	A6		enregistré	5 d	M1	Adaptation	500	fixed duration
Integration tests	TS1		enregistré	10 d	A4	Session de tests d'év	500	fixed duration
project two	P4	external project	enregistré	-		Régie	500	
Management	A7	admin	enregistré	50		Gestion	500	fixed duration
Projet Cycle en V	P18		enregistré	121 d		Forfait	500	
Début	M3		enregistré	-		Date clé	500	floating milestone

Fig. 61: Edit on line

Click the field once if the **Simple click on details** option is disabled, double-click if the option is enabled.

- Click on  to recorded the modification
- Click on  to cancel the modification
- Click on  to display the detail
- Click on  to edit the line
- Click on  to close the detail

The controls relating to the choice of certain fields, such as for the planning modes, are well executed even in free edit mode.

Either with a single click if the “detail on single click” option is deactivated, or by double clicking if the option is activated.

You can use your keyboard to move around and confirm your changes.

- Tab to move within the row.
- ↑, ↓, ←, → keyboard navigation arrows to move between rows and lists.
- Enter to confirm the change, like Ctrl + S.
- Double click on the ID to copy it and paste it into the predecessor column

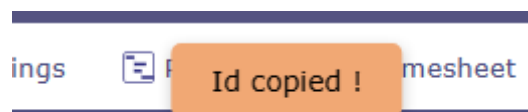


Fig. 62: Double click for copy

Dependencies

Predecessor type dependencies can be displayed in the displayed columns and can be edited online directly. You just need to fill in the type of predecessor, the ID of the predecessors so that they are taken into account.

- A1 for Activity #1
- P1 for project #1
- M1 for Milestone #1
- TS1 for TestSession #1
- MG1 for Meeting #1
- PM1 for Periodic Meeting #1

tâche	id	prédécesseurs
project one	P1	
project one - maintenance	P2	
bug fixing	A1	
project one - development	P3	
Evolution X	A2	
Evolutoin X - Analysis	A3	
composant	M2	A3
Evolution X - Development	A4	A3
Evolution X - Tests	A5	A4;A3
Delivery of Evolution X	M1	A5
Evolution Y	A6	M1
Web Application V1 - Main test session	TS1	A4
project two	P4	
Management	A7	

Fig. 63: example display for ID and dependencies

Tip: To add multiple predecessors at once, separate the items with a semicolon or comma.

For example A1;A2 or A1,A2.

Important: If user enters just ID, without letter, consider it is an Activity.

Note: For all the rest of the elements that could serve as predecessors, you can enter the full name directly

For example to create a dependency with an Action as predecessor then enter Action#ID.

[back to WBS] - [back to Chart view]

Context menu

By right clicking on each of the lines you have access to the Gantt submenu which allows you to access certain actions by going through the main menu of the screen.

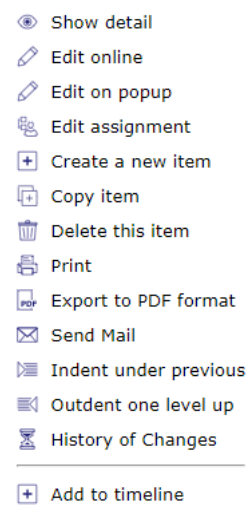


Fig. 64: Right click menu

[\[back to WBS\]](#) - [\[back to Chart view\]](#)

Progress data

The progress data view allows you to visualize the progress of all the elements of one or more projects with their consolidation. Each line corresponds to an element.

To display this information, drag the splitter between the list box and the Gantt chart.

These lines can be edited directly on this view.


task	planning mode	status	type	id	priority	validated start	validated end	validated...	validated c...	validated
1 project one		enregistré	Forfait	1	500	07/09/2023	17/11/2023	52 d		110 d
1.1 project one - maintenance		enregistré	Manual billed	2	500	07/09/2023	17/11/2023	52 d		100 d
1.1.1 bug fixing	regular in half days	en cours	Tâche	1	500	07/09/2023	17/11/2023	52 d		100 d
1.2 project one - developement		enregistré	Manual billed	3	500	11/09/2023	18/10/2023	28 d		10 d
1.2.1 Evolution X	as soon as possible	en cours	Évolution	2	500	18/09/2023	02/10/2023	12	0	10
1.2.1.1 Evolution X - Analysis	as soon as possible		Tâche	3	500	18/09/2023	22/09/2023	5 d		10 d
1.2.1.2 Evolution X - Development	work together		Tâche	4	500	25/09/2023	27/09/2023	3 d		0 d
1.2.1.3 Evolution X - Tests	fixed duration		Tâche	5	500	28/09/2023	02/10/2023	3 d		0 d
1.2.1.4 Delivery of Evolution			Date clé	1	500	02/10/2023	02/10/2023	1 d		0 d
1.2.2 Evolution Y	must not start before validated start date		Évolution	6	500	02/10/2023	25/10/2023	17 d		0 d
1.3 Web Application V1 - Main test session	must start at validated start date		sion de tests d'év	1	500	28/09/2023	02/10/2023	3 d		0 d

Fig. 65: Progress data view

For each planning element, the progress data are displayed at them right.

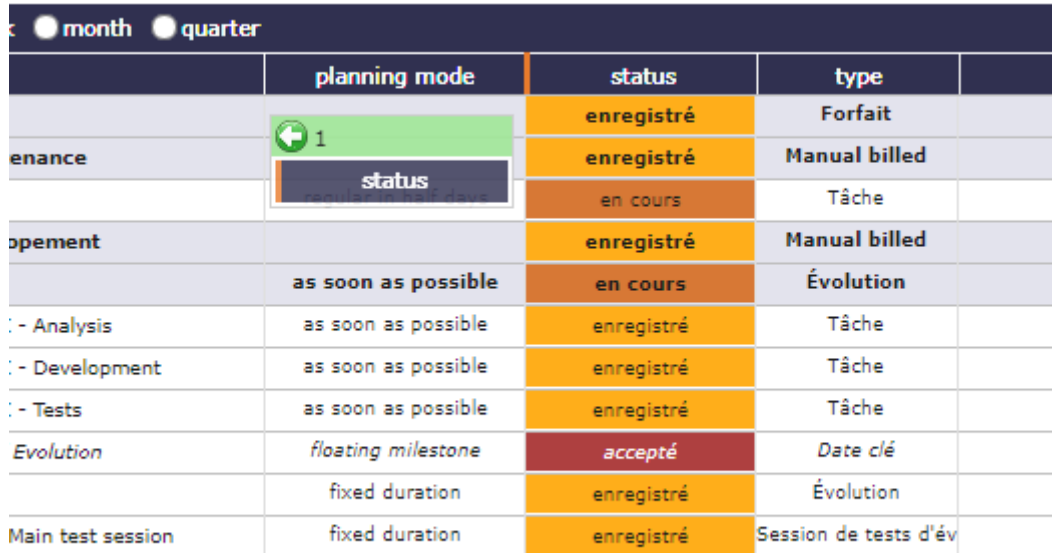
The columns are customizable as on all the other screens of the application.

you can add or remove the columns you are interested in using column management.

Click on  to manage them.

See also:

Display and organize the columns



	planning mode	status	type
		enregistré	Forfait
enance	1	enregistré	Manual billed
		en cours	Tâche
opement		enregistré	Manual billed
	as soon as possible	en cours	Évolution
- Analysis	as soon as possible	enregistré	Tâche
- Development	as soon as possible	enregistré	Tâche
- Tests	as soon as possible	enregistré	Tâche
Evolution	floating milestone	accepté	Date clé
	fixed duration	enregistré	Évolution
Main test session	fixed duration	enregistré	Session de tests d'év

Fig. 66: Move column

You can change the order of columns and resize them from this view without going through the column management menu.

Drag and drop the column to the right or the left. Click on the splitter between two column to resize the column.

[back]

6.4.4 Gantt chart view

The Gantt chart view is a graphical representation of the progress data of a project.

For each planning element, a bar is associated with it

Interface areas

- 1 Scale
- 2 The Gantt chart's Bars
- 3 Dependencies
- 4 Milestone
- 5 Detail of the work
- 6 Project Timeline
- 7 Edit details on line
- 8 Context menu

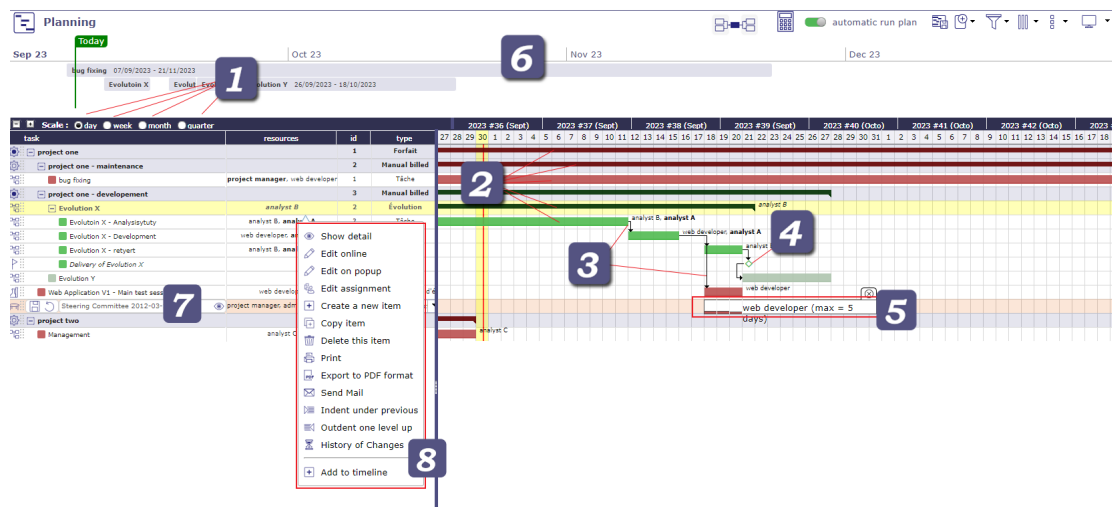


Fig. 67: Gantt chart view

Scale

Scale available: daily, weekly, monthly and quarter.

The Gantt chart view will be adjusted according to scale selected.

When you are in the planning view on the wbs and gantt area and details area, you can move from one scale to another using the wheel control on your mouse.

- Mouse wheel up to increase the scale*.
- Mouse wheel down to decrease the scale.
- When you continue to increase after the semester, then we loop and return to the day scale, the smallest.
- Outside of these areas, the mouse wheel will increase the zoom of your browser.

[back]

Gantt chart's bars

The bars in the gantt chart graphically represent a line of your *WBS* structure.

We visualize the start and end dates and therefore the duration of the task.

The bars displayed in the gantt chart can appear with different colors. Each color has a meaning.

Current date bar



Fig. 68: Current date bar

day, week, month or quarter, according to scale selected.

The red line in yellow collumn display the current day and time.

Yellow column indicates the current

Pale green bar

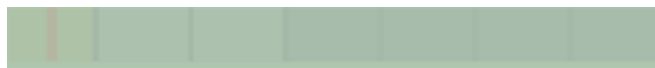


Fig. 69: no charge

without assigned work - Planned end date < or = Validated end date

**Con-
di-
tion:**
Ac-
tiv-
i-
ties

Green bar



Fig. 70: all is well

are available and meet workload - Planned end date < or = Validated end date

**Con-
di-
tion:**
As-
signed
re-
sources

Pale mauve bar



Fig. 71: no charge

tion - no calculations between projects were carried out - graphical representation - without load - modifications to the task without taking into account the steering levers - Planned end date < or = Validated end date

**Con-
di-
tion:**
Fast
cal-
cu-
la-

Mauve bar



Fig. 72: all is well

tion - no calculations between projects were carried out - graphical representation - with load - modifications to the task without taking into account the steering levers - Planned end date < or = Validated end date

**Con-
di-
tion:**
Fast
cal-
cu-
la-

Pale red bar



Fig. 73: no charge and date planned is superior to validated date

without assigned work - Planned end date > Validated end date

**Con-
di-
tion:**
Ac-
tiv-
i-
ties

Red bar



Fig. 74: Overdue tasks

Validated end date - Real end date if completed task > Valited end date

**Con-
di-
tion:**
Planned
end
date
>

Purple bar



Fig. 75: Impossible to calculate the remaining work

is not or is no longer available on an activity.

The calculator is trying to plan the workload.

The resource assigned to the activity is unable to be planned for this task (absence, calendar, assignment or assignment periods, etc.); then the bar turns purple.

**Con-
di-
tion:**
If
a
re-
source

Pink bar

Thanks to the setting on the management of inherited dates, you will be able to display the pink color to indicate that the end date of this task was recovered from a successor element.



Fig. 76: Impossible to calculate the remaining work

into account validated end dates of activities as a priority using a global parameter.

When this option is activated, the validated end date, if it is not provided, is automatically inherited from the successor or parent.

**Con-
di-
tion:**
Plan-
ning
can
take



In
the
case

of
an

inheritance and the Planned end date > Validated end date, the bar turns pink.

Pale pink without workload and bright pink with workload.

▼ Progress

	validated	planr
start date	<input type="text"/>	27/C
end date	08/03/2024	03/C
duration	<input type="text"/> d	<input type="text"/>

Fig. 77: Inherited date

When the validated dates are inherited then they are displayed in italics and grayed out whether in the list area or the detail area.

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Special bars

Some features offer different color codes.

Surbooking and overuse bar



Fig. 78: Capacity overbooking

time on the standard capabilities of your resources to plan more projects that you will not process.

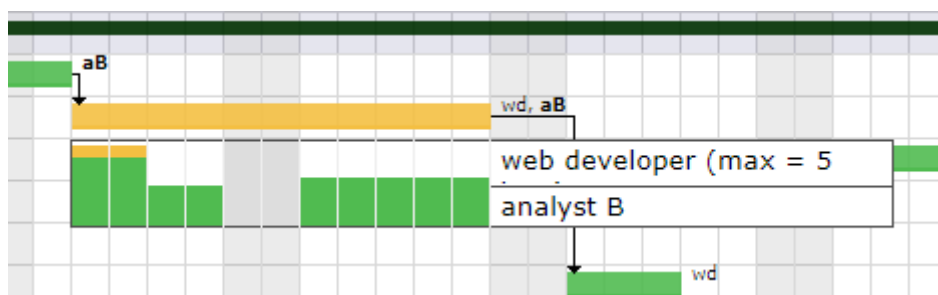


Fig. 79: Surbooking or overuse view on Gantt chart

overuse

**Con-
di-
tion:**
Add
ex-
tra
work

**See
also:**

*Man-
ag-
ment
of
sur-
book-
ing
pe-
ri-
ods
and*

Surcapacity



Fig. 80: Overcapacity of resources

Condition: The capacity of the resource has been changed. It can be under capacity or over capacity. That is to say, it does less or more than its FTE.

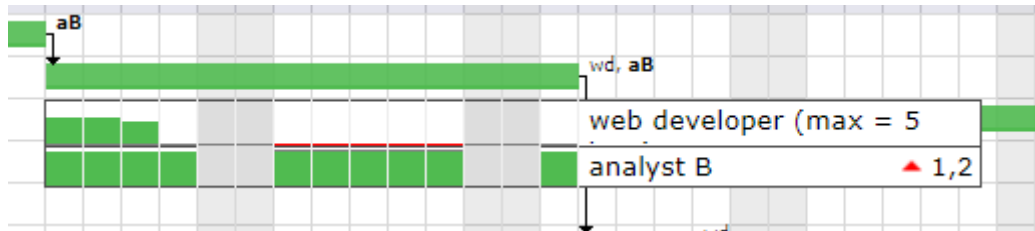


Fig. 81: Surcapacity view on Gantt chart

See also:

Variations in resource capacity

Real work



Fig. 82: Work in progress

sents the percentage of completion based on the actual progress (Assigned - Real work) versus the length of the Gantt bar.

**Con-
di-
tion:**
the
length
rep-
re-

Technical progress



Fig. 83: Technical progress

represents the percentage of completion of the units of work that you enter manually (Delivered - completed) in relation to the length of the Gantt bar.

You can display both progress bars at the same time on the Gantt chart bar.

**Con-
di-
tion:**
the
length



Fig. 84: Progress bars for actual work and work units

Consolidation bar



Fig. 85: Consolidation Bar

play of the dates consolidated by the group of planning elements for a project

Custom colors

You can apply the color of your choice on the bars of the Gantt chart representing activities, milestones and meetings.

If the Planned end date > Validated end date then the bar should be colored red.

In case you have set a custom color, this state will still be indicated by a thin line at the bottom of the bar.

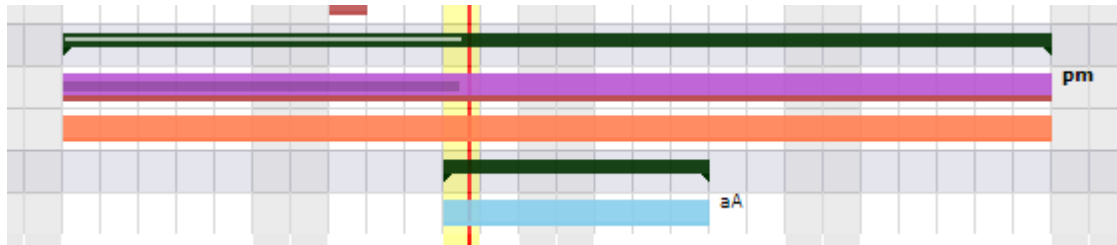


Fig. 86: Custom colors on the gantt chart bars

Con-
di-
tion:
graph-
i-
cal
dis-

And
in
the
task
list,
where
the
indi-
ca-
tors
re-
main

the original color.

A parameter in the tools box allow to apply the color on the left part of the Gantt chart. See: *Apply color on left part*

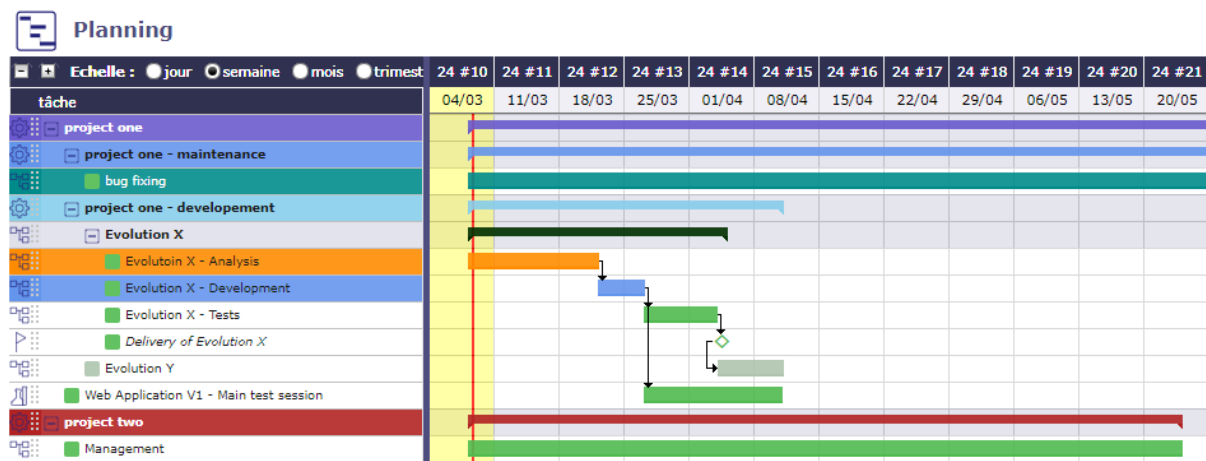


Fig. 87: color applied to the left part of the gantt chart

Click on the reset button to come back to original colors.

You can also set a default color based on the *activity type*.

Bars for color blind

With the help of options, whether in the general settings or in the calculation settings, you can change the colors or have new ones.

The color of the bar adapts to color blind people if you have activated the option.

GREEN BAR

the green color of the bar changed to fluorescent green.



Enable this option in *user parameters*

RED BAR

the red color of the bar changed to striped purple to clearly mark the difference.



Enable this option in *user parameters*

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Item name display

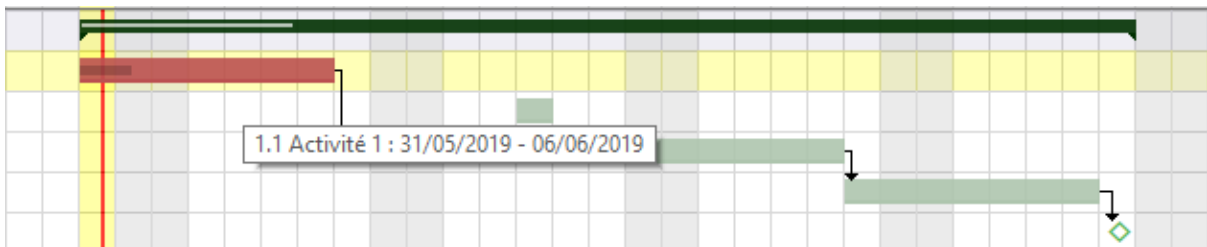


Fig. 88: Item name and planned dates on the selected bar

Move the cursor over the bar to display item name and planned dates.

or activate the “*show bar name*” check box directly on the Gantt view in the planning screen options.

Dependency

Others sections

- *Predecessor and successor*
- *Milestones*

Dependencies allow to define the execution order of tasks (sequential or concurrent).

All planning elements can be linked to others.

Dependencies can be managed in the Gantt chart and in screen of planning element.

Dependencies between planning elements are displayed with an arrow.

Important: Strict mode for dependencies

The strict dependency mode forces the successor planning element not to start on the same day as the same predecessor but the next day. Even if the task is finished before the end of the day.

To have the successor start on the same day or before the end of the predecessor task, select NO for strict mode or you can also put a negative delay.

The strict dependency mode is a *global parameter*. By default, the strict dependency mode is set to YES.

Create a dependency

To create a dependency, left click on a bar of the gantt (the predecessor) and slide towards the successor.

You can also create dependencies with the predecessor and successor tables at the bottom of the details area.

Remember than the first task always drives the second.

Predecessor element				Successor element				
+	element	name	status	end date	+	element	name	status
	Activity #3	Evolutoin X - Analysis		02/08/2021		Activity #5	Evolution X - Tests	
						Test session #1	Web Application V1 - Main test session	

Fig. 89: Predecessor and Successor section - In the NAME field, icons are displayed to indicate the type of dependencies

- Click on on the corresponding section to add a dependency link.
- Click on to edit the dependency link.
- Click on to delete the corresponding dependency link.

Modify a dependency

Click on the arrow which turns orange, a pop up is displayed allowing you to modify the type and one to add a possible delay.

The predecessor and successor elements of the dependencies are displayed at the top of the popup.

Tip: Multi-line selection is possible using Control or Shift key while clicking.

You can change the type of the dependency. An image accompanies the types to make your choice easier.

You can add a delay on the dependencies. The delay can be positive or negative. Negative delay allows overlapping of certain tasks.

The delay is shown on the Gantt chart and the bubble indicating the delay adapts according to the length of the delay.

The dependency line will be extended by as many days as the deadline entered. Otherwise it will start the next day by default.

See also:

the strict mode of dependencies

Add a Predecessor to element Activity #4

linked element type :

linked element :

#2 - Evolution X
 #3 - Evolutoin X - Analysis
 #4 - Evolution X - Development
 #5 - Evolution X - Tests
 #6 - Evolution Y

delay (late) : days between predecessor end and successor start

type :

comments :

Fig. 90: Dialog box - Predecessor or Successor element

update

#3 | Evolutoin X - Analysis

#4 | Evolution X - Development

type

delay (late) days

comments

Fig. 91: Dependencies dialog box

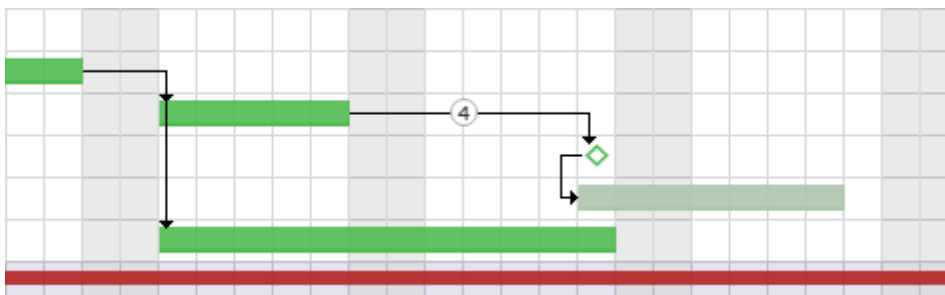


Fig. 92: Delays on dependencies

Dependency types

ProjeQtOr offers three types of dependency. The fourth type **start-End** is not represented.

End-Start

The second activity can not start before the end of the first activity.

Start-Start

The successor can not begin before the beginning of the predecessor. Anyway, the successor can begin after the beginning of the predecessor.

End-End

The successor should not end after the end of the predecessor, which leads to planning “as late as possible”.

Anyway, the successor can end before the predecessor. Note that the successor “should” not end after the end of predecessor, but in some cases this will not be respected:

- if the resource is already 100% used until the end of the successor
- if the successor has another predecessor of type “End-Start” or “Start-Start” and the remaining time is not enough to complete the task
- if the delay from the planning start date does not allow to complete the task

Hidden dependencies

When dependencies are hidden, project folded or parent activity folded on the planning view for example, then a pale orange arrow is displayed in front of the selected element

It means that this element has a constraint that is not currently displayed on the planning view.

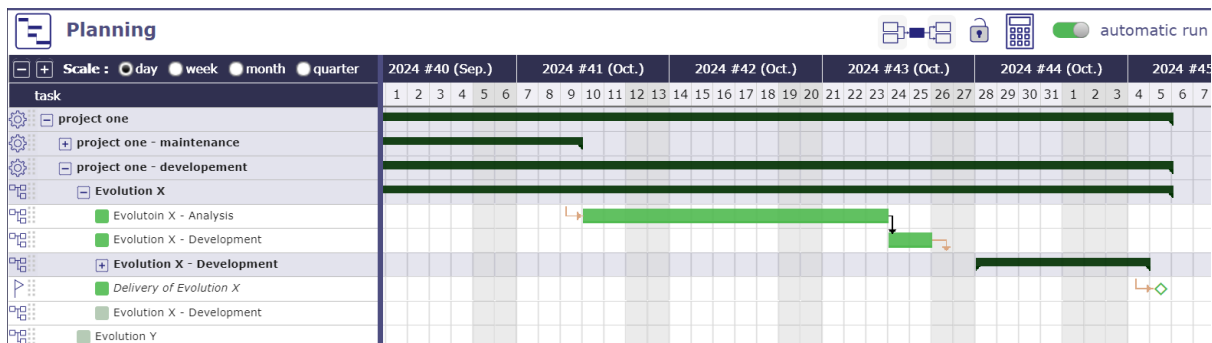


Fig. 93: Hidden dependencies

The direction of the arrow tells you if it is a successor or a predecessor.

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Milestone

Milestones appear as small diamonds. Filled if completed, empty otherwise.
Color of diamond depends on milestone progress.

Ongoing milestone and in times

Planned end date < Validate end date and the task is not done



Completed milestone and in times

Planned end date < Validate end date and the task is done



Ongoing milestone and delayed

Planned end date > Validate end date end date and the task is not done



Completed milestone and delayed

Real end date > Validated end date and the task is done



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Detail of the work

ProjeQtOr also allows you to see the distribution of the workload assigned to the resources.

Right click on a bar to see the detail.

An *option* allows you to display the details of a bar rather than only seeing it on hover.

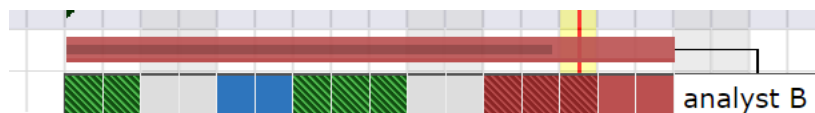


Fig. 94: Display details of the work

The lines are sorted by resource name.

Colors code

- Planned workload
- Real work - charged to the timesheet
- Excess workload over dates
- Real work with Excess workload over dates
- Absence of the resource

Warning: You have to selected day, week or month scale to display detail or a message will ask you to switch to smaller scale.

Quarter is not available for th detail.

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6.4.5 Details area

The details area is the same as on all the ProjeQtOr element screens and adapts according to the selected element.

See also:

Details area in common section

6.5 Planning View

6.5.1 Other planning views

Planning global

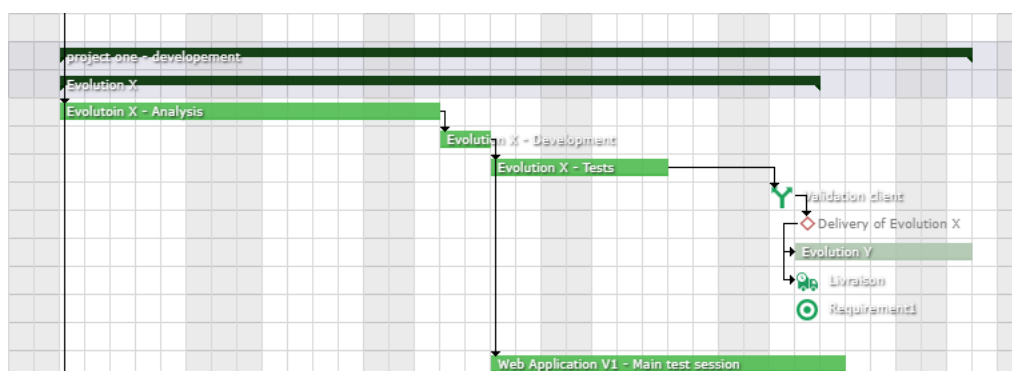


Fig. 95: Global planning

The global planning allows to create and visualize any type of element (project, activity, milestones, risk, meeting, action ...)

- Add and Show any new planning element on Gantt chart
- The created item is added in the Gantt and detail window is opened.
- The detail window allows to complete entry

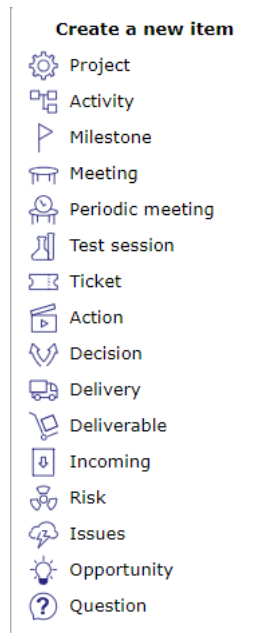


Fig. 96: Create a new item

- Project planning and activity planning calculation can be done in the Gantt.

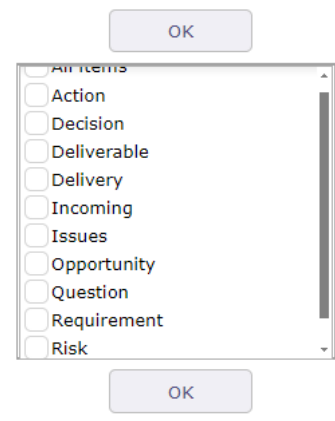


Fig. 97: Display items

- Requirements can be displayed but you will not be able to create them from the planning view

Projects portfolio

This screen displays only the projects on the diagram. The activities and other elements that make up the planning are hidden.

Displaying the columns corresponding to the project fields behind the slider allows you to display all the information about your project in a single view: status, priority, dates, charges, duration, costs, etc.

The possibility of displaying personalized fields using the customization plugin is also possible. Click the Columns button to choose which fields to display.

It displays milestone and project dependencies only.

Note: This section describes specific behavior for this screen. All others behaviors are similar to *Gantt Chart*

screen.

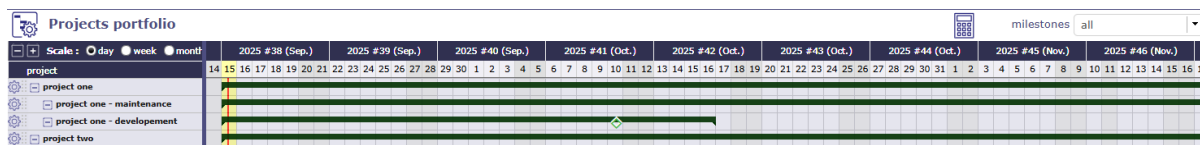


Fig. 98: Gantt (Projects portfolio)

Show milestones

- You have the option to show or hide milestones.
- It is possible to define the type of milestone to display. All milestones are available: deliverable, incoming, key date, etc.
- The milestones are displayed directly on the bar of your project.

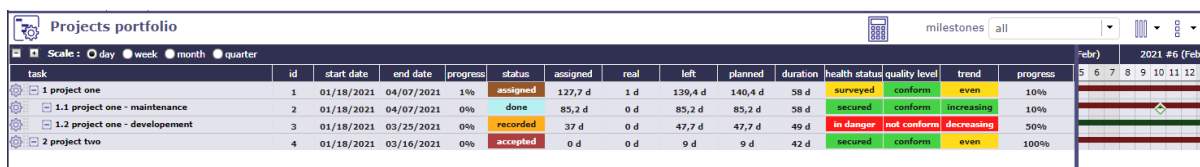


Fig. 99: Projects portfolio columns

As in the planning view, you display a menu dedicated to the portfolio view by right-clicking on the list of projects.

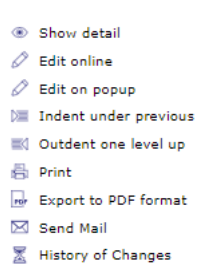


Fig. 100: Right menu

Resource planning

Others section

- *Resource*
- *Diary*

This screen displays the Gantt chart from a resource perspective.

The assigned tasks are grouped under the resource level.

Regarding resource planning, periodic group meetings are under his responsibility.

Ability to view assigned activities without charge.

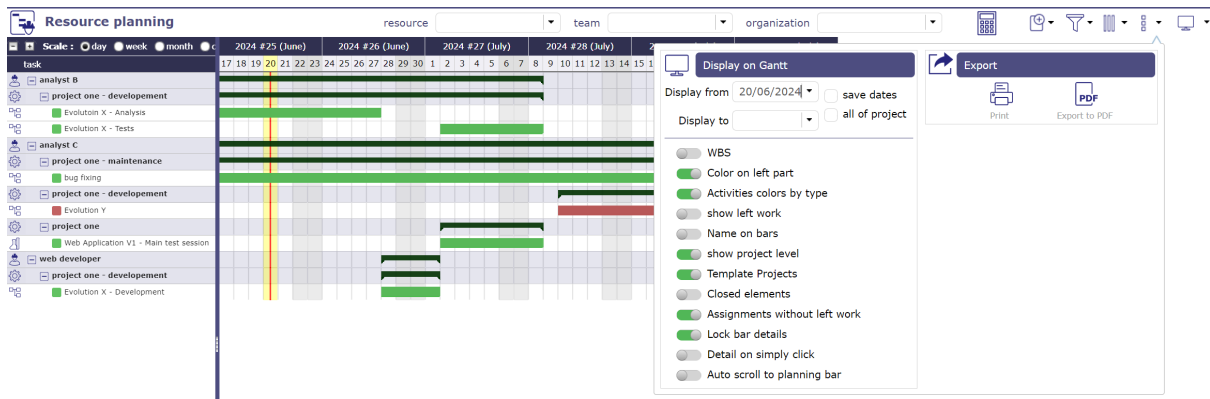


Fig. 101: Gantt (Resource planning)

Limit display to selected resource or team

- Click and select one resource to display only his data.
- Click and select one team to display only data of resources of this team.
- Click and select one organization to display only data of resources of this organization.

Gantt charts for resources

The bars used in the Gantt chart for resources differ slightly from the standard planning bars.

Most of the bars used in the Gantt chart are the same as for standard planning.

See: *Gantt chart's bars*.

GREY BAR



Fig. 102: all is well

sources are available and meet workload, validated or scheduled dates do not conflict with other items.

The gray bar in the middle graphically represents the actual percentage progress relative to the total duration of the activity.

This makes appear some planning gap between started work and reassessed work.

Dependencies behavior







- Links between activities are displayed only in the resource group.
- Links existing between tasks on different resources are not displayed.

Note: This section describes specific behavior for this screen.

All others behaviors are similar to *Gantt Chart* screen.

**Con-
di-
tion:**
As-
signed
re-

Tools

- Click on  to start the *Planning calculation*.
- Click on  to create a new element.
- Click on  to apply many filters and manage *Advanced filters*.
- Click on  to organize the *columns* of the progress data view.
- Click on  to display the sub-menu.
- Click on  to display this screen in horizontal or vertical mode.

Display dates

This functionality allows to define columns displayed in the progress data view.

More details: *Display and organize the columns*.

Display options into the subMenu

Display options are the same as on the planning view.

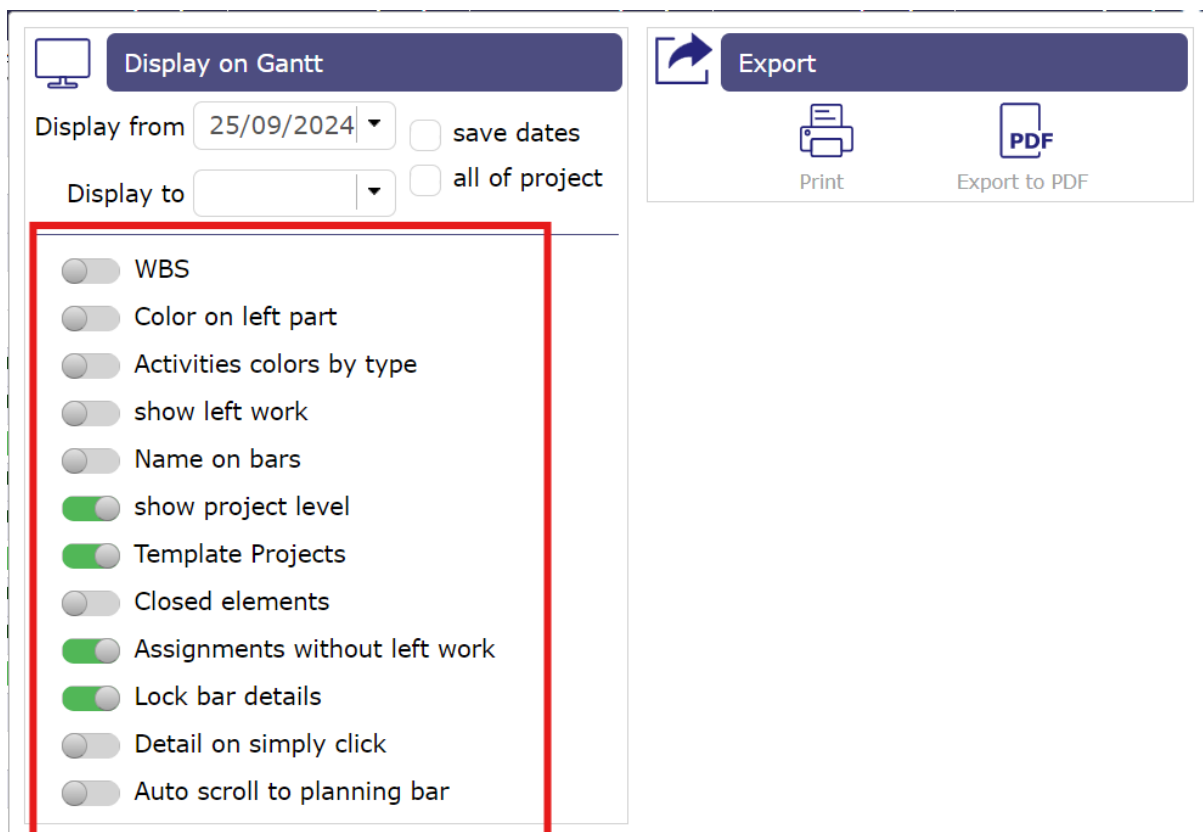


Fig. 103: Gantt chart options

Global view

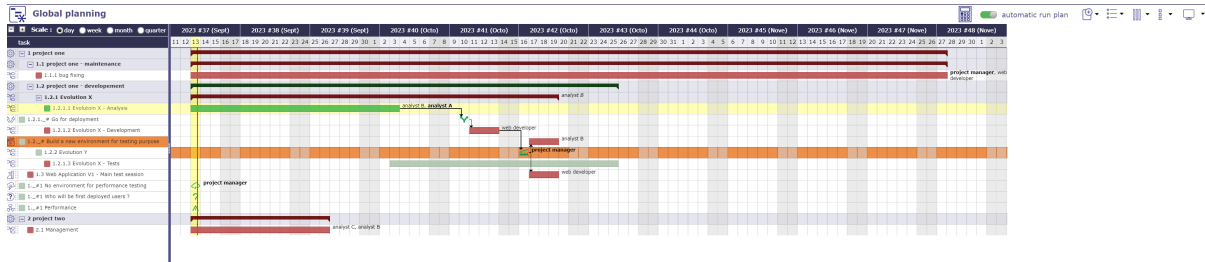


Fig. 104: Global view screen

The “Global view” screen lists all the main objects created during a project. This allows you to quickly search through all types of items available.

You can also choose to display only certain items through the list to display

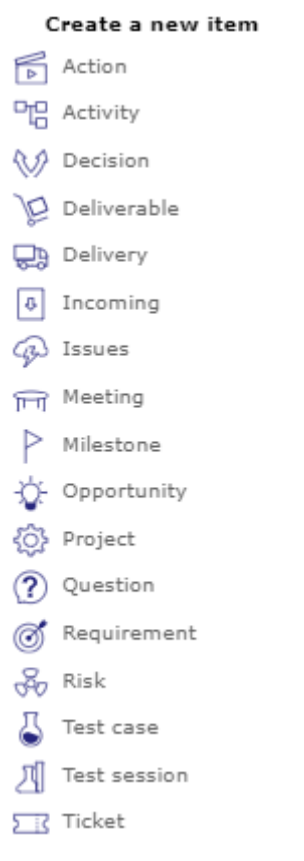


Fig. 105: Display one or more items

6.5.2 Critical resource

The critical resources screen will allow you to identify the resources that will cause the project to drift and not miss certain key dates due to lack of capacity on the project.

This amounts to calculating the complete schedule and all your resources in infinite overbooking mode.

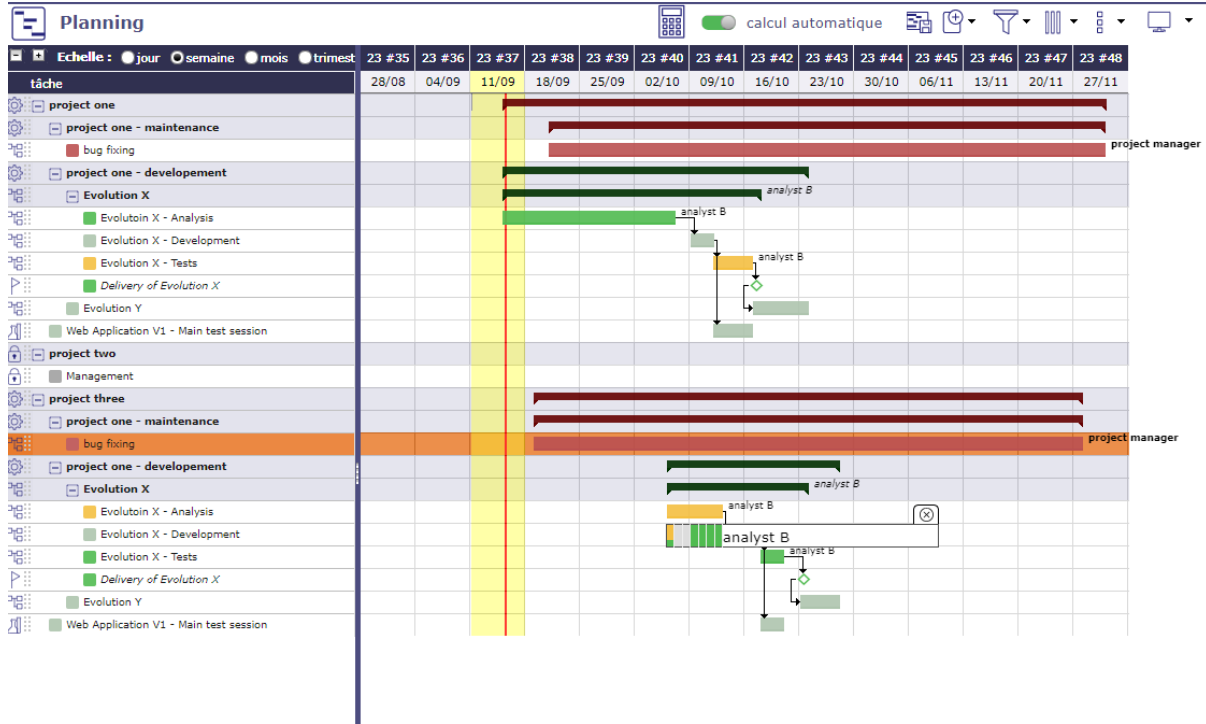


Fig. 106: Planning in infinite overbooking mode

Critical resource list

The critical resources table tells you for each critical resource displayed:

Critical resources

Calculate from:

Display from:

Display to:

maximum critical resources:

scale: week month quarter

- All projects
- project one
- _project one - maintenance
- _project one - development
- project two
- project three
- _project one - maintenance

Resource
Planning
Export
Scenario
Work plan

Critical resources list

order	resource	capa.	avail.	planned on the period			indicato	work margin
				normal mode	overbook mode	including overused		
1	analyst B	1	261 d	26,7 d	26,7 d	1,7 d	-89	234,3 d 90 %
2	project manager	1	261 d	20 d	20 d	0 d	-92	241 d 92 %

Fig. 107: Critical resources list

- The name of the resource

- Its load available
- Its load used
- Overbooking load
- Its rank (Index used to calculate the margin = difference between available - used)

This table of critical resources is broken down by project.

Projects using critical resources

The Projects using critical resources table allows you to visualize the number of days late per project and which resources are causing the delay.

The strategic value has no impact on the display of projects and the determination of critical resources. This (numerical) value is free and left to your discretion.

It can be a value between 1 and 100, or a number of Business, regardless, this will allow you to identify whether projects consuming critical resources are strategically sound and therefore worth implementing.

Critical resources planning

The **Critical resources list by period** table is a representation of the current planning, not the ideal planning.

The display will be done by period defined on the scale (week, month, quarter) or by displaying the “overbooking load” necessary to optimize the planning.

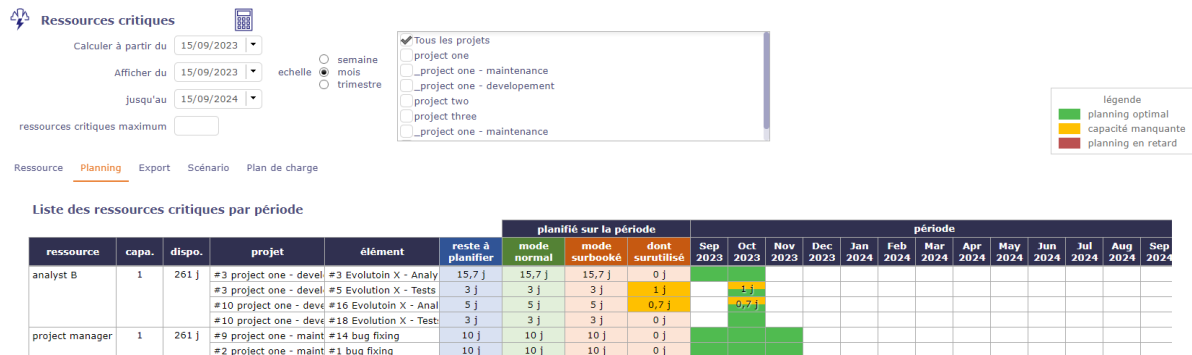


Fig. 108: Critical resource screen

Formatting results and indicators

Indicator is a percentage = (Margin - Subooked) / Available (* 100)

- **Define threshold**
 - Default Red = “< 20%”
 - Default Orange = “< 5%”
- **Late planning**
 - In red, the resource does not have sufficient capacity to complete the task on time
 - planned end date > Validated end date - overbooking on the activity
- **Missing capacity**
 - In yellow, the resource does not have sufficient capacity to complete the task on time but is not the cause of the task delay.

- Planned end date > Validated end date - no overbooking
- **Optimal planning**
 - In green, the resource has sufficient capacity to complete the task on time
 - Planned end date < Validated end date - no overbooking on the activity

Critical resources scenario

Without affecting your basic schedule, you can simulate starting one or more project(s) on later dates in months.

The screenshot shows the 'Critical resources' simulation interface. On the left, there are controls for 'Calculate from', 'Display from', and 'Display to' dates, along with a 'scale' selector (week, month, quarter) and a 'maximum critical resources' input field. A dropdown menu lists project selection options: 'All projects', 'project one', 'project one - maintenance', 'project one - development', and 'project two'. Below this is a table of resource scenarios:

wbs	project	type	start	end	late (month)
1	project one	Forfait	02/02/2024	31/12/2024	0
1.1	project one - maintenance	Manual billed	02/02/2024	31/12/2024	0
1.2	project one - development	Manual billed	02/02/2024	11/03/2024	1
2	project two	Régie	02/02/2024	12/04/2024	0

To the right, a summary table for 'POOL ABC' shows:

pool of resources	capacity (FTE)	additional capacity (FTE)	from a given date
POOL ABC	3	1,0	12/02/2024

Fig. 109: possible scenarios for a simulation on projects containing critical resources

You can also add additional capacity to your pools to check if the possible addition of resources can improve the planning of your projects.

You can apply a particular date for the new capacity to be added which will decide when the new capacity can be added.

Critical resources work plan

You can obtain directly on the critical resources screen the report on the load planning on a selected resource for the indicated period.

The screenshot shows the 'Critical resources' work plan interface. It features a 'Work plan' tab and a chart for 'analyst B'. The chart displays 'Resource capacity' as a line graph and 'project one - development' as a bar chart. The x-axis shows dates from 2023-09 to 2024-09, and the y-axis shows capacity from 0 to 34. The resource capacity fluctuates between approximately 20 and 24 FTE. The project one - development bars show capacity requirements of about 11 FTE in 2023-09, 8 FTE in 2023-10, and 8 FTE in 2024-09.

Fig. 110: load planning report for a resource

6.5.3 Planning & Dynamic work plan

In addition to the planning view and the dynamic work plan view, ProjeQtOr offers a view that combines the two screens.

This screen allows you to quickly visualize how the load quantity affects the dates of your projects.

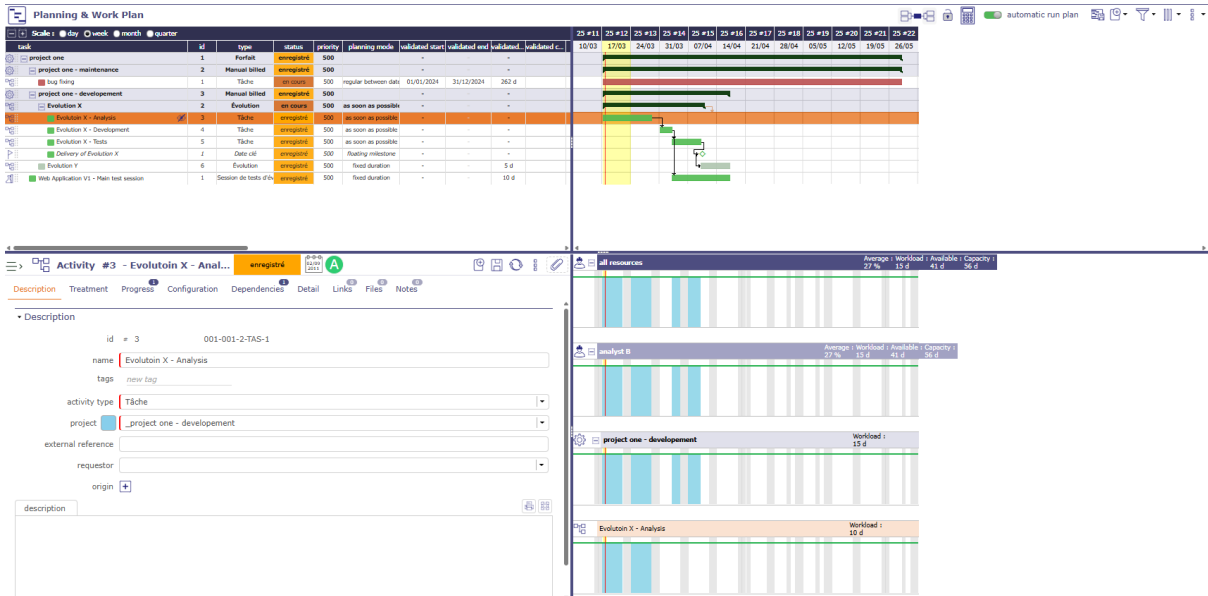


Fig. 111: Planning and dynamic workplan screen

Note: The dynamic load plan combined with the planning was created for reading.

The table therefore does not offer the display options and restrictions proposed on the dedicated screen.

ProjeQtOr offers a dynamic view of the load plan of your resources.

You can view the past and forecast load as well as the future capacity of a resource or all resources and pools.

The display can be restricted using filters.

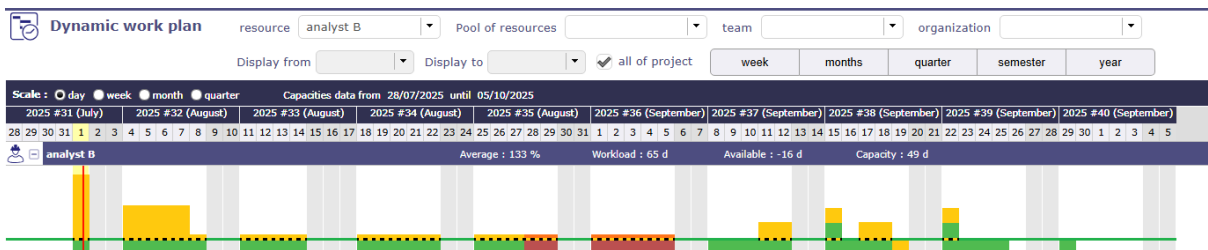




Fig. 112: Dynamic Work plan screen

The graph will represent the past and future workload in the form of bars, similar to the Gantt bar detail and the resource or group capacity as a line.

The data is automatically limited to the data for the project(s) selected in the project selector.

Click on  to open the line of the resources.

All resources of the selected projects are displayed with the work details for each.

Click again on the  of a resource to display all the activities on which the resource has work.

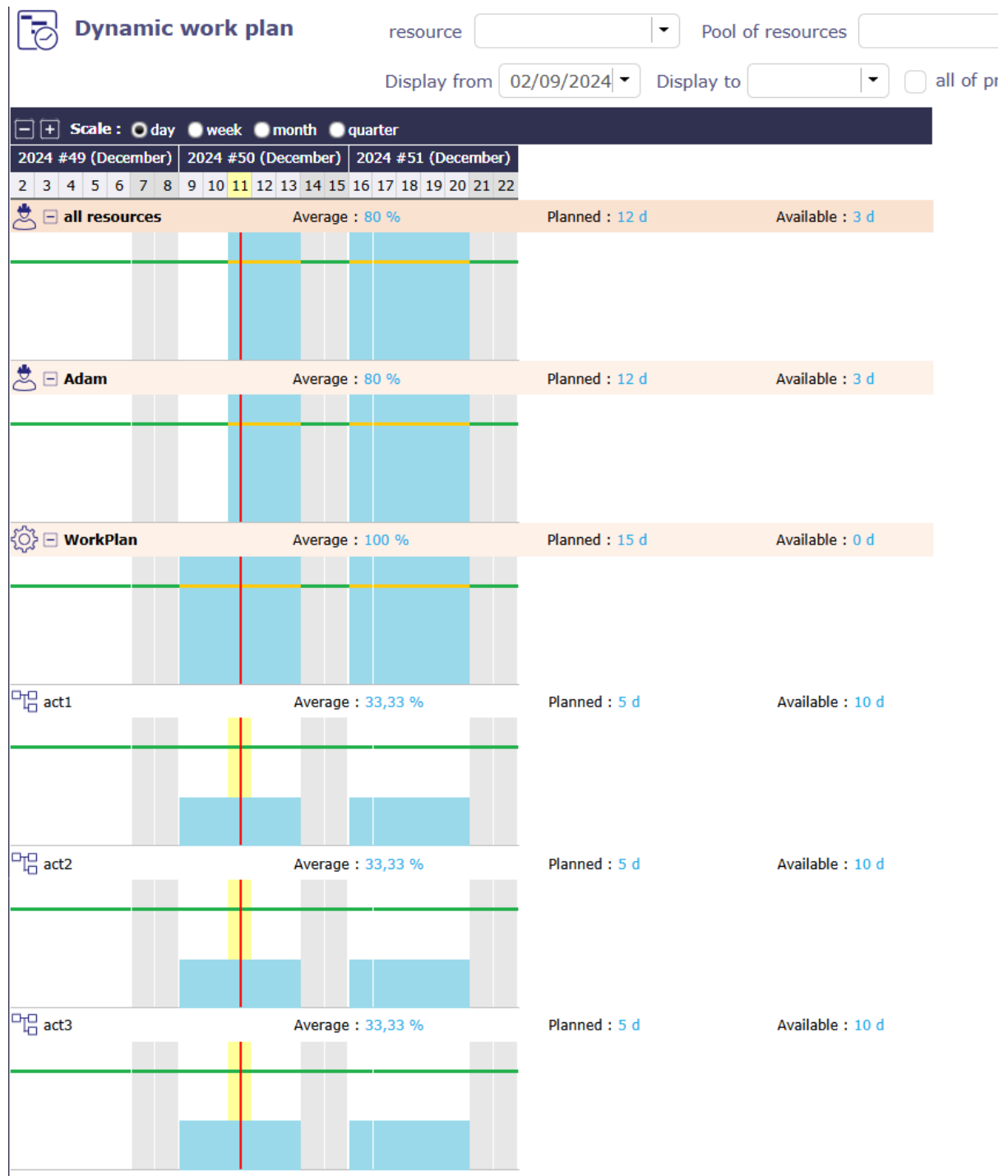


Fig. 113: Workplan level

Hover over an activity to see its details

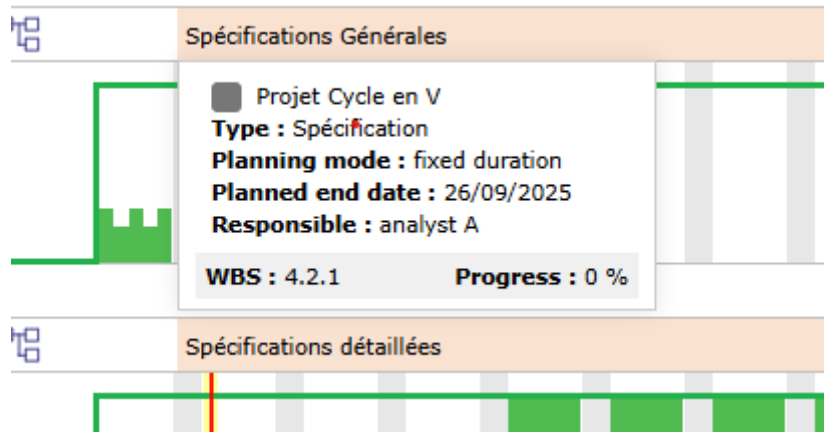


Fig. 114: Details of the activity on dynamic workplan

Tip: An option in the screen display options allows you to display the project level or not.

Many options allow you to customize the display of the dynamic work plan.

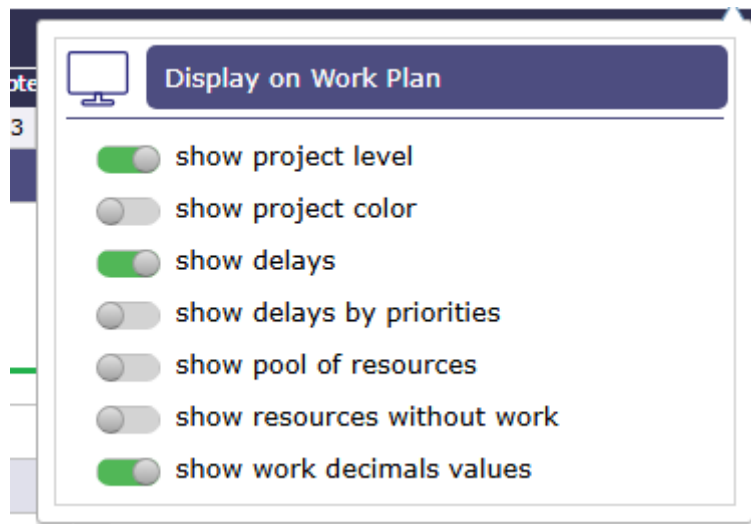


Fig. 115: Dynamic Workplan options

Show project levels

Allows you to have all the data of the elements making up the project on one line for a resource.

Show the project colors

Allows you to view the load bars in the color assigned to the project in the description section

Show delays

Allows you to view the load plan in the same colors as the bars in the Gantt chart.

Show delays by priority

This option, available only when “show delay” is enabled, will not use the Gantt view colors but the priority colors to manage.

Show pool of resources

Pools are a grouping of resources. Their scheduling is distributed across all or part of the group.

Show resources without work

When a resource has no more work to do, and therefore no more planned work, their row disappears, just like closed items.

You can therefore display all the resources in a project, even if no work has been assigned to them.

show work decimals values

Allows you to round or not round the values calculated by the software.

Color code

Different legends can be applied to the dynamic load plan and therefore change colors.

Mode normal

Normal mode shows projects in blue tones.

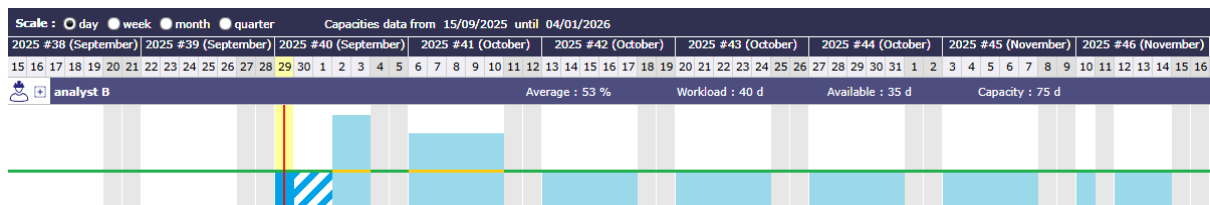


Fig. 116: Dynamic workplan

- Work left. Assigned work.
- Real work - charged to the timesheet.
- Absence

Mode Project color

allows you to display the bars in the project color. If the project has no color, the bars are displayed in gray.

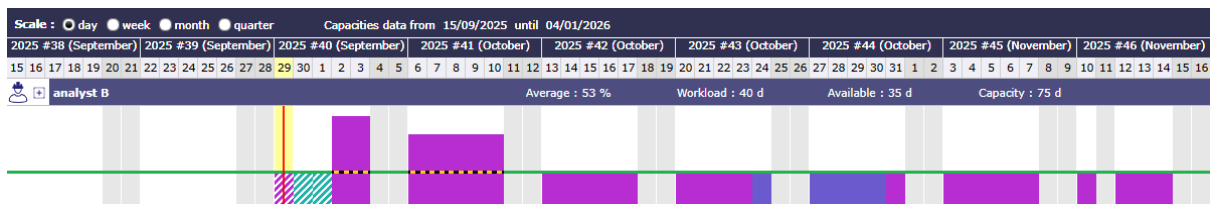


Fig. 117: Dynamic workplan with project color

Mode Delays color

The deadline mode automatically unchecks the project color mode.

This allows you to return to the same colors as on the Gantt chart.

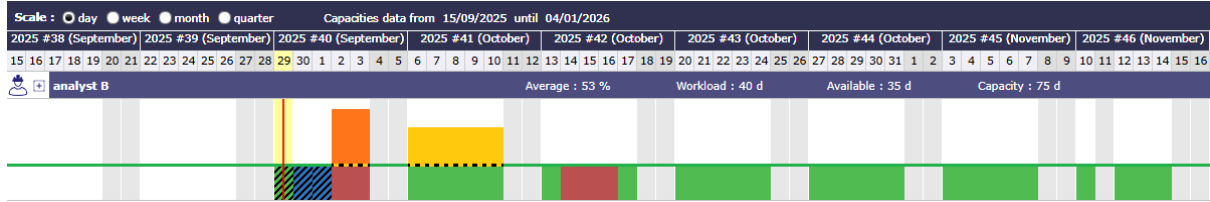






Fig. 118: Dynamic workplan with project color

-  Real work
-  Late real work
-  Work left. Assigned work.
-  Late, but not overbooked.
-  overbooked, but no late.
-  overbooked and late.

Mode Delays color with priorities

The deadline mode with priority visualization will change the colors of the delays.

This allows you to quickly identify the order in which tasks should be completed by highlighting those that are most late.

This will allow us to prioritize red activities, then orange activities, plus youth activities, leaving only green activities, so that everything is fine.

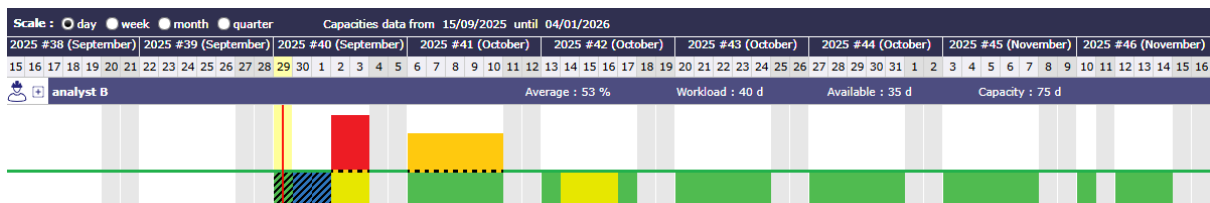




Fig. 119: Dynamic workplan with project color

-  Overbooked, but no late.
-  Overbooked and late.

Capacity

The line corresponds to the resource's capacity.

It only changes color when the dynamic load plan is displayed in normal mode to indicate overutilization.

- capacity value of the resources
- Overuse capacity value of the resources



Fig. 120: Work plan with overbooking

When the schedule is displayed in other modes then the line is dotted black and yellow for better readability.

- - - capacity value of the resources

See also:

Gant chart special bars

Filters

On each line, we display:

- The name of the resource or resource group preceded by its class icon.
- **Average** capacity utilization = $\text{Sum}(\text{workload}) / \text{Sum}(\text{capacity})$ [expressed in %]
- **Planned** work = $\text{Sum}(\text{workload})$ [expressed in days or hours]
- **Available** = $\text{Sum}(\text{capacity}) - \text{Sum}(\text{workload})$ [expressed in days or hours]

Work information is displayed in days or hours depending on the overall load display setting for the selected period.

- **If a Pool is selected**

The data in the graph represents the sum of the data in the Pool and the Resources in the Pool

- **If a Team or Organization is selected**

The data in the graph represents the sum of the data in the Resources and Pools of the team or organization.

- **If no parameters are selected**

The data in the graph represents the sum of the data for all Resources for which the current user is responsible (as listed in the Resource list on the Allocations screen)

Display periods and scales

The scale, which determines the display of the abscissas, is selected at the header level.

You can choose the same scales as for the planning view: day, week, month, quarter for displaying dates.

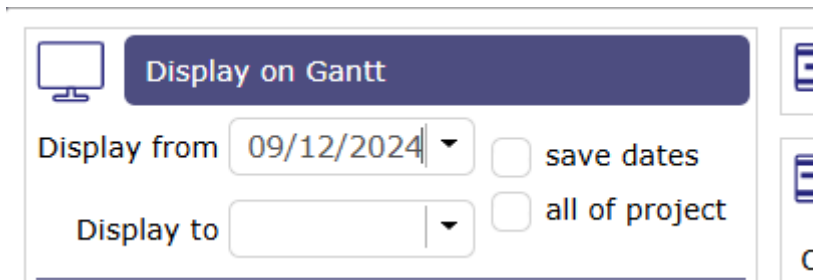


Fig. 121: Display dates on Planning view

The choice of scale will determine:

- The width of the display of a day, exactly as on the planning view
- The granularity of the data display, on a daily or weekly basis, as is the case for the detail of a Gantt bar in the planning view
- The choice of the period to display will be identical to the selection available on the Gantt with start date (positioned by default on the current date) and end date (empty by default).
- the “entire project” option, which automatically determines the start and end date based on the data to be displayed (exactly as for the Planning view).
- The choice of a duration filter, week, month, quarter, semester, year, will determine the end date automatically in the “display to” field.
- The two scales are independent of each other and can be combined.



Fig. 122: Work plan - Scale of duration

Important: The display dates of the planning view and the dynamic load plan are linked.

When you select start and end display dates, they will be identical from one view to another.

If you change the display dates on the dynamic load plan screen, when you return to the planning view, these display dates will be applied automatically

Options

Several options give you the possibility to display the graph in different ways.

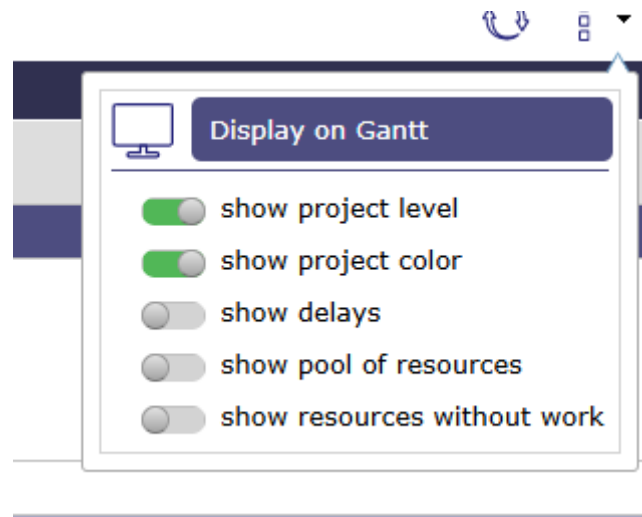


Fig. 123: Options for the dynamic workplan

Project level

You can choose whether to display the resource’s workload for the entire project.

This option allows you to display an additional row and shows the resource’s total workload for the various activities in this project, which will be detailed at the next level.

Color by project

So, instead of just having dark blue for actual and light blue for planned, the load of each project will be displayed in the project color, if it is entered, or in the project type color if not.

The actual load will be distinguished by a hatching of the color.

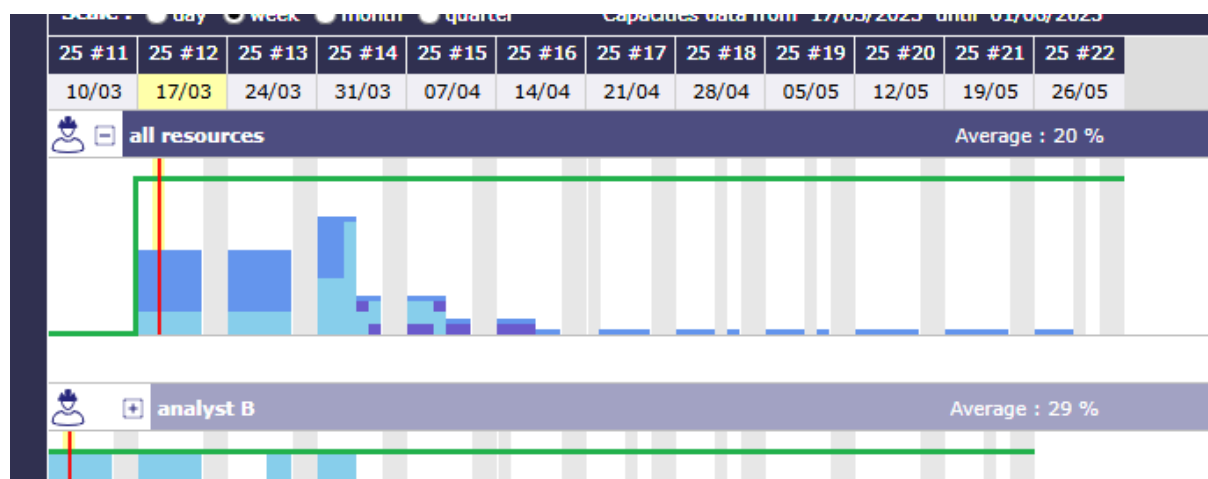


Fig. 124: load plan showing project colors

Show delays

Show delays allows you to display the workload bars in the chart with the colors of the Gantt bars, indicating whether the work is “late” or not.



Fig. 125: Show delays

- Green: Everything is fine
- Red: The work is beyond the expected date
- Orange: The planning is overbooking

6.6 Today (Dashboard)

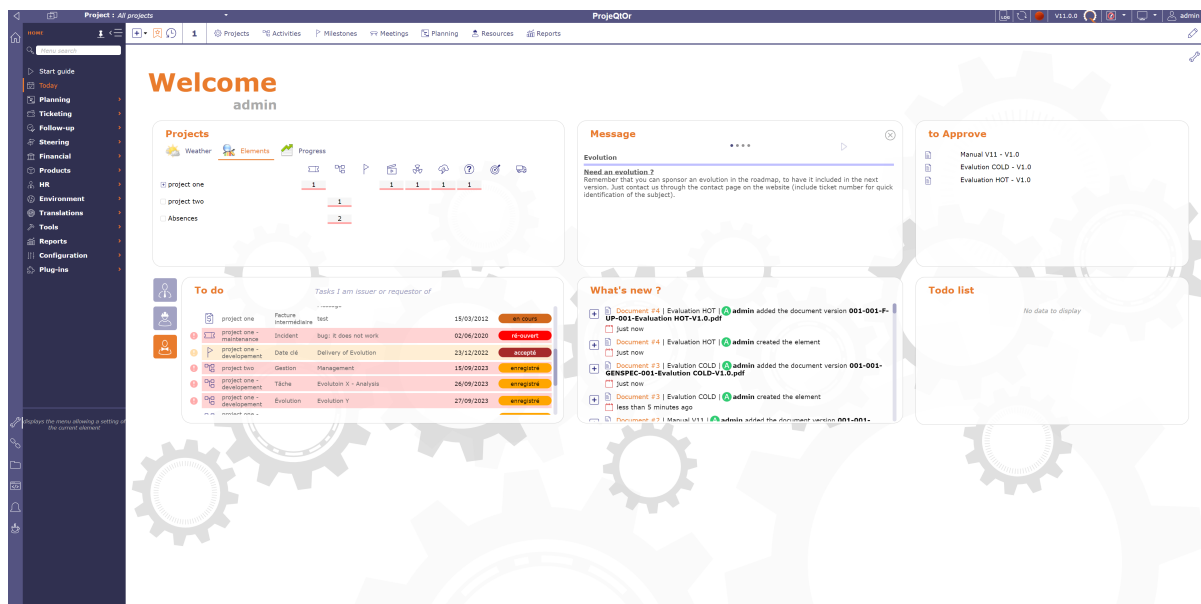


Fig. 126: Today screen's Global view

This screen allows the user to have an overview of the projects and tasks he is working on.


His projects, the tasks to which the user is assigned, those for which he is responsible as well as the various tasks created by himself or for which he is a requestor are listed in different sections.

Each list can therefore contain different types of tasks. The user can therefore view activities, questions, decisions, tickets, risks, meetings, milestones, ... as well as financial elements, such as quotes, invoices or contracts.


It's the User parameter "First page" by default. This parameter defines the screen that will be displayed first on each connection.

The definition of visibility is based on the access rights of each user

Parameters

- Click on  to access screen parameters.

Allows to define sections displayed on the screen.

you can directly click on  at the top right of the section to close it

To change the order of the blocks displayed, click and drag the blocks to the desired location.

If the movement is authorized the header is green otherwise it is red.

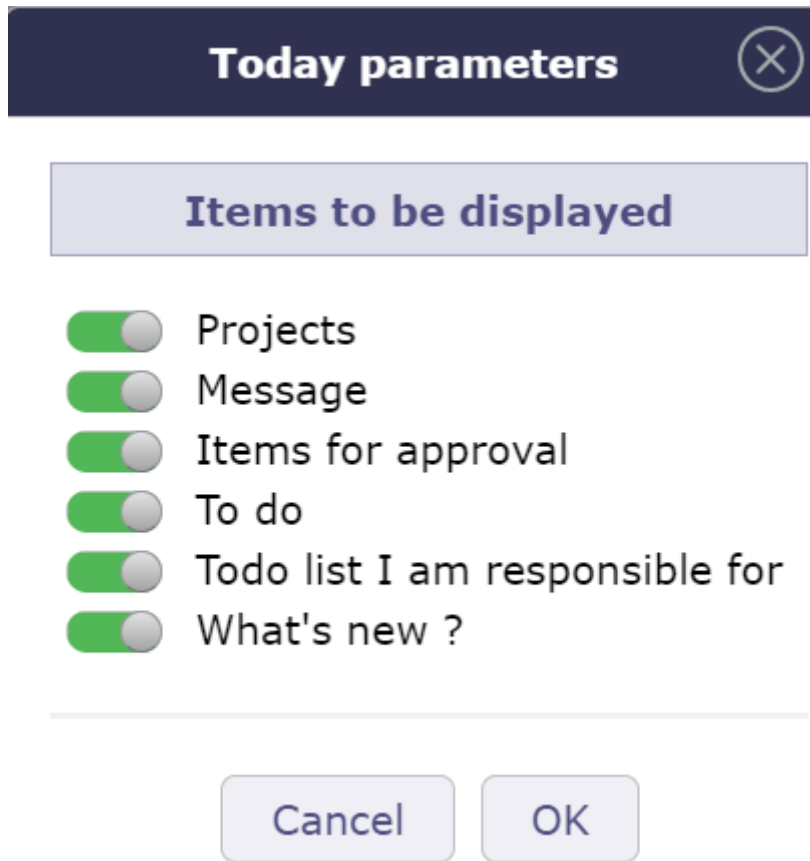


Fig. 127: Dialog box - Today parameters

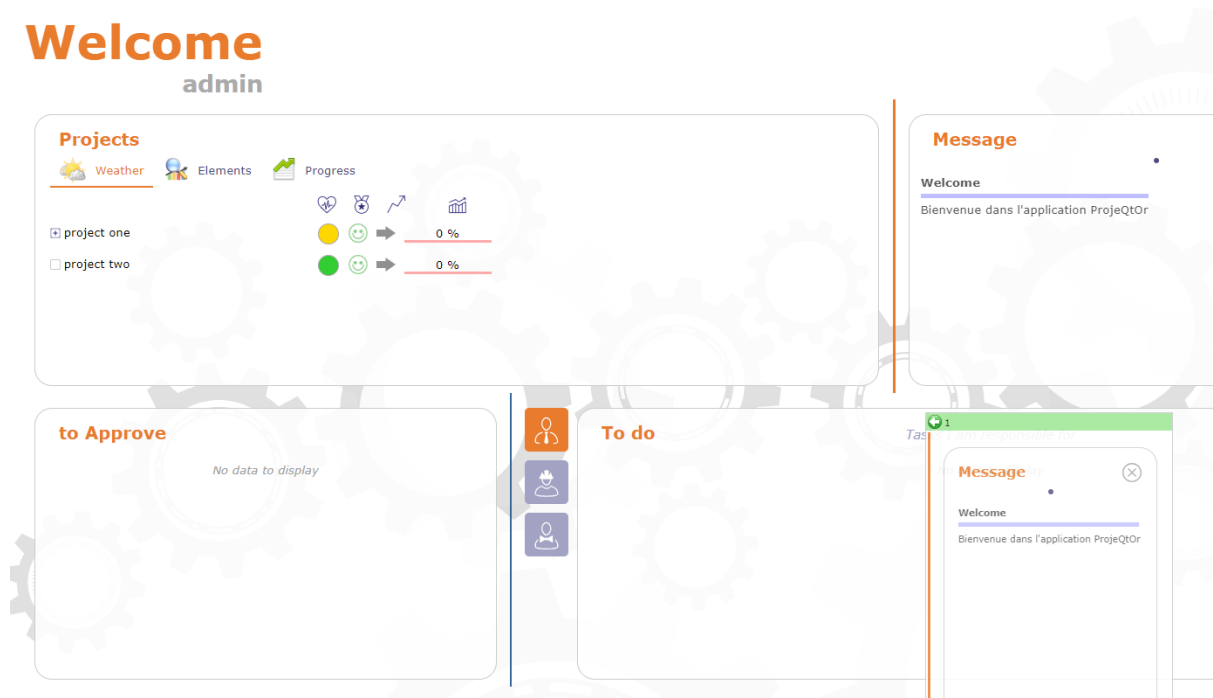


Fig. 128: Move a section

6.6.1 Projects

This section allows you to view current projects on which you have visibility rights.

Several sections are available: the weather forecast of the projects, the elements that compose it and the progress of each.

The projects list is limited to the project visibility scope of the connected user.

The number of displayed projects can be defined in the *global parameters*.

Click on the name of a project will directly move to it.

Weather

The weather is entered manually on each project.

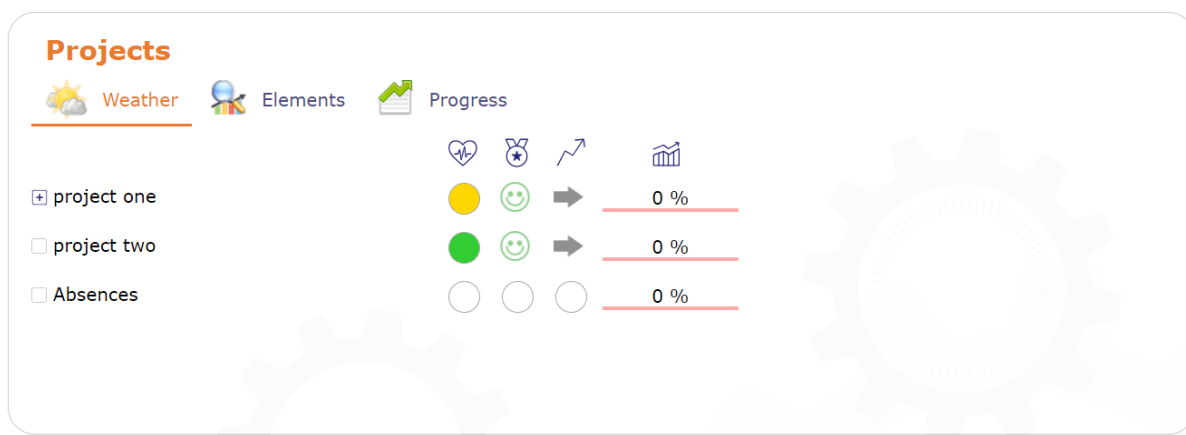


Fig. 129: Projects Weather

Health status

This icon allows to display the health status of the project.

Quality level

A manual indicator can be set on project.

This icon allows to display the quality of the project.

Trend

Manual indicator can be set on project.

Trend indicators are displayed.

This icon allows to display the trend of the project.

Overall progress

Actual progress of the work of project and additional progress manually selected for the project

Elements concerned to project



Fig. 130: Projects Elements

Numbers of elements concerned to a project are displayed.

Calculated and overall progress

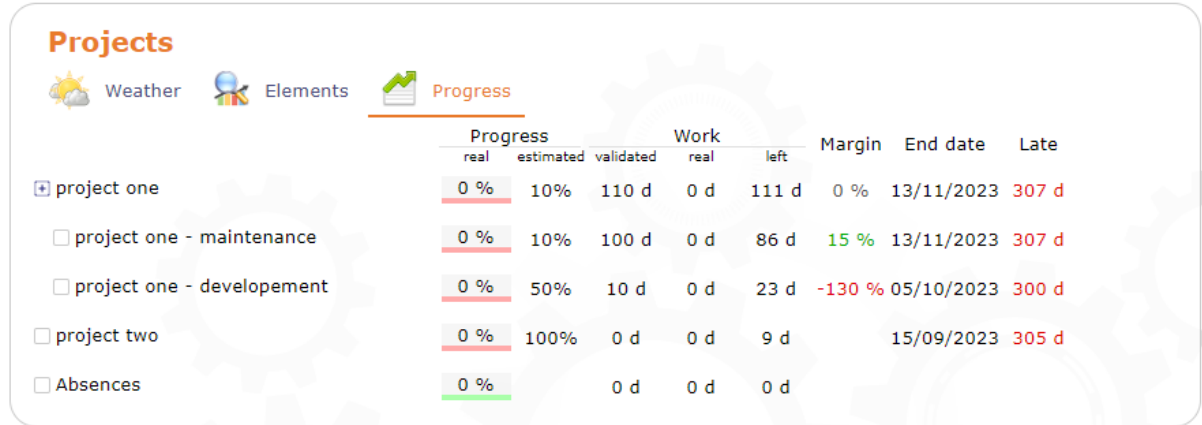


Fig. 131: Projects Progress

Actual progress of the work of project and additional progress manually selected for the project.

On mouse over the bar.

On each project shows part of “to do” (red) compared to “done and closed” (green).

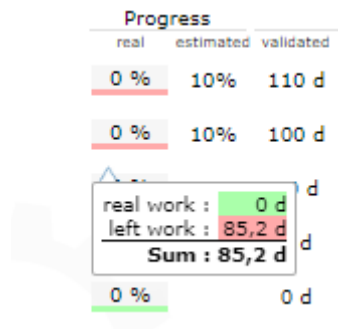


Fig. 132: Calculated progress

Progress

- Real: LefProject progress based on actual resource working time.
- Estimated: Progress of the project based on values set manually for an estimate.

Work

- Validate: validate work on the project
- Real: real work on the project
- Left: remaining work on the project.

Other

- Margin: the margin corresponds to the difference in work between the revised and the validated.
- End date: Planified end date of the project.
- Late: Number of late days in project.

6.6.2 Message

All scheduled messages will be displayed in this section.

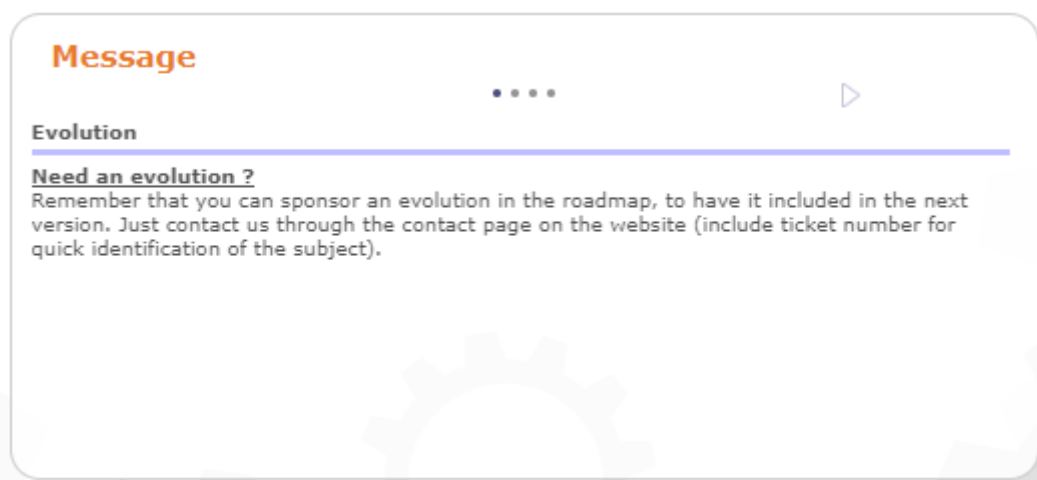


Fig. 133: Message section

Each point corresponds to a different message.

See also:

Messages

6.6.3 To approve

You can define approvers for a document, incoming or outgoing mail.



Fig. 134: Item to approve

Only users assigned to the project linked to the item to be approved can be added.

If you are in the list of approvers, you will see the list of items you need to approve.

The list of items is clickable.

See also:

Documents - Mails - Approval process

6.6.4 To do: Tasks list

The list of tasks is divided into 3 parts, click on the respective buttons to display the list:

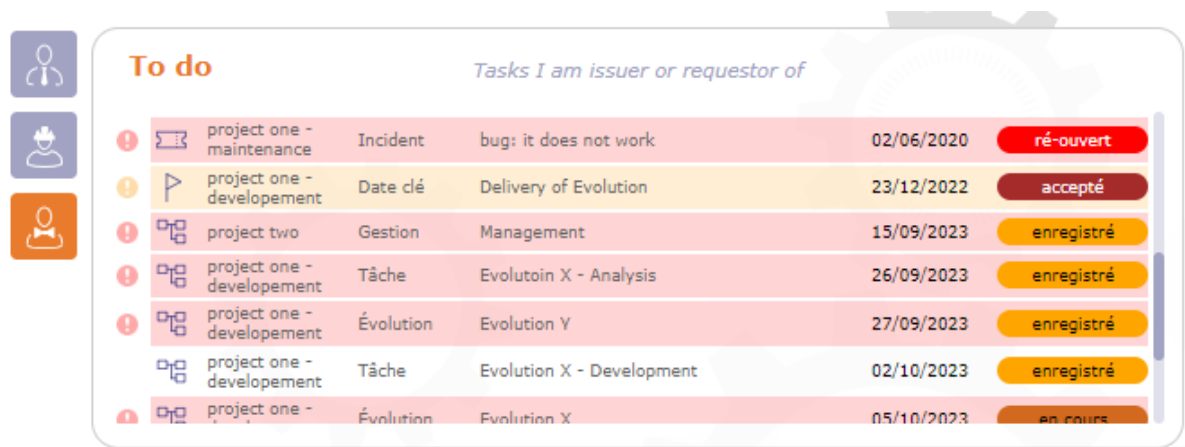



Fig. 135: Tasklist

👤 the tasks for which I am *responsible*,

 the tasks assigned to me and finally

 the tasks of which I am the *issuer* or the *requestor*

Note: Max items to display Parameter

Number of items listed here are limited to a value defined in *Global parameters* and *User parameters*

Enter the number of projects or tasks to appear on the screen.

6.6.5 What's new: the activity Stream

You have access to the activity stream of the elements that you see displayed in accordance with the rights of your profile.

See also:

Activity Stream

6.6.6 Todo List

In this section you see the current todo lists on which you have rights

See also:

Todo list

6.6.7 Reports

You can select any report to be displayed on the Today screen.

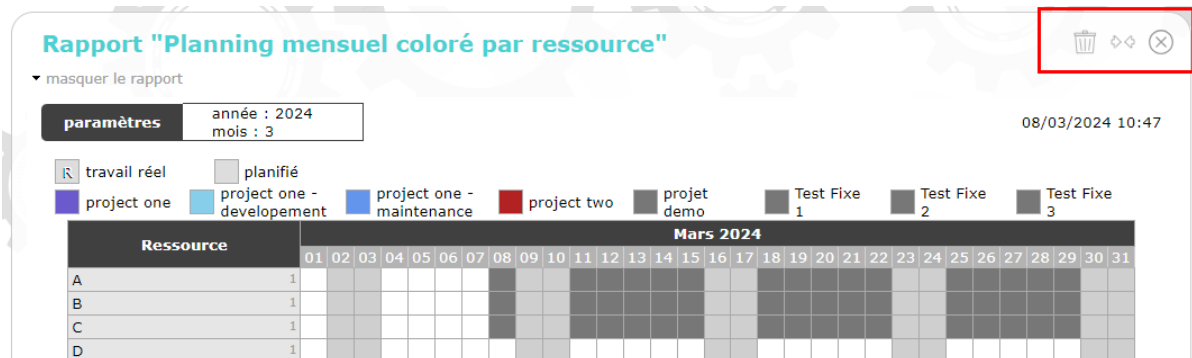





Fig. 136: Reports on today

- Click on  from the today screen window or in the *screen parameters*.
- Click on  to reduce the report display area to half the screen width.
- Click on  to extend the report display area to the entire width of the screen.

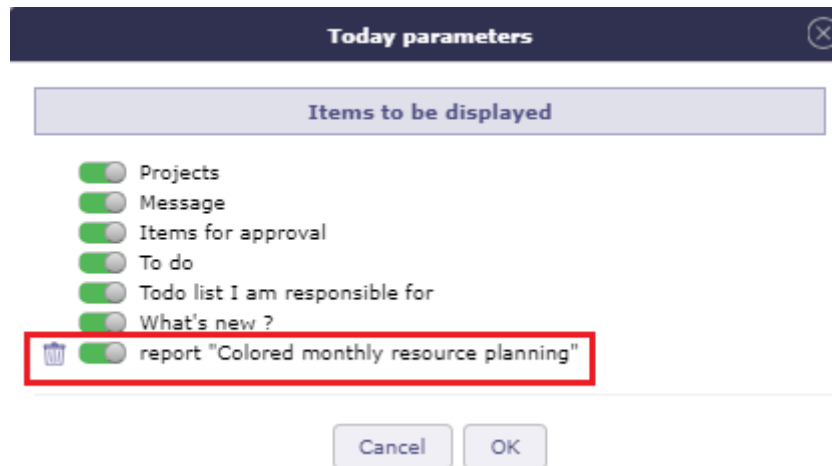



Fig. 137: Display parameters on today

Add selected report

- To do this, just go to the selected report, select parameters and display result (to check it is what you wish on today screen).
- Click on  to insert this report with parameter on the Today screen.
- Any unchanged parameter will be set as default value.
- These reports will be displayed on Today screen like other pre-defined parts.

See also:

Favorite Report - Today Screen Report

6.7 Diary

The calendar allows you to view a resource's scheduled tasks in a calendar-like view.

This view can be daily, weekly, or monthly, and the tiles can be personalized.

6.7.1 Display Options

Display options for the calendar

- *First day*
- *Today button*
- *Format Date*
- *Resource*
- *Options*

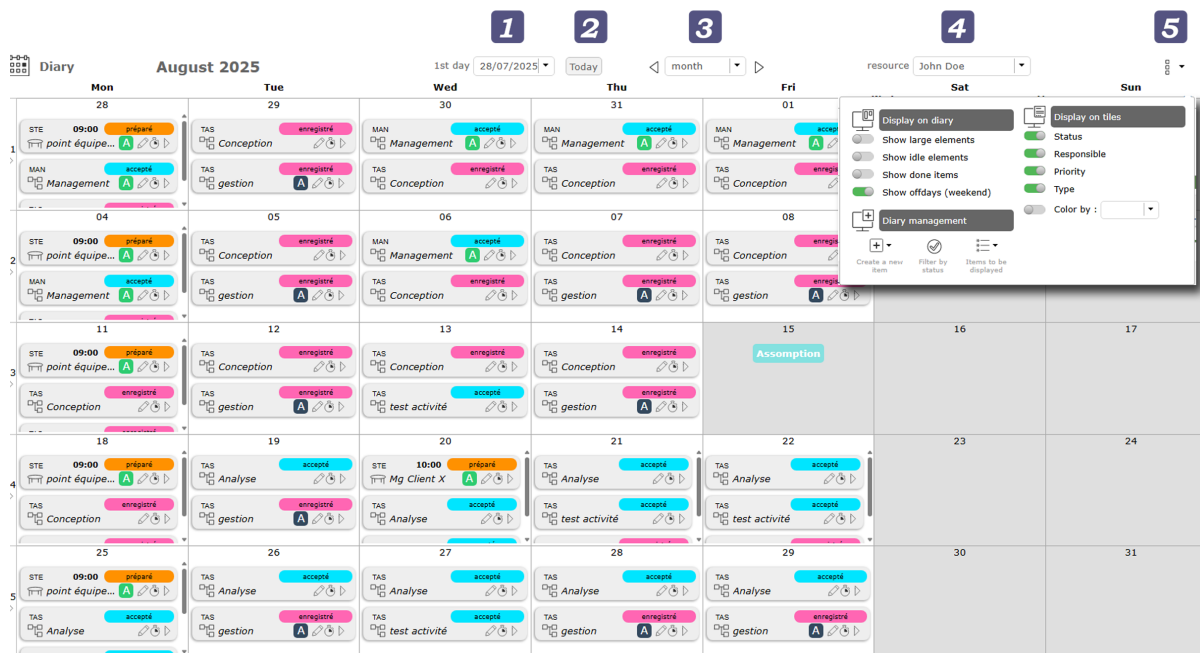


Fig. 138: Diary calendar

First day

Displays a specific date.

The first day of the week or month is displayed depending on the selected view (weekly, monthly).

Today button

Click on the today button to go to today's date.

Display format

Choose from 3 different display modes: monthly, weekly or daily

- **Month**
Allows you to view the full month (1 to 31).
- **Week**
Allows you to view the 5 days of the week with days off or not. Monday to friday with display of hours.
- **Day**
Allows you to view the full day with hours.

You can also change this display by clicking on the edges of the day boxes.

- Click the arrow to the left of the box to display the week.
- Click the day number to display the full day only.

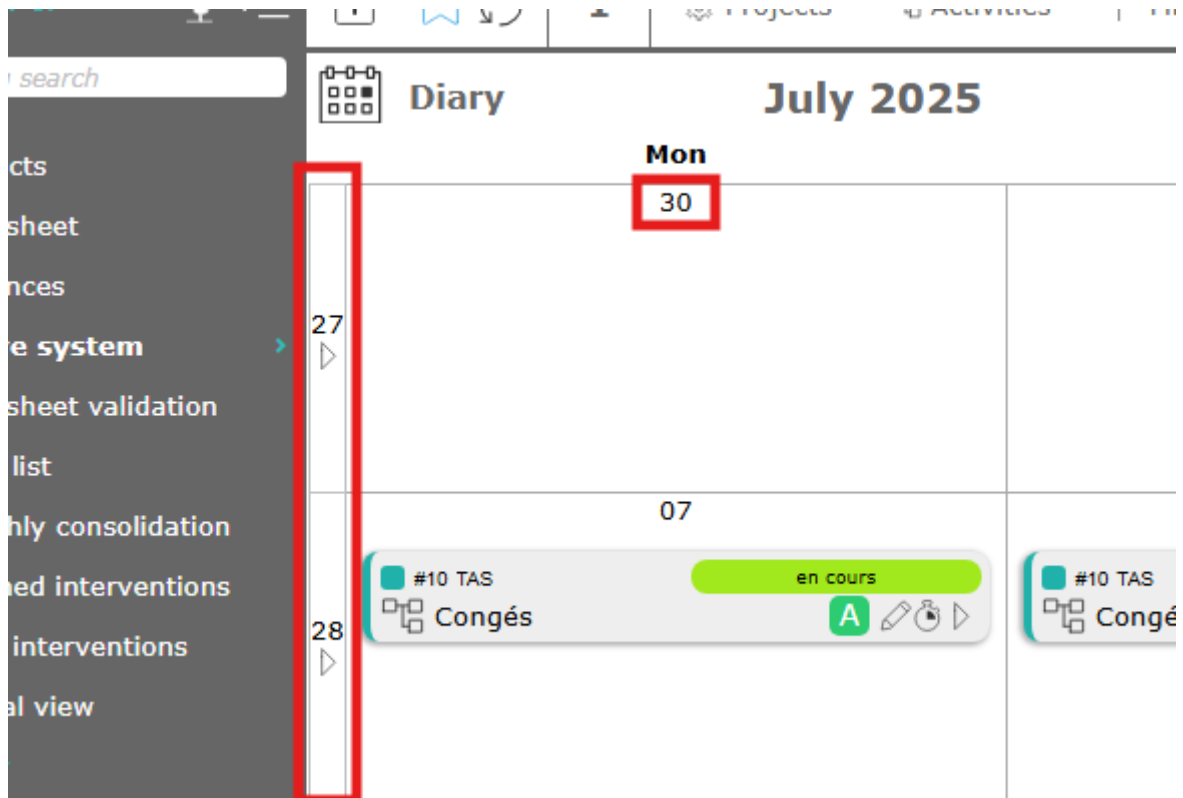


Fig. 139: Arrow to change the calendar display format

Resource

The resource drop-down list allows you to select the resource of your choice to view their calendar.

You must have visibility rights to the resources; otherwise, you will only see your name.

This field is read-only if you do not have visibility rights on other resources.

6.7.2 Diary Options

Display on Diary

Show large element

Switch from a standard “tile” to a wider tile that fits the height of the square and which allows more informations to be displayed.

When the “Large Element” view is selected, a new option appears allowing you to display the workload on the element.

This is the “show work on element” option

See also:

workload on element

Show idle element

As on any ProjeQtOr screen, you have the possibility to display closed elements.

Show done element

In the same way you have the possibility of displaying the elements already completed, that is to say in a “done” status.

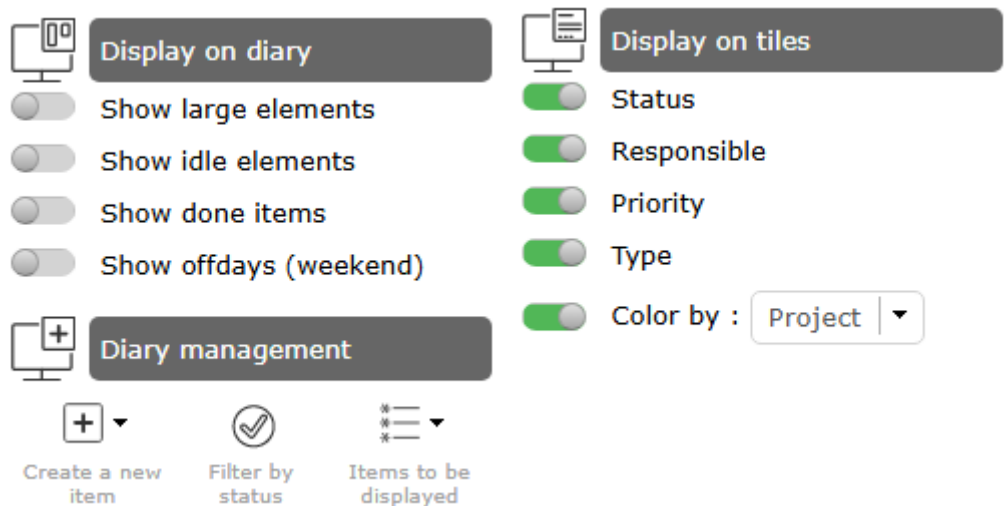


Fig. 140: Diary options

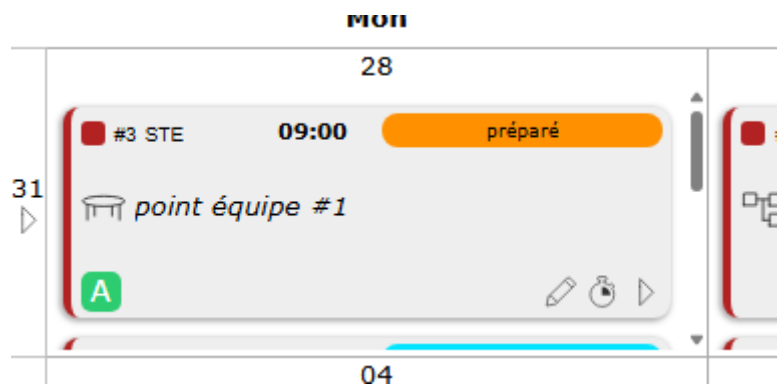


Fig. 141: Large element on diary

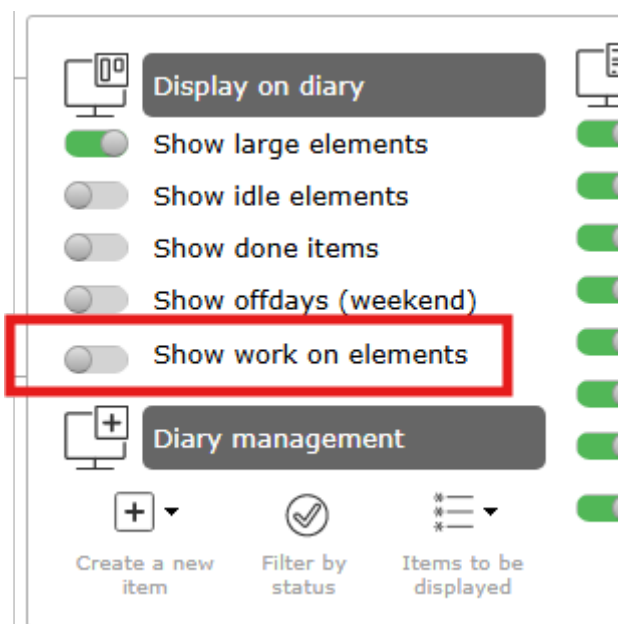


Fig. 142: New option with large element

Show offdays (weekend)

Display or not non-working days

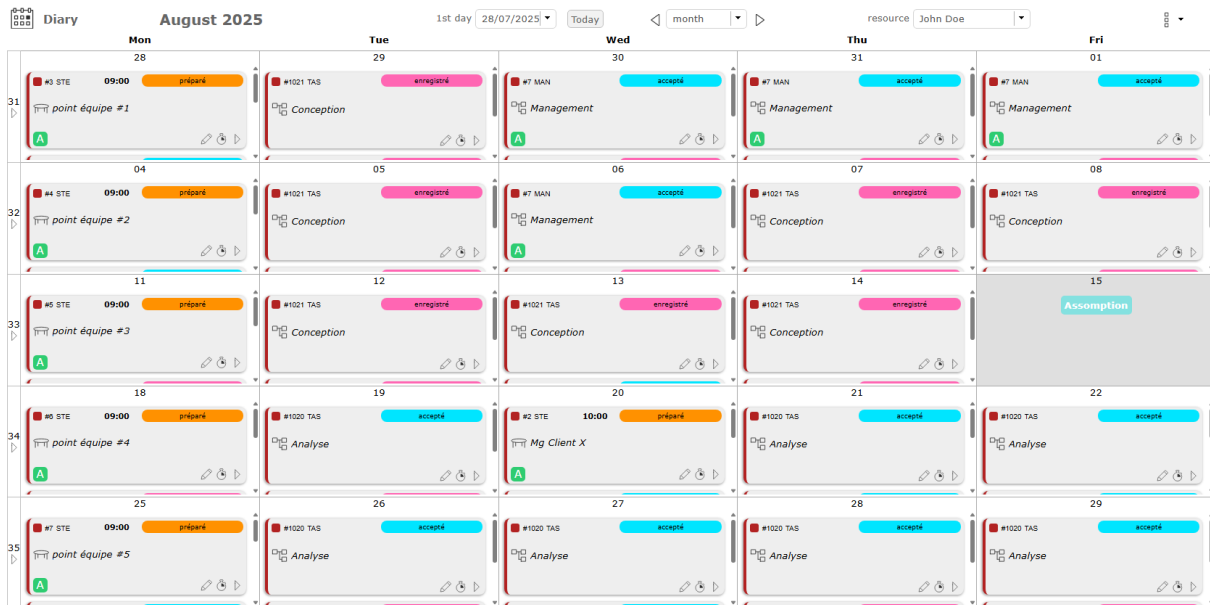


Fig. 143: View of the newspaper without non-working days on the weekend

Show Work on element



Fig. 144: Show work on element

Diary management

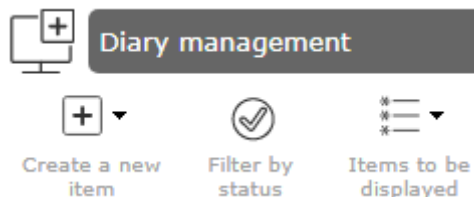


Fig. 145: Diary management

- In a case, click on to create a new item.
- Click on to display status and filter items.

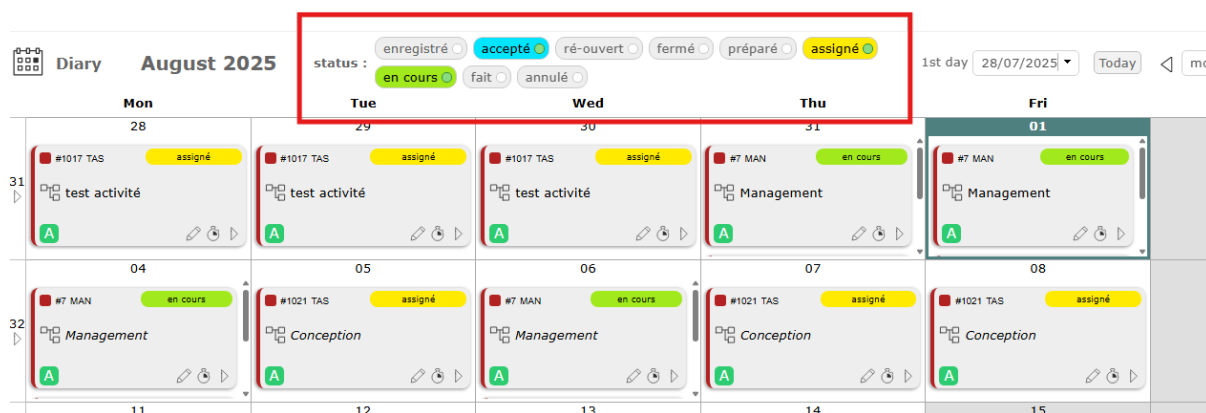
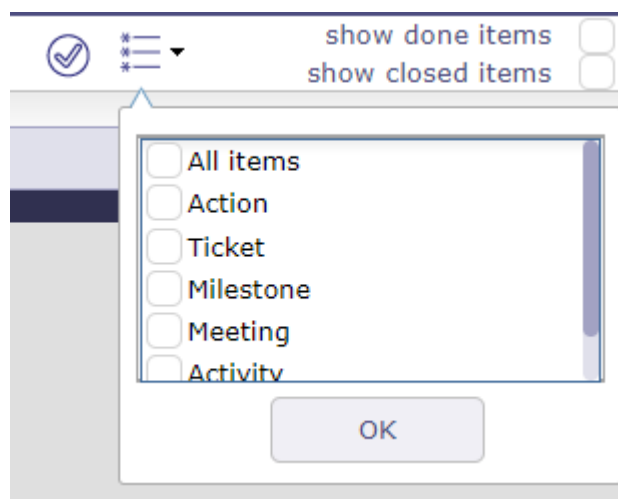


Fig. 146: Status filters

- Click on to display only certain items on the calendar like activities, meetings, actions, tickets...



Display on tiles and case

The tiles are customizable and you can choose what information to see directly on the tile.

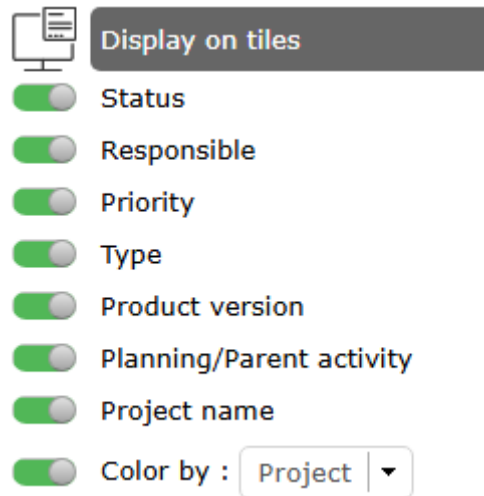





Fig. 147: Display on tiles options

You can display:

- the status,
- the responsible,
- the priority of the item,
- the type,
- the product version linked,
- the planning/parent activity linked
- the project name and his color.

Some elements are only visible on large tiles.

- Click  to open the pop-up window corresponding to the selected item.
- Click  to directly open the timesheet screen with the selected item's row and the current day.
- Click on  click to open the item on its dedicated screen.

Create an item on a case

You can add certain items directly from the calendar.

Hover over a box to see the create button appear.

This also works on days off.

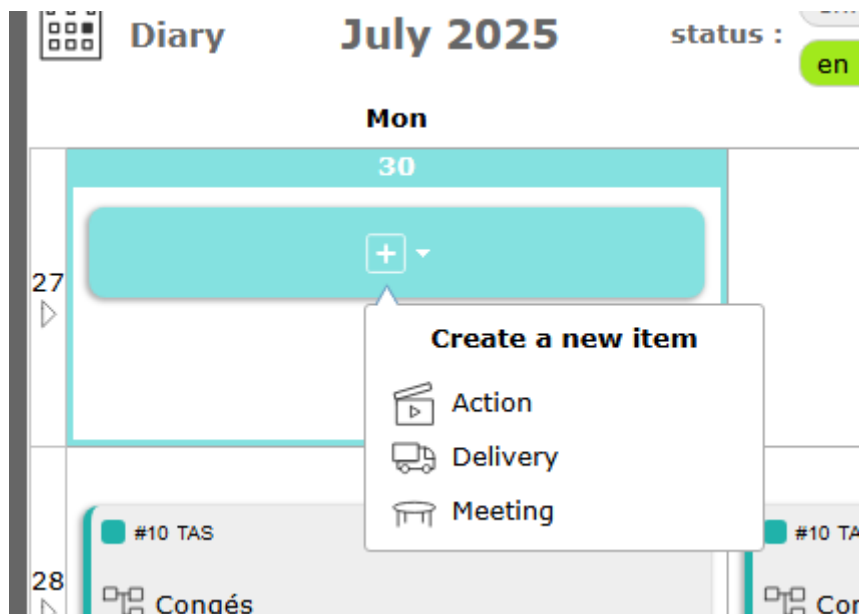
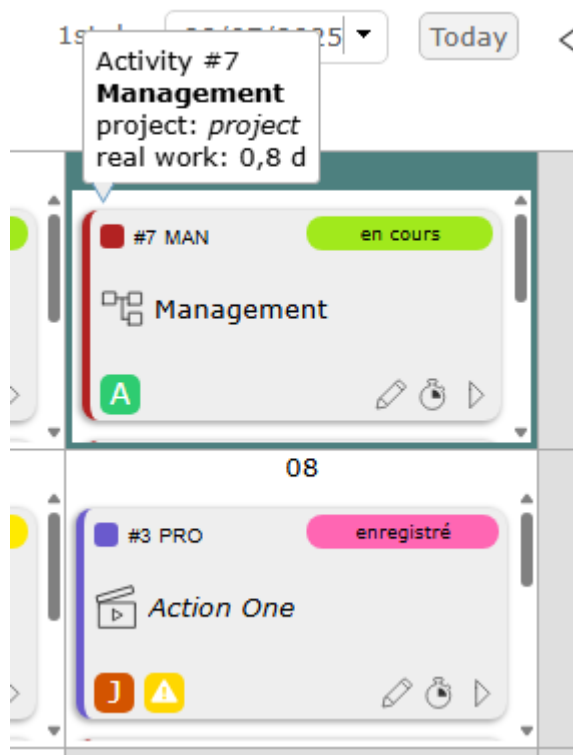


Fig. 148: New item

Diary Items

Each item the resource is assigned to is displayed in its log.

All types of holidays and deliveries are also displayed.



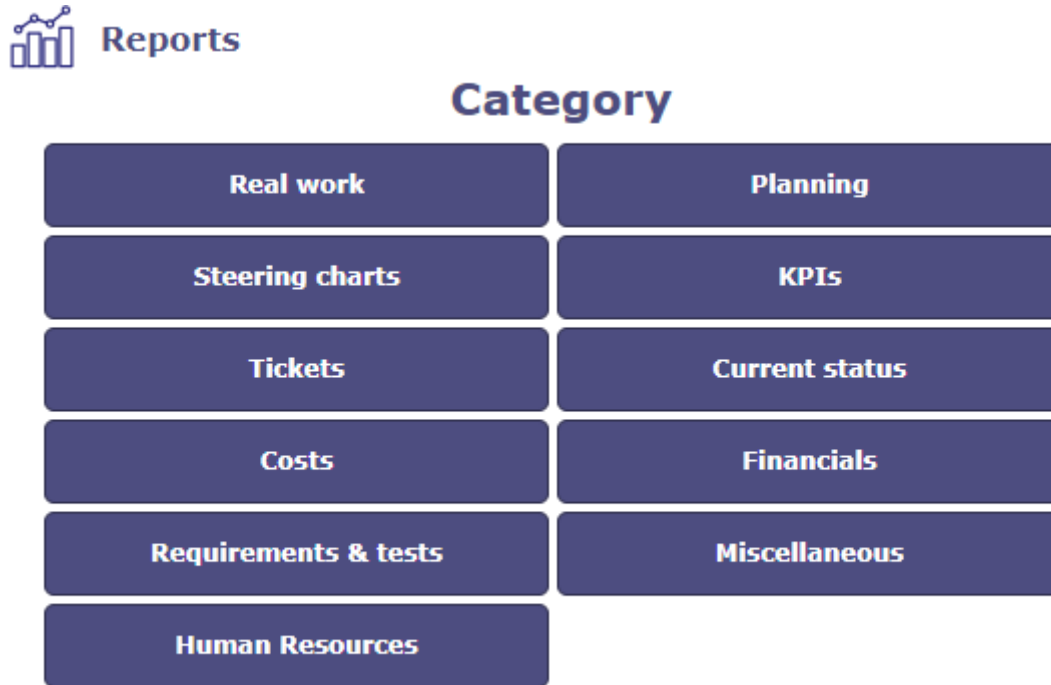
The color that appears on the objects are those of the project to which they are attached.

6.8 Reports

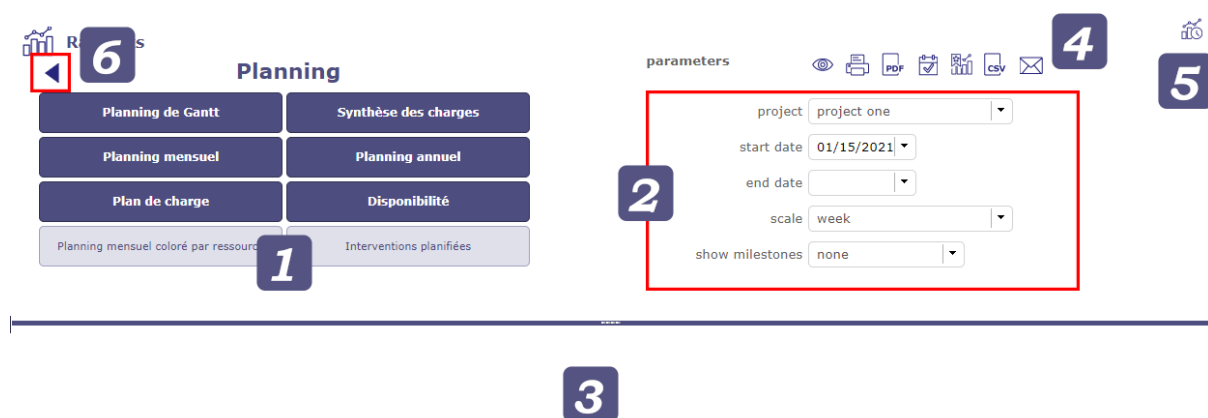
A list of reports is available in different categories. They themselves contain several sub-categories.


You will find the reports home page in the menu but also all the categories.

These, directly accessible, allow you to find the report of your choice from the main menu.










6.8.1 Reports View



1. Select a category to view subcategories and select a report.
2. Parameters specific to this report are displayed. Update the settings to get the information you need.
3. Click on  to generate the report. The selected report will appear under the splitter.
4. Several tools are available to export and send your reports. See *buttons*.


5. You can access the scheduled reports screen from the reports screen.
6. Click on the arrow to return to the list of categories.

Note: Horizontal slider position is saved when changed manually.

- Click on  to View the report.
- Click on  to get a printable version of the report.
- Click on  to export the report as PDF format.
- Click on  to View this report on the Today screen.
- Click on  to define this report as favorite.
- Click on  to schedule sending the selected report
- Click on  to go to scheduled report screen

Today Screen Report

You can add reports to your home screen today.

- Select the report you want to see quickly on this screen.
- Click on the button 
- On the Today screen, the report is Viewed at the bottom of the page
- Click on the setting icon on the screen today to change the location of the report

Note: The Viewed report is updated automatically. Any modification made to the content of the latter is reflected on the screen today.

The reports displayed on the today screen automatically adapt to your screen size as much as they can. If the display can no longer adapt, a horizontal scroll will allow you to read the entire report

- Click the parameter button to define the location of the report (s) on the Today screen.
- Click on the handles to move the item in the list.

Favorite reports

Move your cursor over the reports menu icon (in the top bar) to show the popup menu that contains your favorite reports.

You can add a “blank” report type to the favorites or to a specific project and resources. In this case, next to the report name, linked items will be Viewed.

Start Guide

Projects

scope of the numbers counted : to do (selected) not closed all

Projects	Progress	Left	Margin	End date	Late	Tickets	Activities	Milestone	Actions	Questions	Requirem	Deliveries
project one	1% 10%	120,4 d	-10 %	03/02/2021	235 d	1	1		1	1		
project two	0% 100%	9 d		06/30/2020	0 d							
internal project	0%	0 d										

report "Gantt planning"

task	id	start	end	%	validated	assigned	real	left	reassessed	duration	resources	prio.	planning mode	2021 #02 (Janu)	2021 (Jan)
project one	1	05/04/2020	03/02/2021	1%	110 d	108,7 d	1 d	120,4 d	121,4 d	217 d		500			
project one - maintenance	2	05/04/2020	07/10/2020	0%	100 d	85,2 d	0 d	85,2 d	85,2 d	50 d	pm, wd	500	regular in half days		
project one - development	3	05/04/2020	06/10/2020	0%	10 d	18 d	0 d	28,7 d	28,7 d	28 d		500			
Evolution X	8	05/04/2020	06/04/2020	0%	10 d	18 d	0 d	28,7 d	28,7 d	24 d		500	as soon as possible		
Evolution X - Analysis	9	05/04/2020	05/25/2020	0%	10 d	5 d	0 d	15,7 d	15,7 d	16 d	aB	500	as soon as possible		
Evolution X - Development	10	05/26/2020	05/29/2020	0%	0 d	10 d	0 d	10 d	10 d	4 d	wd, aB	500	as soon as possible		
Evolution X - Tests	11	06/01/2020	06/03/2020	0%	0 d	3 d	0 d	3 d	3 d	3 d	aB	500	as soon as possible		
Delivery of Evolution X	12	06/04/2020	06/04/2020	0%	0 d	0 d	0 d	0 d	0 d	- d		500	floating milestone		
Evolution Y	13	06/04/2020	06/10/2020	0%	0 d	0 d	0 d	0 d	0 d	5 d		500	fixed duration		
Web Application V1 - Main test session	15	06/01/2020	06/03/2020	0%	0 d	2 d	0 d	2 d	2 d	3 d	wd	500	fixed duration		
Steering Committee 2012-03-15	19	03/02/2021	03/02/2021	0%	0 d	1 d	0 d	1 d	1 d	1 d	md, pm, wd	1	fixed milestone		
CommitteePX	20	01/18/2021	01/18/2021	0%	0 d	1 d	0 d	1 d	1 d	1 d	md, pm, wd	1	fixed milestone		
Test	21	01/25/2021	01/25/2021	0%	0 d	0,75 d	0 d	0,75 d	0,75 d	1 d	md, pm, wd	1	fixed milestone		
test 2	22	01/18/2021	01/18/2021	0%	0 d	0,75 d	0 d	0,75 d	0,75 d	1 d	wd, pm, md	1	fixed milestone		
project two	4	05/04/2020	06/30/2020	0%	0 d	0 d	0 d	9 d	9 d	42 d		500			
Management	14	05/04/2020	06/30/2020	0%	0 d	0 d	0 d	9 d	9 d	42 d	pm	500	regular in half days		

Tasks assigned to me

Tasks I am responsible for

Id	Project	Type	Name	Due date	Status	Issuer	Acc.	Resp.
#1	project one	Project	Build a new environment for testing purpose		recorded	✓		
#2	project two	Partial bill	Bill for tests		recorded	✓		
#1	project one	Functional	Go for deployment		recorded	✓		
#1	project one	Technical issue	No environment for performance testing		recorded	✓		
#1	project one	Functional	Who will be first deployed users ?		recorded	✓		

Tasks I am issuer or requestor of

Id	Project	Type	Name	Due date	Status	Issuer	Acc.	Resp.
#1	project one	Project	Build a new environment for testing purpose		recorded	✓		
#2	project two	Partial bill	Bill for tests		recorded	✓		
#1	project one	Functional	Go for deployment		recorded	✓		
#1	project one	Technical issue	No environment for performance testing		recorded	✓		
#1	project one	Functional	Who will be first deployed users ?		recorded	✓		



Fig. 149: View a report on the today screen

Reports

favorite reports








- 45° chart
 - Project : project one
 - Milestones type : Key date
 - show today : Yes
- colored monthly resource planning
- status of all work
- 45° chart
 - show today : Yes

Popup menu management

- Allows to reorder reports Viewed with drag & drop feature. Using the selector area button icon drag .
- Click on  to remove the report from the list.

Filter Reports

For tickets and only tickets, you can apply an existing or create filter

parameters       

product

version

year

start month

ticket type

requestor

issuer

responsible

priority Critical priority High priority Medium priority Low priority Undefined Priority

As with the advanced list box filters, you can choose from many criteria to create your filter;

See also:

advanced filters

Report Sending programming

Other sections

- *Scheduled report*

Ability to schedule the sending of reports as emails

For example, you can send a report every day, every Monday or every first day of the month

To view all scheduled reports for sending, go to Scheduled Report in the Tools menu

Report sending programming
✕

Frequency

Every Days

Every open days

Every week on Monday ▼

Every month on 15 ▼

Hours 16:40

Send name

Receivers

Receivers admin ▼

Other receivers


Cancel
OK

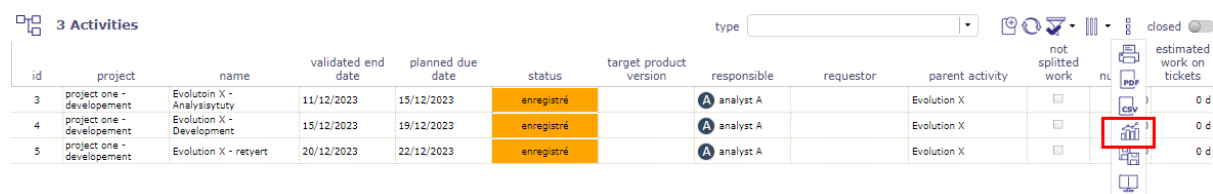
Fig. 150: Sending a report to email

6.8.2 Reports from lists

When you are on a list of items, such as activities, tickets, actions or any other items... you can create reports from your list layout

On the list

The  “save object list as report” function is available in the list box tools.

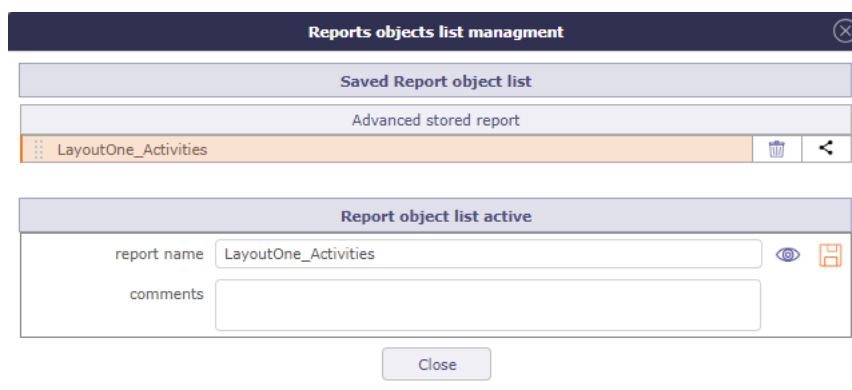


id	project	name	validated end date	planned due date	status	target product version	responsible	requestor	parent activity	not splitted work	nu	estimated work on tickets
3	project one - development	Evolutoin X - Analysisityuty	11/12/2023	15/12/2023	enregistré		analyst A		Evolution X	<input type="checkbox"/>		0 d
4	project one - development	Evolution X - Development	15/12/2023	19/12/2023	enregistré		analyst A		Evolution X	<input type="checkbox"/>		0 d
5	project one - development	Evolution X - retyvert	20/12/2023	22/12/2023	enregistré		analyst A		Evolution X	<input type="checkbox"/>		0 d

Fig. 151: List as report

You can edit the columns and place them in the order you want, you can apply simple or advanced filters.

When you click on  a pop-up is open.



Reports objects list management

Saved Report object list

Advanced stored report

LayoutOne_Activities
🗑️ ⏪


Report object list active

report name 👁️ 📄

comments

Close

Fig. 152: Windows to save the list as report

Name your list layout and save it by clicking .

The list will be stored as you prepared it and you will find it in the reports.

On the reports

In the reports, you will find a new category where the different list reports that you have copied so far will be copied.

They are sorted by items, knowing that you can create several different reports for the same item.



Fig. 153: Windows to save the list as report

You will then obtain the report as you programmed it from the element list.

Each of these reports can be added to the today screen, can be sent at a given frequency.

They can be printed and exported to PDF, CSV and Excel.

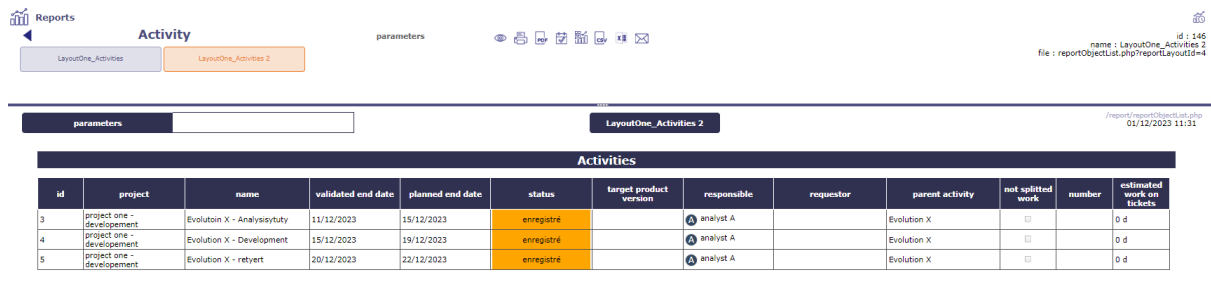







Fig. 154: Windows to save the list as report

6.8.3 Complete list of reports

Legend:


Almost all reports can be exported in PDF or printable format.

-  Export to CSV
-  Export to Excel
-  No export
-  Print only
-  Interactivity





Real Work


Allows you to view the actual expenses consumed by your resources on one or all projects over a given period.

Most reports allow you to refine the display by organization, by team and by resource or even by type of activity.





reports that can be exported in excel format are indicated by the icon 

WORK





1. Work - Weekly 
2. Work - Monthly 
3. Work - Yearly 
4. Work - Between two dates 
5. Work for a resource - Weekly
6. Work for a resource - Monthly

7. Work for a resource - Yearly
8. Work for a resource - Between two dates
9. Monthly work for resource
10. Work monthly detailed by resource
11. Work yearly per month 


WORK DETAILED PER ACTIVITY

12. Detailed work per activity - Weekly 
13. Detailed work per activity - Monthly 
14. Detailed work per activity - Yearly 
15. Detailed work per activity - Between two dates 

WORK DETAILED PER RESOURCE

16. Detailed work per resource - Weekly 
17. Detailed work per resource - Monthly 
18. Detailed work per resource - Yearly 
19. Detailed work per resource - Between two dates 


WORK SYNTHESIS PER ACTIVITY

20. Work synthesis per activity
21. Work synthesis per activity between two dates 

INDIVIDUAL CHARGES BY TYPE OF ACTIVITY

22. Work for a resource per type of activity - monthly
23. Work for a resource per type of activity - Yearly
24. Work for a resource per type of activity - Between two dates





OTHERS

25. Left work 
26. List of work for an activity

Planning

The reports in the planning category allow you to track the use of your resources through your project schedules. Diagram, synthesis, colored report, loads plan between planned and real work. . .


WORK SYNTHESIS

- 27. Work synthesis per activity 
- 28. Work synthesis per activity - between two dates 
- 29. Work synthesis per ticket
- 30. Synthesis of technical progress 
- 31. Work synthesis per resource 

MONTHLY PLANNING

- 32. Monthly planning resource/project
- 33. Monthly planning project/resource
- 34. Monthly planning project/activity/resource
- 35. Monthly planning resource/project/activity
- 36. Monthly planning for a resource
- 37. Monthly planning for a resource (per project)

YEARLY PLANNING

- 38. Yearly planning resource/project
- 39. Yearly planning project/resource
- 40. Global planning project/resource per month
- 41. Yearly planning project/activity/resource 



WORK PLAN

- 42. Work plan per week
- 43. Work plan per month
- 44. Work plan per resource and per week
- 45. Work plan per resource and per month
- 46. Workload plan on given period

AVAILABILITY

- 47. Monthly availability of resources
- 48. Availability synthesis

Colored monthly resource planning




- 49. Colored monthly planning 
- 50. Colored monthly planning fixed scale 

OTHERS

- 51. Planned interventions

Steering charts

The management diagrams are very precise reports to follow, compare and inform on the costs, deadlines and progress of your projects.

- 52. Burndown chart
- 53. S curve chart
- 54. 45° chart
- 55. Performance indicator
- 56. Proposals 
- 57. RIDA (Statement of Information Decisions Actions) 
- 58. Report project analysis 

KPIs

Track your KPI indicators with precision.

KPI DURATION

- 59. KPI Duration for project
- 60. KPI Duration consolidated


KPI WORKLOAD

- 61. KPI Workload for project
- 62. KPI Workload consolidated

KPI INCOMING/DELIVERABLE

- 63. KPI Deliverable for project
- 64. KPI Deliverable consolidated
- 65. KPI Incoming for project
- 66. KPI Incoming consolidated

OTHERS

- 67. Client invoicing terms
- 68. Work Units synthesis 
- 69. Workload history

Tickets

Find here all the reports concerning the follow-up of your tickets on one or more projects and this, over a given period.

You can restrict and filter your display by resource, by customer, by requestor, issuer or manager. But also by priority or qualification.

TICKET COUNT

- 70. Yearly report for tickets
- 71. Yearly report for tickets by type
- 72. Report for tickets cumulated - number of days
- 73. Yearly report for tickets by product



REPORT FOR TICKETS BY QUALIFYING

- 74. Report for tickets by qualifying - weekly
- 75. Report for tickets by qualifying - monthly
- 76. Report for tickets by qualifying - yearly
- 77. Report for tickets by qualifying - global


REPORT REPARTITION

- 78. Report for opened tickets - weekly
- 79. Report for opened tickets - monthly
- 80. Report for opened tickets - yearly
- 81. Report for opened tickets - global

TICKET SYNTHESIS BY STATUS

- 82. Handled ticket synthesis - monthly 
- 83. Done ticket synthesis - monthly 



OTHERS

- 84. Curve of tickets BurnDown
- 85. Clients impacted by tickets 


Current status

The current status category allows you to follow the status of elements relating to the project: Activities, activity tasks, risks, Document approval ...

RISK AND ACTIONS

- 86. Risk management plan 
- 87. Actions table 

OTHERS

- 88. Status of ongoing work
- 89. Status of all work
- 90. Opportunity plan
- 91. Version detail
- 92. Jobs summary for activities 
- 93. Approval of documents

Costs

You will be able to follow all your costs related to the project, the activity or your resources.

EXPENSES

- 94. Project expense per month
- 95. Individual expense per month
- 96. Total expense per month

OTHERS

- 97. Cost synthesis per activity
- 98. Resources costs per month
- 99. Detailed resource costs per activity per month
- 100. Total expense and cost per month



Financials

In the same way, you will be able to follow the receipts related to the project and their consolidation.

CLIENT INVOICING TERM

- 101. Monthly terms
- 102. Weekly terms

OTHERS

- 103. Invoices
- 104. Financial expenses board
- 105. Financial expenses synthesis
- 106. Monthly consolidation 
- 107. Summary of orders / client invoicing 
- 108. Summary of work command / acceptance

Requirements & Tests

You will be able to trace the status of cases played out for requirements and / or products, monitor requirements coverage, review annotations, comments and obtain various summaries.

TEST COVERAGE

- 108. requirements test coverage
- 109. products test coverage
- 110. test cases detail
- 111. test session summary

REQUIREMENT FLOW

- 112. Requirements flow annual
- 113. Requirements cumulated on number of days
- 114. Requirement yearly by type

REQUIREMENT OPENED

- 115. Requirement weekly opened
- 116. Requirement monthly opened
- 117. Requirement yearly opened
- 118. Requirement global opened

OTHERS

- 119. Curve of requirement Burn-Down
- 120. Requirements with open questions

Miscellaneous

A set of additional but very comprehensive reports on your projects and some of its elements.

HISTORY

- 121. Detail of history for one item
- 122. Deleted items

OTHERS

- 123. Connections audit
- 124. Project dashboard
- 125. Followed items
- 126. List of attachments per user

Human Resources

A set of additional but very comprehensive reports on your projects and some of its elements.

- 127. Resources inputs - outputs
- 128. Resources workforce
- 129. Resources seniority

6.9 Real work allocation

6.9.1 Timesheet

This screen is dedicated to entering actual work.

The resource completes their work every day, for each assigned task.

Data entry for a resource is done on a weekly basis.

The corresponding cost to the real work is automatically updated to the assignment, activity and project.

task		start	end	assigned	real	Mo 11	Tu 12	We 13	Th 14	Fr 15	Sa 16	Su 17	13/09/2023	left	revised
project one						0	0	0	0	0	0	0		0	0
project one - development						0	0	0	0	0	0	0		0	0
Evolution X															
	Evolution X - Analysis	13/09/2023	03/10/2023	5	0									5	5
	Evolution X - Tests	09/10/2023	11/10/2023	3	0									3	3
project two						0	0	0	0	0	0	0		0	0
Management		13/09/2023	26/09/2023	10	0									10	10
Absences						0	0	0	0	0	0	0		0	0
	Congés			0	0									0	0
	Maladie			0	0									0	0
unit for Timesheet (real work) = days						0	0	0	0	0	0	0		0	0

Fig. 155: Timesheet zone screen

Interface areas

- 1 Selection and filters
- 2 Switch display
- 3 Tools
- 4 Data entry validation
- 5 Task Zone
- 6 Entry field

Selection and filters

This filters allows to select a timesheet for a resource and for a period.

Resource selection

- By default, users can only select themselves as a resource.
- Access to other resources timesheet depending on *Specific access*.

Selection period

By default, the period is determined according to the current day.

Targeted periods are displayed in different places on the screen.

- You can select the number of the week and its year directly with the corresponding filters.
- The “first day” filter allows you to choose a specific date, day, month and year. The full week containing this date will be displayed.
- The button today targets the current week
- The D-day is highlighted.

Switch display

By default, the timesheet display is presented by week.

By clicking on the “switch the month view” button, the timesheet display switches to monthly view.

The start and end dates of an item are no longer displayed in this mode.

Tools

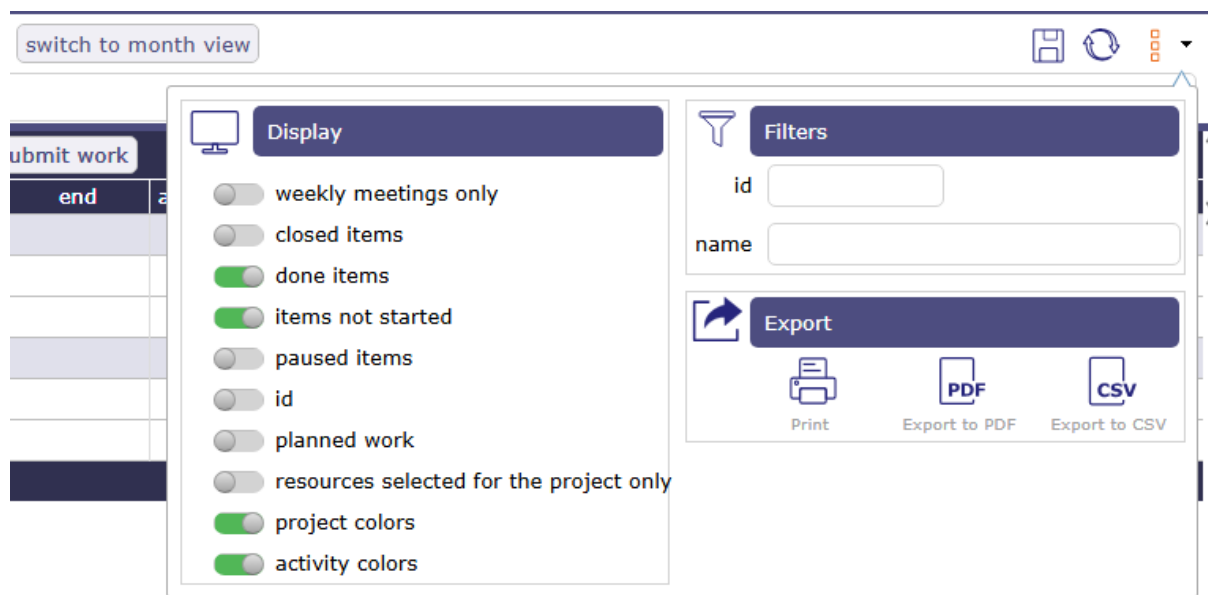





Fig. 156: Timesheet options

- Click on  to save timesheet datas.
- Click on  to refresh datas.
- Click on  to display options.

Display

The toggle buttons help you filter the information visible on your timesheet.

Switch the button to the right (green button) to activate the display.

Weekly meetings only

Recurring meetings display all meetings with one meeting per line. Depending on the period and frequency of your recurring meetings, many lines may be displayed.

With this option, you only display meetings for the week displayed on the screen.

Closed items

Switch the button to show closed tasks. Archived tasks.

Done items

Switch the button to show completed tasks. With left work to 0.

Items not started

Switch the button to show unstarted tasks. The macro state **in progress** must be activated and saved for the tasks for this option.

Paused items

Switch the button to show show tasks that have been paused. the **pause** macro state must be activated and saved for the tasks for this option.

ID

Show ID to identify all single task.

Planned work

Planned work is indicated on each input cell, in the upper left corner, in light blue.

Allows you to display the planned working time per day for the resource assigned to the task.

Resource selected for the project only

You can limit the display of the *resource selection* drop-down list.

If you have selected a project in your *project selector* then you will only see the resources assigned to that project.

real	Mo 25	Tu 26	We 27	Th 28	Fr 29	Sa 30	Su 31
	0	0	0	0	0	0	0
	0	0	0	0	0	0	0
0	1	1	1	1	0,9		
2							

Fig. 157: Planned work

Projects Color en Activity color

Ability to display project and/or activity colors directly on the timesheet.

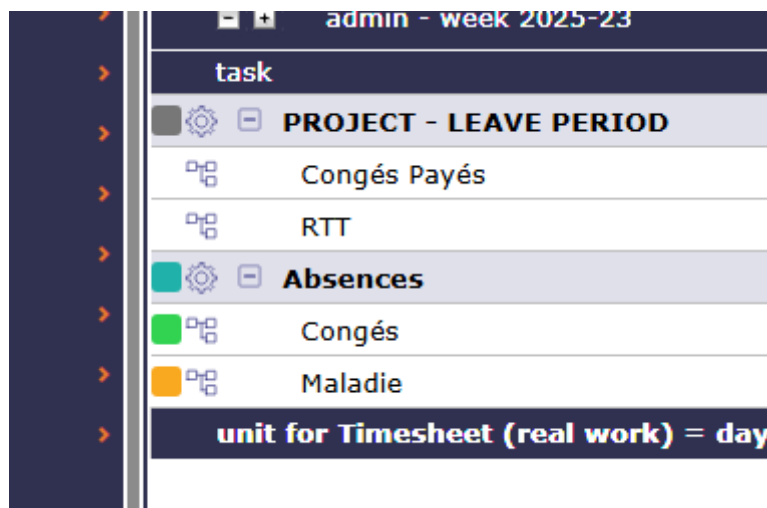





Fig. 158: Planned work

Filter

Quick filters are used to define the list of tasks displayed by name and ID.

Export

- Click on  to print timesheet.
- Click on  to export timesheet in PDF format.
- Click on  to export timesheet in CSV format.

Data entry validation

Enter real as planned

Planned work on an activity for a resource is carried forward for each day.

If there is no figure displayed then it means that the resource is not supposed to be informed of the actual work on this activity during this period.



Fig. 159: Planned work for the resource

Even if planned work is planned for a resource, there is nothing forcing it to complete its work as expected.

The option *Show planned work* must be activated.

Dispatch work

You have the possibility to reduce the granularity of your activity by distributing the work carried out on it into “different jobs”.

This way you can accurately report which task you have carried out.

It is necessary to activate the specific access *Activation of the assignment breakdown*

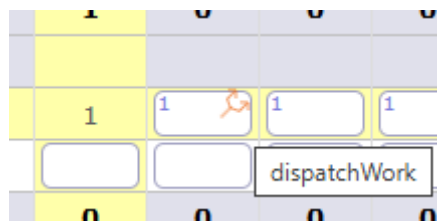




Fig. 160: Dispatched work for the activity

Click on  to dispatch the work on a line of your activity.

In the popup, enter the name of your job, if it exists, it will be available in the drop-down list.

If no job has been entered yet, click on  to add a job.

Enter the time you spent on this job.


The **Uncertainties** and **progress** fields are not mandatory and can be left blank.

Validate.

The amount of work is automatically calculated.

No restrictions are made even if you have work planned on another activity.

Like any line in the timesheet, you can exceed the resource’s FTE if the settings allow you to do so.

To view the work dispatch, click on .

You can edit and modify this list.

To view all the “work” on your activities, the *List of works for an activity* report is available.

Dispatch Work
✕

Work	Works	Uncertainties	Progress
0,4 d	Finalisation dev +	error on ticket #xx5654	80%
0,2 d	Validation service +	on hold	
0,3 d	Integration +		
0,2 d	final test +	With Analyst A	
Sum	0,9 d		

Cancel OK +

Fig. 161: Dispatch work Popup

			1	1,1	0	0	0	0	0
4	10	1	1	1	1	1	1		
5	5	1,1		1,1					
			0	0	0	0	0	0	0
	0	0							
	0	0							
			1	1,1	0	0	0	0	0

Fig. 162: Result dispatch work

Submit work

ProjeQtOr offers a system of validation of charges which makes it possible to follow the information of the real work of resources by a hierarchical manager.

After sending the actual work, you can no longer change the actual working time for the week.

You must cancel the validation request to make a change.

Validate work

Project managers can validate the work or any other personalized profile authorized to do so.

Only people with the necessary permissions can see this button

When the work is validated, then the resource can no longer modify its work on this week. Likewise, the cancellation of validation will no longer be available.

The validation system is optional and can therefore be hidden.

Task Zone

The list displays the tasks assigned to the resource selected in the list.



Click on the activity name to access the activity details screen.

Tasks assigned with actual work are always displayed, even when closed.

The function of the resource on this task is displayed at the end of the line.

Note: A resource can have multiple *functions*.

It is possible to *assign* the same resource several times but with different functions to monitor project costs.

- The icon  allows you to add a comment.
- The icon  indicates that there is a comment on the assigned task.
- Simply move the mouse over the icon to see the latest comment.
- Click to view all comments
- A global comment can be added on the weekly follow-up.

The Start and End columns display the planned dates for each activity.

Entry field

In order to see and know the assignments on a task, several columns indicate the periods assigned to a resource

Assigned

It is the work assigned to the resource that is calculated by the software.

Real work

This is the work actually performed and reported by the resource.

Left work

This is the work that the resource still has to provide for this task

Left work is automatically decreased on input of real work.

Resources can adjust this value to estimate the work needed to complete the task.

Reassessed

This is the work required to complete the task. It's the actual work + the rest to do. See: "progress-section-date-duration"

- You cannot edit Assigned Work, Actual Work, and Reassessed directly in columns.
- This information is calculated directly by the software based on what you have entered

Real work entry

- Area to enter real work. It possible put real work in off days.
- Columns of days off is displayed in grey.
- Days off is determine in resource *calendar definition*.

Total of days

On the last row is the sum for all days of the week.

It is a synthesis displayed for each project and globally for the whole week.

The resource capacity is defined by the number of hours per day and the resource capacity (fte).

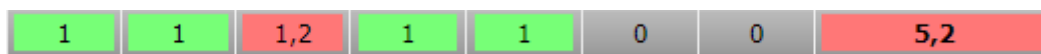


Fig. 163: Total of the day Zone

- Total for the day is **green** if entries are completely within the resource's ETP capacity
- The total for the day is **light red** if entries are greater than the resource's FTE capacity.
- Total for the day is **dark red** if entries are greater than the maximum daily work allowed on the resource.
- A message A message warns you that you exceed the authorized fixed quota.
- You will not be able to save the timesheet with a higher quota.
- Total for the day is **uncolored** if entries are less than the resource's FTE capacity.
- Total for the day is **orange** if entries aren't saved.

See also:

assigned	real	Mo 02	Tu 03	We 04	Th 05	Fr 06	Sa 07	Su 08	left	revised
		1	1	1	1	1	0	0	5	
10	4	1 1	1 1	1 1	1 1				6	10
5	0								5	5
5	0								5	5
5	0								5	5
4	1					1 1			3	4
		0	0	0	0	0	0	0	0	
0	0								0	0
0	0								0	0
		1	1	1	1	1	0	0	5	

Fig. 164: Total of the day with Planning manual

- *Unit for work*

Allows to set the unit time for real work and workload and the number of days worked per week. The number of hours per day is defined here.

- *Timesheet*

You can set many levers, alerts or display options

- *Generation of alerts if real work is not entered*

You can trigger alerts on the entry of actual work for different collaborators. These messages can be sent at a frequency defined by email or displayed as an alert directly in the application.

- *Automatic feeding of the real*

You can automatically fill in the actual work from the work scheduled up to a given date and then trigger the automatic calculation of the projects from the day after that date.

The status of tasks

The task status can be changed automatically according to data entries on real work and left work.

- Set to first **in progress** status: if the parameter value is set to “Yes”, when real work is entered on a task, its status will be changed automatically to the first status “In progress”.
- Set to first **done** status: if the parameter value is set to “Yes”, when left work is set to zero on a task, its status will be changed automatically to the first status “done”.

Change status validation

An icon will be displayed on the task if a status change is applicable.

- Due to real work is entered, the task status will be changed to the first ‘In progress’ status.
- The real work is entered, but the task status will not change because at issue is occurring.
- Due to no more left work, the task status will be changed to the first ‘done’ status.
- No more left work, but the task status will not change because at issue is occurring.

Warning: If a *responsible* or a *result* are set as mandatory in element type definition for the task. It's impossible to set those values by real work allocation screen.

The change status must be done in treatment section on the task definition screen.

6.9.2 Pool of ressource management

When the option **display pools on Timesheet** is activated, when a resource is assigned to an activity at the same time as a resource pool of which it is a part, then it will see the row for itself and the row for the resource pool.

When the option is disabled then the resource only sees its line.

Fig. 165: Timesheet with resource and resource pool lines

When the option is set to **no** then you can choose to display at least the left work to be done on this one.

The following option **show pool to update their left work** allows you to display a row for the pool below the resource row to modify the left work.

an icon then appears at the end of the resource line for the pool.

Fig. 166: icon pool of resources for the left work

Click on it and a line is available to modify the left work for the pool of resources.

Fig. 167: pool of resource line

6.9.3 Timesheet Validation

Timesheet validation resource: analyst A from the 12/21/2020 until [] show not validated weeks [] show validated weeks [] show All [] show not submitted weeks [] show submitted weeks [] show All [] team []

Resource	Week	Expected	Input work			Timesheet submitted	Timesheet validation	validate work
			Operational work	Administrative work	Sum			
analyst A	2020-52 (12/21/2020 - 12/27/2020)	5 d	5 d	0 d	5 d	submitted by analyst A on yesterday at 10:33	not validated	validate work
	2020-53 (12/28/2020 - 01/03/2021)	5 d	5 d	0 d	5 d	submitted by analyst A on yesterday at 10:34	not validated	validate work
	2021-01 (01/04/2021 - 01/10/2021)	5 d	5.3 d	0 d	5.3 d	submitted by analyst A on yesterday at 10:34	not validated	validate work
	2021-02 (01/11/2021 - 01/17/2021)	5 d	5 d	0 d	5 d	submitted by analyst A on yesterday at 10:47	not validated	validate work
	2021-03 (01/18/2021 - 01/24/2021)	5 d	0 d	5 d	5 d	submitted by analyst A on yesterday at 10:47	validated by admin on yesterday at 10:49	Cancel
	2021-04 (01/25/2021 - 01/31/2021)	5 d	0 d	1 d	1 d	not submitted	not validated	validate work

Fig. 168: Timesheet validation

The timesheet validation screen allows the project manager to receive, verify and validate the time allocated weekly by the resources to an activity for all the projects.

Selection and filters

You can filter the display of this screen by resource, by team and by period.

The visibility of resources in the list is defined according to your rights defined by your profile.

You can increase the display restriction with the possibility to show only some of the validation request.

Color code

According to the work completed by the resource, and according to the expected workload for this resource.

The project leader receives the timesheet with a precise color code.

- **Green:** The completed job is the same as the expected one.
- **Red:** The filled workload is shorter or longer. It does not match the expected work.
- **Orange:** the job is not the same as the expected job but the load is the same.

soumis le il y a moins d'une demi-heure	Annuler soumission		Valider		28/12/2020 - 03/01/2021							26/01/2021	
début	fin	assigné	réel	Lu 28	Ma 29	Me 30	Je 31	Ve 01	Sa 02	Di 03	reste	réévalué	
Analyst	25/01/2021	01/02/2021	5	4	0	0	0	0	0	0	1	5	
Analyst	12/01/2021	13/01/2021	0	0	0	0	0	0	0	0	0	0	
Analyst			0	0							0	0	
Analyst	18/01/2021	22/01/2021	0	5							0	5	
Analyst			0	0							0	0	
					1,1	0,9	1	1	1	0	0	5	
Analyst	21/12/2020	25/12/2020	5	5							0	5	
Analyst	28/12/2020	01/01/2021	5	5	1,1	0,9	1	1	1	0	0	5	
Analyst	04/01/2021	08/01/2021	5	5,3							0	5,3	
Analyst	11/01/2021	15/01/2021	5	5							0	5	
					0	0	0	0	0	0	0	0	
					1,1	0,9	1	1	1	0	0	5	

Fig. 169: Example of completed charges which generate the orange color code

Validation

In the **Timesheet submitted** column you see the date and time when the resource to send the submission.

In the **Timesheet validation** column you have the possibility to validate the work or to cancel the submission so that the resource can correct his work.

6.9.4 Monthly consolidation

Monthly consolidation allows you to view, control and validate resource allocations to a particular project for an entire month. This screen will list all the projects on which the user has visibility.

Project	revenue	Work					Margin	Blocking	Monthly consolidation	
		Approved	Total real	Real of the month	Remain to do	Reassessed			Validated	Not validated
project one	0,00 €	110 d	5 d	5 d	62,0 d	67,0 d	42,1 d	🔒	⊘	not validated
project one - maintenance	0,00 €	100 d	4 d	4 d	19,2 d	23,2 d	76,8 d	🔒	⊘	not validated
project one - development	0,00 €	10 d	0 d	0 d	37,2 d	37,2 d	-27,2 d	🔒	⊘	not validated
project two	0,00 €	0 d	0 d	0 d	15 d	15 d	-15 d	🔒	⊘	not validated
internal project	0,00 €	0 d	7 d	7 d	0 d	7 d	-7 d	🔒	⊘	not validated
holidays	0,00 €	0 d	7 d	7 d	0 d	7 d	-7 d	🔒	⊘	not validated
Project	1 500,00 €	25 d	20,3 d	11,3 d	0 d	20,3 d	4,7 d	🔒	⊘	not validated
PROJECT - LEAVE PERIOD	0,00 €	0 d	0 d	0 d	0 d	0 d	0 d	🔒	⊘	not validated

Fig. 170: Monthly consolidation screen

Filters will limit the list:

- Project to restrict the listed projects to this project and its sub-projects
- Project Type to restrict the listed projects to projects of this type
- Organization to restrict the listed projects to the projects of this organization
- Month and year to restrict to this date



Note: By default, this will be the last month for which projects are still blocked, or failing this it will be the current month.

This screen will display for each project not validated:



- The currently known CA
- The currently known validated load
- The total actual load currently known to the project
- The actual load consumed on the project for the selected month
- The remainder to be done currently known
- The currently known reassessed load
- The currently known margin (load) = load validated - load reassessed

For validated projects, the data displayed is that stored during validation.

Block a project over a month

The  and  buttons allow you to block or unblock charges beyond the month-end date. When the project is blocked for a given month, you cannot enter a charge for the following month, even if it has started. The block will be propagated recursively to sub-projects.

Validate a project over a month

The  and  buttons allow you to block or unblock charges beyond the month-end date. When the project is blocked for a given month, you cannot enter a charge for the following month, even if it has started. The block will be propagated recursively to sub-projects.

Warning: Access to the blocking / unlocking and the validation button will be configured by a *specific right*.

6.9.5 Absences

Absences must be reported as soon as possible so that the calculation of your project schedule takes into account the unavailability of resources.

projeqtOr offers two types of non-productive work records:

- A simple system, that of absences, linked to an administrative project which will make it possible to record real work in the future.
- a complex system, that of *human resources*, linked to a system of contracts and rights acquired over time.

Absences are related to an administrative type project.

The screenshot shows the 'Absences' management interface. At the top, there are filters for 'resource' (set to 'analyst A') and 'year' (set to '2022'). Below the filters is a table listing absence types:

project name	id activity	activity name
Absences	#10	Paid vacation
Absences	#11	Exceptional leave
Absences	#14	Sick leave
Absences	#15	RTT

To the right of the table is a form to define an absence:

- Daily absence duration: 1 day
- Duration: Full day, Half day, Erase
- Recurring absence for all future: Monday, Valid
- Absence between two dates: Valid

At the bottom is a calendar grid for the year 2022, with months from January to December. The grid shows various absence periods marked with colored cells (blue, orange, red, grey) and labels like 'W20', 'F20', 'F29', 'F30', 'F31'.

Fig. 171: absences screen

Only one project is necessary for all the resources, without them being allocated to this project.

Sections

- 1 Resource Selector
- 2 Types of absences
- 3 Accelerator
- 4 calendar

Resource Selector

Depending on your rights and profile, you can have access to the resources that you manage or only to yourself.

Select the resource whose non-productive days you want to add as well as the year on which these days will be retained.

Types of absences

Each type of absence is an activity related to the administrative project.

You can create as many activities as types of absences.

you must select an activity first to be able to click on calendar days.

Accelerator

After selecting the type of leave, click on the accelerators to enter the selected value directly in the date boxes in the calendar.

- 1: full day
- 0.5: half day on the type of leave selected
- 0: delete the days already entered

You can combine an absence recurrence for a given day.

- Select the day value (0.5, 1) and then select a day from the drop-down list.
- The corresponding days will be marked absent for the previously selected value from the current date until the end of the current year.

You can also select a period between two dates to apply the selected value.

calendar

Select the type of leave from the existing list.

Click on the boxes of the dates concerned by non-productive work or use accelerators.

The boxes are filled with the color of the leave type.

If you use the human resources absence system, then you will see the dedicated project appear.


project name	id activity	activity name
Absences	#10	Congés
Absences	#11	Maladie
PROJECT - LEAVE PERIOD	#8	Congés Payés
PROJECT - LEAVE PERIOD	#9	RTT


Fig. 172: list of projects and related activities on the absences screen

Absences recorded via the human resources system will still be displayed on the absences screen.

Others color

 indicate non-working days.

 indicate real work (timesheet).

 indicates the week has been submitted/validated.

 indicate that real work recorded has been submitted/validated.

6.10 Collaboration

6.10.1 Voting management

ProjeQtOr gives users the possibility to vote on tickets, activities, change requests or requirements.

The voting functionality is a module and will need to be enabled through module management in order to be used.

To make an item votable you must create some use rules.

The principle is to assign points to users so that they can vote on a particular item.

See also:

Vote on tickets

Voting attribution rule

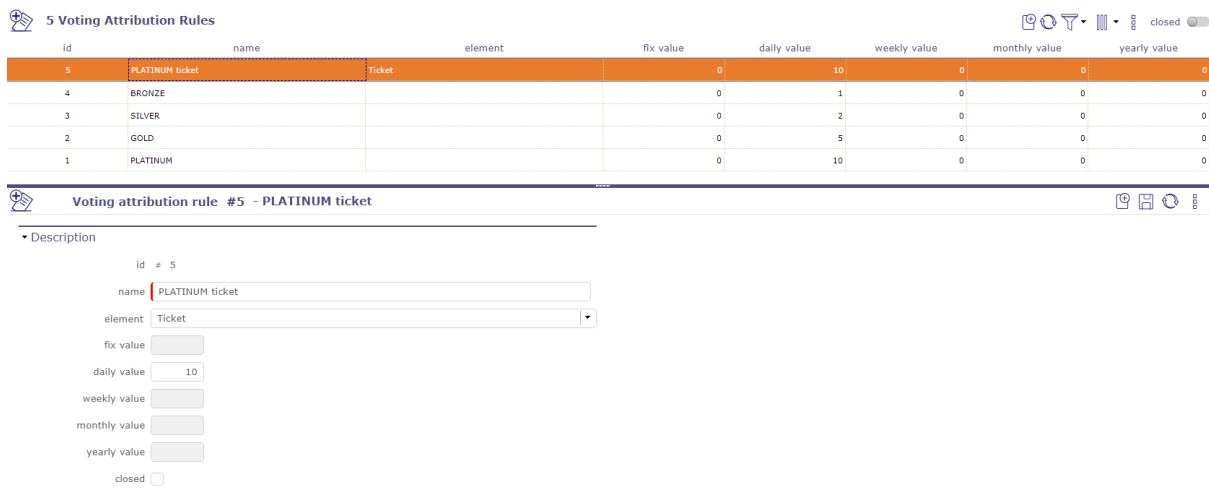
Points are assigned to a client and his contacts or to a user.

It is possible to assign fixed points or to assign points at a given frequency.

The user can use his own points or the points of the customer he belongs to as a contact.

The allocation is recalculated when the user logs in, for himself and for the client to which he belongs.

The calculation is based on the last date of assignment of voting points.



id	name	element	fix value	daily value	weekly value	monthly value	yearly value
5	PLATINUM ticket	Ticket	0	10	0	0	0
4	BRONZE		0	1	0	0	0
3	SILVER		0	2	0	0	0
2	GOLD		0	5	0	0	0
1	PLATINUM		0	10	0	0	0

Voting attribution rule #5 - PLATINUM ticket

Description

id = 5

name: PLATINUM ticket

element: Ticket

fix value:

daily value:

weekly value:

monthly value:

yearly value:

closed:

Fig. 173: Voting attribution rules screen

On the voting rules screen click on  to create a new rule.

Fill in one of the voting elements. If the field is left empty, then the attribution will concern all the voting elements at the same time.

Fill in a value (number of points) to give to the user.

Fix value

You give a well-defined number of points that will not change.

To reassign points, you must recreate a new attribution rule.


Periodicity of values

You give a number of points which will increment at regular intervals.

Every day, every week, every month or every year, the user will receive the number of points entered.

Attribution

On the client or user screen, in the Voting attribution section you add the rules created beforehand.

Click  to add a rule.

The pop-up opens and you can choose the rule(s) that suits your needs.

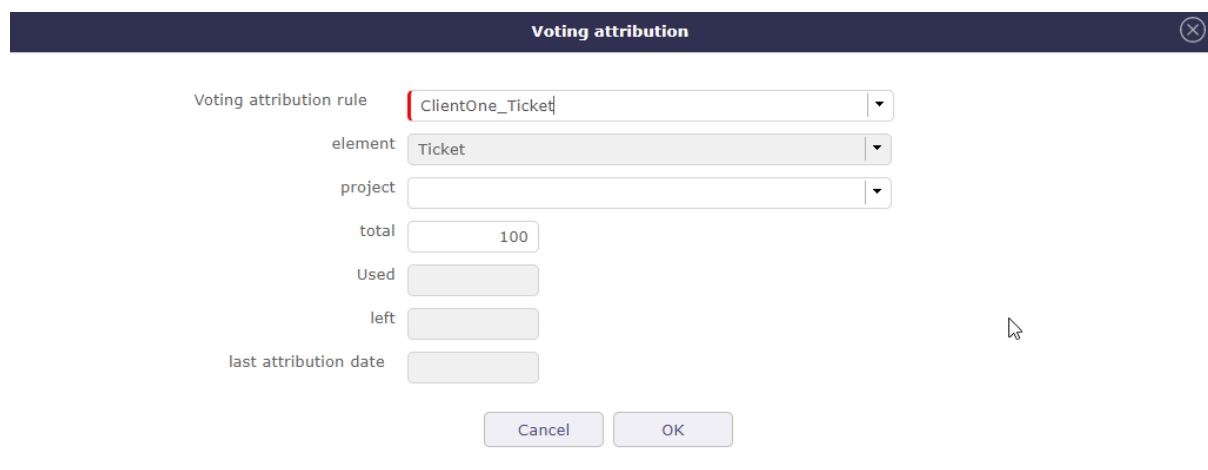


Fig. 174: Voting attribution pop-up


The information is retrieved automatically from the allocation rule and the history of points spent.

You will be able to follow the evolution of your points directly on the customer or user screen.

Voting use rule


To be able to vote, it is necessary to create rules for the use of votes.

How the user will and can use their points, on what element and how to convert and equate points to workload days.





Click on  to create a new rule

The project is not mandatory. If it is filled in then the points will only be usable on the elements of this project.

The voter can vote without having the rights to update the item, just with “read” rights on the element and a certain number of points.



Voting use rule #1 - Votin...

Description

▼ Description

id # 1

name

project

element

type

blocking status

conversion of points

fix value

maximum points per vote

downvoting capacity

closed

The voter can withdraw his points from one element to put them on another.

Blocking status

At a stage (status to be defined), the element can be blocked: the points can no longer be edited or deleted.

conversion of points

Conversion ratio of estimated work into number of points.

For example with a ratio of 2, a ticket with 1.5 estimated work will have target points of 3.0

Fix value

The fixed value is only filled in if the assignment rule linked to the usage rule is filled in as a fixed value.

Maximum points per vote.

Vous pouvez fixer un maximum de point à utiliser sur un élément votable.

Si vous fixer cette valeur, vous ne pourrez jamais dépenser plus que cette valeur sur l'élément.

Downvoting capacity

The voter can vote negative. This is a good way to show your disinterest or a way of mentioning that you don't like the general idea of the element.

Vote

When a voteable item is defined, the voting attribution table is available on the respective screens of the items.

▼ Voting

target value

actual value

rate %

Fig. 175: Voting section

The target value is populated only if you have estimated work on the item.

Estimated work on tickets and requirements and validated workload on activities.

See: *Dates and duration*

Tip: Conversion

$\text{TargetValue} = \text{ceil}(\text{plannedWork} * \text{workPointConversionRate})$

If work = 0,5j | rate = 3 -> points = 2

There is no decimal value. Round up to the next whole.

If work = 5j | rate = 2 -> points = 10

Click on the vote button to access the voting pop-up.

Fig. 176: Voting pop-up

Fill in the number of points you want to use for this vote.

Limit per vote

indicates the maximum number of points you can use for voting this item.

Own vote

The user uses his points in his own name.

Client vote

The user uses the points attached to the customer as a contact.

Left points

Indicates your remaining number of points for the user and for the customer.

Comment

The comments are added as *note* on the item page.

When a user/customer has voted, a tracking table allows you to see who has voted and how many points have been scored.

The rate indicates the percentage of progress for the vote of the element according to the target value and the number of votes.

On the *Kanban* this percentage is reflected by the color filling of the vote icon.

To modify or delete your vote, click on the edit vote button. Leave the field empty or fill in 0 to cancel your vote.

Voting follow-up

The area at the top of the screen allows you to view the allocation rules that are linked to you.

The area at the bottom of the screen allows you to see the voted items, sorted by descending % of votes.

Voting follow-up

Element all by class / id closed

number to display Lock status not locked by % by value

locked

Voting attribution rule	Element	Project	Total	Used	Left
3 - Platinum	Ticket		20	5	15

Element	Name	Status	Target version	Description	Note	Target value	Actual value	%	See votes
Ticket	#1 bug: it does not work	ré-ouvert				0	0	0%	
Activity	#1 bug fixing	en cours				1	0	0%	
Activity	#2 Evolution X	en cours	web application V2.0			1	0	0%	
Activity	#3 Evolutoin X - Analysis	enregistré				1	0	0%	
Activity	#4 Evolution X - Development	enregistré				1	0	0%	
Activity	#5 Evolution X - Tests	enregistré				1	0	0%	
Activity	#6 Evolution Y	enregistré				1	0	0%	
Activity	#7 Management	enregistré				1	0	0%	
Ticket	#2 Enter some quotes on filed names : error Message	enregistré				0	0	0%	
Ticket	#3 choix	enregistré				0	5	100%	

Fig. 177: Voting follow up screen

Filters make it possible to restrict the view of the elements and to sort them.

Click to display the item detail in a pop-up.

Click to view or add a note.

Click to display the voting table.

Click on the voteable item's ID to go to the item's screen.

On this screen, a project manager (rights to be defined) can modify the target version and the status of one or more elements.

Voting Attribution follow-up

The vote attribution follow-up screen allows you to view the elements voted by a user.

- Username
- Name of the client if he is the latter's contact.
- The attribution rule linked to it.
- The element affected by the assignment rule.
- The status
- The target version
- The project if it has been informed about the rule of use linked to the element.
- The points acquired, spent and remaining

Several filters allow you to restrict the display by user, client and/or element.

Voting Attribution follow-up show attributions without left user client Element

User	Client	Voting attribution rule	Element	Project	Total	Used	Left
user							
admin		3 - Platinum	Ticket		20	5	15

Fig. 178: Voting attribution flow-up screen

6.10.2 Vote on element

It is possible to vote on tickets, change request and requirements.

In the detail tab of each element, find the voting section. The target value, current value, number of votes and fill rate are displayed.

Click on the vote button to assign a vote on the selected item.

▼ Voting

target value

actual value

number of voters

rate %

Fig. 179: Voting Section

In the voting window, several pieces of information such as the maximum point limit of the vote that you can use on the vote of the item in question.

Your personal vote which is not necessarily identical to the maximum points that you can award.

And finally the number of points that you have left to spend in the period of use set upstream in the rules for awarding and using votes.

See also:

Voting attribution rule

Voting use rule

Once you have validated your vote, if the *specific access* dedicated to voting have been activated, a table appears to display the names of the voters and the points that each of them has assigned to the element.

If several people have voted, the cumulative number of their points is displayed in the current value.

You continue to see the number of your points already assigned, directly in the vote button or in the table if you have the right to see it.

In the *specific access*, if the display of the table is deactivated, you can display at least the names of the voters.

In any case, the names of the voters and the points they have assigned are necessarily displayed in the table.

✕
Vote

limit per vote

own vote left points

comments Your comment will be stored as a note on the item. It can give information on how you want the item to be treated (need expression or specification).

it seems to me that this type of development has its place in the community roadmap

body div

Fig. 180: Voting pop-up

▼ Voting

target value

actual value

number of voters

rate %

voter's name	value	user	client
admin	3	admin	
analyst A	2	analyst A	

Fig. 181: Voting table

6.11 Asset Management

This module is dedicated to the management of your IT infrastructure.

You can manage:

- All types of asset
- Asset categories
- Brands
- Models
- Asset localisations

6.11.1 Asset

This screen allows you to manage lists of licenses, versions, products or even components linked to equipment.

- Define the list of devices contained in another device.
- Display the global tree of the equipment constituting an equipment, by being able to close or expand a given level.
- When copying a device you can select the complete composition of this device.
- Each piece of equipment contained is duplicated, recursively, by initializing the unique data (serial number, references, etc.).

The screenshot displays the '7 Assets' table and a detailed view for 'Asset #7 - WorkStation 003-145'.

id	name	brand	model	serial number	parent asset	location	user	status	closed
7	WorkStation 003-145	HP	Pavillon				John Doe	recorded	<input type="checkbox"/>
6	Keyboard 003-0056	Logitech	K 360		WorkStation 003-145		John Doe	recorded	<input type="checkbox"/>
5	Mouse-003-034	Logitech	G PRO		WorkStation 003-145		John Doe	recorded	<input type="checkbox"/>
4	SCR-0014	ASUS	VG275Q		WorkStation 003-145		John Doe	recorded	<input type="checkbox"/>
3	M806C	HP	Deskjet		WorkStation 003-145		John Doe	recorded	<input type="checkbox"/>
2	OFF-001-0012	Microsoft	Office 2020		WorkStation 003-145		John Doe	recorded	<input type="checkbox"/>
1	SE-0014	Microsoft	Windows 10 pro 64b		WorkStation 003-145		John Doe	recorded	<input type="checkbox"/>

The detailed view for 'Asset #7 - WorkStation 003-145' includes the following sections:

- Description:** Fields for name (WorkStation 003-145), asset type (Computer), brand (HP), model (Pavillon), provider, asset category (Individual), parent asset, serial number, and inventory number (1278-778).
- Attribution:** Status (recorded), dates for installation (04/10/2018) and decommissioning (03/06/2023), location (SIEGE), and user (John Doe).
- Costs:** Purchase value (1 280,00 €), full amount (1 536,00 €), warranty duration (48 months), warranty end date (04/20/2021), and depreciation period (5 years).
- Asset composition:** A table listing linked assets:

id	name	Asset type	Brand	Model	user
SE-0014	License	Microsoft	Windows 10 pro 64b	John Doe	
OFF-001-0012	Software	Microsoft	Office 2020	John Doe	
M806C	Printer	HP	Deskjet	John Doe	
SCR-0014	Device	ASUS	VG275Q	John Doe	
Mouse-003-034	Device	Logitech	G PRO	John Doe	
Keyboard 003-0056	Device	Logitech	K 360	John Doe	

Fig. 182: Asset management screen

Access rights

You can limit the visibility of equipment.

some fields will be updated automatically to allow the user to see the items they have just created.

If a profile has creation rights and read rights only on “the items for which it is responsible”, the creation must automatically position the manager on the current user.

If a profile has creation rights and read rights only on “its own elements”, the creation must automatically position the user on the current user.

This rights management is automatically extended to all elements not dependent on the project.

Feeding the responsible field when creating an element if the user has visibility rights such as “the elements for which he is responsible”.

Warning: Hide buttons “Lock” and “send mail” when access right is readonly

Note: Each asset related to a resource or an user, is displayed on their respective screen.

See: *Resource* and *User*

Attribution

▼ Attribution

The screenshot shows the 'Attribution' section of a software interface. It contains the following elements:

- status:** A dropdown menu with 'recorded' selected, next to a yellow square icon. To its right is a grey button labeled 'qualified' with a right-pointing arrow.
- installation / decommissioning:** Two sub-sections. 'installation' has a date field '04/10/2018'. 'decommissioning' has a date field '03/06/2023'.
- location:** A dropdown menu with 'SIEGE' selected, next to a text input field containing '003'.
- location :** The text 'SIEGE' is displayed below the dropdown.
- user:** A dropdown menu with 'analyst A' selected. To its right are icons for play, eye, plus, and search, followed by a dropdown arrow.
- closed:** A checkbox that is currently unchecked.

Fig. 183: Attribution section

This section allow to define:

- A status for each device according to the selected workflow.
- An installation date and a possible decommissioning date.
- The location of the equipment, with the possibility of defining a list (see: *Asset types*) and / or a manual entry field for more precision.
- The user who will benefit from this equipment.
- The closed check box. Which allows to put the equipment in archive mode.

Costs section

This section allow to define costs for the selected asset.

You can set a cost for:

- Purchase value
- The warranty period
- End of warranty date
- The amortization period
- The need for insurance

▼ Costs

	untaxed amount	full amount
purchase value	<input type="text" value="1 280,00 €"/>	<input type="text" value="1 536,00 €"/>
warranty duration	<input type="text" value="48"/> months	
warranty end date	<input type="text" value="04/20/2021"/>	
depreciation period	<input type="text" value="5"/> years	
need insurance	<input type="checkbox"/>	

Fig. 184: Costs section

Asset composition section

When you define an element parent, the components of the element appear in this section giving you the complete structure of an element.

▼ Asset composition

+	name	Asset type	Brand	Model	user
🗑	SE-0014	Licence	Microsoft	Windows 10 pro 64b	John Doe
🗑	OFF-001-0012	Software	Microsoft	Office 2020	John Doe
🗑	M806C	Printer	HP	Deskjet	
🗑	SCR-0014	Device	ASUS	VG275Q	John Doe
🗑	Mouse-003-034	Device	Logitech	G PRO	John Doe
🗑	KeyBoard 003-0056	Device	Logitech	K 360	John Doe

Fig. 185: Asset composition

The button **display the structure** opens a pop up which summarizes the complete composition of your equipment in table form.

You can print this box.

Print preview						
Send document to printer						
name	Asset type	Brand	user	serial number	status	
		Model		inventory number		
#7 WorkStation 003-145	Computer	HP	John Doe	1278-778	recorded	
#1 SE-0014	Licence	Microsoft Windows 10 pro 64b	John Doe		recorded	
#2 OFF-001-0012	Software	Microsoft Office 2020	John Doe		recorded	
#3 M806C	Printer	HP Deskjet			recorded	
#4 SCR-0014	Device	ASUS VG275Q	John Doe		recorded	
#5 Mouse-003-034	Device	Logitech G PRO	John Doe		recorded	
#6 KeyBoard 003-0056	Device	Logitech K 360	John Doe		recorded	

Fig. 186: Asset composition section

Asset types

Other sections

- Behavior

The types of asset in equipment make it possible to list the different materials of an equipment.

For example, a workstation contains a computer, peripherals such as a screen, a mouse, a keyboard, or even a webcam, software, licenses, a printer ...

But you can also create even more detailed lists with types of information storage, processing, or network equipment.

You can define an icon for each type of asset.

ProjeQtOr puts some icons at your disposal.

Tip: You can create and import yours in the application.

Save your icons in the `www\projeqt\view\icons` folder and relaunch the application.

Asset category

The screen of the equipment categories will allow you to make a more detailed inventory of certain equipment.

You can determine for example whether a piece of equipment can be personal, for a service or collective.

But you can also determine if a device is part of a hardware, network or workstation architecture

6.11.2 Brands

The brand screen allows to create a list of brands making up your IT infrastructure.

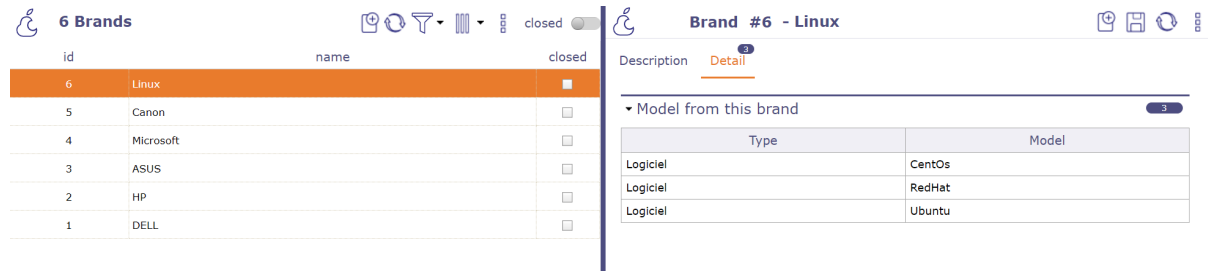


Fig. 187: Recorded Brands

6.11.3 Models

The model screen allows you to create a list of models linked to a brand and type of equipment.

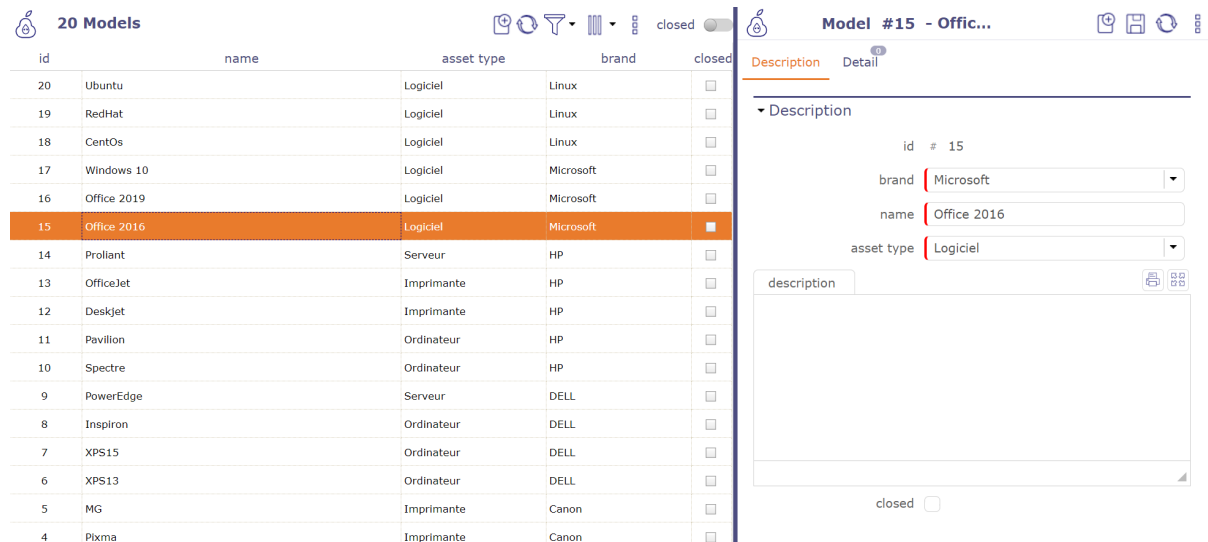


Fig. 188: Recorded models

6.11.4 Location

Location screen allow to create a list of places so that you can locate your equipment.

The “location” fields in the assets screen offers the possibility of selecting from the recorded list of locations and a manual entry field allowing you to add details with alphanumeric characters.

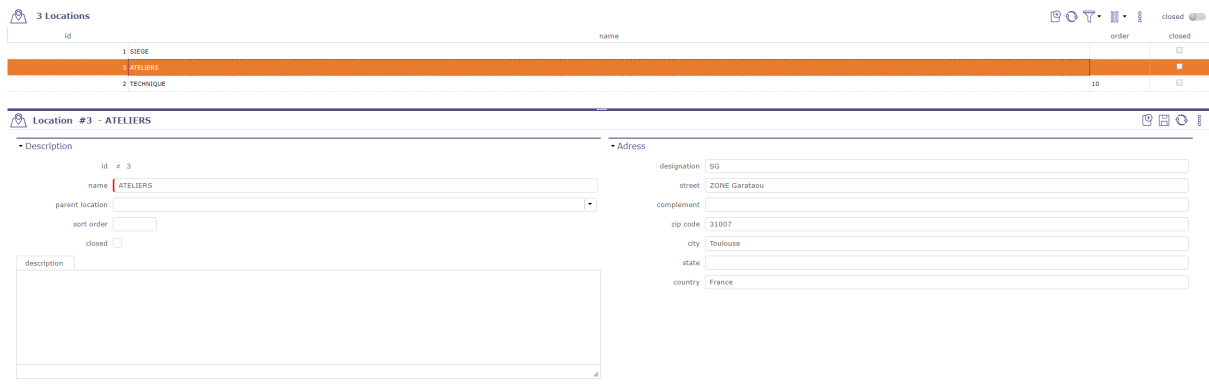


Fig. 189: Location screen

Address section

You can complete the axacte address by filling in numerous fields :

- Street
- Complement
- Zip code
- City
- State
- Country

DOCUMENT MANAGEMENT TRANSLATION

7.1 Documents

ProjQtOr integrates some EDM functionalities, and allows you to manage documents and follow the evolution of document versions. Each document or document version can then be linked to an element of ProjQtOr (Project, Activity or other).

Concepts

- *Product*

A document is a reference element that gives a description of a project or product.

The document element describes the general information.

The file will be stored in the tool as versions.

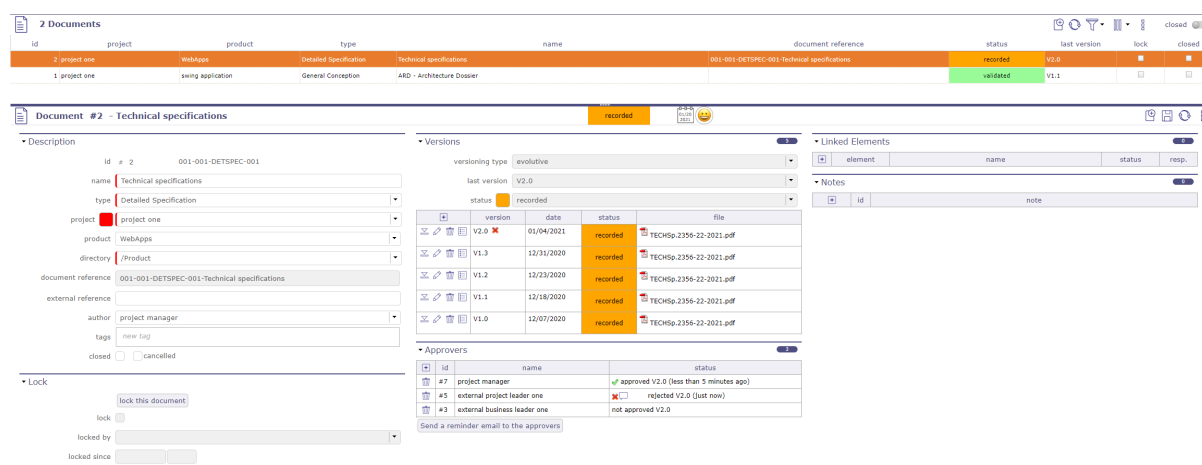


Fig. 1: Documents screen

Warning: ProjQtOr does not integrate the following features:

Full text indexing of documents, to search for a document using a keyword it contains as well as online editing of documents.

Project and Product

Must be concerned either with a project, a product or both.

If the project is specified, the list of values for field “Product” contains only products linked the selected project.

Field Author

Positioned by default as the connected user.

Can be changed (for instance if the author is not the current user).

Section Lock

This section allows you to manage the locking of documents in order to protect them from any modification or the addition of a new version.

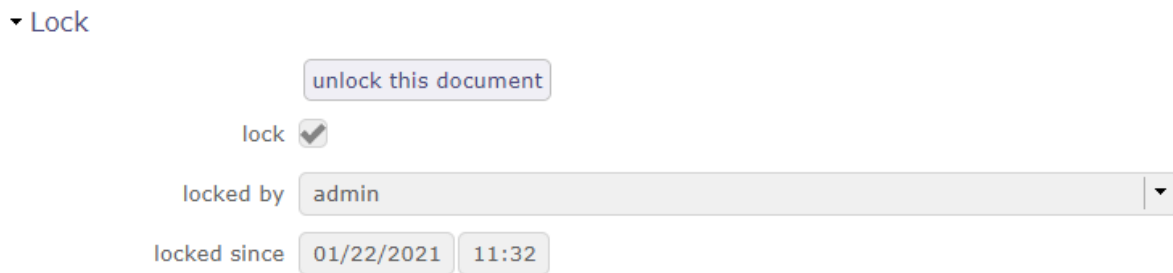


Fig. 2: Lock document section

When a document is locked the following fields are displayed.

- Locked: box checked indicates the document is locked.
- Locked by: user who locked the document.
- Locked since: date and time when document was locked.

When the document is locked, it can not be downloaded except for the user who locked it or a user with privilege
Only the user who locked the document, or a user with privilege can unlock it

You can forbid *Global Parameters*






7.1.1 Document versioning

This section allows to manage version list of document.

Document versioning allows to keep different version at each evolution of the document.

Document can evolve and a new file is generated at each evolution.

Type of versioning must be defined for a document.

- Click on  to add a new version.
- Click on  to download file at this version.
- Click on  to modify a version.
- Click on  to delete a version.
- Click on  to display the history for approvals for version

Tip: You can drag your file directly onto the screen.

The “document version” pop-up opens automatically to allow you to drop your file into the pop-up window.

▼ Versions 5

versioning type

last version

status recorded

	version	date	status	file
	V2.0	01/04/2021	recorded	TECHSp.2356-22-2021.pdf
	V1.3	12/31/2020	cancelled	TECHSp.2356-22-2021.pdf
	V1.2	12/23/2020	done	TECHSp.2356-22-2021.pdf
	V1.1	12/18/2020	done	TECHSp.2356-22-2021.pdf
	V1.0	12/07/2020	done	TECHSp.2356-22-2021.pdf

Fig. 3: Versioning section

Type of versioning

A document can evolve following four ways defined as versioning type :

Evolutive

- Version is a standard Vx.y format.
- It is the most commonly used versioning type.
- Major updates increase x and reset y to zero.
- Minor updates increase y.

Chronological

- Version is a date.
- This versioning type is commonly used for periodical documents.
- For instance : weekly boards.


Sequential

- Version is a sequential number.
- This versioning type is commonly used for recurring documents.
- For instance : Meeting reviews.

Custom

- Version is manually set.
- This versioning type is commonly used for external documents, when version is not managed by the tool, or when the format cannot fit any other versioning type.

Document viewer

- Document viewer available for image, text and PDF files.
- Click on  to display the pop up.

Note: Drag and drop

You can drag your file directly onto the screen.

The “document version” pop-up opens automatically to allow you to drop your file into the pop-up window.

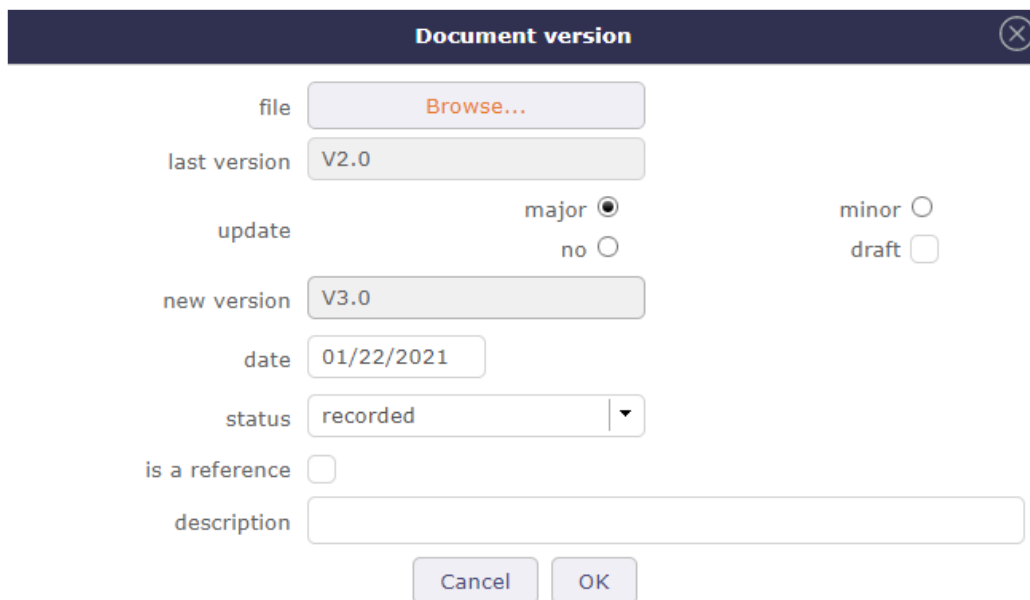


Fig. 4: Document version dialog box

Note: The name of download file will be the document reference name displayed in **description** section.

If you want to preserve the uploaded file name, set the parameter in the *Global parameters*

Field “Update”

Choose the type of versioning you will use on the last imported document.

Major versions bring new features or even completely restructure the document and will be noted v2 for example.

Minor versions mainly bring bug fixes or additions of secondary features. These versions will then be noted v2.1 for example.

A version can have a **draft** status, that may be removed afterwards.

Field “Is a reference”


Should be checked when version is validated.

Only one version can be the reference for a document.

Reference version is displayed in bold format in the versions list.

Field “Description”

May be used to describe updates brought by the version.



This icon  appears when the description field is filled.

Moving the mouse over the icon will display description text.

Approval process

You can define approvers for a document.

Only users assigned to the project linked to the document can be added.

- Click on  to add an approver
- Click on  to delete an approver

The approvers

When an approver is created in the list, the approver is also automatically added to the latest version of the document.

When adding a version to the document, approvers are automatically added to the version.

Each approver can see the list of documents to approve on their Today screen.

On the Documents screen, the approver can approve or reject the document.

All approvers of the document can view the response of other approvers.

Once the document is **approved**, the line is then checked and the date and time of the approval recorded.

If the document is **rejected**, the line is then marked with a cross with date and rejection cause.

The screenshot shows the ProjeQtOr 9.2 interface. The main content area is divided into several sections:

- Projects:** A table showing project progress. The 'scope of the numbers counted' is set to 'to do'.

Projects	Progress	Left	Margin	End date	Late	Tickets	Activities	Milestone	Actions	Risks
project one	0% / 10%	115,9 d	-5%	16/08/2021	402 d	1			1	1
project two	0% / 100%	9 d		03/08/2021	399 d		1			
holidays	0%	0 d								
- Tasks assigned to me:** A table listing tasks assigned to the user.

Id	Project	Type	Name	Due date	Status	Issuer	Acc.	Resp.
#8	PROJECT - LEAVE PERIOD	Leave period	Congés Payés		recorded			
#9	PROJECT - LEAVE PERIOD	Leave period	RTT		recorded			
#7	project two	Management	Management	03/08/2021	recorded			<input checked="" type="checkbox"/>
#1	project one - maintenance	Task	bug fixing	16/08/2021	in progress			<input checked="" type="checkbox"/>
- Tasks I am responsible for:** (Empty table)
- Tasks I am issuer or requestor of:** (Empty table)
- All tasks of my projects (projects I am member of):** (Empty table)
- Documents to approve:** A table listing documents requiring approval, highlighted with a red box.

Id	Project	Type	Name	Due date	Status	Issuer	Acc.	Resp.
#2	project one	Contract	SpecTech		recorded			

Fig. 5: Documents to be approved on the today screen

▼ **Approvers** 3

approval status: Waiting for approval

+	id	name	status
🗑️	#7	admin	not approved V1.0 approve now reject
🗑️	#4	project manager	✅ approved V1.0 (just now)
🗑️	#3	external project leader one	not approved V1.0

Send a reminder email to the approvers

Fig. 6: Documents to be approved on the today screen

Approval status

This status allows you to globally track the status of the approval.

It can be used in a filter, like all the other fields of the document object.

calculated according to the approval status of the latest version of the document and may take the following values:

- **Without approval:** if no approver has been added to the list of approvers
- **Rejected:** if at least one approver rejected the version of the document
- **Pending approval:** if there is at least one approver who has not approved the document and no one has yet rejected the version of the document
- **Approved:** if all approvers approved the document.

Note: The quick search only display documents that are in directories to which the user has rights.

Send a reminder email to approvers

Send an email to approvers who have not yet validated the document.

Those who have already validated it will not receive this email.

The sending will be effective if an email address has been registered for the user.

7.1.2 Document directory

Document directories management allows to define a structure for document storage.

id	location	name	project	product	closed
2	/Product	Product			<input type="checkbox"/>
5	/Product/Conception	Conception			<input type="checkbox"/>
8	/Product/Deployment	Deployment			<input type="checkbox"/>
9	/Product/Exploitation	Exploitation			<input checked="" type="checkbox"/>
3	/Product/Need	Need			<input type="checkbox"/>
4	/Product/Specification	Specification			<input type="checkbox"/>
7	/Product/Testing	Testing			<input type="checkbox"/>
1	/Project	Project			<input type="checkbox"/>
10	/Project/Contract	Contract			<input type="checkbox"/>
14	/Project/Financial	Financial			<input type="checkbox"/>
13	/Project/Follow-up	Follow-up			<input type="checkbox"/>
11	/Project/Management	Management			<input type="checkbox"/>
12	/Project/Reviews	Reviews			<input type="checkbox"/>

Document directory #9 - Exploitation

Description

id # 9

name

parent directory

location

project

product

responsible

default type

closed

Access right to documents

Documents rights per directory

Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Gues
Manager+	Reader+	Manager	Manager	Reader	Reader	No access

Fig. 7: Document directory screen

Location

The files of document will be stored in the folder defined by the parameters **Document root** and **Location**.

- **Document root** is defined in *Global parameters* screen.
- **Location** is automatically defined as «Parent directory» / «Name».
- **Product** will be the default to new stored documents in this directory.
 - If the project is specified, the list of values contains the products linked the selected project.
 - If the project is not specified, the list of values contains all products defined.
- The **Default type** will be the default to new stored documents in this directory.

Directory access rights

The list of documents only displays Documents that are in directories for which the user has read rights.

You can define the access rights to documents according to the profile at each level of the document directory tree.

There is no notion of inheriting rights to subdirectories.

You define for each profile the CRUD right (create / read / update / delete) on each directory.

The rights defined in the “Project dependent data access” rights screen will only be used as a definition of default values when creating a directory.

See also:

Documents rights per directory

Note: Note that if a directory is dedicated to a project, the profile used for assigning rights is the user’s profile on this project, otherwise it is his default profile.

The assignment of modification or deletion rights without assigning read rights is inconsistent and will not be taken into account.

7.1.3 Global export for document

The export of documents allows the extraction of documents in .zip file format.

The generated .zip file will be named with the formatting nameElement_UserN°ID.zip

You will be able to extract:

- All documents in a directory
- All the documents for a given element (project, activity, ticket, etc.)
- All the documents of a project and its elements
- All the documents of a project and its elements including the sub-projects and the elements of these sub-projects.

This includes attached files in addition to documents.

Extract files for project

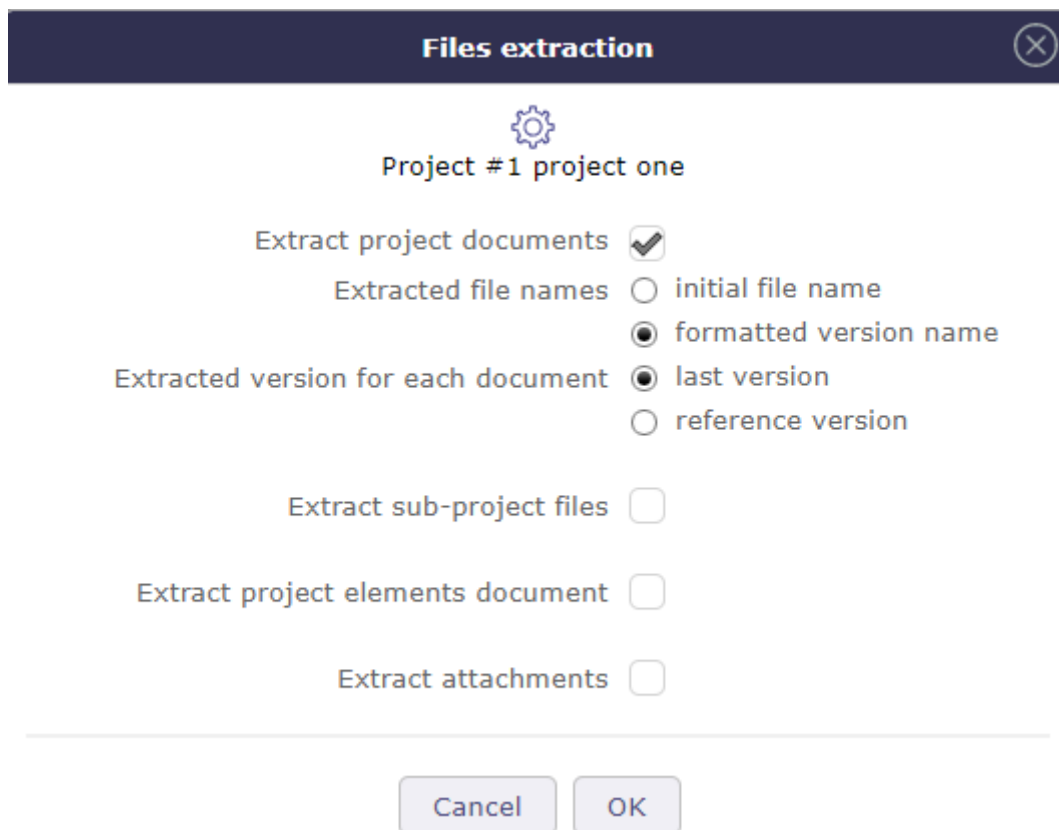



Fig. 8: Document's files extraction for project

- Click on  in the tools menu in the details area to open the pop up

Extract project document

All documents related to the selected project will be exported.

Extracted file names

Name preservation is only active on documents.

The initial name keeps the exact name of your document.

The formatted name retrieves the document reference and the extracted version.

Extracted version for each document

Two possibilities:

- Last version
- Reference version

Warning: The reference version is not necessarily the last version

Extract sub-project files

Without this option the sub-projects will not be included in the extraction.

Extract project elements document

Each element of the project containing documents will be exported.

Each item will have its own folder in the zip file.

Extract attachments

All the attached files on the project and its elements will be exported.

Extract files for directories

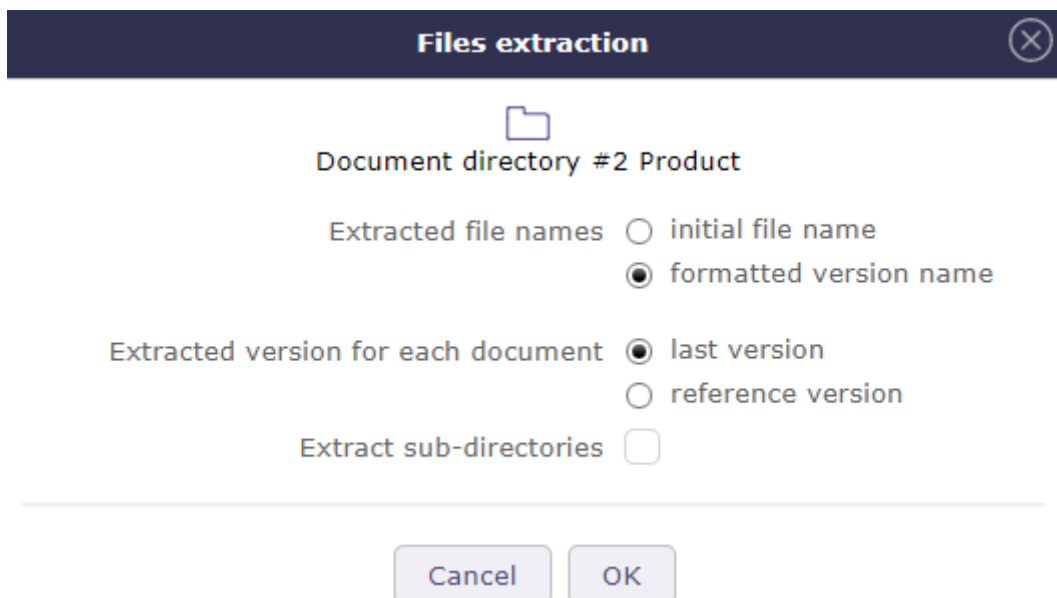


Fig. 9: Document's file Extraction for directories

The document directories can be extracted in their entirety.

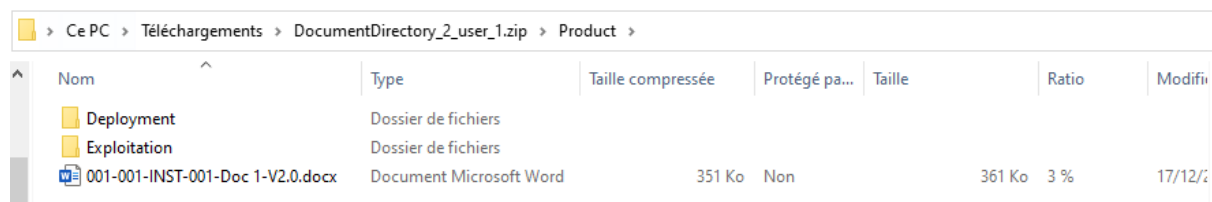


Fig. 10: Exemple Extract files for directory

When extracting directories including sub-directories, we find in the generated zip file only the sub-directories containing documents.

Extract file names

Name preservation is only active on documents.

The initial name keeps the exact name of your document.

The formatted name retrieves the document reference and the extracted version.

Extract document version

Two possibilities:

- Last version
- Reference version

Warning: The reference version is not necessarily the last version

Extract sub-directories

Without this option the sub-directories will not be included in the extraction.

Extract for item

The documents, attached files can be extracted of an item.

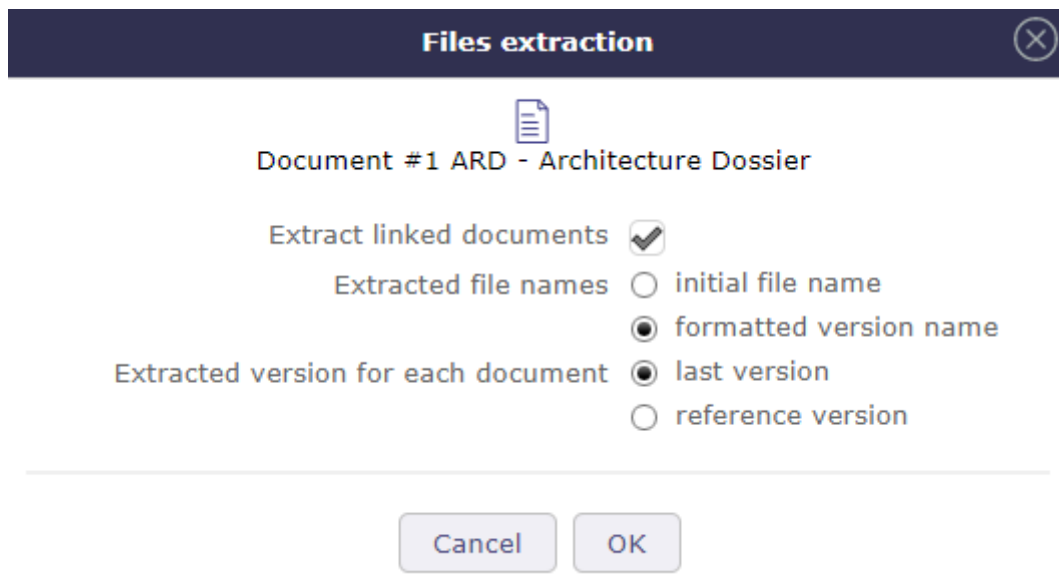


Fig. 11: Document's file Extraction

Extracted file names

Name preservation is only active on documents.

The initial name keeps the exact name of your document.

The formatted name retrieves the document reference and the extracted version.

Extracted version for each document

Two possibilities:

- Last version
- Reference version

Warning: The reference version is not necessarily the last version

Extract attachments

Include attached files in the extract

7.1.4 Nomenclature

Product designation in the document nomenclature is possible to take into account the designation of the product in the nomenclature of documents with the new codes

- {PROD} product designation
- {PROJ/PROD} the project code if specified, otherwise the product designation
- {PROD/PROJ} designation of the product if specified, otherwise the project code

7.2 Translation

Translations are a separate module. By activating it you have access to a series of screens allowing you to manage your translation requests.

See also:

Module management

7.2.1 Translation request

You must enable configuration management to manage products, product versions, and release components.

When you request a translation, the fields “version component” and “product version” are mandatory.

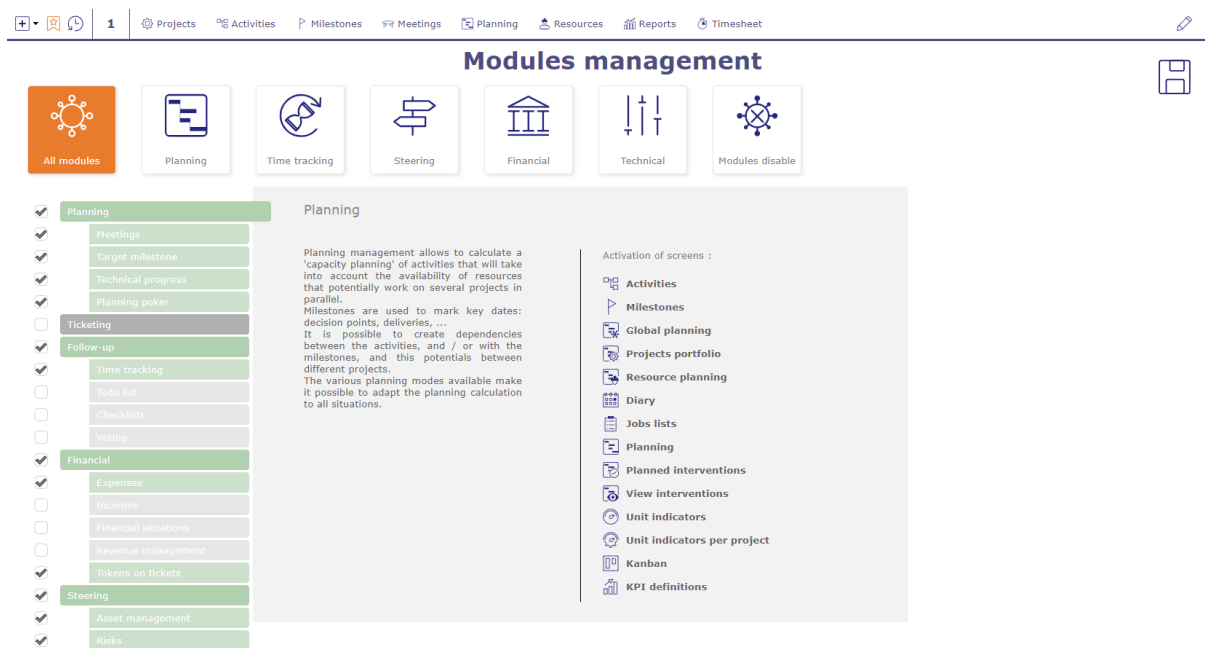


Fig. 12: Module management screen

7.2.2 Translation

When you perform a translation request, a translation line is created for each language associated with the product or component version.

▼ Translation items 3			
Translation	name	status	translator
#1	Notice VB758 - French	recorded	
#2	Notice VB758 - Spanish	recorded	
#3	Notice VB758 - German	recorded	

Fig. 13: Translation items

Each of these lines are displayed on the translation screen.

You will find the information entered in the translation requests screen. These fields are grayed out and can only be modified on the request screen.

The only field available is that of translators.

The list of translators is proposed according to the skills indicated on the translators and the languages requested during the request.

If the text to be translated is of German origin and the destination languages are English and Spanish, then the translator must know these three languages to appear in the lists.

If no translator appears in the lists, it means that you do not have the competent translators for this translation.

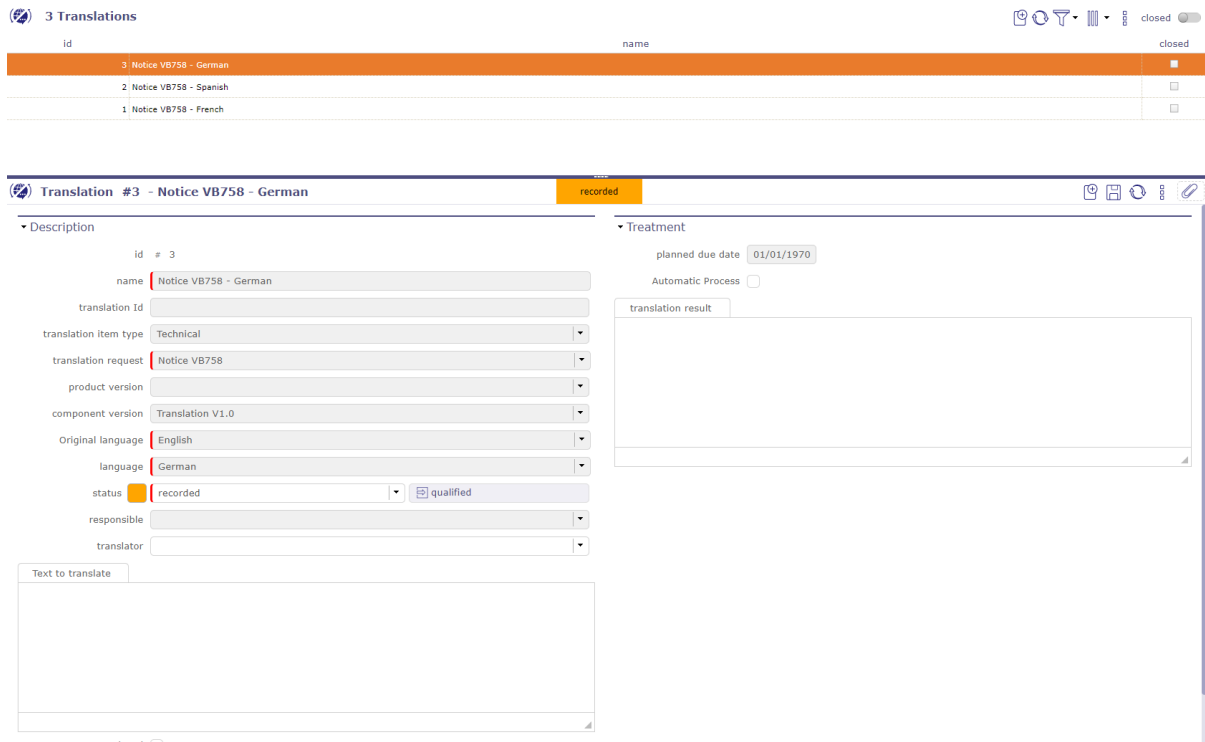


Fig. 14: Translation items

7.2.3 Translators

You register your translators from your resources.

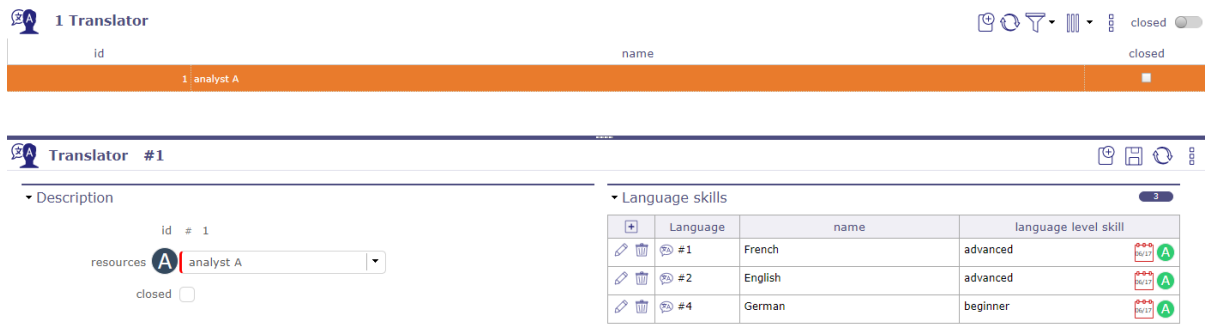


Fig. 15: Translators screen

- Each translator can have one or more associated languages.
- Each language has a skill level.

7.2.4 Language skill level

You set the skill levels on this screen.

The levels are customizable and you can create as many as you want.

By default, ProjeQtOr offers you the 3 most basic levels: beginner, intermediate and advanced.

These skill levels are required of you when creating your *Translators*.

7.2.5 Translation requests and items types

You define the types of translation that you will use in your business.

This allows you to apply a different workflow and behavior for each type.

For each type you can apply automatisms.

Translation lines also have the possibility of being typed.

You can more easily compartmentalize your requests.

See also:

List of types

8.1 Expenses

8.1.1 Hierarchical budget

The hierarchical view of budgets allows you to display an overview of budgets in a graphic way with an indent system for better reading.

You can filter the list of budgets using the parent budget filter.

You can display a particular budget family.

You can move budgets by “drag and drop”.

The screenshot shows a web interface titled "Hierarchical budget" with a "parent budget" dropdown menu. Below the menu is a table with the following data:

budgets	estimate amount	initial amount	update n°1 amount	update n°2 amount	exceptional update	transferred amount	updated amount	engaged amount	available amount	invoiced amount	real left amount
Budget 1	40 000,00 €	40 000,00 €				1 000,00 €	41 000,00 €		41 000,00 €		41 000,00 €
Poste 1.1	20 000,00 €	20 000,00 €				1 000,00 €	21 000,00 €		21 000,00 €		21 000,00 €
Budget 1.2	20 000,00 €	20 000,00 €					20 000,00 €		20 000,00 €		20 000,00 €
Poste 1.2.1	15 000,00 €	15 000,00 €					15 000,00 €		15 000,00 €		15 000,00 €
Budget 1.2.2	5 000,00 €	5 000,00 €					5 000,00 €		5 000,00 €		5 000,00 €
Poste 1.2.2.1	5 000,00 €	5 000,00 €					5 000,00 €		5 000,00 €		5 000,00 €

Fig. 1: Hierarchical budget screen

8.1.2 Budget

A budget is a list of all products and different expenses to plan. It is a plan that allows to define in advance the expenses, the incomes and the possible savings to be realized during a definite period.

It allows to anticipate the resources that the company will have at a specific moment.

- You can create as much budget and sub budget as you want.
- An expense is related to a base budget, ie a budget item
- A budget item is linked to a parent budget
- Only the current budget items will be displayed in the lists.
- Current, under construction and closed budgets will not appear in the lists. To view the closed items, check the “closed” box.

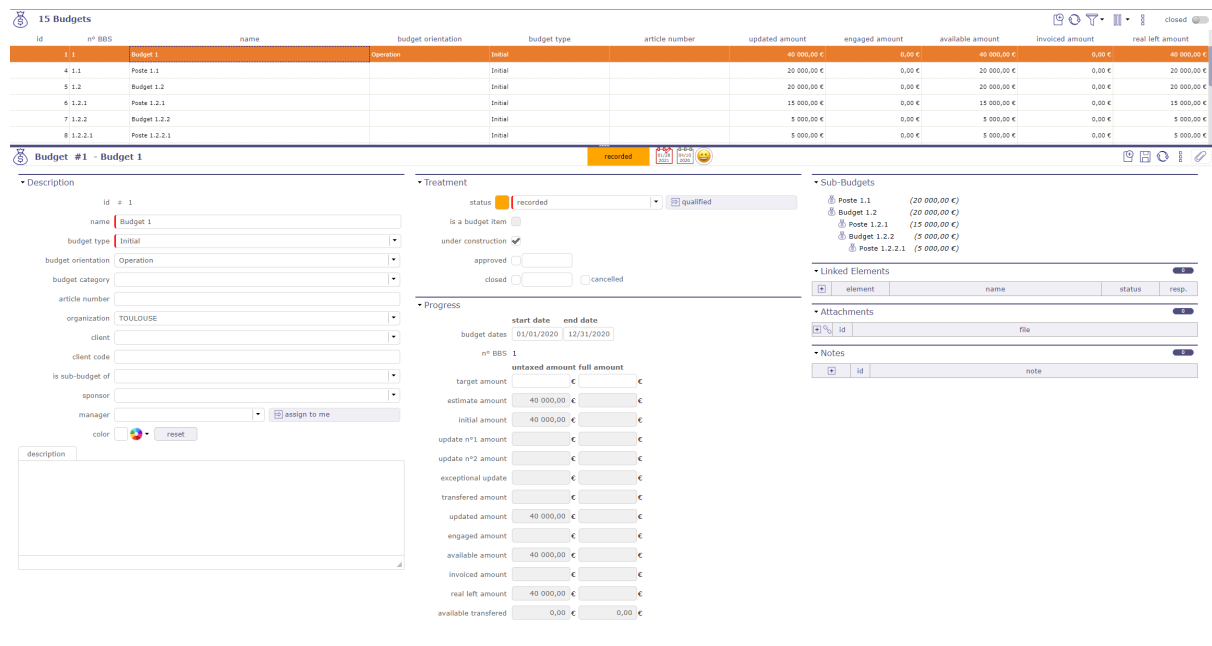


Fig. 2: Budget Screen

Budget parent filter

With the filter, you can display in the list area, only a budget and its family (sub-budget).

An indentation of these to the right shows that they are sub-budgets.

To see the closed items in this list, check the “closed” box.

If you change the name of a budget, remember to refresh the page so that the lists take into account the changes.

- The parent budget exists only to consolidate the data of the underlying budget items.
- You cannot modify the expenses in the Progress field of a parent budget.
- Only the target amount can be changed if the budget treatment is still under construction.

The budget item

- The budget item is the finer element of the budget analysis.
- These posts or budget destinations will allow you to detail your budget, categorizing it at your convenience.
- When you create a *project expenses* or an *individual expenses*, you can link them to a specific budget item.

Treatment

This area allow you to change the macro state of the budget.

- A budget may be under construction
- A budget under construction does not allow to see the fields “target amount” and prevents the modification of the estimated amount
- The “approved” macro-state changes and automatically cancels the “under construction” macro state. The date is then displayed in the fields of the macro-state concerned.
- Each sub-budget is then impacted and the “approved” state will then be propagated on all of his family.

FILTERS
Reset
always display

id	<input type="text"/>	<input type="checkbox"/>
name	<input type="text"/>	<input type="checkbox"/>
type	<input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-top: 1px solid #ccc; border-left: 1px solid #ccc; width: 100%;" type="text"/> ▼	<input type="checkbox"/>
client	<input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-top: 1px solid #ccc; border-left: 1px solid #ccc; width: 100%;" type="text"/> ▼	<input type="checkbox"/>
parent budget	<input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-top: 1px solid #ccc; border-left: 1px solid #ccc; width: 100%;" type="text"/> ▼	<input type="checkbox"/>
quick search	<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>
display direct status filters		<input checked="" type="checkbox"/>

🔍 Advanced filters

Advanced stored filters

no filter clause

Fig. 3: Filerts on budget

- Each macro state “under construction”, “approved”, “closed” and “canceled” modified from the parent budget screen propagates in cascade over the entire budget hierarchy.

Progress

▼ Progress

	start date	end date
budget dates	<input type="text" value="01/01/2020"/>	<input type="text" value="12/31/2020"/>
n° BBS 1		
	untaxed amount	full amount
estimate amount	<input type="text" value="40 000,00 €"/>	<input type="text" value=""/>
initial amount	<input type="text" value="40 000,00 €"/>	<input type="text" value=""/>
update n°1 amount	<input type="text" value=""/>	<input type="text" value=""/>
update n°2 amount	<input type="text" value=""/>	<input type="text" value=""/>
exceptional update	<input type="text" value=""/>	<input type="text" value=""/>
transferred amount	<input type="text" value="1 000,00 €"/>	<input type="text" value="1 500,00 €"/>
updated amount	<input type="text" value="41 000,00 €"/>	<input type="text" value="1 500,00 €"/>
engaged amount	<input type="text" value=""/>	<input type="text" value=""/>
available amount	<input type="text" value="41 000,00 €"/>	<input type="text" value="1 500,00 €"/>
invoiced amount	<input type="text" value=""/>	<input type="text" value=""/>
real left amount	<input type="text" value="41 000,00 €"/>	<input type="text" value="1 500,00 €"/>
available transferred	<input type="text" value="-1 000,00 €"/>	<input type="text" value="-1 500,00 €"/>

Fig. 4: Progress Section

This section allows to follow the consolidation of all the expenses.

The target amount is the only amount that you can change on a parent budget if it is still under construction.

The other amounts are recovered from the sub-budgets and consolidated on the parent budget.

Transferred Amount allows to release a sum of an amount planned for a budget item in order to redistribute it to another item.

This amount is visible on all budget items.

Transferred Amount

- Enter a negative amount on a budget line to transfer an amount
- Enter a positive amount on a budget line to recover this amount
- Only the parent budget and its sub budget will see this amount.
- Another parent budget can not recover this amount.

Budget expense detail

This section displays lines in detail This section, available at the first level of the parent budget, displays in detail the *expense lines of the project* that have been linked to the defined budget items.

▼ Budget expense detail 1					
name		date	untaxed amount	tax amount	full amount
📁 #3 - Servers	planned	03/01/2021	4 500,00 €	900,00 €	5 400,00 €
	real	01/29/2021	5 400,00 €	1 080,00 €	6 480,00 €

Fig. 5: Details lines

8.1.3 Expense's type

Project expense

Other sections

- *Expenses detail lines*

A project expense stores information about project costs that are not resource costs.

This can be used for all kinds of project cost :

- Machines (rent or buy).
- Softwares.
- Office.
- Any logistic item.

Fields Planned & Real

Ex VAT: Amount without taxes. Real amount is automatically updated with the sum of the amounts of detail lines.

TAX rate: VAT amount

Tax: VAT amount from the amount and rate entered previously.

Full: Amount with taxes.

Payment date:

- For field “Planned” is the planned date.
- For field “Real” can be the payment date or else.

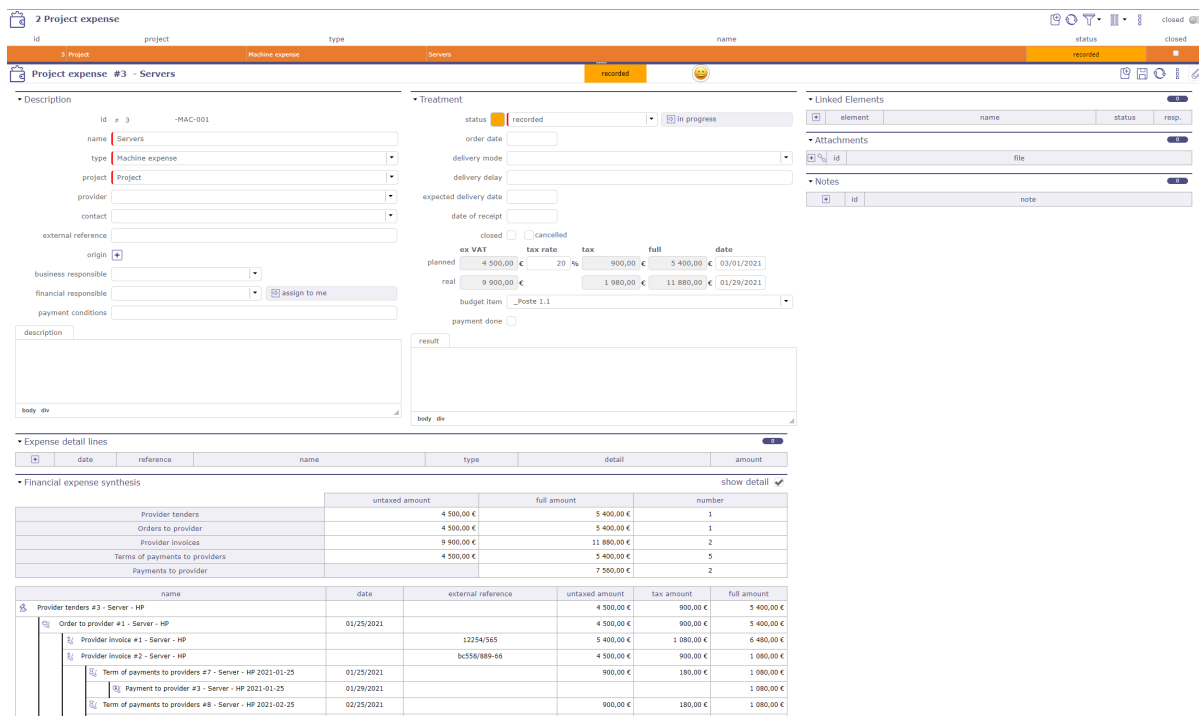


Fig. 6: Expense project

Activity expenses

The payment due date can be retrieved from the activity.

Choose from the start, middle, or end of the activity associated with the expense.

Save and the date is automatically displayed.

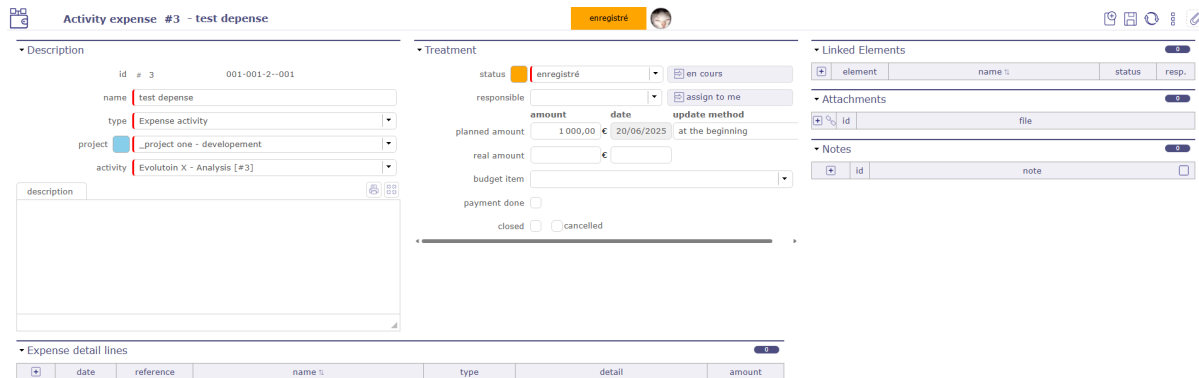


Fig. 7: Expense activity

Individual expenses

An individual expense stores information about individual costs, such, for example, as travel costs.

This can for instance be used to detail all the expense on one month so that each user opens only one individual expense per month (per project), or detail all the elements of a travel expense.

Expenses detail lines





Expense detail lines						
	date	reference	name	type	detail	amount
			RAM 168 Go			400,00 €
			Cable			200,00 €
	01/25/2021		Server MX8 00201			4 000,00 €
	01/25/2021		ChamberHX-Serv			800,00 €

Fig. 8: Project details lines




Section Expenses detail lines

This section is common to individual, activity and project expenses.

It allows to enter detail on expense line.

Note: When a line is entered, expense real amount is automatically updated to sum of lines amount.

Real date is set with the date in the first detail line.

- Click on  to add a detail line.
- Click on  to modify an existing detail line.
- Click on  to delete the detail line.

Field Date

This allows to input several items, during several days, for the same expense, to have for instance one expense per travel or per month.

Field Type

Depending on type, new fields will appear to help calculate of amount.

Available types depending on whether individual or project expense.

See also:

Expenses details types.

Field Amount

Automatically calculated from fields depending on type.

May also be input for type “justified expense”.

Financial expenses synthesis

When your financial elements have been linked and attached to a project expense (detailed or not), you will find the summary of these elements.

Financial expense synthesis show detail ✓

	untaxed amount	full amount	number
Provider tenders	4 500,00 €	5 400,00 €	1
Orders to provider	4 500,00 €	5 400,00 €	1
Provider invoices	9 900,00 €	11 880,00 €	2
Terms of payments to providers	4 500,00 €	5 400,00 €	5
Payments to provider		7 560,00 €	2

name	date	external reference	untaxed amount	tax amount	full amount
Provider tenders #3 - Server - HP			4 500,00 €	900,00 €	5 400,00 €
Order to provider #1 - Server - HP	01/25/2021		4 500,00 €	900,00 €	5 400,00 €
Provider invoice #1 - Server - HP		12254/565	5 400,00 €	1 080,00 €	6 480,00 €
Provider invoice #2 - Server - HP		bc558/889-66	4 500,00 €	900,00 €	1 080,00 €
Term of payments to providers #7 - Server - HP 2021-01-25	01/25/2021		900,00 €	180,00 €	1 080,00 €
Payment to provider #3 - Server - HP 2021-01-25	01/29/2021				1 080,00 €
Term of payments to providers #8 - Server - HP 2021-02-25	02/25/2021		900,00 €	180,00 €	1 080,00 €
Term of payments to providers #9 - Server - HP 2021-03-25	03/25/2021		900,00 €	180,00 €	1 080,00 €
Term of payments to providers #10 - Server - HP 2021-04-25	04/25/2021		900,00 €	180,00 €	1 080,00 €
Term of payments to providers #11 - Server - HP 2021-05-25	05/25/2021		900,00 €	180,00 €	1 080,00 €

Fig. 9: Financial expenses synthesis with details lines

8.1.4 Call for tenders

Fig. 10: Call for tender screen

This screen allows you to record information on your needs for any request for tenders from your providers.




This can be used to detail all requests and find the best proposal.

To help you do this, you have the option of creating different evaluation criteria. You can then assign a value to them in the offer.

The call for tenders, once saved, automatically creates a provider offer for each of the selected providers.

Submissions of tenders

This section contains the list of providers to whom the invitation to tender is sent.

- Click on  to add a provider to the list.
- Click on  to edit informations.
- Click on  to delete a provider to the list.

A pop up is displayed. Fill in the different fields necessary for your needs.











Submissions of tenders						
	provider		requested	expected	received	evaluation amount
 	LDLC 		01/25/2021 10:00:00	02/15/2021 12:00:00		0 0,00 €
 	DELL 		01/25/2021 10:00:00	02/15/2021 12:00:00		0 0,00 €
 	HP 		01/25/2021 10:00:00	02/15/2021 12:00:00		0 0,00 €

Fig. 11: Submission to call for tender pop-up

- You can choose a specific supplier contact.
- The contacts available in the list are linked to the selected supplier.
- These contacts must be registered in advance on the provider's screen.
- Change supplier, the contact list will adapt
- The dates of the request and the expected response.
- The status of the submission to tender. Several statuses are available.
- They are fully configurable and customizable. Each status has a color code.




You can access to each offer by clicking on the name of the provider or by visiting the provider offers screen.

See also:

List of values

Evaluation Criteria

This section allows you to add evaluation criteria to rate your providers based on your requests.

- Click on  to add a criteria
- Click on  to modify a criteria
- Click on  to delete a criteria
- Name your evaluation criteria.
- Assign a maximum rating value.
- Assign a coefficient according to the importance of the criteria.
- The score is calculated based on the values assigned and reported in the "submission of tenders" table.

Tender evaluation criteria ✕

name

max evaluation value

coefficient

Cancel
OK

Fig. 12: Add an evaluation criteria

Tip: Click on to logically switch from one financial item to another:

Call for tenders -> Provider tenders -> Order to provider -> Terms/Bills -> Payments to providers

Each time you copy a financial item, the most logical financial item for the rest of the order process will be displayed automatically.

The amount of expense of these elements will be recovered, passed on and linked to each of the others and will allow you more precise monitoring.

You can prevent the carry forward of amounts or the generation of expenses in the *global parameters*

8.1.5 Provider Tenders

Provider tenders store information about responses to tenders you have submitted.

This can be used to detail all the offers, compare them, evaluate them to choose the most suitable for your needs.

3 Provider tenders 🔍 🗨️ 📄 📊 📌 📄 closed

id	project	type	name	tender status	untaxed total	status
3	Project	open call for tender	Server - HP	admissible	4500,00	accepted
2	Project	open call for tender	Server - ODL	waiting for reply		recorded
1	Project	open call for tender	Server - UDC	waiting for reply		recorded

Provider tenders #3 - Server - HP 🔍 🗨️ 📄 📊 📌 📄

Description

id # 3 --003

name

type

project

call for tender

tender status

provider

external reference

description

Treatment

status:

responsible

contact

request date

expected answer date

date of receipt

offer validity

untaxed amount	tax rate	tax amount	full amount
initial 4 500,00 €	20 %	900,00 €	5 400,00 €
discount	rate (%)	0 %	
total 4 500,00 €		900,00 €	5 400,00 €

project expense

payment conditions

delivery delay

expected delivery date

In progress

done

closed cancelled

Evaluation

name	value	coefficient	total
Price	8 / 10	2	16
Quality	8 / 10	2	16
Deadlines	10 / 10	1	10
max evaluation value : 50			42

evaluation value

Linked Elements

element	name	status	resp.
Order to provider #1	Server - HP	recorded	
Provider Invoice #1	Server - HP	recorded	
Payment to provider #1	Server - HP	recorded	

Attachments

id	file
#17	Quot001-554-72.docx

Notes

id	note

Fig. 13: Provider tender screen

An offer can be created manually or generated automatically following a call for tenders.

Each provider added to the invitation to tender will generate an offer.

Generate expense

	untaxed amount	tax rate	tax amount	full amount
initial	4 500,00 €	20 %	900,00 €	5 400,00 €
discount		rate (%)	0 %	
total	4 500,00 €		900,00 €	5 400,00 €

project expense

generate expense (automatically create expense from current item)

payment conditions

delivery delay

expected delivery date

in progress

Fig. 14: Generate expense

You can attach a specific expense to your order.

Select a manually created expense from the project expense list.







If you have not created an expense upstream, check the generate expense box, a line will then be created in the project expenses.

Evaluation

The Evaluation section is only available when the offer is linked to a call for tenders.

If the offer is created manually, the evaluation section does not offer criteria.

▼ Evaluation criteria

	name	max evaluation value	coefficient
 	Price	10	2
 	Quality	10	2
 	Deadlines	10	1
total :			50

max evaluation value fix evaluation value

Fig. 15: Evaluation section

When the link is made then:

- You can assign evaluation criteria
- You can assign a rating with a coefficient system.
- The evaluation will display a summary of your criteria with their scores.
- The overall score will then be displayed on the invitation to tender for all the offers concerned.

See also:

the criteria evaluations in the Call for tenders chapter

8.1.6 Orders to provider

This screen allow to manage the orders to provider.

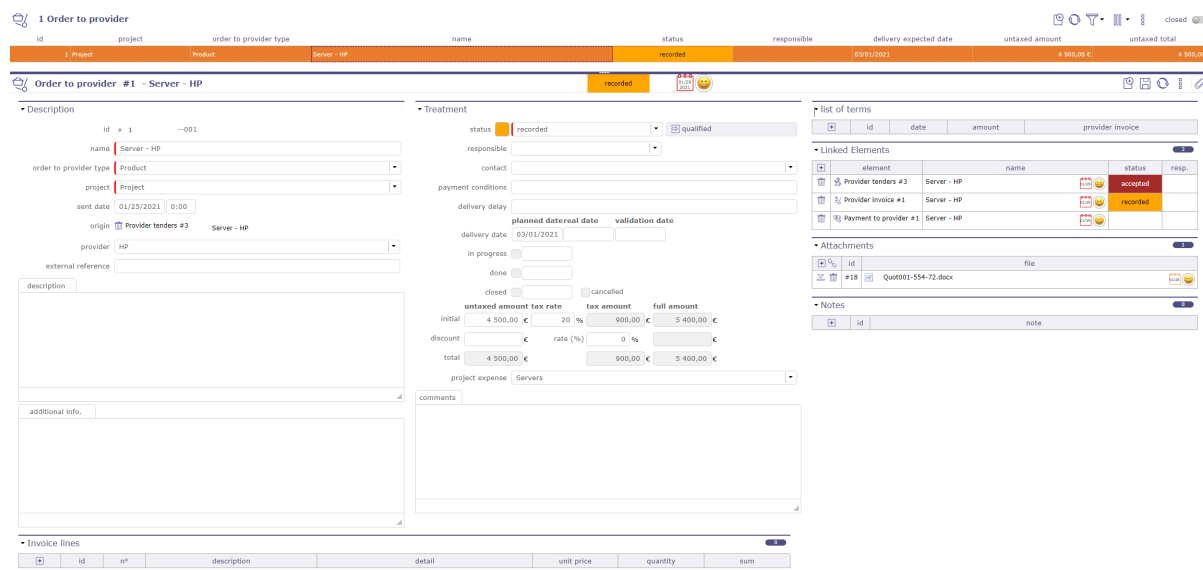




Fig. 16: Order to provider screen

List of terms orders

This section allows you to create one or more terms for your invoices.

- Click on  to add a term. A pop-up opens.
- Click on  to add an existing term.

list of terms




	id	date	amount	provider invoice
 	#2	01/25/2021	1 080,00 €	
 	#3	02/25/2021	1 080,00 €	
 	#4	03/25/2021	1 080,00 €	
 	#5	04/25/2021	1 080,00 €	
 	#6	05/25/2021	1 080,00 €	
	Sum		5 400,00 €	

Fig. 17: List of term section

- The name and the date are mandatory.
- Enter the number of installments you want to pay your invoice.
- If 1 then it is a cash payment.
- When you enter several terms, the calculation on the total amount is done automatically.
- When you copy your order as an invoice, the terms are automatically added to it.
- You can add due dates from the provider invoices screen if you have not done so on this screen.

term
✕

name

date

untaxed amount € (untaxed amount from order)

discount rate % (discount rate from order)

untaxed total € (untaxed total from order)

tax rate % (tax rate from order)

general sum € (general sum from order)

full amount of terms € (sum of full amounts of terms already booked)

detail of term				
number of terms	untaxed amount	rate (%)	tax amount	full amount
<input style="width: 40px;" type="text" value="1"/>	4 500,00 €	100 %	900,00 €	5 400,00 €

Fig. 18: Terms creation pop-up

detail of term				
number of terms	untaxed amount	rate (%)	tax amount	full amount
<input style="width: 40px;" type="text" value="5"/>	900,00 €	20 %	180,00 €	1 080,00 €

5 terms on day 25 of month starting at 01/25/2021

Fig. 19: Calculation after number of deadlines entered

When you transform your order into an invoice, the terms recorded in the offer are automatically transferred to the invoices.

See: *List of terms*

In the order, these will be filled in as invoiced with a link to the latter.

▼ list of terms

	id	date	amount	provider invoice	
invoiced	#10	04/25/2021	1 080,00 €	#2	bc558/889-66 qualified
invoiced	#11	05/25/2021	1 080,00 €	#2	bc558/889-66 qualified
paid	#7	01/25/2021	1 080,00 €	#2	bc558/889-66 qualified
invoiced	#8	02/25/2021	1 080,00 €	#2	bc558/889-66 qualified
invoiced	#9	03/25/2021	1 080,00 €	#2	bc558/889-66 qualified
Sum			5 400,00 €		

Fig. 20: List of terms invoiced

8.1.7 Terms of payments to providers

In France, inter-company payment periods are regulated and set at maximum 60 calendar days or 45 days end of month from the date of issue of the invoice.

Failing to mention the payment period in the contract or the invoice, it is legally fixed to 30 days after receipt of the goods or performance of the service.

- Depending on the sector, deadlines are modifiable
- you can save, organize, track and edit your payment dates to your provider
- You can record one or more payment delays on each invoice to the service provider.
- A invoice can therefore be paid either in cash or in several installments.
- Each recorded due date, whether on the supplier orders screen or on the supplier invoices screen, generates a line on the terms screen.

Note:

- **Ex VAT:** The column value is automatically updated with the sum of invoice line amounts.
- **Tax:** If the tax is not defined, nothing is applied in this field and the amount will remain without tax
- **Full:** If the total amount exclusive of tax and the tax rate have been entered, the total amount will be calculated automatically

On the project, the sum of the expenses must be carried out in including taxes if the entry of expenses is in including taxes

8.1.8 Provider invoices

This screen is used to manage invoices generated manually or linked to provider offers.

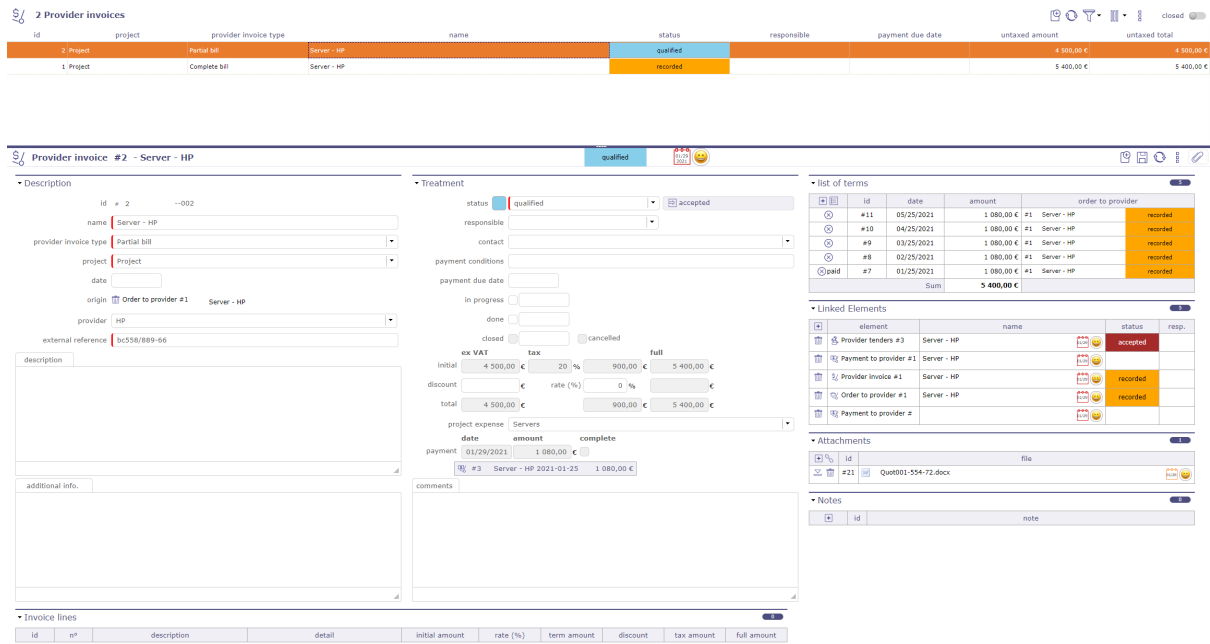


Fig. 21: Provider invoice screen

List of terms

list of terms							5
	id	date	amount	order to provider			
⊗	#11	05/25/2021	1 080,00 €	#1	Server - HP		recorded
⊗	#10	04/25/2021	1 080,00 €	#1	Server - HP		recorded
⊗	#9	03/25/2021	1 080,00 €	#1	Server - HP		recorded
⊗	#8	02/25/2021	1 080,00 €	#1	Server - HP		recorded
⊗ paid	#7	01/25/2021	1 080,00 €	#1	Server - HP		recorded
	Sum		5 400,00 €				

Fig. 22: List of terms invoiced

This section allows you to create one or more terms for your invoices.

If your invoice was created from an order, then the terms recorded on the offer will be automatically recovered on the invoice.

- Click on to add a term. A pop-up opens.
- Click on to add an existing term.
- Click on to remove a term.
- The name and the date are mandatory.
- Enter the number of installments you want to pay your invoice.

- If 1 then it is a cash payment.

term
✕

name

date

untaxed amount € (untaxed amount from order)

discount rate % (discount rate from order)

untaxed total € (untaxed total from order)

tax rate % (tax rate from order)

general sum € (general sum from order)

full amount of terms € (sum of full amounts of terms already booked)

detail of term				
number of terms	untaxed amount	rate (%)	tax amount	full amount
<input style="width: 20px;" type="text" value="1"/>	4 500,00 €	100 %	900,00 €	5 400,00 €

Fig. 23: Terms creation pop-up

When you transform your order into an invoice, the deadlines recorded in the order are automatically transferred to the invoices.

In the orders, in the deadlines section, these will be indicated as invoiced

Each line provides a link to the item screen.

▼ list of terms

	id	date	amount	provider	invoice	
invoiced	#10	04/25/2021	1 080,00 €	#2	bc558/889-66	qualified
invoiced	#11	05/25/2021	1 080,00 €	#2	bc558/889-66	qualified
paid	#7	01/25/2021	1 080,00 €	#2	bc558/889-66	qualified
invoiced	#8	02/25/2021	1 080,00 €	#2	bc558/889-66	qualified
invoiced	#9	03/25/2021	1 080,00 €	#2	bc558/889-66	qualified
Sum			5 400,00 €			

Fig. 24: List of terms invoiced

8.1.9 Payments to provider

Follow the payment of your provider invoices to better organize your general cash flow or your working capital.

When the payment to the supplier has been completed and recorded, on the screen of provider invoice in the treatment section, you will find a record of these payments.

In the list of terms section, you can see in the table, the terms for which the settlement has been made.

When all the due dates have been paid:

- on the invoice screen the “full” box is automatically checked
- The date of the last installment is recorded
- A summary is displayed with the name of each payment made
- Each line is clickable.

discount € rate (%) %

total € €

project expense

	date	amount	complete
payment	<input type="text" value="01/29/2021"/>	<input type="text" value="5 400,00"/> €	<input checked="" type="checkbox"/>
	#3	Server - HP 2021-01-25	1 080,00 €
	#4	Server - HP 2021-03-25	1 080,00 €
	#5	Server - HP 2021-02-25	1 080,00 €
	#6	Server - HP 2021-04-25	1 080,00 €
	#7	Server - HP 2021-05-25	1 080,00 €

comments

Fig. 25: List of paid installments

8.1.10 Provider Contract

Other sections

- *Contract Gantt provider*

ProjeQtOr gives you the possibility to manage and precisely follow your supplier contracts

The supplier contract is necessarily linked to a project and a supplier.

A Gantt chart view is available to visualize your contracts graphically.

See also:

This view is also available for the *contrat client*

Treatment

Follow the state, the progress of your contract in this section.

Responsible

- Choose a responsible
- Its initials are displayed on the Gantt chart of contracts

Workflow

- The workflow is based on the default workflow.
- You can change or modify the current workflow.

See also:

Workflow

Renewal

Defines the behavior of the renewal of a contract at the end of the initially planned duration

- **Never:** the contract will never be renewed
- **Tacit:** the contract will be renewed if there is no termination
- **Express:** the contract is renewed and is the subject of a written or verbal act

Status

- **In progress:** Date on which the contract is taken over. Effective. This date can be entered manually or by going to the Assigned state of the workflow
- **Done:** Date the contract ends.
- **Closed:** Date on which the contract was closed.
- **Cancelled:** Cancellation Date

Progress

In the Progress section, determine the different dates and deadlines for the contract, notice, deadlines, payments ...

Provider contract Gantt chart

In addition to the contract management screen (list and details area), you can view your contracts in a time view on a Gantt chart. This is the “contract schedule”

Each bar representing the different contracts, going from the start date to the end date of the contract.

Notice dates and due dates are displayed as milestones.

Gantt bars for customer contracts turn red when the due date is higher than the end of contract date.

No calculation is made. This is an indication to show an inconsistency.

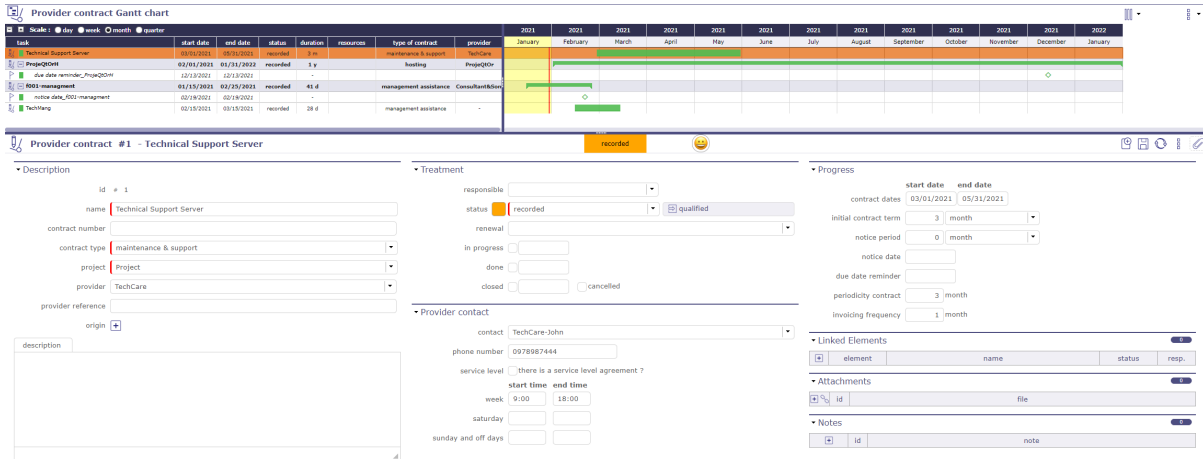


Fig. 26: Supplier contract Gantt chart screen

8.2 Incomes

Follow with the “Incomes” menu, incoming financial movements and your customers and all the elements revolving around them, such as contracts, quotations, bills, catalogs ...

8.2.1 Client Quotation

A quotation is a proposal estimate sent to customer to get approval of what’s to be done, and how must the customer will pay for it.

On the quotation form, you can record all the information about the sent proposal, including attaching some file completely describing the proposal with details terms and conditions.

A quotation can be copied into an order when corresponding document is received as customer agreement.

Invoices lines allows to detail the quotation.

Tip: The **client** field is automatically filled in if the project selected on the quote is linked to a customer.

8.2.2 Client Orders

An order (also called command) is the trigger to start work.

On the order form, you can record all the information of the received order.

Scheduled work and budgeted cost of project

The scheduled work (field: “validated work”) of the project will be initialized with the sum of total work from all orders.

The budgeted cost (field: “validated cost”) of the project will be initialized with the sum of the total amount before taxes for all orders.

See also:

Progress section

Tip: The **client** field is automatically filled in if the project selected on the quote is linked to a customer.

Fields behavior

- **Ex VAT:** Amount before taxes: the column value is automatically updated with the sum of bill line amounts.
- **Tax:** Applicable tax. if the applicable tax isn't set, the tax defined for the selected customer is used.
- **Full:** Amount with taxes.
- **Work:** Work days corresponding to the order. The column value is automatically updated with the sum of invoice lines quantities.
- The columns values "Ex VAT" and "Work" are automatically updated with the sum of invoice lines with selected amendment checkboxes.

Warning: Activity type: the activity should be created only after approval.

8.2.3 Client invoicing terms

A term is a planned trigger for billing.

You can define as many terms as you wish, to define the billing calendar.

Note: Terms are mandatory to bill "Fixed price" project.



A term can be used just one time. The bill name will be displayed.

A term has triggers

- You can link the activities that should be billed at this term.
- A summary of activities is displayed for validated and planned amount and end date.
- Validated and planned values play the role of reminder.
- You can use these values to set real amount and date.

Tip: Fields Amount and Date (Planned & Validated)

When a trigger is entered, the values of planned and validated are automatically updated with the sum and the max of triggered amounts.

- Click on  to add an element trigger.
- Click on  to delete an element trigger.

8.2.4 Client invoices

An invoice is a request for payment for delivered work.

Invoicing will depend on invoice type defined for the project through project type.

The screenshot displays the '4 Client Invoices' list at the top, with columns for id, reference, client, project, name, date, recipient, full amount, and status. Below this is the detailed view for 'Client Invoice #1 - Bill March 2012'. The interface is divided into several sections: Description (with fields for name, invoice type, project, date, payment deadline, etc.), Treatment (with status, responsible, sent date, etc.), Linked Elements, Attachments, and Notes. At the bottom, there is an 'Invoice lines' table.

id	n°	description	detail	unit price	quantity	sum	number of days
#1	1	March 2012 - 50%	Evolution x	2 400,00 €	1	2 400,00 €	0

Fig. 27: Clients Bills

Invoice Type



Fig. 28: Schema bill

Each invoice is linked to project, a project has a project type, and a project type is linked to a billing type.

So the invoicing type is automatically defined for the selected project.

Invoicing type will influence invoice line format.

At terms

- A *term* must be defined to generate the invoice, generally following a billing calendar.
- Used for instance for: **Fixed price projects**.

On produced work

- No term is needed.
- The billing will be calculated based on produced work by resources on selected *activities* and on a selected period.
- Used for instance for **Time & Materials projects**.

On capped produced work

- No term is needed.
- The billing will be calculated based on produced work by resources on selected *activities* and on a selected period.
- Taking into account that total billing cannot be more than project validated work.
- Used for instance for **Capped Time & Materials projects**.

Manual

- Billing is defined manually, with no link to the project activity.
- Used, for instance for **Any kind of project where no link to activity is needed**.

Not billed

- No billing is possible for these kinds of projects.
- Used, for instance for **Internal projects & Administrative projects**.

Warning: Report

Only invoice with at least status “done” will be available for reporting.

Before this status, they are considered as a draft.

Invoice lines

▼ Invoice lines									
	id	n°	description	detail	unit price	quantity	sum	number of days	
	#2	1	Billing for not followed work	10 days of Architect	900,00 €	10	9 000,00 €	0	
	#4	2	project manager Management (not included in fixed price) 01/03/2012 - 31/03/2012	Management : 5 days	900,00 €	5	4 500,00 €	0	

Fig. 29: bill lines treatment

Input for each invoice line depends on invoicing type.

A different “invoice line” dialog box will be displayed depends on invoicing type.

- Click on to add an invoice line.
- Click on to add a formatted line depending on invoicing type.
- Click on to modify an existing bill line.
- Click on to delete the bill line.

Bill line “At terms”

Client invoicing terms must be created in client invoices terms screen to be displayed in the list.

Fig. 30: Add a line at term

Can be modified on update.

▼ Invoice lines

1

+ \$	id	n°	description	detail	unit price	quantity	sum	number of days
✎ 🗑	#5	1	Activity term	Evolution X - Development	15 000,00 €	1	15 000,00 €	0

Fig. 31: Line at term

Bill line On produced work & On capped produced work

Select the resource whose work you want to recover and the period you want to invoice

Can be modified on update.

Invoice line Manual billing

For manual invoicing, you can select a line from the catalog if you have created one beforehand.

The catalog is not mandatory to fill in a line

At least describe the invoice line and enter the price.

The unit to be invoiced is left to the user’s choice (day, month, piece, lot, etc.)

Can be modified on update.

Invoice line
✕

n°

resource

activity price

start date

end date

price € /

quantity jour

amount €

Fig. 32: Row insertion popup for a resource and over a given period

▼ Invoice lines 1

	id	n°	description	detail	unit price	quantity	sum	number of days
✎ ✖	#11	1	analyst C Management (not included in fixed price) 09/09/2024 - 26/09/2024	Management : 3 days	600,00 € / jour	3 jours	1 800,00 €	0

Fig. 33: Retrieving job information for the resource

Invoice line
✕

catalog

n°

description

detail

price € /

quantity

amount €

Fig. 34: Manual invoicing

▼ Invoice lines 1

	id	n°	description	detail	unit price	quantity	sum	number of days
✎ ✕	#6	1		services	550,00 € / jour	5 jours	2 750,00 €	0

Fig. 35: Invoice line for manual invoicing

8.2.5 Client Payments

Allow to define payment of bills.

The bill keeps track of payment.

1 Client payment
🔍 🗨️ 📄 📅 📄 📄 closed

id	payment type	name	payment mode	payment date	payment amount	invoice reference	client
1	final payment	Payment_PX1_001-00002-ABC	bank transfer	01/22/2021	500,00 €		

Description

id # 1

name

payment type

project

description

Treatment

payment mode

payment date

payment amount

payment fee

payment credit

invoice

invoice reference

client

recipient

invoice amount

closed

Attachments

Notes

id	note

Fig. 36: Payment client

8.2.6 Activities prices

Activity price defines daily price for activities of a given **activity type** and a given **project**.

This is used to calculate a billing amount for billing type **On produced work** and **On capped produced work**.

8.2.7 Financial Gallery

the financial gallery allows you to display in list form and by elements, the different client quotation, invoices and orders recorded in ProjeQtOr, per date, client or per type, partial, final and complete bill.

Attachments are displayed grouped by element.

Click on  to display attachment list.


element	start date	end date	client	type	
Client Invoice				Partial bill	
Bill March 2012 Download Quot001-554-56.docx					
Bill technical assistance Server <i>No attachment found</i>					
Bill for tests Download Quot001-554-72.docx					
Bill_001-0002-ABC <i>No attachment found</i>					

Fig. 37: Financial gallery

Filters can be applied to the list.

8.2.8 Financial catalog

Catalog defines items (products or services) that can be objects of a quotation, an order or a bill.

This is used on the quotation lines, order lines and invoice lines.

See also:

Invoice lines.

8.2.9 Revenue Management

You can manage the turnover of the project at completion, and its consistency with the orders and invoices on the project.

A “Revenue management” section is visible on the projects screen in the Progress section after activation of the “Revenue management” module under the financial section.

The following information is then accessible:

- The turnover at completion corresponds to the total amount that will be invoiced for this project.
- Display of the sum of the project’s customer orders
- Display of the sum of customer invoices for the project
- Method of valuation of turnover

Method of valuation of turnover

The turnover is fixed then it is entered manually

The turnover is Variable over time depending on the activities, it will be calculated from the turnover of all the activities (not canceled) of the project and possibly of the sub-projects. In this case the activities will also have a turnover field to feed.

Projects with sub-projects will systematically have a “Variable” valuation mode, this mode will automatically consolidate the turnover of the sub-projects on the parent project.

Consistency with project orders and invoices

For projects with sub-projects, the sum of orders and invoices will consolidate the data of the sub-projects, that is to say, it will integrate the orders and invoices of the sub-projects in addition to the orders and invoices possibly on the project itself.

The sum of the orders is in red if it is lower than the turnover. The sum of the invoices is in red if it is greater than the turnover.

Raise alerts

You can create definable alerts for projects in the “unit indicators” section:

- Revenue upper than command’s sums
- Revenue less than invoices sums

In order to integrate this evolution into the community version, without disturbing the users who do not need this functionality, we will condition the behavior:

In order to transcribe the current use of the validated cost, a *global parameter* will determine whether the turnover is automatically reported as validated cost on activities and projects.

Note: This functionality is only visible if the Revenue Management module is activated via the access rights menu in *Modules management*.

The Revenue Management is a sub-module of the financial module.

This new module will activate / deactivate the management of OUs and everything related to the management of OUs (see below).

This module will be disabled by default.

8.2.10 Work units catalog

You can define catalogs of work units, made up of work units, themselves broken down into several complexities.

This functionality will only be accessible if the *Revenue management* module is activated.

The concept of Project on the catalog is not essential, it is present to guarantee the management of rights.

You can assign any catalog to a project, whatever its position in the structure, while maintaining the notion of inheritance on the sub-projects.

- A “catalog used” field on the projects screen is available.
- The OUs proposed on the activities of the project will systematically be the OUs of this catalogue.
- When the “catalog used” field is populated (entered or edited) for a project, all subprojects (recursively) that had the same initial catalog value (or no value) are assigned the new catalog value.
- The level of recursion stops at the first project that does not respect this rule.

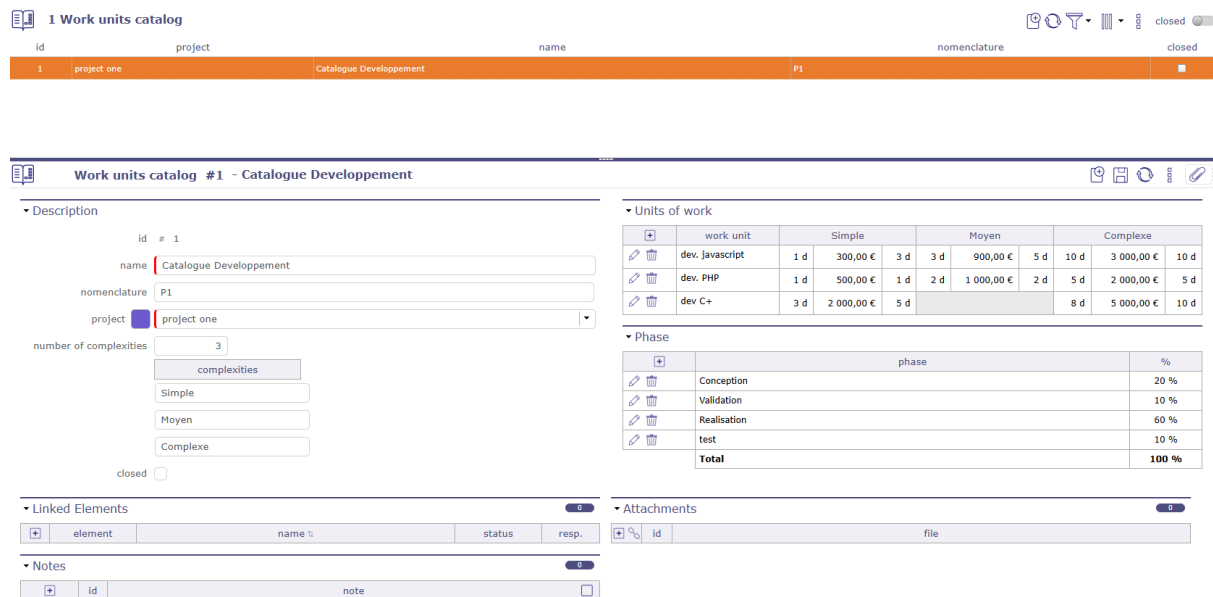


Fig. 38: Work units Catalog screen


- When a catalog is created or modified to be attached to a project then the “catalog used” field of the project is updated, and the update is passed on to the sub-projects.

Important: Modification rights are defined on the catalog by filling in the project field.

Only profiles who have the right to modify the project and the catalog will be able to modify it, regardless of the project on which it is used.

Create a catalog

In the Finance menu Incomes section Catalog of work unit screen.

- Click on  to create a new catalog

Warning: If the complexity number is not filled in, you will not be able to add details in the work order units. The default number set in the *global parameters* is applied.

Then fill in the fields with the name of the complexities managed by this catalog.

Click on  to open the pop-up windows and complete the complexity details.

You can fill in the following fields for each OU:

- Reference
- Description
- Incomes
- Deliverable
- validity date

The description, incoming and deliverable fields are text editors in inline mode. Edit buttons appear when the cursor is in the field.

dialog work unit
✕

reference

description

incomes

deliverable

validity date

closed

complexity	Simple	Complexe	Medium
work (d)	<input style="width: 40px;" type="text" value="1"/>	<input style="width: 40px;" type="text" value="3"/>	<input style="width: 40px;" type="text" value="6"/>
price (€)	<input style="width: 40px;" type="text" value="500"/>	<input style="width: 40px;" type="text" value="800"/>	<input style="width: 40px;" type="text" value="1 000"/>
duration (d)	<input style="width: 40px;" type="text" value="2"/>	<input style="width: 40px;" type="text" value="5"/>	<input style="width: 40px;" type="text" value="10"/>

Fig. 39: Pop-up of the complexities details

For each complexity of the OU, we can define:

- Validated workload - 0 is allowed
- Price (CA) of complexity
- Duration in working days - optional

It is not mandatory to fill in all the complexities for an OU.

Revenue						
revenue		10 500 €				
+	work unit	complexity	quantity	work	duration	price
	PHP	Medium	2	10 d	10 d	1 000,00 €
	PHP	Complexe	5	50 d	50 d	5 000,00 €
	JAVA	Medium	3	24 d	36 d	4 500,00 €
sum				84 d	96 d	10 500,00 €

Fig. 40: Revenue section on the activity screen

Phasing

The goal is to be able to provide the technical part, the project management part, the quality part for example on work units.

Phase		
+	phase	%
	Technique	65 %
	Quality management	20 %
	Realisation	15 %
Total		100 %

Fig. 41: Phasing on work unit catalog

You can enter percentages that will express % of the OU load at the catalog level and not at the OU level.

Phasing at the catalog level avoids an entry for each OU and each OU complexity.

You can enter as many lines as desired.

Use of a catalog of work units

You can select an OU on an activity, only if the project has a Variable CA valuation mode.

We will inform the OU, its complexity and the number of units:

- Entering the OU in the list of OUs in the catalog linked to the project. This will dynamically populate the list of OU complexities by displaying only those that have a charge and a price that is not zero but may be equal to zero.
- Entering complexity
- Entering the quantity number of work units

An activity will only be associated with a single OU / Complexity pair.

If OU is selected, complexity and quantity are mandatory, otherwise they are prohibited, i.e. not enterable.

The OU / Complexity / Quantity data will make it possible to value:

- The validated load = load of the OU / Complexity x Quantity
- The turnover of the activity = price of the OU / Complexity x Quantity
- The validated duration = duration of the OU / Complexity x Quantity

Entering the validated duration will automatically calculate the validated end date if the validated start date is entered.

Note: This will only determine the planned duration of the activity if it is in “fixed duration” planning mode.

Otherwise, the schedule will determine the planned duration from the assigned load and the availability of assigned resources.

These 3 data (validated load, validated duration, CA) will then go into read-only since they are calculated.

- If the OU’s expiry date has passed, an alert will be displayed on the activity, without this blocking the recording of the activity.
- If the global parameter “Report of turnover on the validated cost of activities” is activated, the turnover entered or entered through the OU is recopied in the validated cost of the activity.
- You can modify the catalog on the data of an OU, a Complexity or a Quantity however it is not possible to modify a unit of work from the catalog, if it is already used on an activity.
- If resources are assigned, application of the variation in the assigned load, in proportion to the load assigned to each resource and updating of the “still to do” accordingly (without ever being able to become negative).
- You can delete the catalog on the data of an OU, a Complexity or a Quantity however it is not possible to delete a unit of work from the catalog, if it is already used on an activity.

Tip: In the case of an OU whose complexity generates 5 days of load with a quantity of 1.

if A is assigned for 2 days and B assigned for 3 days

if we double the quantity (and therefore the validated load) A is then assigned 4 days and B is assigned 6 days.

8.2.11 Work commands

The services ordered use the work unit catalog functionality.

You must “activate ordered services” in the *global parameters*


Services can be recorded directly on client orders or on the dedicated work commands screen.


On the client order

On the client orders screen, you must enter the project that will use the catalog.

Only this project will be able to use these work units.

If the project has sub-projects, although the catalog is inherited, the work units will only be accessible to the project linked to the order.

Click on  to add a new OU.

Click on  to add a mother line for the OU.

▼ Work command

Work command				Ordered		Used		Accepted		Billed		
		Id	Work unit	Complexity	Qty	Amount	Qty	Amount	Qty	Amount	Qty	Amount
		#7	Développement		15	13 500,00 €	2	1 800,00 €	0	0,00 €	0	0,00 €
		#8	Développement Javascript	Moyen	10	9 000,00 €	2	1 800,00 €	0	0,00 €	0	0,00 €
		#9	Développement PHP	Complexe	5	4 500,00 €	0	0,00 €	0	0,00 €	0	0,00 €
Total						13 500,00 €		1 800,00 €		0,00 €		0,00 €

Fig. 42: Command work on activities

Work command
✕

work unit

complexity

parent work command

unit amount €

quantity

amount €

Fig. 43: Add a work unit on command

You enter the work unit from the catalog of the project linked to the order that you wish to use.

Its complexity as well as its quantity.

The amount fields are automatically calculated based on the information in the catalog.

Billing

When copying your order to an invoice, the table of ordered services is also created taking into account the quantity already invoiced.

- The sum of the total invoiced quantity (including the current and already invoiced quantity) must not exceed the ordered quantity.
- Selecting a work order displays the work unit, complexity, unit quantity and quantities (stored on the work order line).
- The amount is calculated = invoiced quantity x unit amount.
- When updating, the work order reference cannot be changed.
- When data is inserted/updated, the sum of the data on the work order is updated.

On the activities

When you have an effective order on an activity project, you can link the ordered OUs to the activities of the same project.

The catalogs are inherited, but the OUs are accessible only to the activities of the project linked to the order.

Revenue							
revenue	<input type="text" value="0"/>	€					
<input type="button" value="+"/>	work unit	complexity	quantity	work command	work	duration	price

Fig. 44: Work command on activities

A window allows you to add an OU from the catalog linked to the project.

If an order exists for this OU (or+complexity) on this project, then you can select the order in the corresponding field.

Once linked, the order will follow the completion of the activities to update the Work Units used.

Important:

- The quantity must not be less than the quantity already invoiced,
 - The quantity must not be less than the quantity already carried out
 - If there is a quantity performed or invoiced, the unit of work and the complexity cannot be changed
-

When an activity is linked to an OU of the order, the OU table of the order is updated to indicate the number of OUs that were used on your activity.

Work unit
✕

work unit

complexity

quantity

work command

amount

Fig. 45: Work command on activities

Revenue							
		revenue		<input style="width: 100%;" type="text" value="1 800 €"/>			
+	work unit	complexity	quantity	work command	work	duration	price
✎ ✖	Développement Javascript	Moyen	2	001-001--003 - Développement - Développement Javascript - Moyen	6 d	10 d	1 800,00 €
sum					6 d	10 d	1 800,00 €

Fig. 46: Work command on activities

▾ Work command

Work command				Ordered		Used		Accepted		Billed		
+	-	Id	Work unit	Complexity	Qty	Amount	Qty	Amount	Qty	Amount	Qty	Amount
✎ ✖		#7	Développement		15	13 500,00 €	2	1 800,00 €	0	0,00 €	0	0,00 €
✎ ✖		#8	Développement Javascript	Moyen	10	9 000,00 €	2	1 800,00 €	0	0,00 €	0	0,00 €
✎ ✖		#9	Développement PHP	Complexe	5	4 500,00 €	0	0,00 €	0	0,00 €	0	0,00 €
Total						13 500,00 €	1 800,00 €	0,00 €	0,00 €	0,00 €	0,00 €	

Fig. 47: OU updated in client order table

On the work command screen

This screen allows you to view all the units of works ordered, all projects and catalogs combined.

A dedicated screen allows you to treat the units of works ordered as a separate element and benefit from the filter functions.

id	order	name	quantity ordered	amount ordered	quantity done	amount done
9	Work command client	Développement - Développement PHP - Complexe	5	4 500,00 €	0	0,00 €
8	Work command client	Développement - Développement Javascript - Moyen	10	9 000,00 €	2	1 800,00 €
7	Work command client	Développement	15	13 500,00 €	2	1 800,00 €
6	nouvelle	Développements - Moyen	5	4 500,00 €	0	0,00 €
5	nouvelle	Ateliers - Simple	10	10 000,00 €	0	0,00 €
4	Commande Développement n°1	Ateliers - Simple	3	3 000,00 €	0	0,00 €
3	Commande Développement n°1	Développements - Complexe	5	15 000,00 €	0	0,00 €
2	Commande Développement n°1	Développements - Moyen	10	9 000,00 €	0	0,00 €
1	Commande Développement n°1	Développements - Simple	20	6 000,00 €	0	0,00 €

qty	amount
ordered	10 9 000,00 €
realised	2 1 800,00 €
Accepted	€
invoiced	€

Fig. 48: Work command on activities

You will find the same information as on your customer order but in a generalized way.

Acceptance

Accepted services are linked to Ordered services.

This involves integrating the concept of Client Acceptance. The objective is to be able to define and track these in terms of dates and content.

Click on to create a new acceptance.

In the detail tab, click on to add the relevant work units of your order.

The current accepted column is filled in.

In the Progress tab, enter the client acceptance date so that the accepted column is displayed.

On the client order, you find the consolidation of the acceptance of the OUs.

8.2.12 Client contract

ProjeQtOr gives you the possibility to precisely manage and monitor your customer contracts.

The customer contract is necessarily linked to a customer.

A Gantt chart view is available to visualize your contracts graphically.

add accepted work command
✕

work command

work unit

complexity

unit amount €

	Ordered	Used	Accepted	Billed
quantity	<input style="width: 40px; border: 1px solid #ccc;" type="text" value="10"/>	<input style="width: 40px; border: 1px solid #ccc;" type="text" value="2"/>	<input style="width: 40px; border: 1px solid #ccc;" type="text" value="0"/>	<input style="width: 40px; border: 1px solid #ccc;" type="text"/>

accepted quantity

amount €

Fig. 49: Acceptance on OU

▼ Accepted work command

Work command			Ordered		Used		Accepted		Current accepted	
+	Work unit	Complexity	Qty	Amount	Qty	Amount	Qty	Amount	Qty	Amount
	Développement Javascript	Moyen	10	9 000,00 €	2	1 800,00 €	0	0,00 €	1	900,00 €
Total			9 000,00 €		1 800,00 €		0,00 €		900,00 €	

Fig. 50: Current accepted

▼ Accepted work command

Work command			Ordered		Used		Accepted		Current accepted	
+	Work unit	Complexity	Qty	Amount	Qty	Amount	Qty	Amount	Qty	Amount
	Développement Javascript	Moyen	10	9 000,00 €	2	1 800,00 €	1	900,00 €	1	900,00 €
Total			9 000,00 €		1 800,00 €		900,00 €		900,00 €	

Fig. 51: Accepted

▼ Work command

Work command				Ordered		Used		Accepted		Billed	
+	Id	Work unit	Complexity	Qty	Amount	Qty	Amount	Qty	Amount	Qty	Amount
	#7	Développement		15	13 500,00 €	2	1 800,00 €	1	900,00 €	0	0,00 €
	#8	Développement Javascript	Moyen	10	9 000,00 €	2	1 800,00 €	1	900,00 €	0	0,00 €
	#9	Développement PHP	Complexe	5	4 500,00 €	0	0,00 €	0	0,00 €	0	0,00 €
Total				13 500,00 €		1 800,00 €		900,00 €		0,00 €	

Fig. 52: OU accepted on Client Order

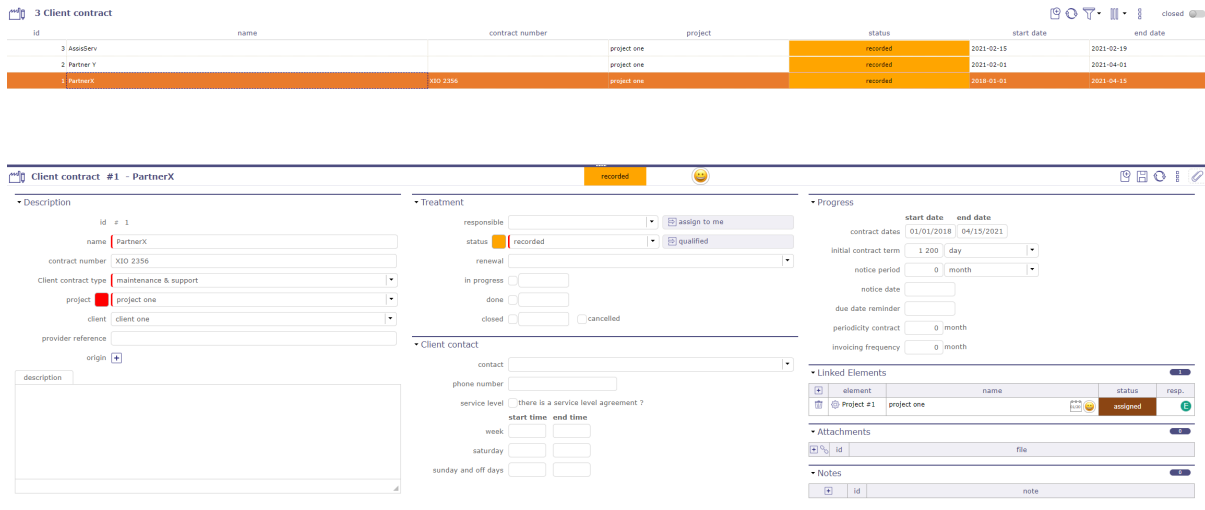


Fig. 53: Client contract screen

Treatment

Follow the state, the progress of your contract in this section.

Responsible

- Choose a responsible
- Its initials are displayed on the Gantt chart of contracts

Workflow

- The workflow is based on the default workflow.
- You can change or modify the current workflow.

See also:

Workflow

Renewal

Defines the behavior of the renewal of a contract at the end of the initially planned duration

- **Never:** the contract will never be renewed
- **Tacit:** the contract will be renewed if there is no termination
- **Express:** the contract is renewed and is the subject of a written or verbal act

States

- **In progress:** Date on which the contract is taken over. Effective. This date can be entered manually or by going to the Assigned state of the workflow
- **Done:** Date the contract ends.
- **Closed:** Date on which the contract was closed.
- **Cancelled:** Cancellation Date

Client contract Gantt chart

In addition to the contract management screen (list and details area), you can view your contracts in a time view on a Gantt chart. This is the “customer contract calendar”

Each bar representing the different contracts, going from the start date to the end date of the contract.

Notice dates and due dates are displayed as milestones.

Gantt bars for customer contracts turn red when the due date is higher than the end of contract date.

No calculation is made. This is an indication to show an inconsistency.

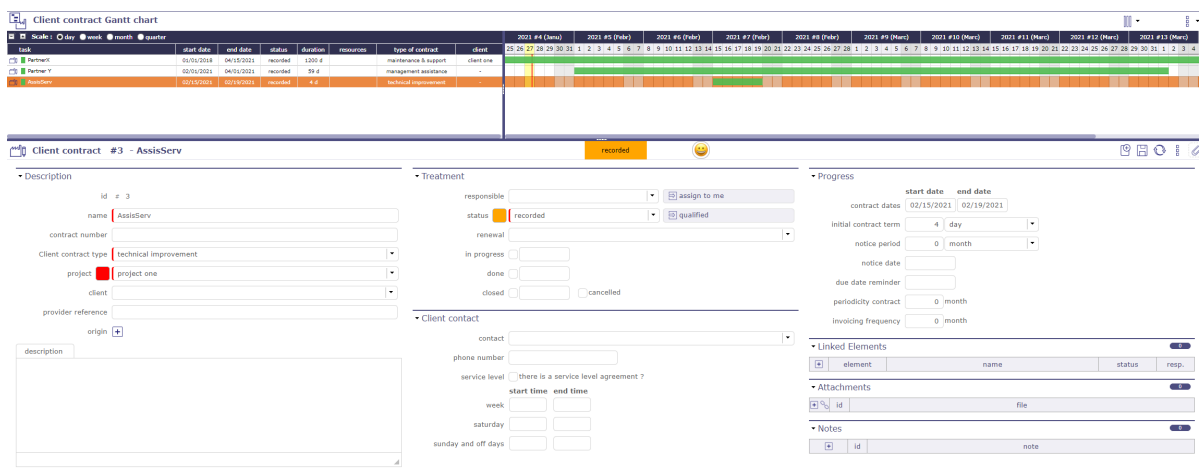


Fig. 54: Client contract Gantt chart screen

8.3 Financial situation

The financial situation screens allow you to follow precisely with your own steps all the financial elements of a project.

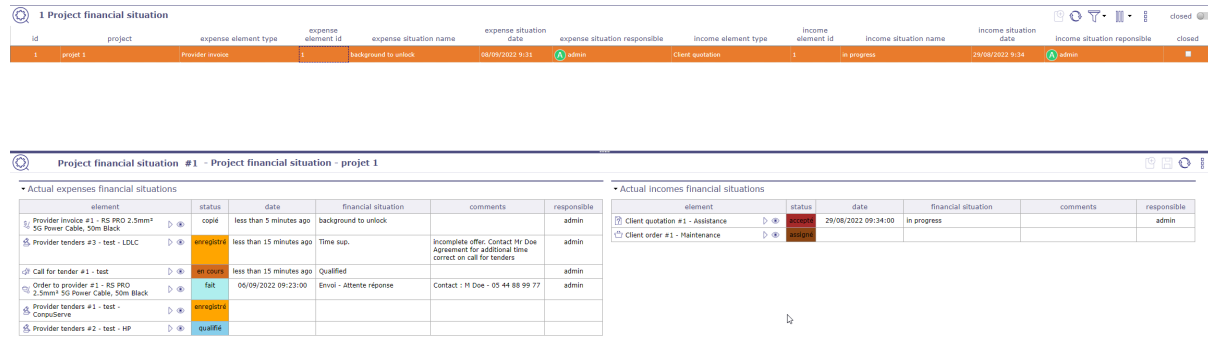


Fig. 55: Project financial situation screen

Find the financial situation in its entirety on the respective screens of the elements.

Financial status screens will only display the most recent transaction.

8.3.1 Project financial situations

On this screen you view all the financial documents related to your projects. To display a situation, you must create them directly on the screen of the document concerned. It is possible to predefine financial situations.

The list box displays the last processed financial document. The detail area displays all the expense and income financial documents in their current state.

You can display only the expenses financial situation or the income financial situation on their respective screen.

Expenses financial situation

The following operations will then be displayed for the expenses.

- Call for tender.
- Provider tenders
- Orders to provider
- Provider bills

Incomes financial situation

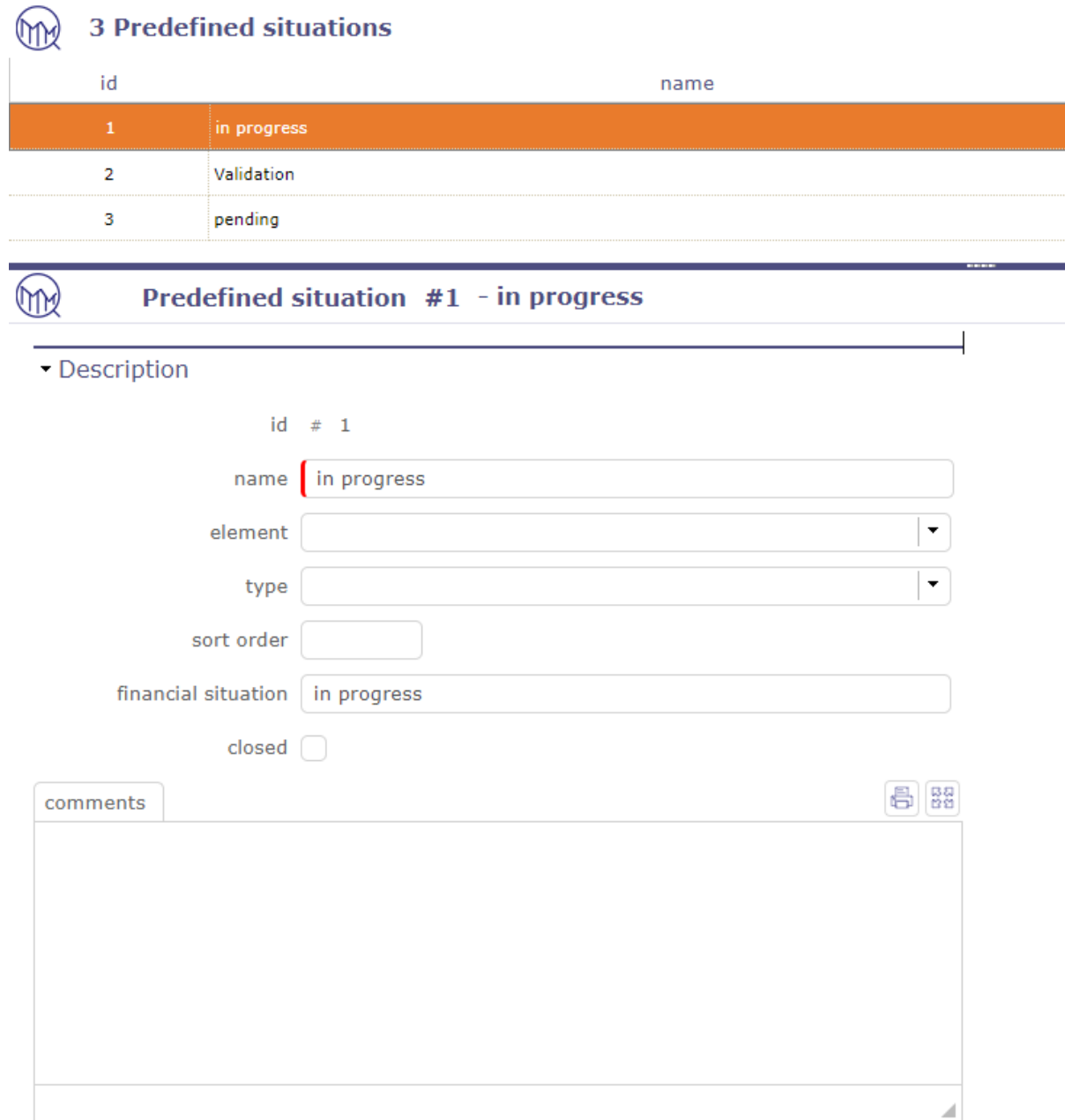
The following operations will then be displayed for the incomes.

- Client quotations
- Client orders
- Clients bills
- Client paiements

Predefined situation

You create several defined situation than you will can used to defined situations on the financial elements.

Click on  to add a new predefined situation



The screenshot shows the 'Predefined situations' management interface. At the top, there is a table with 3 predefined situations. Below the table, the details for the first situation, 'in progress', are shown in a form. The form includes fields for name, element, type, sort order, financial situation, and a closed checkbox. A comments section is also visible at the bottom.

id	name
1	in progress
2	Validation
3	pending

Predefined situation #1 - in progress

▼ Description

id # 1

name

element

type

sort order

financial situation


closed

comments

Fig. 56: Predefined situation

You can limited the predefined situation on an element or a type of element.

Financial situation

Click on  to create a financial statement on an eligible financial document.

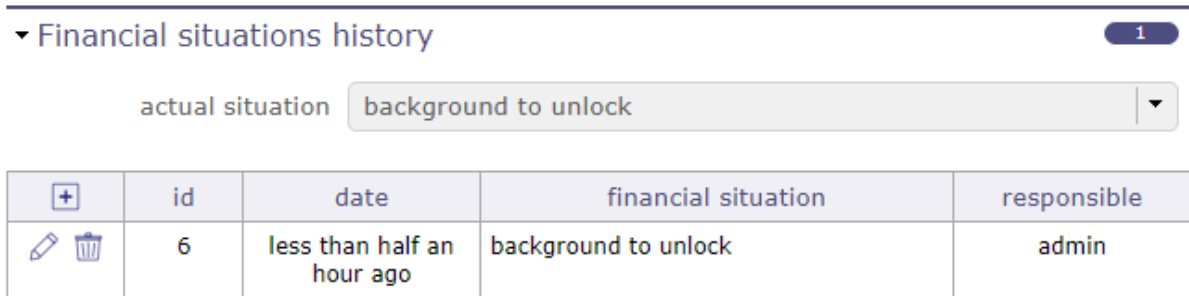


Fig. 57: Financial situation section

If you have created predefined situations, you can choose them from the corresponding drop-down list. If you do not have predefined situations, then fill in the situation directly manually, respecting the mandatory fields.

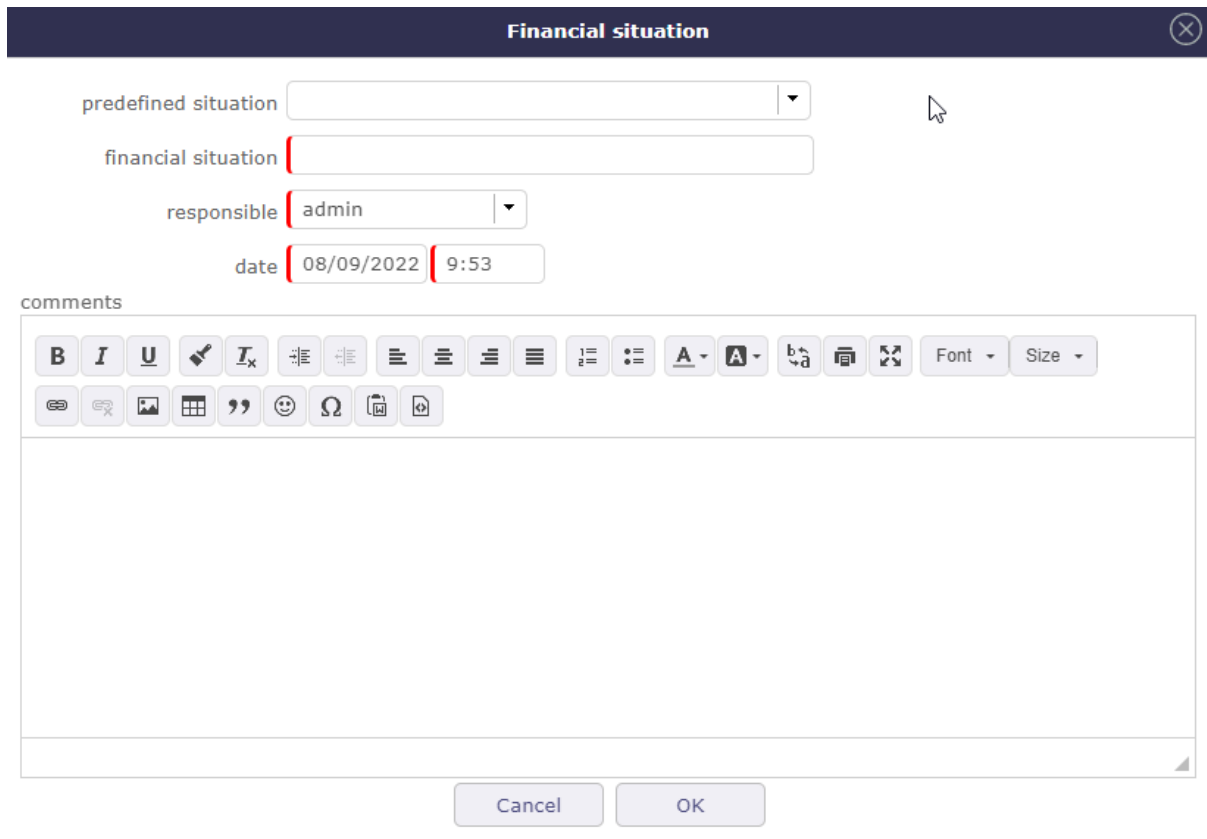


Fig. 58: Financial situation pop-up

8.4 Multi currency

It is possible to define a local currency for each project.

The project carries the conversion rate between global currency and local currency.

▾ Local Currency of Project

local currency currency position

to global to local

conversion rate

1 \$ = 0.95 € 1 € = 1.05263 \$

Fig. 59: multi currency in project

You must enable the setting to be able to use the feature.

See also:

multi-currency in global parameters.

- Existing fields are considered in the global currency.
- An amount entered in local currency is automatically converted and stored in global currency.
- The sub-projects of a project always have the same currency and the same conversion rate as the parent.
- The monetary data of the sub-projects is always consolidated in the global currency.

If a project has a local currency, the monetary data of its sub-projects is consolidated without worrying about the conversion rate, because the sub-projects necessarily have the same currency and the same conversion rate.

If a project does not have a local currency, we do not try to consolidate the monetary data of its sub-projects in local currency.

An element that carries monetary data cannot change projects if the source and destination projects do not have the same currency and the same conversion rate.

Important: Existing reports will all be produced in the global currency.

²&.. include:: ImageReplacement.txt

9.1 Steering

9.1.1 Meetings

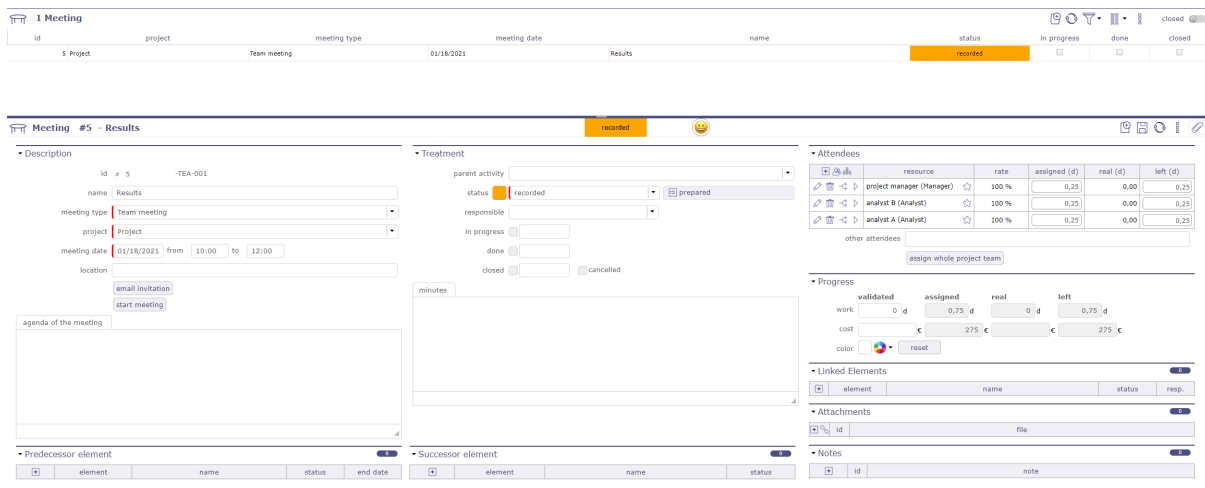


Fig. 1: Meeting screen

Meeting items are stored to keep track of important meetings during the project lifecycle :

- Progress Meetings
- Steering committees
- Functional workshops

Keeping track of each meeting makes it possible to follow the decisions or the answers to questions that are taken during them.

This will provide an easy way to find back when, where and why a decision has been taken.

Each meeting is displayed in the agenda. listed in chronological order during the day.

If the manager is filled in, he is automatically added to the meeting assignments.

If one of the resources is assigned to another meeting on the same day, a non-blocking message is displayed if the times overlap.

Project task

Other sections

- *Attendees*
- *Live meeting*

- Meeting is a planned task. they appear in the Gantt diagram and imputation sheets with the date fixed.
- You can assign project resources (named attendees).
- You have progress section that allows for followed resources work and cost.

Description can be used to store agenda.

Email invitation

- Allows to send the email to attendees.
- They will receive the invitation in their calendar management tool.

Note: Minutes

You can enter here only a short summary of the minutes and attach the full minutes as a file.

Steering

Retrieving the agenda of a meeting from the description of its type

Diary

Viewing meetings in agenda, even if they are not planned

9.1.2 Live Meeting

LiveMeeting you can manage meetings in an *Agile* way.

- Manage written production quickly and easily.
- Recovery in the liveMeeting of the agenda established on the meeting screen.
- Automatic saving of the minutes when leaving the live meeting.
- Automatically share the time between all participants.
- Dynamically measure the speaking time of each participant.
- Easily write minutes while assistants speak.
- Easily manage actions / decisions / questions while writing minutes.
- Manage tickets, activities, actions and requirements with Kanban while writing minutes.
- Saving the items entered in the live in the minutes section of the meeting.

Click on **Start meeting** button to access the Live Meeting Management screen.

- Click on **Hide time counters** to show or hide participants' tabs with their speaking time
- Click on **|meetingPlay|** to start the meeting and to start decrementing the speaking time
- Click on **|meetingStop|** to stop the meeting and close the LiveMeeting window
- Click on **|Exit|** to exit the LiveMeeting screen

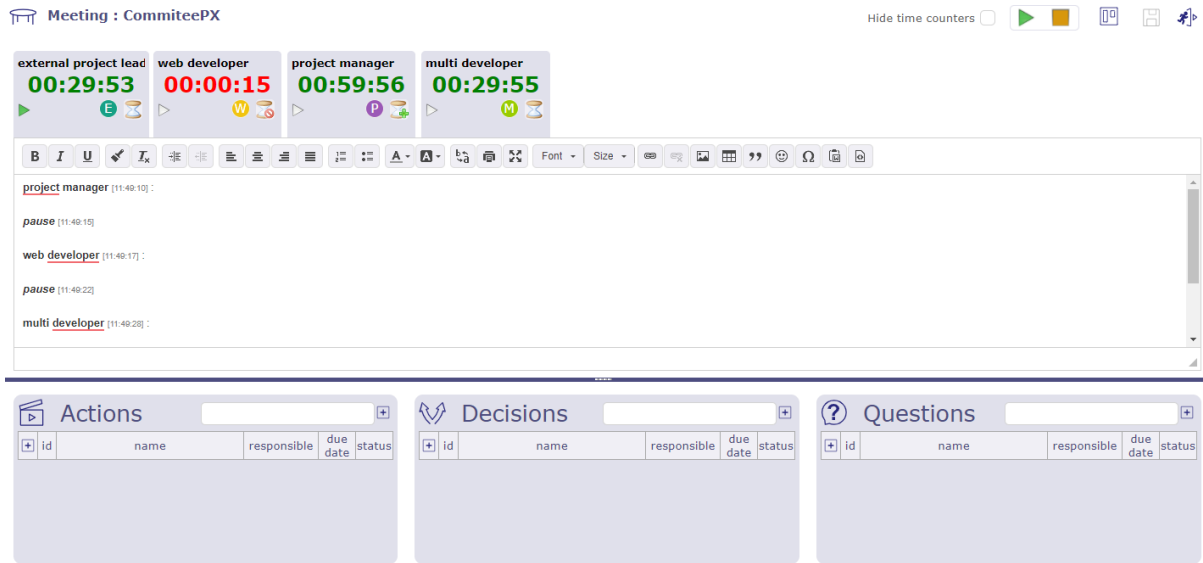


Fig. 2: The Live Meeting screen

- Click on **|Save|** to save the live meeting report

See also:

Live Meeting

Kanban Management

Click on **|Kanban|** to manage the kanbans.

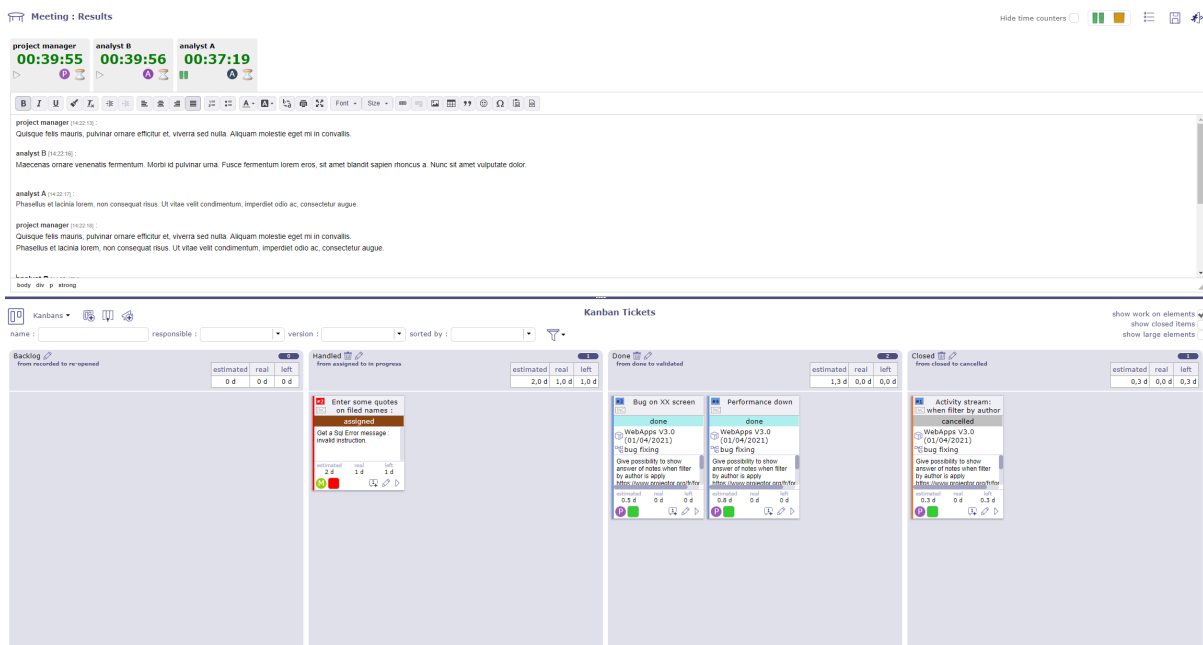


Fig. 3: Kanban management in the Live Meeting

You can manage your Kanban tiles directly in the Live Meeting interface.

See also:

KanBan

9.1.3 Periodic meetings

Periodic meeting is a way to define some meetings that will occur on a regular basis.

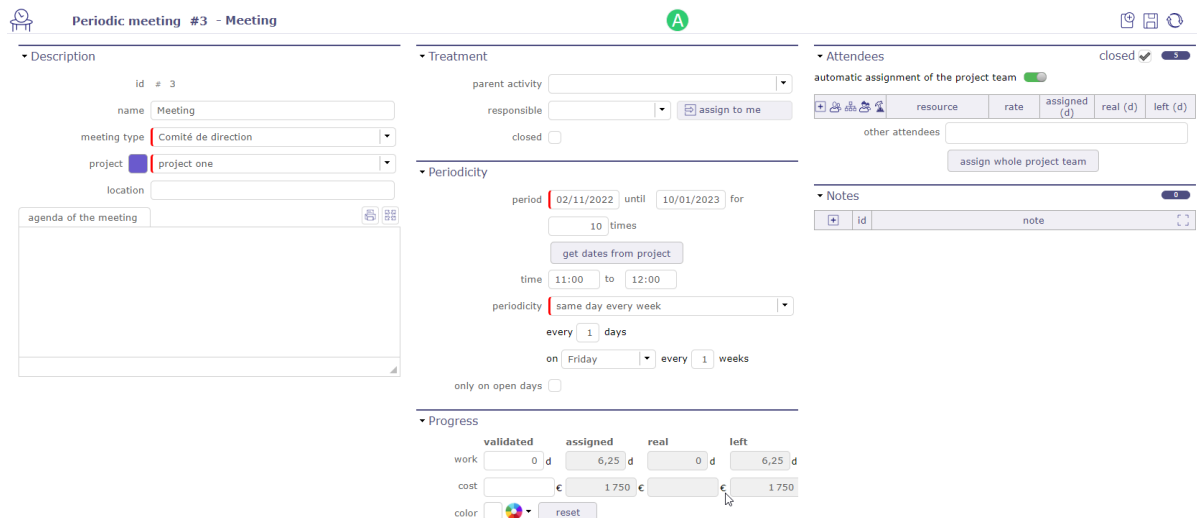


Fig. 4: Periodic meeting screen

Warning: Most fields match between meeting and recurring meeting, but some information is not present for recurring meetings, such as minutes or status.

When recording a recurring meeting, each meeting is automatically created in a parent folder, the recurring meeting.

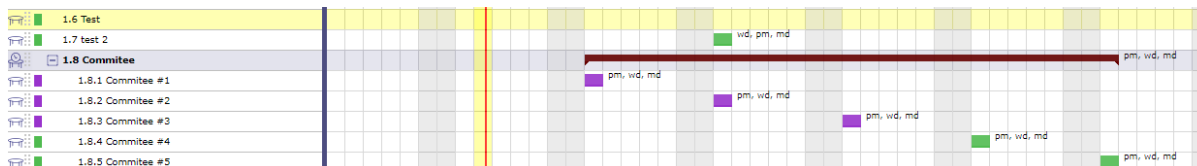


Fig. 5: Display of unit meetings under the parent folder

When the parent folder is closed, the meeting lines are not visible, but they appear on the same line as the folder.

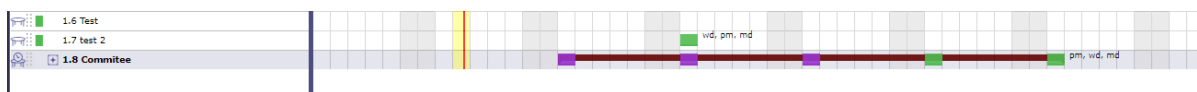


Fig. 6: Display of single meetings on the parent folder bar

Other sections

- Attendees

Changes can be made on each group meeting.

In most cases, these changes will not be affected or erased by periodic meeting updates.

Meetings created by recording a recurring meeting will also be displayed on the meetings screen.

Attendees can be defined on a periodic meeting.

Assignments of the entire project team to a periodic meeting (as existing for a simple meeting) is possible but the participants will be visible only on unit meetings.

The periodic meetings will not be planned, only elementary meetings will be.

So left work will always be set to zero on periodic meetings.

Resource who is responsible for the organization of the meeting. But the responsible is not automatically assigned.

Update on a periodic meeting

On each update of a periodic meeting, meetings are re-evaluated.

This may lead to deletion of some meetings.

This will also reposition meetings, even if their planned dates were elementary updated.

Attendees assignment section

Attendees can be defined on a periodic meeting.

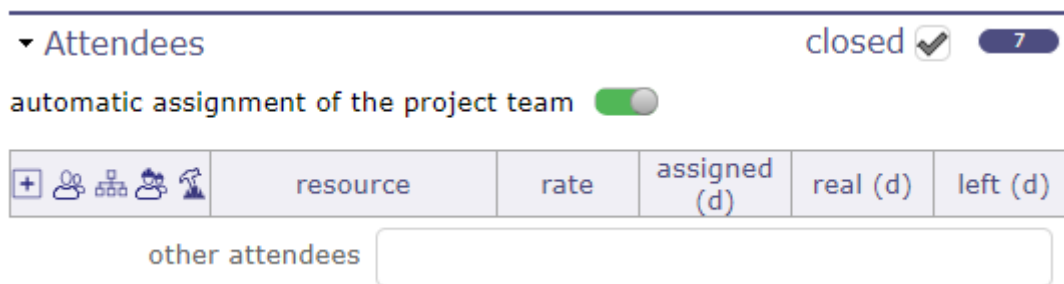


Fig. 7: attendees section

The assignment of a project team to a periodic meeting is possible.

The participants are visible in read-only mode from the recurring meeting but can be modified individually on the unit meeting screens.

You can defined a parent activity for the meeting.

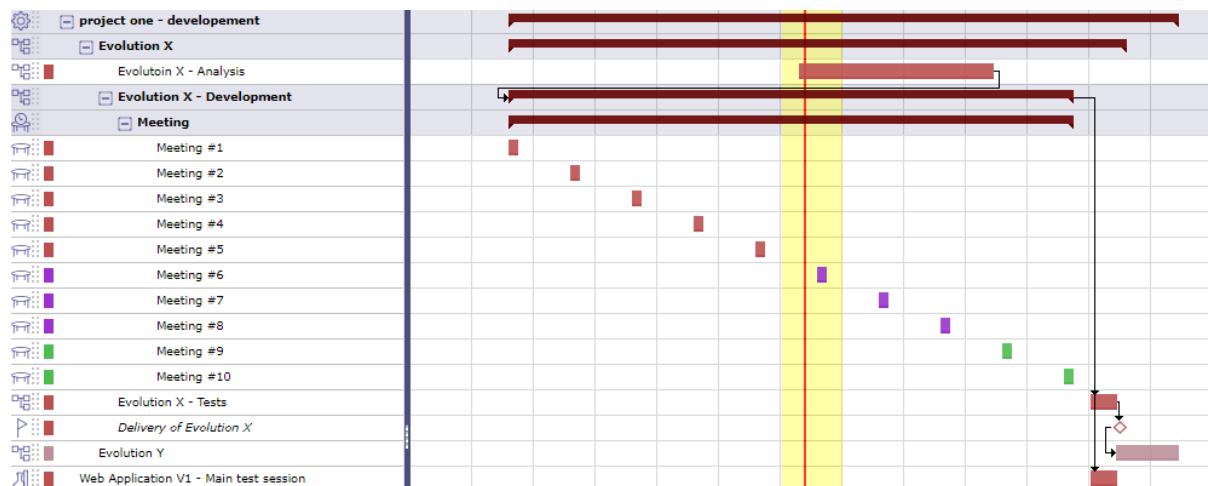


Fig. 8: display of meetings under a parent activity on the Gantt chart

The meetings will be display under the selected activity.

Periodicity section

You can set a time and frequency for your meetings.

▼ Periodicity

period until for
 times

time to
periodicity ▼
every days
on ▼ every weeks
only on open days

Fig. 9: Periodicity Section

The period of the recurring meetings can be entered manually or you can retrieve the dates of the selected project by clicking on the **get dates from project** button.

The number of occurrences and/or the end date can be completed automatically by entering one or other of these criteria.

Fill in the time - Meeting schedules allows you to automatically calculate and fill in the workload to be assigned to the resources - participants of the meeting in the table of assignments.

Periodicity

Depending on the frequency selected in the drop-down list, the parameter information displayed is different.

Every day

Example → every **3** days

The number of occurrences being to be personalized

Same day every week

example → On **Friday** every **2** weeks

Same day every month

example -> day 7 every 2 month

Same week every month

example -> On 1 th **Monday** every 2 months

If the periodicity is likely to include non-working days, check the box to keep only meetings that will fall on a working day.

Attendees section

This section allows to define the list of attendees to the meeting.

- The list of participants is displayed with
 - The assignment rate
 - The time assigned and planned for this activity
 - The real time filled in by the resources
 - The remainder to be done.
- If a resource has an entered entry date then they will be taken into account.
- Resources prior to their entry date will not be displayed on meeting prior to this date.
- So meeting works of these attendees are booked in the project.
- Ability to assign to a meeting a resource or a contact or a user not member of the project team.
- A special icon is placed on resource rows representing a pool of resources.

▼ Attendees
closed 6

automatic assignment of the project team

	resource		rate	assigned (d)	real (d)	left (d)
	POOL ABC ★ 		0 FTE	0,125	0,00	0,125
	admin (Chef de projet) ★		100 %	0,125	0,00	0,125
	analyst A (Analyste) ★		100 %	0,125	0,00	0,125
	analyst B (Analyste) ★		100 %	0,125	0,00	0,125
	analyst C (Analyste) ★		100 %	0,125	0,00	0,125
	project manager (Chef de projet) ★		100 %	0,125	0,00	0,125

other attendees

Fig. 10: Attendees section

You can assigned a team to the pool of resource, one dynamic and the other static.

- The switch button **automatic assignment of the project team** above the assignment table allows you to assign the current project team. If a resource is added to the project then they will also be assigned to the meeting.
- The **assign whole project team** button assigns the project team from time to time. If a resource is assigned to the project later, it will not be added to the meeting assignment

Attendee list

- Click on **Add** to add a new attendee
- Click on **Edit** to modify the assignment of the resource
- Click on **Delete** to delete the assignment of the resource
- Click on **Split** to divide the assignment with another resource
- Click on **Goto** to go to the resource's timesheet screen for the week the meeting was planned

Mandatory participant and Optional attendant option

The icon **Star** indicates that the presence of the participant is mandatory

Fig. 11: Optional attendant

More detail about how assigned project resources, see: *Assignment section* section.

Other attendees

Extra list of persons attending (or expecting to attend) the meeting, in completion to resource in the attendee list.

- You can enter attendees by email address, resource or contact name, user name or initial without caring about.
- Just separate attendees with commas or semicolons.

Note: Duplicate email addresses in the attendee list will automatically be removed.

9.1.4 Change Request

The change request feature provides effective tracking of your customer's change requests.

Its purpose is to describe a process that makes clear how the change is communicated, how decisions will be made and by whom and how the project will adapt accordingly.

A change request is very close to a requirement, it can also generate several requirements. The change request is necessarily linked to a project and can be linked to a product.

9.1.5 Decisions

Decisions are stored to keep track of important decisions, when, where and why the decision was taken.

You can link a decision to a meeting to rapidly find the minutes where the decision is described.

Note: The field **Origin** can be either the reference to a meeting where the decision was taken (so also add the reference to the meetings list), or a short description of why the decision was taken.

The field **Accountable** is the person who took the decision.

9.1.6 Questions

Question are stored to keep track of important questions and answers.

In fact, you should keep trace of every question and answer that have an impact to the project.

The questions can also afford an easy way to track questions sent and follow-up non-answered ones.

This will provide an easy way to find back when, who and precise description of the answer to a question.

Also keep in mind that some people will (consciously or not) be able to change their mind and uphold it has always been their opinion...

You can link a question to a meeting to rapidly find the minutes where the question was raised or answered.

Monitoring indicator

Possibility to define indicators to follow the respect of dates values.

- Respect of initial due date
- Respect of planned due date

9.1.7 Deliverables

This section allows to define the list of deliverables items.

This will provide an easy way to organize your due to customers.

In fact, you can keep track of every deliverables.

Deliverables links with Milestones.

Note: If you change the responsible of milestones, the responsible of deliverable will automatically changed, and vice versa.

You can estimated quality value for deliverable and this will produce a KPI.

See also:

KPI definitions

To follow life cycle management on deliverables (status managed as a workflow)

9.1.8 Incomings

This section allows to define the list of incomings items from customers.

It can be an indicator to follow if you can begin an action. For example, if you need an item from customer.

Incomings links with Milestones.

Note: If you change the responsible of milestones, the responsible of Incomings will automatically changed, and vice versa.

You can estimated quality value for incoming and this will produce a KPI. See: *KPI definitions*

9.1.9 Deliveries

Deliveries items are stored to keep track of deliveries.

Added list of deliverables integrated in delivery.

Note: Automatic dispatch of delivery status to deliverables.

To follow life cycle management on deliveries (status managed by a workflow)

9.1.10 Mails follow-up

Incoming and outgoing mail allows the dematerialization of mail to facilitate its distribution, allow archiving and monitoring by all employees

Incoming mails

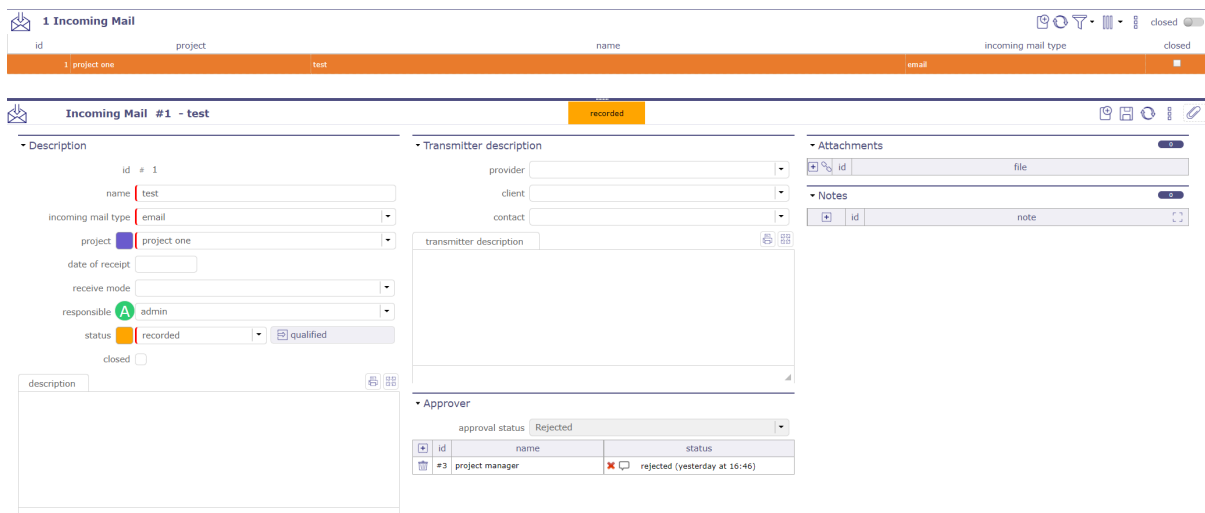


Fig. 12: Incoming mails screen

Transmitter description

In this section it is possible to indicate which transmitter is.

If it is a contact known to your database, you can select it directly from the lists.

Approvers

You can define approvers for a mail.

- Click on **Add** to add an approver
- Click on **Delete** to delete an approver

On the incoming mail screen, the approver can approve or reject the mail.

All approvers of the mail can view the response of other approvers.

Approval status

This status allows you to globally track the status of the approval.

It can be used in a filter, like all the other fields of the mail object.

calculated according to the approval status of the mail it may take the following values:

- **Without approval:** if no approver has been added to the list of approvers
- **Rejected:** if at least one approver rejected the mail
- **Pending approval:** if there is at least one approver who has not approved the document and no one has yet rejected the mail
- **Approved:** if all approvers approved the mail.

Outgoing mails

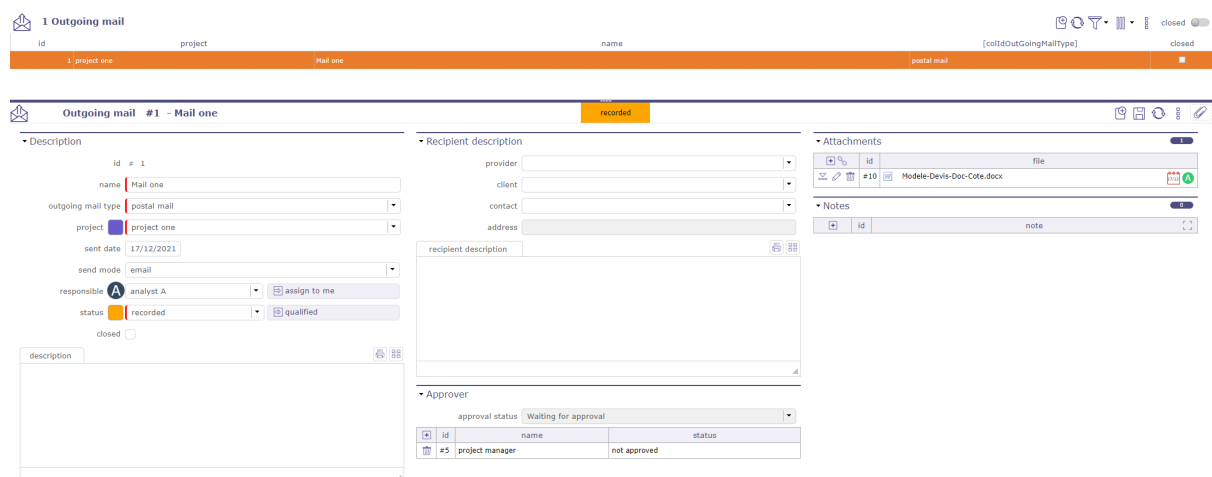


Fig. 13: Outgoing mails screen

Transmitter description

In this section it is possible to indicate which transmitter is.

If it is a contact known to your database, you can select it directly from the lists.

Approvers

You can define approvers for a mail.

- Click on **|Add|** to add an approver
- Click on **|Delete|** to delete an approver

On the outgoing mail screen, the approver can approve or reject the mail.

All approvers of the mail can view the response of other approvers.

Approval status

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It can be used in a filter, like all the other fields of the mail object.

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- **Pending approval:** if there is at least one approver who has not approved the document and no one has yet rejected the mail
- **Approved:** if all approvers approved the mail.

9.1.11 Project Analysis

ProjeQtOr allows you to record **assumptions, constraints** and **lessons learned**.

This involves having several screens to enter this information which can be linked to the project like each element of ProjeQtOr.

These screens will allow you to establish a management plan for your projects, whatever they may be.

9.2 Configuration Management

Configuration management consists of managing the technical description of a system, as well as managing all changes made during the evolution of the system.

It is the set of processes to ensure the conformity of a product to the requirements, throughout its life cycle.

In computing, for example, configuration management can be used for many purposes.

- To store and trace the different versions or revisions of any information intended to be used by a system (hardware, software, document, unit data, etc.).
- To deploy configurations through a computer park in the form of files and data.
- Manage source codes ...

9.2.1 Products

Allows to define product and sub-product.

Allows to link components to product.

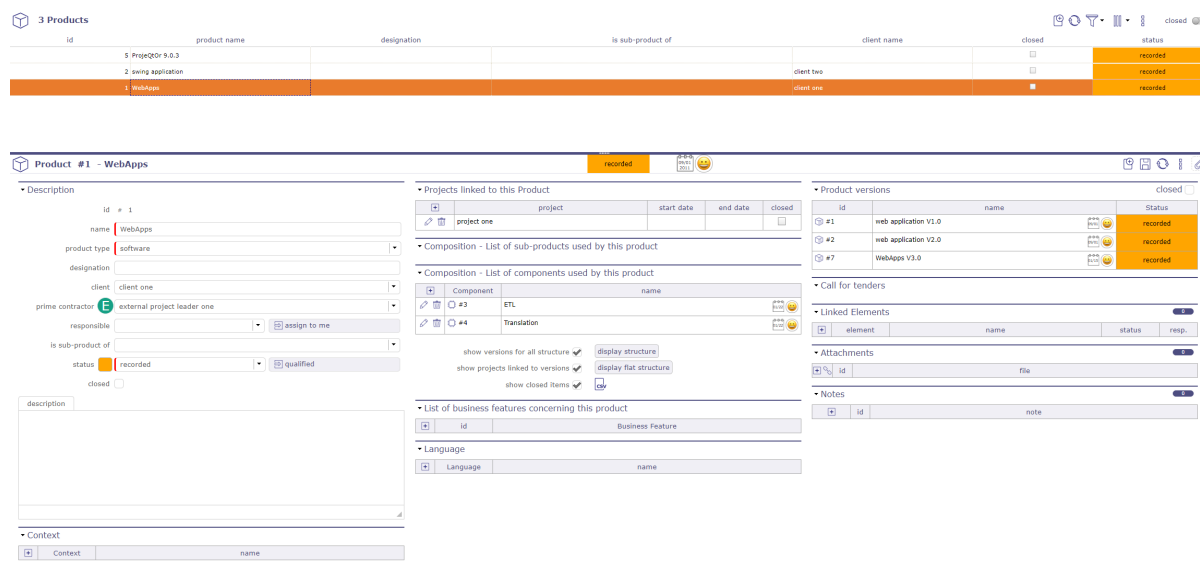


Fig. 14: Product configuration screen

You can create many links between products, product versions and component

Project linked to this product

Possibility of attaching the products of the list to projects.

When you link a project to a product, all versions of this product are going to be linked.

The start and end date corresponds to the duration of this link.

Composition

List of sub-products and list of components used by this product

See also:

Relationships.

Structure

You can display 2 ways to display the structure. Normal and flat.

Box checked “Show versions for all structure” allows to display versions of sub-products and components.

Box checked “Show projects linked to versions” allows to display projects linked.

Print preview			
Send document to printer			
#2 - swing application	id	name	Status
	#3	swing application V1.0	recorded
#3 - ETL			
#4 - Translation			
#4 - Translation			

Fig. 15: Normal display the product structure

Print preview			
Send document to printer			
#2 - swing application	id	name	Status
	#3	swing application V1.0 project two	recorded
#3 - ETL	id	name	Status
	#4	ETL V1.0 project one - maintenance project two project one	recorded
	#5	ETL V2.0 project one project one - developement	recorded
#4 - Translation	id	name	Status
	#6	Translation V1.0 project one - maintenance project one project one - developement project two	recorded
#4 - Translation	id	name	Status
	#6	Translation V1.0 project one - maintenance project one project one - developement project two	recorded

Fig. 16: Display the product structure with the boxes checked

9.2.2 Product Versions

Allows to define versions of a product.

Allows to link a component version to product version.

Allows to link the product version to a project.

Ability to define the compatibility between product versions (feature activated through a global parameter)

Automatic formatting of version name

Other sections

- *Projects linked to this version*
- *Composition...*

Possibility to define if the version name is automatically produced from the product name and version number.

Set *Global Parameters* to activate this feature.

Else, the version name will entered manually.

By profile, possibility to have a different list of the version of the original product according to the status.

Version number & Name

The field “Version number” appears only if the global parameter “Automatic format of version name” is set to Yes.

The field “Name” will be read only.

Prime contractor

The field “Prime contractor can be different from product prime contractor.

Entry into service (Real)

The field “Entry into service” specify the date of entry into service.

The box “Done” is checked when the real date field is set.

End date (Real)

The field “End date” specify the date end-of-service.

The box “Done” is checked when the real date field is set.

 **Product Version #7 - WebApps V3.0**

▼ Description

id # 7

product

version number

product version type

name

prime contractor

responsible

	initial	planned	real	done
start date	<input type="text" value="01/20/2021"/>	<input type="text" value="01/20/2021"/>	<input type="text"/>	<input type="checkbox"/>
delivery date	<input type="text" value="01/25/2021"/>	<input type="text" value="01/22/2021"/>	<input type="text" value="01/15/2021"/>	<input checked="" type="checkbox"/>
entry into service	<input type="text" value="01/04/2021"/>	<input type="text" value="01/04/2021"/>	<input type="text"/>	<input type="checkbox"/>
end date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

status

description

▼ Context

<input type="button" value="+"/>	Context	name
----------------------------------	---------	------

Fig. 17: Product version description

9.2.3 Components

Other sections

- *Structure...*
- *Composition...*

Allows to define product components.

Allows to define products using the component.

Possibility to define component types and component versions that will only be used for definition of structure (not for Version Planning or Tickets)

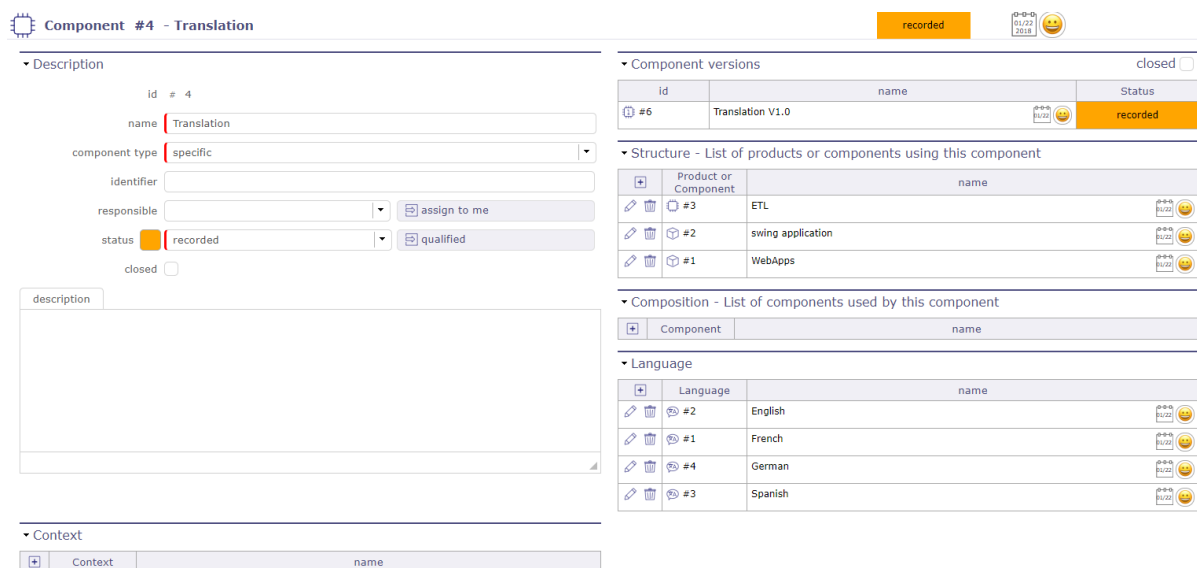


Fig. 18: Component details

List of versions defined for the component.

Component versions are defined in *Component Versions* screen.

9.2.4 Component Versions

Other sections

- *Structure...*
- *Composition...*

Allows to define versions of a component.

Allows to link a product version to component version.

Note: Possibility to define if the version name is automatically produced from the component name and version number.

Set global parameters to activate this feature. Else, the version name will entered manually.

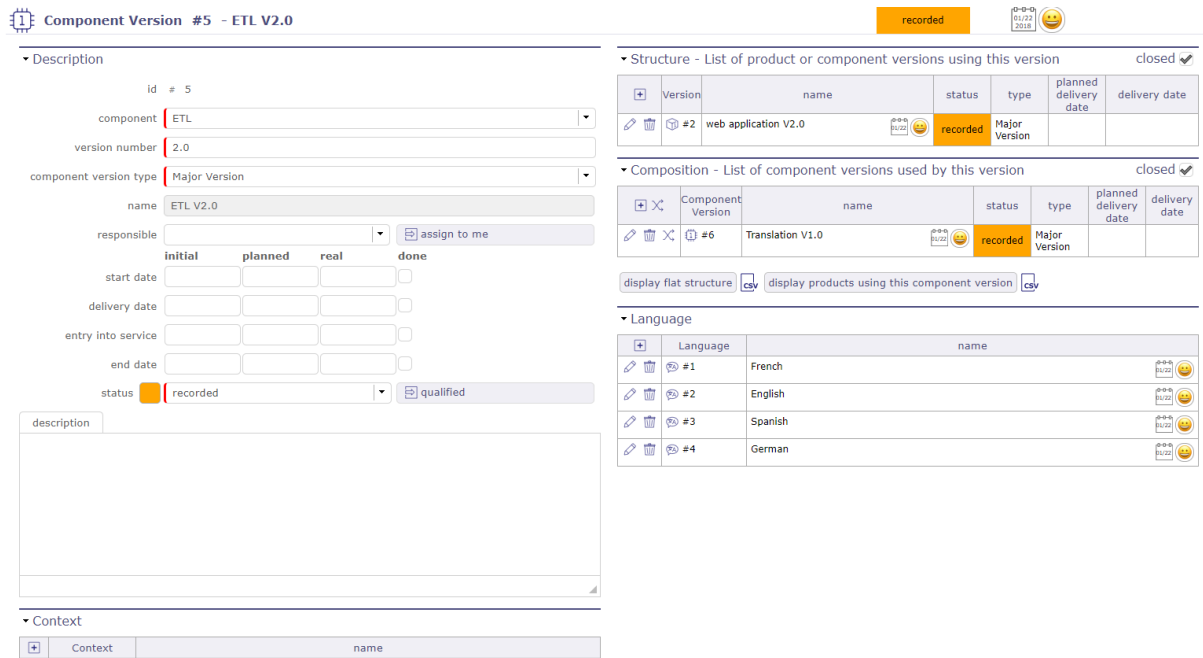


Fig. 19: Component version details

Version number & Name

The field “Version number” appears only if the global parameter “Automatic format of version name” is set to Yes.
 The field “Name” will be read only.

Entry into service (Real)

The field “Entry into service” specify the date of entry into service.
 The box “Done” is checked when the real date field is set.

End date (Real)

The field “End date” specify the date end-of-service.
 The box “Done” is checked when the real date field is set.

Note: Initial Date: when the planned date has been set, the initial date (if it is empty only) will be defined

9.2.5 Relationships

Product and component elements

Allows to manage relationships between products and components to define product structure.
 See possible relationships: *Product structure*

Relationships management



- Click on  to create a new relationship. The dialog box “Structure” appear.
- Click on  to delete the corresponding relationship.





Fig. 20: Structure

Versions of products and components

Allows to define links between versions of products and components.

Note: Only with the elements defined in the product structure.

Link management

- Click on  to create a new link. The dialog box “Version Structure” appear.
- Click on  to delete the corresponding link.

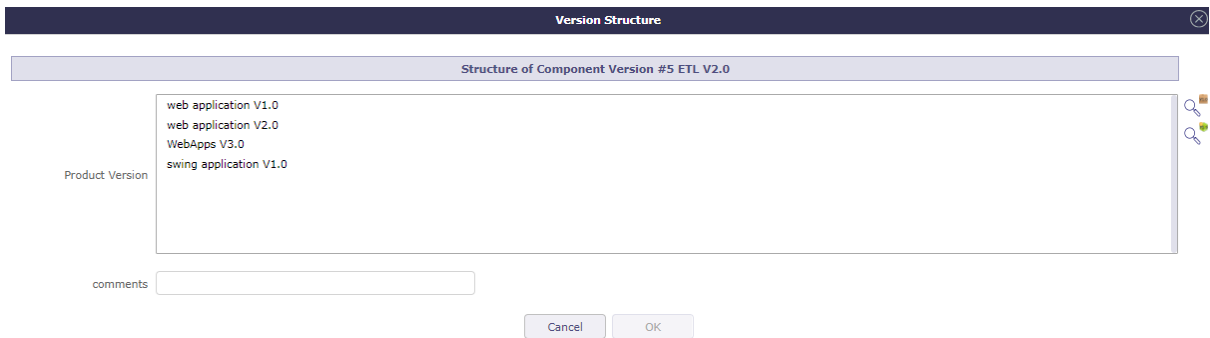





Fig. 21: Version structure

version to projects

This section allows to manage links between projects and versions of products.

Link version to projects management

- Click on  to create a new link.
- Click on  to update an existing link.
- Click on  to delete the corresponding link.

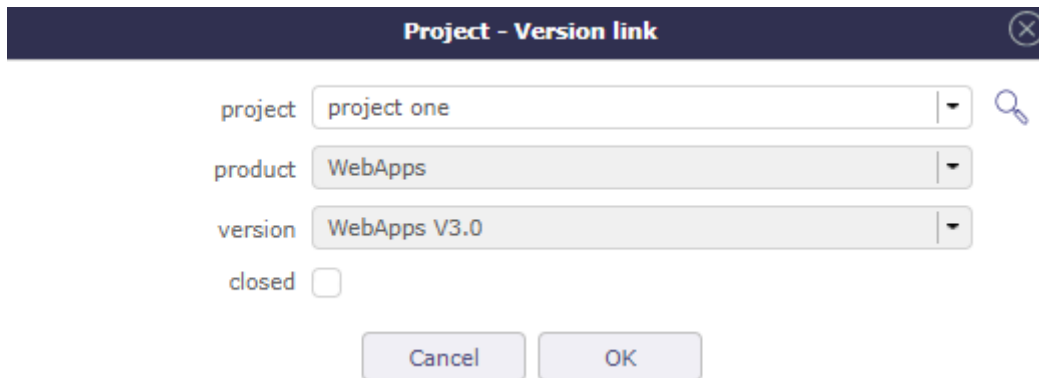


Fig. 22: Project / Version Link

Fields Project, Product and Version

- From the screen **Projects**, the fields **product** and **version** will be selectable.
- From the screen **Product versions**, the field **project** will be selectable.

9.2.6 Versions planning

Select one or more product versions and the planning version is displayed.

This planning displays each version of selected product versions and their components from define start date to deliverable date.

To use it define your start and delivery date in Product Version and Component Version.

Note: To insert values you have to activate display the start and delivery milestones' in global parameters otherwise these fields are hidden.

This screen allows to see if the delivery date of Component versions is more later than their Product versions. Graphically, you can see any delay or incompatibility.

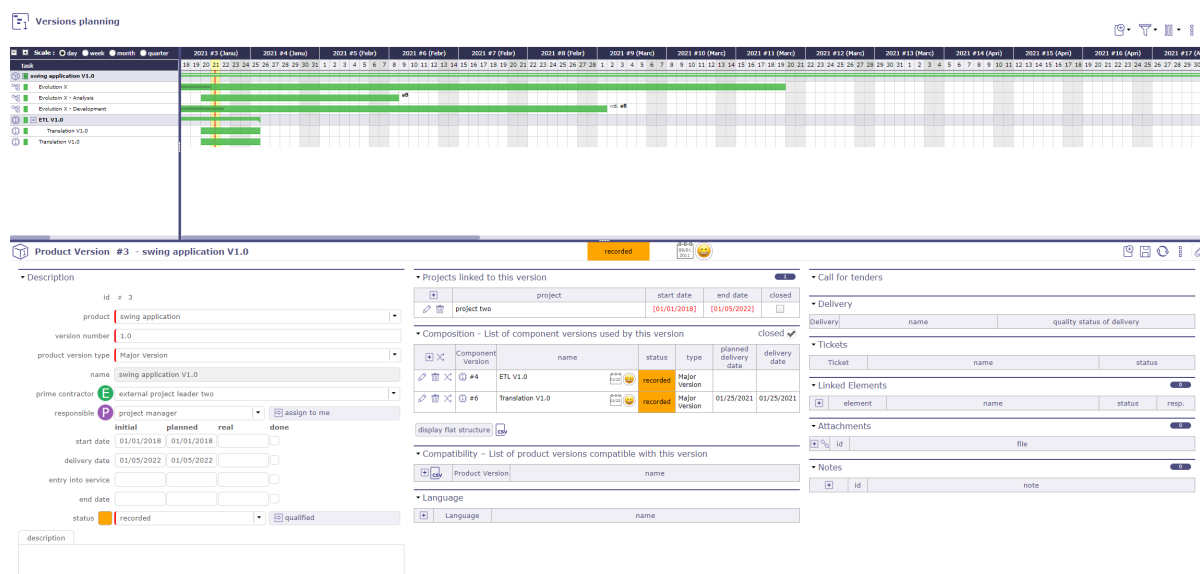


Fig. 23: Planning version

Display options

Click on  to add an activity. Click on  to filter the version display.

Click on **Show activities from product version** or **Show activities from component version** To display the related activities.

New check boxes will appear: one to show resources and the other to show or hide versions with no activity displayed.

You must select an existing activity to insert the new activity into the WBS structure.

If no activity is selected then the “add new element” icon will be grayed out.

The new activity is automatically inserted after the selected activity.

The new activity is generated on the same project, with the same component, the same component version, and with the same product and the same product version if these elements are filled in on the original activity.

The insertion from the selection of a product and component version will not be possible because we do not know where to insert it in the WBS of the projects.

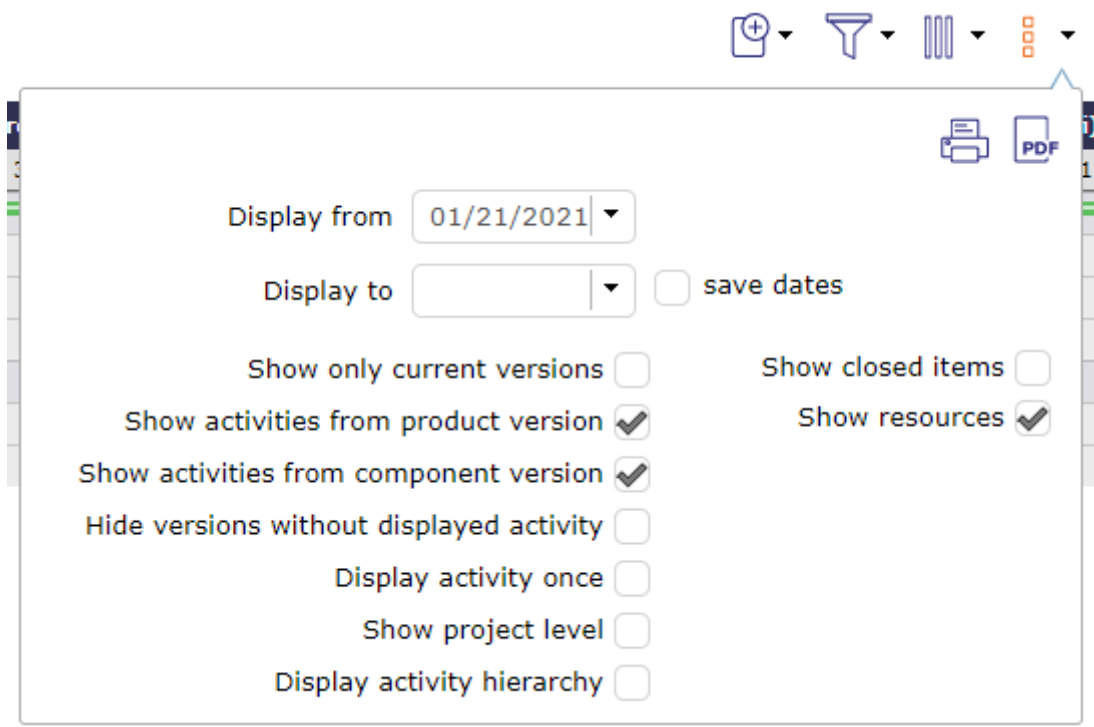


Fig. 24: Version planning options

REQUIREMENTS & TESTS

10.1 Requirements and tests

10.1.1 Requirements

Concepts

- *Product*
- *Project*

Requirement is a rule defined for a project or a product.

In most IT projects, requirement can be a functional rule for a software.

It allows to define and monitor cost and delays.

It can be linked to test cases, it's used to describe how you will test that a given requirement.

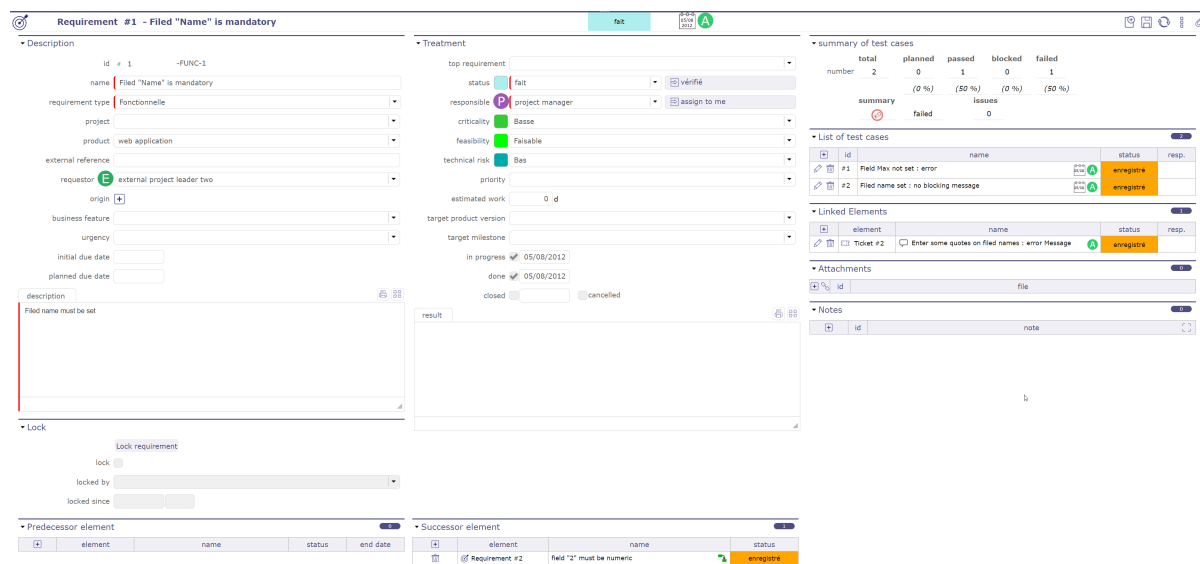


Fig. 1: Requirements screen

Linking requirements to a project will limit the visibility, respecting rights management at project level.

Requirement link to test cases

Test cases can be linked to a requirement in **List of test cases**.



Fig. 2: List of test cases section

- Click on to add a test case that will cover the requirement or part of the requirement.
- Click on to search for an item that is not in the list

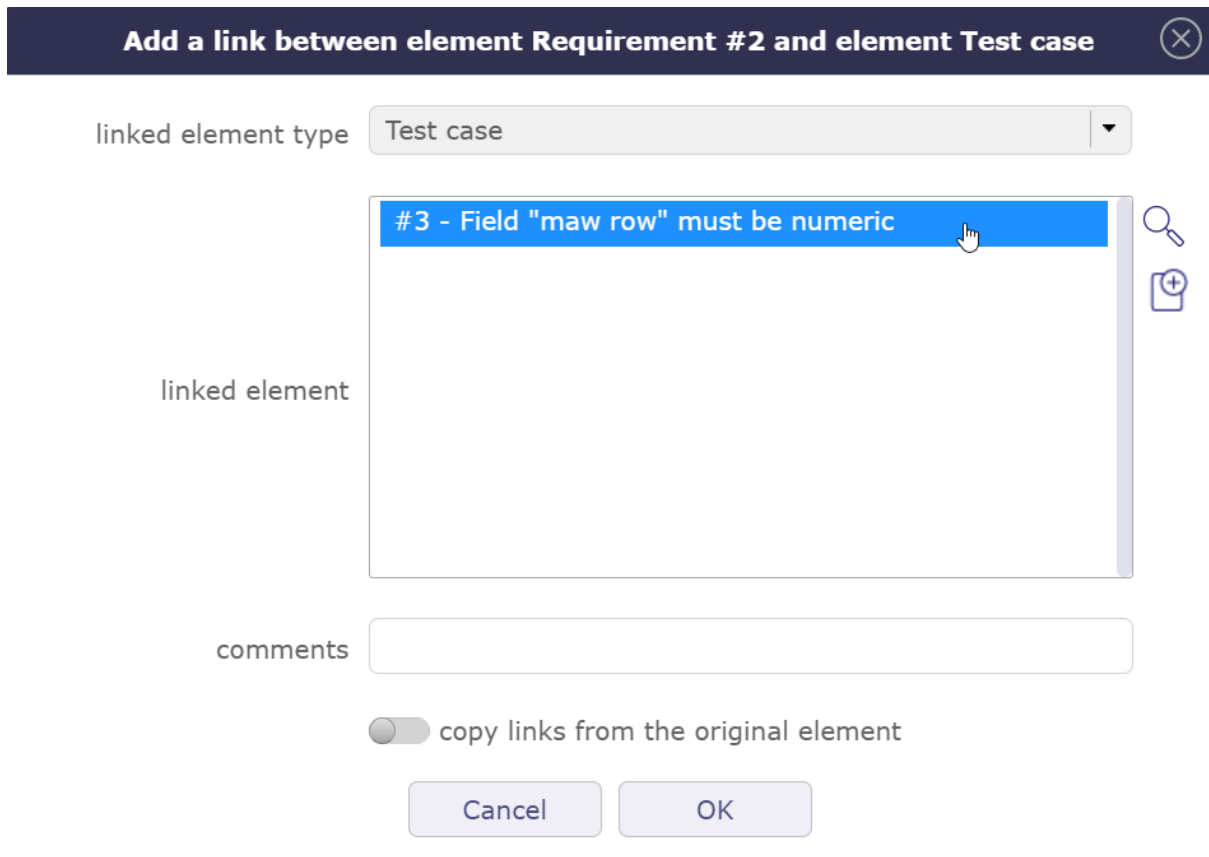



Fig. 3: Add a test case

- Click on  to create a new item from the popup

Linking a requirement to a test case will display a summary of test case run (defined in test session). This way, you will have an instant display of test coverage for the requirement.

▼ summary of test cases






	total	planned	passed	blocked	failed	work
number	3	0	1	1	1	0 d
		(0 %)	(33 %)	(33 %)	(33 %)	
summary			issues			
	failed		1			

Fig. 4: Summary test cases

This section summarizes the status of test case runs to requirement and test session.

-  **Planned:** No test failed or blocked, at least one test planned.
-  **Passed:** All tests passed.
-  **Failed:** At least one test failed.
-  **Blocked:** No test failed, at least one test blocked.

Requirement

Summarizes the status of test case runs for test cases are linked to the requirement.

Because a test case can be linked to several test sessions, total can be greater than linked to the requirement.

Test session

Summarizes the status of test case runs in the test session.

Requirement link to tickets

- When test case run status is set to **failed**, the reference to a ticket must be defined (reference to the incident).
- When the requirement is linked to a test case with this run status, ticket is automatically linked to the requirement.

Predecessor and successor elements

- Requirements can have predecessors and successors.
- This defines some dependencies on the requirements.
- The dependencies don't have specific effects. It is just an information.

Monitoring indicator

Possibility to define *indicators* to follow the respect of dates values.

- Respect of validated end date
- Respect of planned end date
- Respect of requested start date
- Respect of validated start date
- Respect of planned start date
- % final use of validated costs (revised/validated)
- % final use of assigned work (revised/assigned)
- % final use of validated work (revised/validated)
- % final use of assigned work (revised/assigned)
- % progress of validated work (real/validated)
- % progress of assigned work (real/assigned)
- % real progress

Note: Fields Project and Product

- Must be concerned either with a project, a product or both.
- If the project is specified, the list of values for field "Product" contains only products linked the selected project.

Field Target version

- Contains the list of product versions available according to the project and product selected.
-

Lock

A requirement can be locked to ensure that its definition has not changed during the implementation process.

Lock/Unlock requirement

- Button to lock or unlock the requirement to preserve it from being changed.
- Only the user who locked the requirement or a habilitated user can unlock a requirement.

Requirement locked

- When a requirement is locked the following fields are displayed.

Vote on requirement

It is possible to vote on requirement. In the detail tab of each requirement, find the voting section. The target value, current value, number of votes and fill rate are displayed.

Click on the vote button to assign a vote on the selected item.

▼ Voting

target value	<input type="text" value="10"/>
actual value	<input type="text" value="0"/>
number of voters	<input type="text" value="0"/>
rate	<input type="text" value="0"/> %

Fig. 5: Voting Section

In the voting window, several pieces of information such as the maximum point limit of the vote that you can use on the vote of the item in question.

Your personal vote which is not necessarily identical to the maximum points that you can award.

And finally the number of points that you have left to spend in the period of use set upstream in the rules for awarding and using votes.

See also:

Voting attribution rule

Voting use rule

Once you have validated your vote, if the *specific access* dedicated to voting have been activated, a table appears to display the names of the voters and the points that each of them has assigned to the element.

If several people have voted, the cumulative number of their points is displayed in the current value.

You continue to see the number of your points already assigned, directly in the vote button or in the table if you have the right to see it.

In the *specific access*, if the display of the table is deactivated, you can display at least the names of the voters.

In any case, the names of the voters and the points they have assigned are necessarily displayed in the table.

✕
Vote

limit per vote

own vote left points

comments Your comment will be stored as a note on the item. It can give information on how you want the item to be treated (need expression or specification).

it seems to me that this type of development has its place in the community roadmap

body div

Fig. 6: Voting pop-up

▼ Voting

target value

actual value

number of voters

rate %

voter's name	value	user	client
admin	3	admin	
analyst A	2	analyst A	

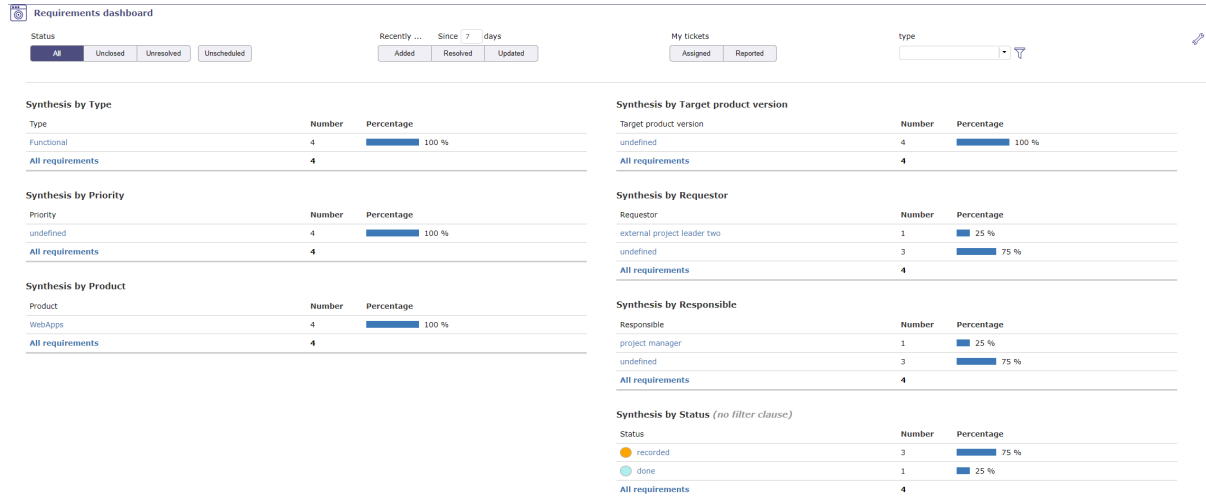
Fig. 7: Voting table

Requirements dashboard

Allows user to have a requirement global view of his projects.

Shows several small reports, listing the number of requirements by item.


Filters are available to limit scope.



Direct access to the list of requirements


- In reports, click on an item to get list of requirement corresponding to this item.

Parameters

- Click on  to access parameters.

Important: For **Synthesis by status**, filter clauses are not applicable.



- Allows to define reports displayed on the screen.
- Allows to reorder reports displayed with drag & drop feature.
- Using the selector area button .

Scope filters

- Filters allow you to restrict the display of saved requirements.
- By status, period, duration, closed element, linked to the user or no related...

No resolution scheduled

- **Unscheduled:** Requirements whose resolution is not scheduled in a next product version (target product version not set).

10.1.2 Test cases

Test cases are elementary actions executed to test a requirement.

You may define several tests to check a requirement, or check several requirements with one test.

The test case is defined for a project, a product or one these components.

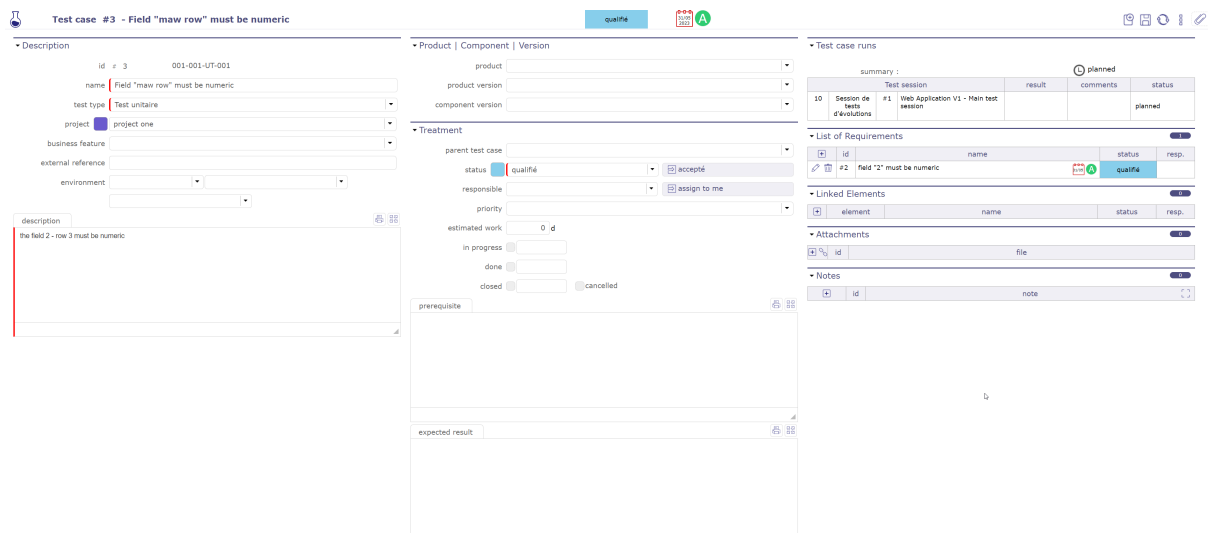


Fig. 8: Test cases screen

Linking test case to a *project* will limit the visibility, respecting rights management at project level.

Test case can have predecessors and successors.

This defines some dependencies on the test case.

Dependencies don't have specific effects. It is just an information.

Fields Project and Product

- Must be concerned either with a project, a product or both.
- If the project is specified, the list of values for field "Product" contains only products linked the selected project.

Field Version

- Contains the list of product and component versions available according to the project and product selected.

Field Environment (Context)

- Contexts are initialized for IT Projects as “Environment”, “OS” and “Browser”.
- This can be easily changed values in *Contexts* screen.

Field Description

- The description of test case should describe the steps to run the test.

Note: If field **Prerequisite** left blank and test case has a parent, parent prerequisite will automatically be copied here.

Test case run

























▼ Test case runs 4									
	order ↑	type ↑	id ↑	Test case ↑	result	comments	detail	status ↑	ticket ↑
  	10	Test d'implémentation d'exigence	#1	Filed name not set : error	null		 	failed	Ticket #2 
  	20	Test d'implémentation d'exigence	#2	Filed name set : no blocking message		session test 2	 	blocked	(just now) 
 	30	Test d'implémentation d'exigence	#3	Filed name set : error 455				passed	(just now) 
  	40	Test d'implémentation d'exigence	#4	Filed name set : set the size				planned	

Fig. 9: Test case run

-  **Planned:** Test to be executed.
-  **Passed:** Test passed with success (result is conform to expected result).
-  **Blocked:** Impossible to run the test because of a prior incident (blocking incident or incident on preceding test) or missing prerequisite.
-  **Failed:** Test has returned wrong result.

This section allows to display a complete list of test case runs. These are links of the test to test sessions. This list also displays the current status of the test in the sessions.

Warning: Field Summary

- An icon whose presents the run status of the test case.
- For detail, see: *Summary of test case run status*.
- To go, click on the corresponding test session.

10.1.3 Test sessions

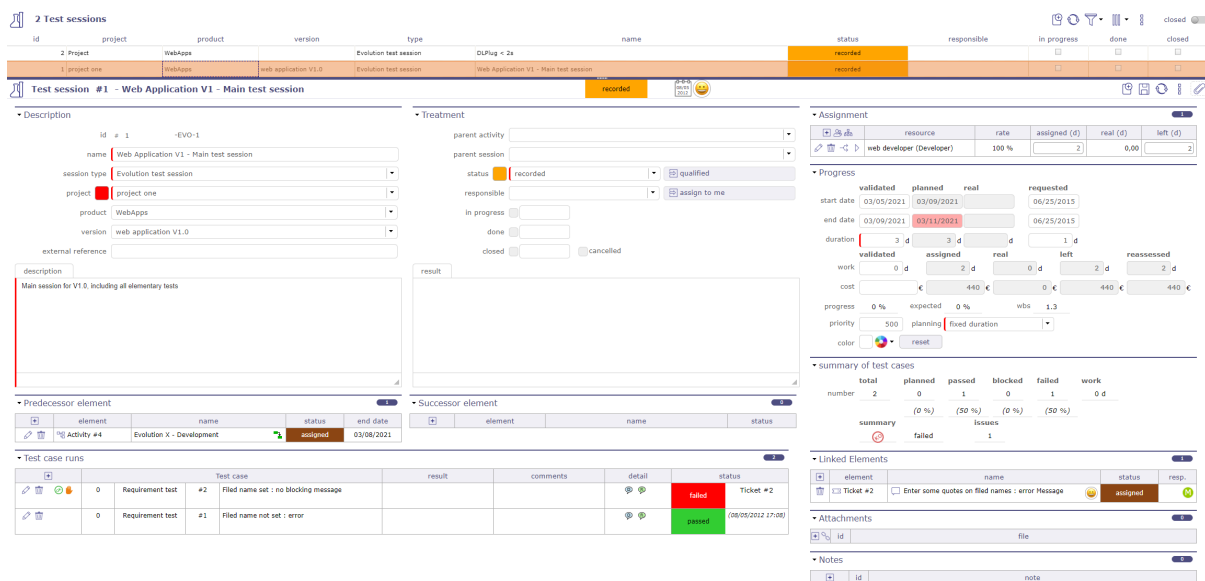


Fig. 10: Test session screen

A test session defines the set of tests to be executed to achieve a given objective, such as covering a requirement.

Define in the test case runs all test cases will be running to this test session.

For each test case run sets the status of test results

The test session is defined for a project, a product or one of these components.

See also:

Test case run status

Rights management

- Linking test session to a *project* will limit the visibility, respecting rights management at project level.

Test sessions regroupment

- Test session can have parents to regroup test sessions.

Planning element

- A test session is a planning element like *Activity*.
- A test session is a task in a *Gantt type project planning*.
- Allows to *assigned* resource and follow up progress.

Predecessor and successor elements

- Test sessions can have predecessors and successors.
- This defines some *dependencies* on test cases or planning constraints.

Monitoring indicator

- The indicators can be defined in the *List of Values*.
- See: *Health status* and *Overall progress*

Note: Fields Project and Product

Must be concerned either with a project, a product or both.

If the project is specified, the list of values for field “Product” contains only products linked the selected project.

Field Version

Contains the list of product and component versions available according to the project and product selected.





Test case runs

The screenshot displays the 'Test case runs' interface in ProjeQtOr. At the top, there's a navigation bar with various project management tools. Below it, a table lists 'Test sessions' with columns for id, project, product, version, type, name, status, responsible, in progress, done, and closed. The main area is divided into several sections: 'Description' with fields for name, session type, project, product, and version; 'Treatment' with fields for parent activity, parent session, status, responsible, in progress, done, and cancelled; 'Assignment' with a table for resource assignment; 'Predecessor element' and 'Successor element' sections; and a 'Test case runs' table. This table lists individual test cases with their order, type, id, name, result, comments, detail, status, and ticket. The status column uses color-coded icons: red for 'failed', orange for 'blocked', green for 'passed', and yellow for 'planned'. To the right, there's a 'Progress' section with various metrics and a 'summary of test cases' table showing total, planned, passed, blocked, failed, and work counts. At the bottom, there are sections for 'Linked Elements' and 'Attachments'.

Fig. 11: Test case run screen

This section allows to manage test case runs.

You can order the list of test cases by order, type, id, name, status or tickets.

- Click on  to add a test case run. The **Test case run dialog box** will be appear.
- Click on  to edit a test case run. The **Test case run detail dialog box** will be appear.
- Click on  to remove a test case run.
- Click on  to mark test case run as passed.

▼ Test case runs									4
	order	type	id	Test case	result	comments	detail	status	ticket
	10	Test d'implémentation d'exigence	#1	Filed name not set : error	null			failed	Ticket #2
	20	Test d'implémentation d'exigence	#2	Filed name set : no blocking message		session test 2		blocked	(just now)
	30	Test d'implémentation d'exigence	#3	Filed name set : error 455				passed	(just now)
	40	Test d'implémentation d'exigence	#4	Filed name set : set the size				planned	

Fig. 12: Test case run section

- Click on to mark test case run as failed. The **Test case run detail dialog box** will be appear.

Test case run ✕

Test case

status

ticket

result

comments

sort order

Fig. 13: PopUp PopUp test failed

When the status is set to failed, the pop-up window allows you to create a ticket (reference to the incident) or a comment.


If you create a ticket, it is automatically added to Links.

Information about the selected ticket is also displayed and the ticket is clickable to go to its dedicated screen.




Field ticket appear only whether status of test case run is **failed**.

- Click on to mark test case run as blocked.

Field Test case

- This icon  appears when the test case run comment field is filled.
- Moving the mouse over the icon will display the test case run comments.

Field Detail

- Moving the mouse over the icon  will display the test case description.
- Moving the mouse over the icon  will display the test case expected result.
- Moving the mouse over the icon  will display the test case prerequisite.

RISK MANAGEMENT & TICKETING

11.1 Risks and issues management

Risk and issues management is a process of identifying and assessing risks associated with a project, with the aim of managing their impact on the project.

11.1.1 Risks

A risk is any threat of an event that may have a negative impact to the project, and which may be neutralized, or at least minimized, through pre-defined actions.

Possibility to define indicators to follow the respect of dates values.

The risk management plan is a key point to project management:

- Identify risks and estimate their severity and likelihood.
- Identify mitigating actions.
- Identify opportunities.
- Follow-up actions.
- Identify risks that finally occur (becoming an issue).

Contingency reserve

- Contingency reserve is defined according to monetary impact and likelihood of occurrence.
- Contingency reserve for risks and potential gain for opportunities allow to define the project reserve.

Note: Field Criticality: Automatically calculated from Severity and Likelihood values. Value can be changed.

Field Project reserved cost: Automatically calculated from the percentage defined for the selected likelihood. (See: *Likelihoods*)

See also:

Project reserve

Criticality value calculation

11.1.2 Opportunities

An opportunity can be seen as a positive risk. It is not a threat but the opportunity to have a positive impact to the project.

Potential gain

The potential gain is defined according to the expected amount and likelihood of occurrence.

Contingency reserve for risks and potential gain for opportunities allow to define the project reserve.

Note: Field Criticality: Automatically calculated from Significance and Likelihood values. See: *Criticality value calculation* - Value can be changed.

Field Project reserved gain: Automatically calculated from the percentage defined for the selected likelihood. (See: *Likelihoods*)

See also:

Project reserve

Criticality value calculation

Criticality value is automatically calculated from **Severity (Significance)** and **Likelihood** values.

Criticality, Severity (Significance) and Likelihood values are defined in lists of values screens.

In the previous screens, a name of value is set with numeric value.

Criticality numeric value is determined by a simple equation as follows:

Default values are determined. You can change its values while respecting the equation defined above.

Note: Equation

- $[\text{Criticality value}] = [\text{Severity value}] \times [\text{Likelihood value}] / 2$
 - For example: Critical (8) = High (4) X High (4) / 2
-

See also:

Criticalities, Severities and Likelihoods screens.

11.1.3 Issues

An issue is a problem that occurs during the project.

If the risk Management plan has been correctly managed, issues should always be occurring identified risks.

Actions must be defined to solve the issue.

Possibility to define indicators to follow the respect of dates values.

11.1.4 Actions

An action is a task or activity that is set-up in order to :

- Reduce the likelihood of a risk
- or reduce the impact of a risk
- or solve an issue
- or build a post-meeting action plan
- or just define a “to do list”.

The actions are the main activities of the risk management plan.

They must be regularly followed-up.

Private actions allow to manage a personal to-do list.

Possibility to define indicators to follow the respect of dates values.

11.2 Ticketing

11.2.1 Ticket

A ticket is a kind of task that cannot be scheduled in a unitary manner.

This is usually a short-lived activity for a single ticket that gives feedback to the issuer or to keep track of the result.

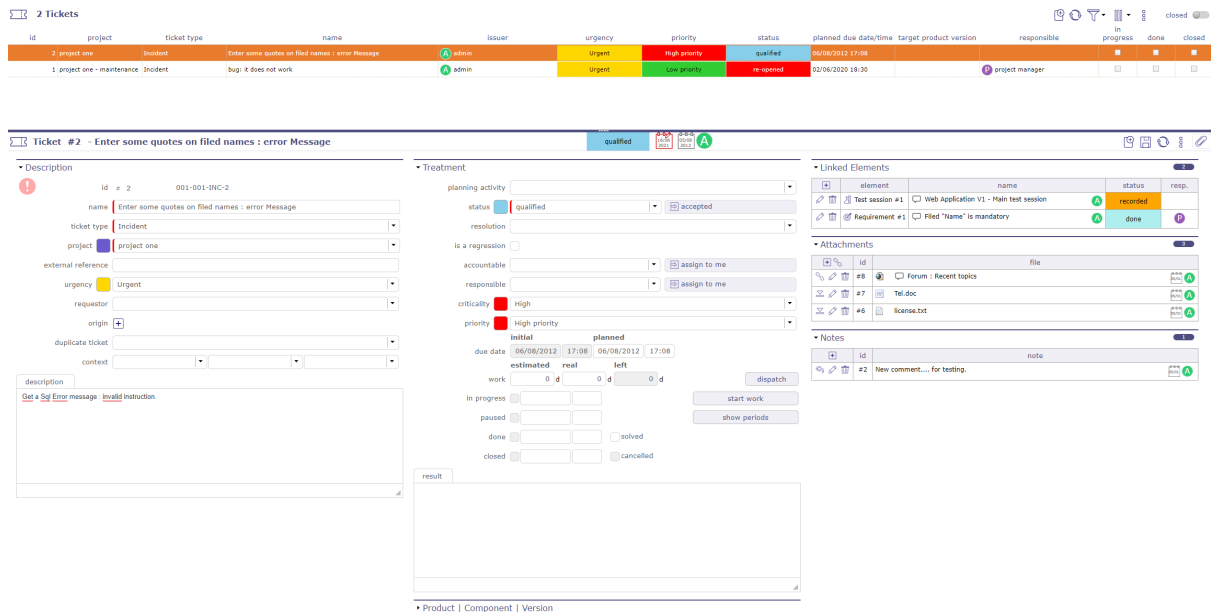


Fig. 1: Tickets management screen

It can be globally planned as a general activity, but not unitarily.

For instance, bugs should be managed through tickets :

- You can not plan bugs before they are registered.
- You must be able to give a feedback on each bug.
- You can globally plan bug fixing activity.

Tickets (simple)

- This screen is a limited version of screen “Tickets”.
- It’s dedicated to users who want to create and follow their own tickets without be involved in their treatment.
- When fields and features are available, the description is similar.

Tip: Possibility to define that only the responsible of ticket can enter real work.

This behavior can be set in *Global parameters* screen.

Dates

Due dates

- Initial and planned due date allows to define a target date for solving the ticket.
- If a deadline definition for a ticket exists, the initial planned date is automatically calculated with this deadline.

See also:

Delays for tickets screen allows to define ticket delay.

Planned due date

- Is used to define a target date after evaluation.
- Automatically initialized to the initial due date.

Monitoring indicator

- Possibility to define indicators to follow the respect of dates values.

Product, component and versions fields

Allows to identify the product and component relating to the issue.

Identifies from which versions, the issue occurs and to which versions a resolution will be applied.

Versions identified

- A ticket can identify all versions allocated.
- Possibility to define a main version and the other versions allocated.

See also:

Product concept.

Responsible of product

A responsible can be defined for a product or component.

If a product or component is selected, the responsible defined can be automatically assigned to the ticket.

Tip: Ticket responsible from product responsible, in *Global Parameters*, allows to define, if the defined responsible is automatically assigned to the ticket.

Original product version & Original comp. version

- The list of values will be filtered depends on the selected value in fields “Product and component”.
- Click on to add a other version, see *Multi-version selection*.

Section Treatment

Table 1: Required fields

Field	Description
Planning activity	Activity where global work for this kind of ticket is planned.
Status	Actual <i>status</i> of the ticket.
Resolution	Ticket resolution.
Regression	Notion of regression can be added.
<i>Responsible</i>	Resource who is responsible for the ticket.
Criticality	Importance of impact on the system, as determined after analysis.
Priority	Priority of treatment.
Initial due date	Initial target date for solving the ticket.
Planned due date	Actual target date for solving the ticket.
Estimated work	Estimated workload needed to treat the ticket.
Real work	Real workload spent to treat the ticket.
Left work	Left workload needed to finish the ticket. Automatically calculated as Estimated – Real Set to zero when
<i>In progress</i>	Box checked indicates the ticket is taken over.
<i>Done</i>	Box checked indicates the ticket has been treated.
Solved	Box checked indicates the ticket has been solved.
<i>Closed</i>	Box checked indicates the ticket is archived.
Solved	The box is automatically checked or unchecked, according to the resolution selected
Cancelled	Box checked indicates the ticket is cancelled.
Target product version	Product versions for which a resolution of issue will be delivered.
Target comp. version	Component versions for which a resolution of issue will be delivered.
<i>Result</i>	Complete description of the resolution of the ticket.

Note: **Priority** is automatically calculated from Urgency and Criticality values. This can be changed manually

See also:

Priority value calculation.

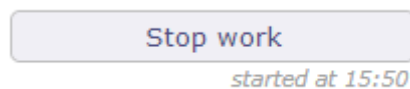
Note: Target product version & Target comp. version

- The list of values will be filtered depends on the selected value in fields “Product and component”.
- Click on to add a other version, see *Multi-version selection*.

Button Start/End work

	initial		planned	
due date	<input type="text" value="06/01/2020"/>	<input type="text" value="18:00"/>	<input type="text" value="06/02/2020"/>	<input type="text" value="18:30"/>
	estimated	real	left	
work	<input type="text" value="0,8"/> d	<input type="text" value="0"/> d	<input type="text" value="0"/> d	<input type="button" value="dispatch"/>
in progress	<input checked="" type="checkbox"/>	<input type="text" value="01/20/2021"/>	<input type="text" value="10:45"/>	<input type="button" value="Start work"/>
done	<input checked="" type="checkbox"/>	<input type="text" value="01/20/2021"/>	<input type="text" value="10:45"/>	<input type="checkbox"/> solved
closed	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> cancelled

- The start Work / Stop Work button is a clock on / off timer.
- If the logged in user is a resource, he or she has the option to start working on the ticket.
- Click the “Start work” button to start timing the processing time on the ticket.
- The start time is then displayed under the button and the button changes name.



- Once the work is done, press the “stop work” button.
- The spend time will automatically be converted as real work.
- It’ll be transferred on planning activity if it is set.
- A decrease in “left work” on activity will be carried out.
- if the ticket goes into a paused state then the work started with the start work button will be stopped.

Important: Closing the application or starting work on another ticket will automatically stop the current ongoing work.

Button Dispatch

This button allows to dispatch ticket.

- Click on to add a line.

Button Show periods

You can calculate the time spent between the start of processing, which corresponds to the receipt of the ticket and the end of processing of a ticket, that is to say when it goes to the done state, with the possibility of subtracting waiting periods thanks to the “paused” state macro.

The passages from an active macro-state to a non-active macro-state (paused or done), are recorded thanks to the start and end dates of each period. This table is updated automatically with calculation of the duration in working hours and the duration in calendar hours when the end date of the period is entered.

Dispatch work
✕

date	resources	work
01/25/2021 ▾	admin ▾	0,2 d
01/26/2021 ▾	analyst A ▾	0,4 d
▾	▾	0 d
Sum		0,6 d

Cancel
OK
+

Status periods
✕

macro status	start of period			end of period			duration	
	date	status	user	date	status	user	calendar	open days
✔ in progress	less than 5 minutes ago	in progress	A admin	less than 5 minutes ago	paused	A admin	1mn	1mn
✘ paused	less than 5 minutes ago	paused	A admin	just now	in progress	A admin	3mn	3mn
✔ in progress	just now	in progress	A admin					

close

Morning	start	end
Afternoon	08:00	12:00
	14:00	18:00

Fig. 2: Status period

Planning activity

Planning activity field allows to link the ticket with a planning activity.

If the global parameter *limit Planning Activity to those with flag* is set to yes then:

- You must check the “Planning activity” box on the activity to be linked.
- It will then be visible in the planning activities list of your ticket.
- Work on the ticket will be included in this activity.
- After saving the option, new fields are displayed.
- You can see the number of tickets linked to this activity and time information corresponding to all of these tickets.

The 'Steering' panel includes the following fields and options:

- progress: 2 %
- expected: 1 %
- wbs: 1.1.1
- priority: 500
- planning: as soon as possible (dropdown)
- color: [color picker] [reset]
- minimum threshold: 0 d
- not splitted work:
- fix planning: do not include in planning calculation
- number: 3
- estimated: 1,6 d
- real: 0,6 d
- left: 0 d
- planning activity:

Fig. 3: New fields displayed after saving the Planning activity option

- Click on to open a popup which will display the details of these tickets.

element	name	estimated	real	left	status
Ticket #1	Activity stream: when filter by author give possibility to show answer of notes	0,3 d	0 d	0 d	cancelled
Ticket #3	Bug on XX screen	0,5 d	0 d	0 d	done
Ticket #4	Performance down	0,8 d	0,6 d	0 d	done

Fig. 4: List of tickets linked to the activity

Real work

Put the real work from tickets to the resource timesheet.

- When a resource has entered the real work on the ticket and the ticket is linked to a planning activity.
- The resource is automatically assigned to this activity.
- Real work set on tickets is automatically set in resource timesheet.

Resource	Activity	Manager	Start	End	Estimated	Real	Left	...	Total
project one					0,2	0	0	0	0,2
project one - maintenance					0,2	0	0	0	0,2
bug fixing		Manager	01/27/2021	03/02/2021					
Performance down					0	0,6	0,2	0	0
analysis		Manager	02/17/2021	03/11/2021	0	0	0	0	0
internal project					0	0	0	0	0


Fig. 5: Imputations real work on related tickets.



- The tickets are very dependent on the planning activity.
- The time indicated by the resources will be decremented to that planned for the activity.

Multi-version selection

In the version fields, it's possible to set several versions.

Main and other version

- The version with smaller id will appear in the select list and is considered as the main version.
- Other versions are listed above.
- It is possible to set an 'other' version as the main version using the button .

- Click on  to add a other version.
- Click on  to delete a version.

Priority value calculation

Priority value is automatically calculated from **Urgency** and **Criticality** values.

Priority, Urgency and Criticality values are defined in lists of values screens. See: *Priorities*, *Urgencies* and *Criticalities* screens.

In the previous screens, a name of value is set with numeric value.

Priority numeric value is determined by a simple equation as follows:

Equation

- [Priority value] = [Urgency value] X [Criticality value] / 2
- For example:
 - Blocking (4) X Critical (8) / 2 = Critical priority (16)for [Priority value]

Default values

- Default values are determined.
- You can change its values while respecting the equation defined above.

mailbox for tickets

ProjeQtOr offers to save tickets from e-mail directly in the application.

You can create new mailboxes for tickets on projects and for each type of ticket configured in ProjeQtOr.

id #


name

project

IMAP host

connection mode

IMAP user

IMAP pwd 

security constraints emails from any source (may lead to spam)
 only emails from known users
 only emails from known users allocated to the project

processed e-mails mark e-mail as read
 delete e-mail from imap mail box

rejected e-mails do not modify e-mail
 mark e-mail as read
 delete e-mail from imap mail box

include attachments

recipients to follow up add recipients to the follow up of created items

pseudo-users create pseudo-users for unknown email addresses

sort order

closed

Fig. 6: Receive email from ticket screen

IMAP Host

The address must be an IMAP connection string.

Example to connect to the GMAIL input area, the host must be

```
{imap.gmail.com:143}INBOX
```

No protocol is required

Tip: If the certificates are self-signed then you can test to add novalidate-cert in your address

```
{imap.gmail.com:143/novalidate-cert}INBOX
```

Security constraints

- **Mails from any source (may lead to spam)**

Allow you to receive emails from anyone and therefore can cause spam

- **Only mails from known users**

Can only receive emails saved in your ProjeQtOr application

- **Only mails from known users allocated to the project**

Only allows you to receive emails saved in your ProjeQtOr application and which are assigned to the project selected in the settings of your mailbox

Processed emails

- **mark e-mail as read**

All emails that are authenticated and correct according to the constraints set, are accepted and marked as read.

- **delete e-mail from imap mail box**

All emails that are not properly authenticated and that do not meet the set constraints are permanently deleted from the IMAP box.

Rejected emails

- **do not modify e-mail**

An email is rejected when it does not meet the criteria for setting up your mailbox. Do not modify the email is an option that will not trigger either deletion or marking.

The rejected email remains unread.

- **mark e-mail as read**

The rejected email is marked as read.

- **delete e-mail from imap mail box**

The rejected email is permanently deleted from the IMAP box.

Other constraints

- **Include attachments**

Indicates whether or not you allow your users to attach attachments.

- **recipients to follow up**

Systematically include the sender and recipients of the email in the follow up of the ticket created or note added by this email.

This includes the main recipients (except the one corresponding to the inbox) and the copy recipients.

- **pseudo-users**

Allow sending from unknown users and keep track of the sender's emails and copy them.

Results in the creation of fictitious users.

Warning: There is no weight limit in ProjeQtOr but probably your mail server.

Most of the time emails are blocked beyond 5 to 10 MB

- **Sort order**

In case of several mailboxes on a single project, the order of the boxes is important since it is always in ascending order that the mailboxes manage incoming tickets.

- **Recipients to follow up**

Add recipients to the *follow up* of created items.

See also:

Management of several mailboxes

Replies from email

Important: **CRON** Cron must be launched for tickets to be processed in ProjeQtOr, if you do not receive a ticket, try to stop the cron so that it can restart with a refresh of the code.

Limit of tickets / hour

- This limit allows you to restrict the reception of emails by hour.

If the number of tickets received is much higher than your limitation then the probability of spam is to be considered or you have incorrectly evaluated the number of tickets to be processed.

- When the maximum number of tickets is reached then the mailbox freezes

Only manual intervention by the administrator can unlock it

Its role will consist in reassessing the number of tickets to allow their receipt

Important: If the maximum number of tickets per hour has been reached then you have a rejection message on the history line **rejected ticket: ticket limit per hour**

History of ticket created

You can choose the number of tickets to display in the history by filling in the “history to display” field

Replies from Email

The use of the mailbox for new tickets is the same for replies.

The reference of the element from which the email is sent is added in the subject of the email.

In the procedure for determining the origin of an incoming email, ProjeQtOr searches for the reference in the subject of the email.

- **If it is not found**

ProjeQtOr considers it a new request to be integrated as a new ticket.

- **If the reference is found in the subject of the incoming email**

When receiving a reply to an email sent by projeqtOr, the reply is inserted on the item as a note with an option to include attachments in the attached files.

oAuth2 pour IMAP

The goal is to enable connection to IMAP mailboxes via oAuth2 authentication, for the “Input Mailbox for Tickets.” This allows connection to Office 365 mailboxes.

With oAuth2, the protocol allows the acquisition of client credentials as a connection method.

This method requires no human interaction. When declaring the client, it will be necessary to correctly define that it has all the necessary rights to process messages from the IMAP mailboxes used, such as:

- listing unread messages,
- marking messages as read,
- deleting messages.

Management of processed emails

In the *global parameters* you can determine, upon receipt of the email, whether you want to mark it as read or delete it.

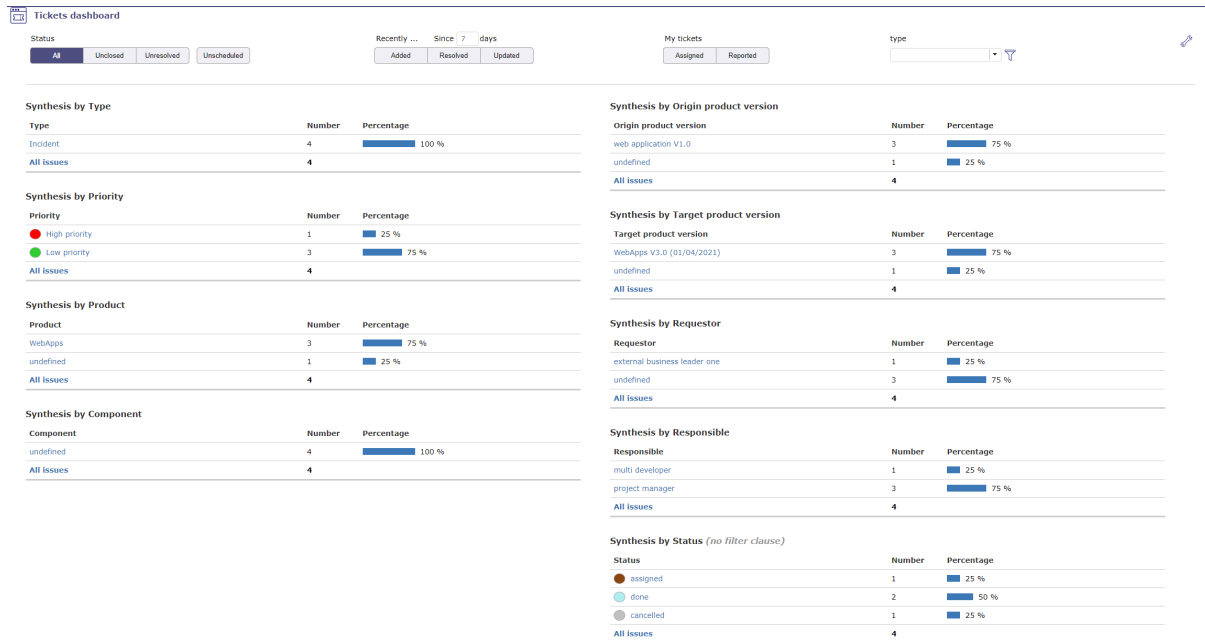
Receipt of multi-project tickets

You will be able to receive all tickets from different customers on a single IMAP box.

- You define several configurations on the same IMAP box with constraints on the existence of the sender and its assignment to the project concerned.
- You define a configuration on the IMAP box that has no constraint or just a constraint on the existence of the sender
- You set the order in which configurations are processed to ensure that the most permissive configuration is processed last.

Important: Be careful, you will have to be careful to have a “final” configuration that will mark as read or delete emails that are not correctly processed. Otherwise, the IMAP box will keep an increasing amount of emails that will be reprocessed (and rejected) by all configurations on each sequenced cycle of reading IMAP boxes. This will not be controlled by the system.

Tickets dashboard



Allows user to have a tickets global view of his projects.

Displays several small syntheses that group the tickets by category: type, priority or by product, component or by state.



The number of tickets is listed. The result is displayed with numbers and as a percentage.

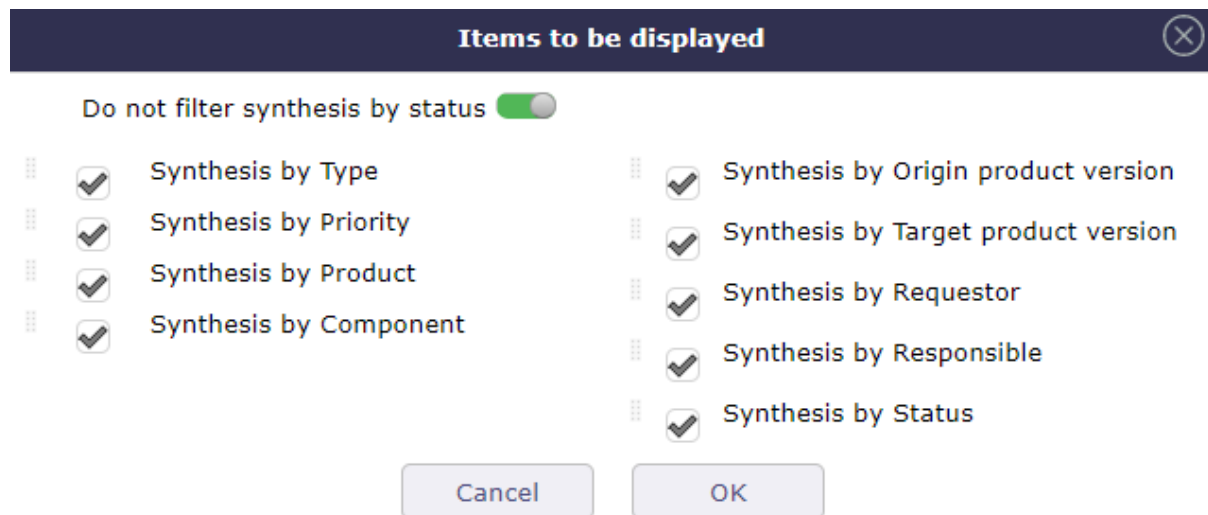
Filters are available to limit scope.

Direct access to the list of tickets

- In the various summaries, click on an element to obtain the list of tickets corresponding to this element.
- you return to the tickets screen

Parameters

- Click on  to access parameters.
- Allows to define reports displayed on the screen.
- Using  to reorder reports displayed.
- For Synthesis by status, filter clauses are not applicable.



Filters

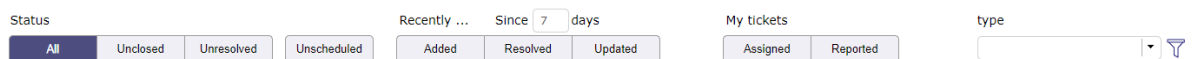


Fig. 7: Filters

Filters allow you to restrict the display of saved requirements

Scope filters

By status, period, duration, closed element, linked to the user or no related...

No resolution scheduled

Unscheduled: Requirements whose resolution is not scheduled in a next product version (target product version not set).

11.2.2 Management of tokens on ticket

You can define and integrate tokens on tickets that you can track on your customer contracts.

The use of this feature is configurable and must be activated in the *modules management* to have access to it.

A new screen for the definition of tokens will be accessible via the financial part incomes menu.

Token definition

The objective is to define all types of tokens likely to be ordered by your client.

You set values for a token.

3 Work tokens définition closed

id	project	name	closed
3	project three	Formation	<input type="checkbox"/>
2	project three	Assistance	<input type="checkbox"/>
1	project three	support lv1	<input type="checkbox"/>

Work tokens #1 - support lv1 🔍 📄 🔄 🗑️

Detail Files Notes

▼ Description

id = 1

name

project

closed

description

▼ Treatment

duration d

amount €

splittable token

Surcharge situations	
<input type="text" value="night"/>	<input type="text" value="3"/>

Fig. 8: Token definition screen

Duration

Value of the token in days or hours (depending on the time recording unit in global parameters)

Amount

Monetary value of the token in € (depending on the currency recording unit in global parameters)

Splittable token

Defines if the token can be divisible, if half tokens can be entered

Surcharge situations

Enter situations of increase that may apply to tokens, such as night work, or even during days normally not worked

Warning: When a token has been used on a ticket, it becomes impossible to modify it.
Similarly, it is not possible to delete or modify the coefficient for a mark-up situation used on a line of work

Token on the client contract

On the client contract, we will add a table with order management functions.

- Click on to add tokens to the order

Add work tokens command ✕

work tokens

quantity

description

allow over use allow to use more tokens than ordered

closed

Fig. 9: Add work token command

- Select the token type from those defined on the project or its parent projects.
- Entering the ordered quantity of tokens
- Added a descriptive comment
- Choose if you can exceed the amount of tokens on the order.

Client contract #1 - ContractSupport-003 recorded

Description **Progress** Treatment Detail Links Files Notes

▼ Progress

start date end date
 contract dates 01/01/2022 12/31/2022
 initial contract term 1 year
 notice period 2 month
 notice date 11/01/2022
 due date reminder
 periodicity contract 12 month
 invoicing frequency 1 month

▼ Management of ordered tokens

+	id	token	description	tokens ordered			tokens used				left tokens	
				quantity	duration	amount	total	total with markup	duration	cost	duration	amount
	#1	support lvl1 #1		150	75 d	22 500,00 €	15	15	7.5 d	2 250,00 €	67.5 d	20 250,00 €
	#2	Assistance #2	on site	10	10 d	10 000,00 €	1	1	1 d	1 000,00 €	9 d	9 000,00 €
Total				160	85 d	32 500,00 €	16	16	8.5 d	3 250,00 €	76.5 d	29 250,00 €

Fig. 10: Management of ordered tokens

When you have entered the order, the table will indicate:

In the tokens ordered section

- The type of tokens ordered and its description
- The total amount of tokens ordered
- the total duration to which the number of tokens corresponds
- The total amount to which the number of tokens ordered corresponds

In the tokens used part

- The total number of tokens used without surcharges
- The total number of tokens used with markup
- the total duration of the tokens used with and without surcharges
- The total cost of tokens used taking into account markups

In the remaining tokens part

- Display of the remaining duration of the tokens (duration ordered - duration used)
- Display of the number of remaining tokens (amount ordered - amount used)

The Total Line, sums the numbers, amounts and durations (ordered, completed, remaining) for all types of tokens in the contract

Token on tickets

When you create a ticket on the project where the tokens have been defined then you will be able to select these tokens when distributing the work.

You can retrieve these tokens from a parent project.

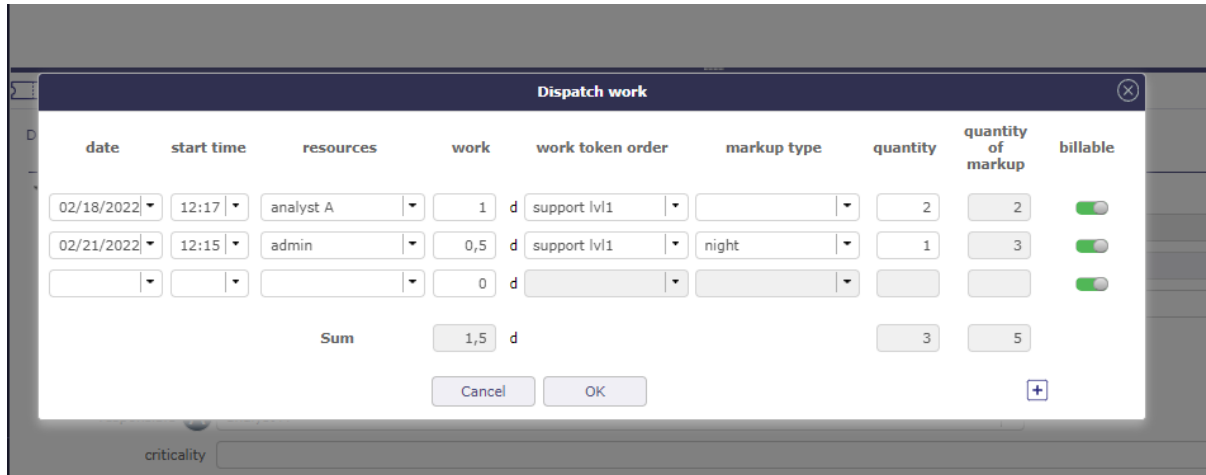


Fig. 11: Dispatch work with selection of tokens

Click on  to open the pop-up.

The start date and time are automatically filled in with the current dates and times.

- Select the resource working on the ticket
- Add the workload for this ticket
- Select the token corresponding to the need of the ticket
- Determine if a markup type applies to this ticket
- The quantity of tokens (without decimal if the token is not divisible)
- The mark-up rule, to be chosen from the rules defined on the token
- The number of increased tokens calculated by applying the increase rule
- If the billable box is checked then the tokens will not be counted on the customer contract.

Warning: The “Mark-up situations” are descriptive and may or may not be related to the time of execution. There will therefore be no automatic determination of the increase situation according to the day or time of the entry of the time spent.

11.2.3 Synchronize activities and tickets

You can sync tickets with activities. So when you enable this option, all tickets are synced like this:

- We attach the activity as a planning activity of the ticket
- We link the activity with the ticket
- The ticket is entered as the origin of the activity
- We modify the state of the element which has the least advanced state to pass it to the state of its binomial (the most advanced).

- The other data is not synchronized (a gap may then exist if the ticket is attached to an existing activity).

▾ Synchronization

definition of synchronization

Fig. 12: Synchronization of tickets with activities

You activate the option directly on the project. More flexible solution that will allow great flexibility according to potentially different behaviors depending on the project.

This is a one-time link to avoid recursive updates. A ticket is synchronized with a single activity and an activity will be synchronized with a single ticket (unique pair).

Synchronization functionality set on a project is not inherited to subprojects.

Synchronize existing tickets

When this option is selected, all unclosed tickets whose status is greater than or equal to the trigger status and whose type is the one specified will be synchronized with an activity.

- If the ticket is already synced with an activity, nothing happens. This is the case of reactivating a previously deactivated rule.
- If the ticket is attached to an open planning activity, the ticket is synchronized with this activity.
- If the ticket originates from one and only one unclosed activity, it is synchronized with this activity. Otherwise we will create a new activity that will be synchronized with the ticket.

In all cases of research of the activity to be attached, we make sure that it is not already synchronized with another ticket and that it does not originate from another ticket

When a Ticket or Activity item is edited and synced to a pair, changes to some fields carry over to their pair:

- Name
- Project
- State
- Responsible
- Product
- Component
- Target product version
- Target component version

The project

When you change the project of a ticket attached to a planning activity, a consistency check prevents you from making this modification since the two elements must be linked on the same project.

In case of synchronization, the control is ignored and you can change the project on one of the two elements, the modification will be passed on to the other.

- If a ticket changes project or type before its triggered state, it is not synced.

It is then subject to the new project or new type rule.

A check is carried out to find out if the ticket is not already in the trigger state for the new project or the new type and to trigger the synchronization in this case.

- If a ticket changes project or type after its triggered state, it's already synced. He continues to be synchronized with his partner according to the rule of his original project, whether his new project has a synchronization rule or not.

The change of project of the ticket can also come directly from a modification on the ticket or from a modification of its binomial activity.

The rule is always the same: pair synchronization is maintained.

The statuses and the workflow

On certain status changes, certain fields may become mandatory and these fields are not necessarily synchronized. Like the description or the result.

In this case, these fields - not synchronized - are automatically filled in if they are in the element being modified.

If, despite everything, there are still invalid checks for the element to be synchronized, the update is globally rejected with an explicit message.

For example, closing a ticket associated with an activity on which there is still work to do should not be done.

In order for status changes to be consistent, the workflows between the ticket and the related activity should be the same to avoid inconsistencies in status changes.

A mechanism will still make it possible to override the rules of the workflow for the element which will change state automatically.

Essential, especially when creating the activity, which must be created directly in the same state as the ticket, but which will also be applied later.

For example, if an activity has moved into a state that does not belong to the ticket's workflow, the state change is made to keep synchronization.

Warning: This can lead to placing the ticket in a state from which it can no longer exit (because it is outside its workflow). In this case, only the change of state of the activity can unlock the ticket.

The same case can be produced on the activity which would be blocked following the change of state of the ticket.

Workload

Attaching the activity as the Ticket's **planning activity** will impact the load:

- The charge charged in real time to the ticket is recorded in the actual costs of the activity
- The charge charged in real time on the ticket is automatically decremented in the remaining charges of the activity

In the case of synchronized items, you can only enter actual load on the ticket.

This charge will then be properly accounted for on the activity via the Planning Activity mechanism.

Deleting a synced item

When a Ticket or Activity item is deleted and synced to a pair, a confirmation message is displayed to the user.

In this case, the associated item is not deleted, but the synchronization is deleted.

Click on **define synchronization** to open the pop-up.

The screenshot shows a dialog box titled "Definition of synchronization". It contains the following elements:

- Source:** Tickets
- Destination:** Activity
- Type of ticket concerned:** (empty dropdown)
- Status of the ticket generating the destination:** recorded
- Type of activity to be created:** Task
- Attach the activity as a planning activity:**
- Treatment of the existing:**
 - Synchronize existing tickets:**
- Buttons:** Cancel, OK

Fig. 13: Definition of synchronization

When activating the function on a project, a pop-up window will be displayed allowing to define:

- The status of the ticket automatically generating the activity
- The type of ticket concerned (optional) - don't fill to allow all types of tickets
- The type of activity to create

Options

- An option to automatically trigger the attachment of the activity as a ticket *planning activity*
- An option to sync existing tickets

Desactivation of the function

In case of deactivation of the function at the project level, a check is carried out and alerts the user if there are tickets synchronized with activities.

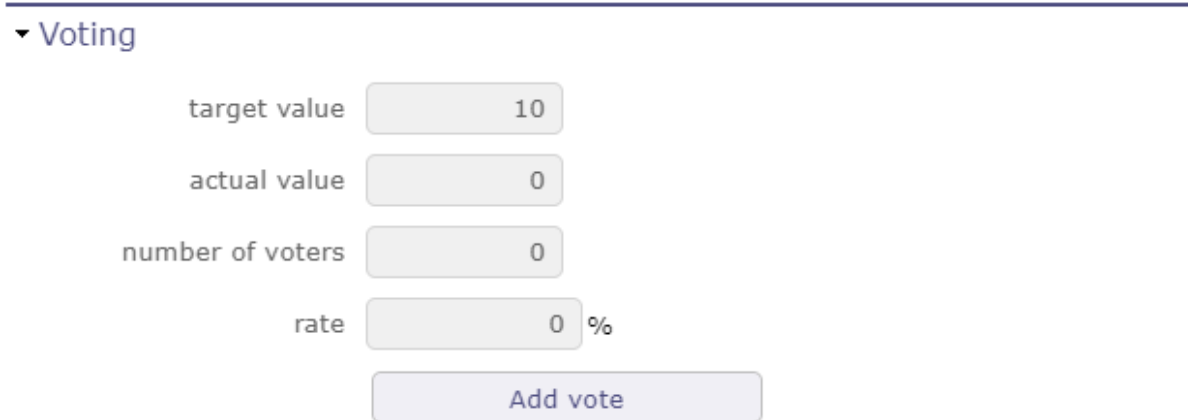
- If there are synchronizations in progress, a pop-up window opens to display the number of existing pairs, distinguishing the number of closed and unclosed.
- If the number of existing pairs is not zero, you can select the existing links that must be kept or deleted.
 - In case the links are deleted, the function is completely disabled
 - In case the links are not deleted, the function is disabled only for tickets not yet synchronized. Tickets already synced remain synced.

There is then no longer any way to delete the synchronization (except to delete one of the elements of the pair).

11.2.4 Vote on ticket

It is possible to vote on tickets. In the detail tab of each ticket, find the voting section. The target value, current value, number of votes and fill rate are displayed.

Click on the vote button to assign a vote on the selected item.



The screenshot shows a 'Voting' section with a dropdown arrow on the left. It contains four input fields: 'target value' with the value 10, 'actual value' with the value 0, 'number of voters' with the value 0, and 'rate' with the value 0 and a percentage sign. Below these fields is a button labeled 'Add vote'.

Fig. 14: Voting Section

In the voting window, several pieces of information such as the maximum point limit of the vote that you can use on the vote of the item in question.

Your personal vote which is not necessarily identical to the maximum points that you can award.

And finally the number of points that you have left to spend in the period of use set upstream in the rules for awarding and using votes.



The screenshot shows a 'Vote' pop-up window with a dark header and a close button. It contains three input fields: 'limit per vote' with the value 5, 'own vote' with the value 3, and 'left points' with the value 12. Below these is a 'comments' section with a text area containing the text 'it seems to me that this type of development has its place in the community roadmap'. To the left of the text area is a small text block: 'Your comment will be stored as a note on the item. It can give information on how you want the item to be treated (need expression or specification)'. At the bottom of the window are 'Cancel' and 'OK' buttons.

Fig. 15: Voting pop-up

See also:

Voting attribution rule

Voting use rule

Once you have validated your vote, if the *specific access* dedicated to voting have been activated, a table appears to display the names of the voters and the points that each of them has assigned to the element.

If several people have voted, the cumulative number of their points is displayed in the current value.

You continue to see the number of your points already assigned, directly in the vote button or in the table if you have the right to see it.

In the *specific access*, if the display of the table is deactivated, you can display at least the names of the voters.

In any case, the names of the voters and the points they have assigned are necessarily displayed in the table.

▼ Voting

target value

actual value

number of voters

rate %

voter's name	value	user	client
admin	3	admin	
analyst A	2	analyst A	

Fig. 16: Voting table

ENVIRONMENTAL PARAMETERS

12.1 Roles definitions

12.1.1 Resource

The resources of a project can be human or material Resource availability is defined by assigning it to a project.

- Resources are needed for project planning
- A resource can be a group of people
or a fictitious resource with a FTE > 1

See also:

- *ProjeQtOr roles*
- *Profiles definition*
- *Resource function and cost*
- *Resource calendar*
- *Allocations*
- *Assignment*
- *Resource planning*

Full Time Equivalent

FTE stands for “full-time equivalent”. This is the number of hours worked by a single employee in a day.

- 1 FTE (full time equivalent)
- < 1 for part time working resource or variations of capacity
- > 1 for virtual resources or teams, pool of resource or variations of capacity

Note: If you want a resource pool of three people, the FTE capacity must be set to 3

Max work

- You can set a maximum value beyond which no charge can be entered.
- For example, being able to define that a user cannot enter more than 12 hours per day.
- You can set a limit per day and a limit per week.
- The resource will not be able to enter more than the number of hours authorized on its timesheets.

See: *Real work entry*

Field is a contact

- Check this if the resource must also be a *Contacts*.
- The resource will then also appear in the “Contacts” list.

Field is a user

- Check this if the resource must connect to the application.
- You must then define the **User name** and **Profile** fields.
- The resource will then also appear in the *Users* list.

Field is an employee




- Check this box if the resource needs to be linked to the human resources module.
- The resource will then also appear in the *Environmental parameters* list.

Concepts

- *Allocations*
- *Assignment*

Allocations to projects

This Zone allows to allocated the ressources to the project.

- Click on  to allocate a new resource to the project.
- Click on  to update an existing resource cost.
- Click on  to delete the resource cost.

▼ Allocations to projects 3











	id	project	profile	start date	end date	rate (%)
  	8	Project	Project Member			100
  	6	holidays	Project Member			0
  	2	project one - maintenance	Project Member			100
200%						
[100%] project one - maintenance						
[0%] holidays						
[100%] Project						

Fig. 1: Resource assigned to the project

Variations in resource capacity

You can record dates (start and end) to indicate that the capacity (FTE) of your resource will vary during this period.

This allows you to reserve and enter additional working time (overtime) or to withdraw hours at standard capacity (recovery).

The resource will then enter its imputations, the exact value of its variable capacity for the given period. 1 + XX hours for the status of the day to go green

The surcapacity of a resource is directly visible on the Gantt chart.

A thin red stripe overcomes the resource work allocation bars and you will find the exact capacity added at the end of the resource detail.

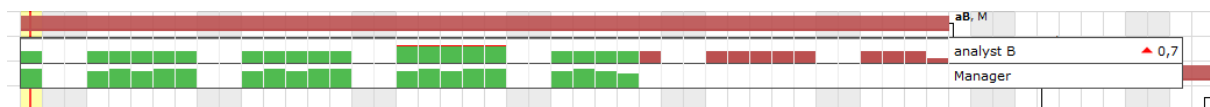


Fig. 2: Variations in the capacity

Managment of surbooking periods

Surbooking in planning allows you to add extra work time on the standard capabilities of your resources to plan more projects that you will not process.

You can also subtract this work time to not plan the full availability of resources.

The resource will continue to report their charges normally, with no extra or reduced work time, to change the status of their day to green.

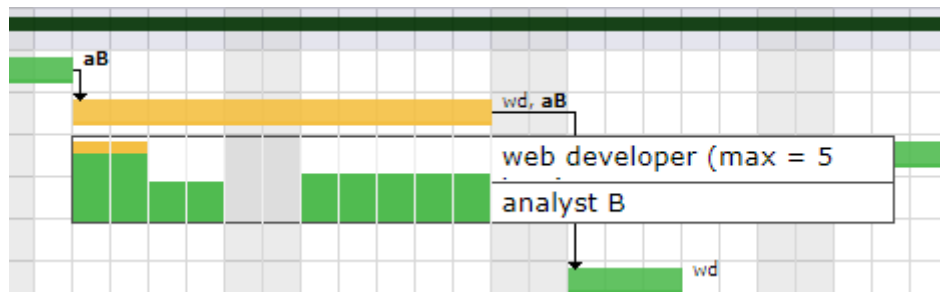


Fig. 3: Variations in the capacity

Warning: variable capacity and overbooking do not behave in the same way.

Variable capacity will be more used to control and record periods of actual overtime and the behavior of imputations will be adapted to this ability.

overbooking is a way of planning in the future without interacting with the behavior of the working time of the resources

Function and cost zone

This section allows to define functions and cost of the resource.

update-resource-cost

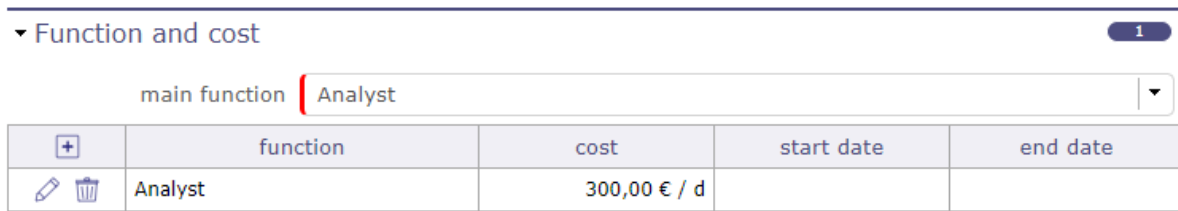


Fig. 4: Function and cost zone

Main function

- The main function allows you to enter the default functions that will be used in the assignments of the activities.
- A resource can have several functions and different costs depending on the function.
- A cost is proposed by default if you have entered the costs in the *list of values - Functions*.
- This cost can be modified at any time from the function table of the resource screen, or with the resource *Update resource cost*

Resource cost definition

- Allows to define the daily cost according to the functions of the resource.
- The daily cost can be defined for a specific period.

Table 1: **Function and cost section fields**

Field	Description
Function	Function of the resource for the selected cost.
Cost	Daily cost of the resource for the selected function.
Start date	Start date for the cost of the resource, for the selected function.
End date	End date for the cost of the resource, for the selected function.

Field End date

- The end date is set when a new resource cost is defined in the same function.
- The end date is the day before the start date in the new resource cost entry.

Resource cost management

- Click on to create a new resource cost.
- Click on to update an existing resource cost.
- Click on to delete the resource cost.



The dialog box is titled "Resource Cost" and contains the following fields and buttons:

- function:** A dropdown menu with "Developer" selected.
- cost:** A text input field containing "150" followed by "€ / d".
- start date:** A date selection field.
- Buttons:** "Cancel" and "OK".

Fig. 5: Resource cost dialog box

Table 2: Resource cost dialog box fields

Field	Description
Function	Function to be selected.
Cost	Daily cost of the resource for the selected function.
Start date	Start date for the cost of the resource, for the selected function.

Field Function

The default value will be the main function.

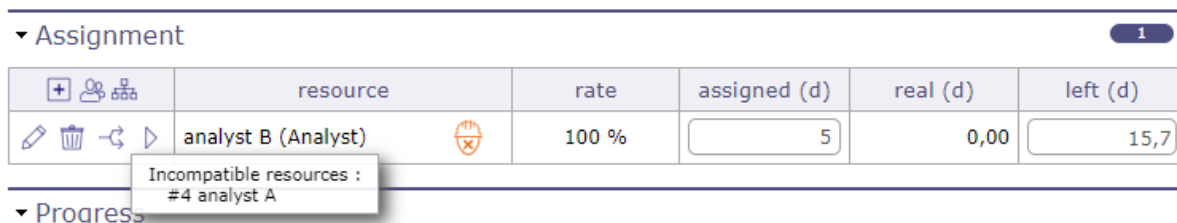
Field Start date

Start date must be set when a new resource cost is created for the same function.

Table 3: Miscellaneous section fields

Field	Description
Don't receive team mails	Box checked indicating that the resource doesn't want to receive mails sent to the team.

Incompatible resources



The table shows an assignment for "analyst B (Analyst)" with a rate of 100%, assigned for 5 days, and 15.7 days left. A tooltip indicates that 4 analyst A resources are incompatible.

Assignment					
	resource	rate	assigned (d)	real (d)	left (d)
	analyst B (Analyst)	100 %	5	0,00	15,7

Incompatible resources :
#4 analyst A

Fig. 6: Assignment with incompatible resource

Two resources A and B are incompatible.

If A is scheduled at a given time, B can not be scheduled on the same day as for a load less than or equal to the remaining availability of To date,

that is, the minimum of [capacity of the resource-load already planned] for each incompatible resource and reciprocally with the relation is bijective.

Exemple

Example with two FTE resources = 1

Day x, A is scheduled 0.6 d so B can be scheduled only 0.4 d on all the activities on which A is scheduled

Support resources







▼ Assignment 2					
+	resource	rate	assigned (d)	real (d)	left (d)
	analyst C (Analyst) 	100 %	<input type="text" value="5"/>	0,00	<input type="text" value="0"/>
  	analyst A (Analyst)  	100 %	<input type="text" value="5"/>	5,00	<input type="text" value="0"/>

Fig. 7: Assignment with incompatible resource

If resource B is the resource resource of resource A, if A and planned at a given moment, B must also be automatically planned pro-rata indicated as employment rate in the definition of the support resource.

If A's support resource B is not available (in part or in full), we plan for A only the part that is available taking into account the employment rate.

The display of the scheduled load for the support resource, although it is not assigned to the activity, is visible on the detail of a right-click Gantt bar.

Exemple

Example with B support resource of A with a 50% employment rate

- Day x, A is available 1.0 d and B 1.0 d: A is planned 1.0 d, B is planned 0.5 d.
- Day y, A is available 0.5 d and B 1.0 d: A is planned 0.5 d, B is planned 0.25 d
- Day z, A is available 1.0 d and B 0.2 d: A is planned 0.4 d, B is planned 0.2 d

Others

Allocated asset

▼ Allocated assets 1			
Type	Asset	Brand	Model
Computer	#7 WorkStation 003-145	HP	Pavilion

Fig. 8: Allocated asset

This section allows you to view all the equipment connected to the resource in the form of a simple table.

Each line of equipment is clickable and directs to the element screen.

See: *Asset Management*

12.1.2 Pool of Resources

A pool is a group of resources that can work as any of the assigned resources.

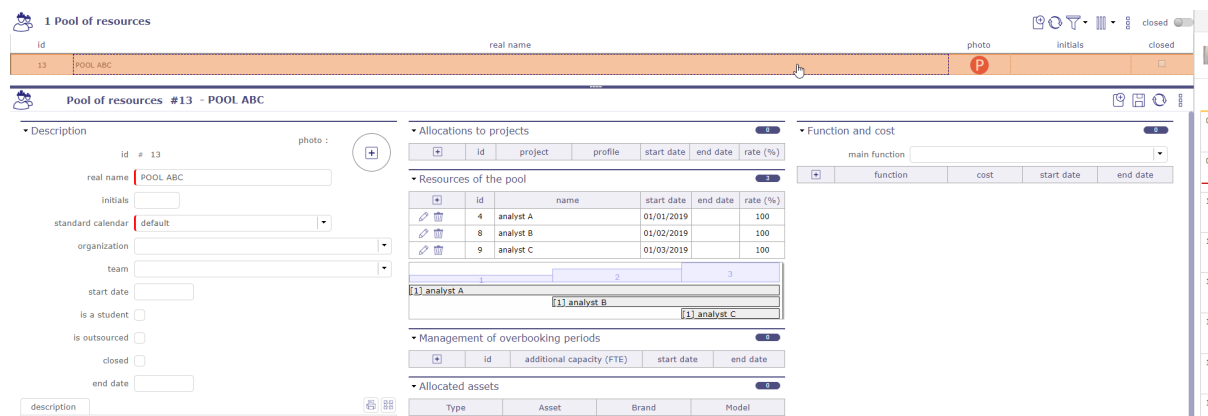


Fig. 9: Pool of resources screen

The use cases for a resource pool can be many :

- When you have a group of resources that may work on same tasks, but you don't know in advance who will work. For instance a maintenance team that may work on maintenance tasks and other project tasks.
- For macro planning.
- Define a pool for each group of resources (depending for instance on competencies).
- On first step, assign fake resources to the pools, and plan your project with the pools : you get a first draft of your project, even before knowing who will work on the project, and without needing to go to a very detailed level of tasks (it's macro planning, you just have macro tasks).
- Then when you know who will work on the project : just replace the fake resource with real resources : you immediately get a realistic planning taking into account availability of real resources already booked on other projects. It's still a macro planning, but realistic.
- Then you can draw you detailed planning, just adding sub-activities to your macro tasks, and assigning real resources to the lowest level activities : when you add assigned work, it is automatically subtracted from assigned work on the pool on the macro task, and global assigned work on the project is constant.

Planning

▼ Resources of the pool

3

	id	name	start date	end date	rate (%)
	4	analyst A	01/01/2019		50
	8	analyst B	01/02/2019		100
	9	analyst C	01/03/2019		20

0,5	1,5	1,7
[0,5] analyst A	[1] analyst B	[0,2] analyst C

- You assign resources to the pool at a given rate for a given period.

- A pool can be allocated to projects like any resource.
- A pool can be assigned to activities like resources. The difference is that when you assign a pool, you don't specify the rate but the FTE (Full Time Equivalent) assigned to the activity. It means the number of resources that can work at the same time on the activity.
- A pool does not have a specific capacity. Its maximum capacity is calculated from the capacity and the rate of the resources composing it.
- When planning a pool, availability of unitary resources already booked on other tasks is taken into account.
- When planning an unitary resource, availability already booked through the pool on other tasks is also taken into account (globally for all the resources of the pool).

Rate and FTE

A resource cannot be assigned on pools for more than 100% on a given period.

A resource, if assigned on 2 pools. It is the fraction of the FTE of the resource.

A resource with an ETP of 1, if assigned 50% on a pool, will only be scheduled at a maximum of 0.5 per day.

A 20% resource will only be scheduled up to 0.2 of its FTE per day...

Automatic decrement for assigned work

- When you assign a pool to an activity, and then assign a resource of the pool to the same activity, then assigned work on the resource is automatically subtracted from assignment of the pool.
- The same way, when you assign a pool to an activity, and then assign a resource of the pool to a sub-activity of this activity, then assigned work on the resource is automatically subtracted from assignment of the pool.
- When you assign a pool to an activity, and then assign the same pool to a sub-activity of this activity, then assigned work on the pool on the sub-activity is automatically subtracted from assignment of the pool on the parent activity.
- When deleting an assignment, the remaining job is reassigned within the pool.
- When a resource provides work on an activity with no remaining work, but on the same activity there is an allocation for a pool of the resource assigned to the same function, the remaining work on the pool is decremented.
- This is an option in the *global parameters*

Important: Limits of a pool of resources

A pool can not be a user and does not have a profile as it may not connect to the application.

A pool can not be a contact

A pool cannot be the responsible of an item

You can choose how the pool and its resources can be allocated and assigned. See: *Pool of resource allocation*

Aggregated resource

The aggregated resource allows you to choose a single resource from a resource pool.

When you assign a resource pool to an activity, a check box appears: single resource.

If you select single resource then you will have no FTE capacity to fill in but a busy rate on the activity.

Check the box and confirm to close the pop up.

Assignment
✕

resource

unique resource

function

cost € / d

capacity (FTE)

assigned work d

real work d

left work d

reassessed work d

closed

comments

Cancel
OK

When the pool is allocate, the pool icon appears on the board.

If you chose the **unique resource** then the 1 number will be displayed on the icon.

Similarly, the function of the resource chosen from the pool is indicated in brackets.

▼ Assignment 4

	resource	rate	assigned (d)	real (d)	left (d)
	Pool 1 (Developer)	100 %	<input style="width: 50px;" type="text" value="83"/>	0,00	<input style="width: 50px;" type="text" value="83"/>
	admin (Manager)	%	<input style="width: 50px;" type="text" value="2"/>	0,00	<input style="width: 50px;" type="text" value="3,2"/>
	web developer (Developer)	100 %	<input style="width: 50px;" type="text" value="5"/>	0,00	<input style="width: 50px;" type="text" value="5"/>
	project manager (Manager)	100 %	<input style="width: 50px;" type="text" value="10"/>	0,00	<input style="width: 50px;" type="text" value="10"/>

Click on to edit the allocation.

The pop up opens again and this time you have the summary table showing you the resources of your pool

and the dates each resource can or should finish the activity.

You must fill in the activity load to see the end dates of the pool resources.

Otherwise the message ‘not planned work’ appears instead of the dates.

Assignment ✕

resource

unique resource

function

cost € / d

rate (%)

assigned work d

real work d

left work d

reassessed work d

closed

comments

resource	planned end date	selected by calculation	update selection
analyst A	03/19/2021		<input type="checkbox"/> <input type="button" value="definitively"/>
analyst B	03/26/2021		<input type="checkbox"/> <input type="button" value="definitively"/>
analyst C	02/16/2021	✔	<input type="checkbox"/> <input type="button" value="definitively"/>

Choose the appropriate resource by selecting the corresponding line and confirm.

Basic, ProjeQtOr will automatically select the fastest resource to complete the task.

The selected resource will then be the only one to be planned on this activity from the pool.

12.1.3 Teams

The team is a group of resources gathered on any criteria.

A resource can belong to only one team.

Use for










- To allocate all team members to a project.

- To filter resource data in work, cost and planning reports.
- To set attachment, note and document visibility to the team.

Team members




List of the resources members of the team.

▼ Team members

	id	name	closed
	#10	 web developer	<input type="checkbox"/>
	#8	 analyst B	<input type="checkbox"/>
	#4	 analyst A	<input type="checkbox"/>
	#3	 project manager	<input type="checkbox"/>

[allocate all team members to a project](#)

Fig. 10: Team members section

- Click on  to add one or more members to the team
- Use  in the pop-up window to search for specific resources
- Click on  to delete the member to the team

Button Allocate all team members of a project

- This button allows to allocate all team members of a project.
- The *allocation dialog window* will be displayed.

12.1.4 Material resources

It is possible to create a resource that is “material” so that it can be reserved with work.

This work will not be added to the project. On the other hand, if this resource has a cost, it is added.

This material resource will be planned just like a human resource with a capacity (ETP) of 1 that you will not be able to modify.

The human resource properties for overcapacity and overbooking are not available for this type of resource.

However, a material resource can have a supporting or supported resource or an incompatible resource.

For example a trailer could support a truck. Or an automatic car may be incompatible with a resource that does not know how to drive this type of car.

A material resource cannot be part of a resource pool. This is restricted to human resources.

A material resource can be attached to an organization.

12.1.5 Users

The user is a person that will be able to connect to the application.

Warning: To be able to connect, the user must have a password and a user profile defined.

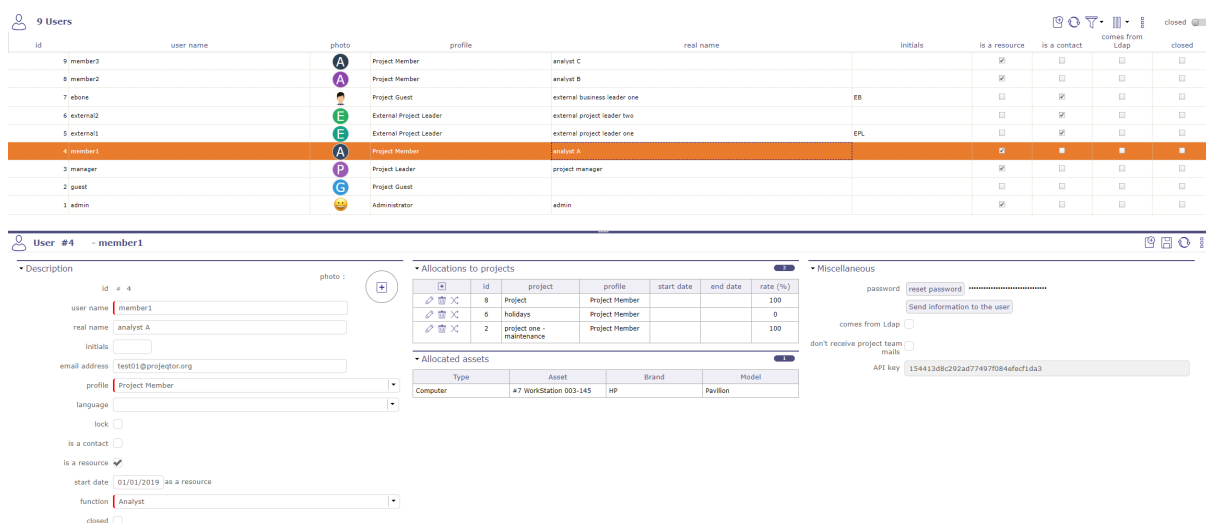


Fig. 11: User screen

ProjeQtOr and LDAP users

ProjeQtOr offers three modes of authentication.

ProjeQtOr users

- Users' information is kept in the application database.
- Password policy and login behavior are managed by the application.
- See: *User and password*

Note: The users “admin” and “guest” are created during installation.

The user name must be unique.

LDAP users

- Allows users defined in an external directory to login at ProjeQtOr by the LDAP protocol.
- Users' information and password policy are managed in the external directory.
- for each user from an LDAP, the word “comes from Ldap” will be displayed next to the user's name with possibility of modification according to the rights of the connected user
- See: *LDAP Management Parameters*

SSO users

- Allows users to connect to ProjeQtOr using the SSO protocol.
- Set entity ID, IDP certificate, unique login and logout, etc.
- Information message on creating a new user from SAML
- User information and password policy are In progress by your SSO solution.
- See *Single Sign On SAML2*

Default user profile

- A default user profile is set during creation of the user.
- A different default profile can be set according to mode of authentication.

Web Service

- ProjeQtOr provides an API to interact with its elements. It is provided as REST Web Service.
- An API key is defined for the user.
- This API key is used to encrypt the data for methods: PUT, PUSH and DELETE.

Allocated asset

This section allows you to view all the equipment connected to the user in the form of a simple table.

Each line of equipment is clickable and directs to the element screen.

See:*Asset Management*

▼ Allocated assets

1

Type	Asset	Brand	Model
Computer	#7 WorkStation 003-145	HP	Pavilion

Fig. 12: Allocated asset for the selected user

Section Miscellaneous

Button Reset password

- This button allows to reset password to default password.
- Default password value is defined in *Global parameters* screen.
- Reset password button is available only for ProjeQtOr users.

Table 4: Users miscellaneous section fields

Field	Description
Don't receive team mails	Box checked indicating that the resource doesn't want to receive mails sent to the team.
Comes from LDAP	Box checked indicating that the user information come from LDAP.
API key	Key string used by web service consumer.

Button Send information to the user

This button allows to send by email to the user the login information.

12.1.6 Contacts

The screenshot shows the 'Contacts' management interface. At the top, there are 3 contacts listed in a table with columns for id, real name, photo, initials, client, recipient, profile, user name, and checkboxes for 'is a user', 'is a resource', and 'closed'. Below this is a detailed view for contact #7, 'external business leader one'. This view includes fields for description, address (designation, street, complement, zip code, city, state, country), phone numbers, and checkboxes for 'is a resource', 'is a user', and 'closed'. On the right side, there are two tables: 'List of subscriptions for this contact' and 'List of tickets for this contact'.

Fig. 13: Contacts screen

Other

- *ProjeQtOr roles*
- *Profiles definition*
- *Stakeholder definition*
- *Tab Profile*
- *Allocations*

A contact is a person in a business relationship with the company.

The company keeps all information data to be able to contact him when needed.

A contact can be a person in the client organization.

A contact can be the contact person for contracts, sales and billing.

Field Is a resource

- Check this if the contact must also be a resource.
- The contact will then also appear in the “Resources” list.

Field Is a user

- Check this if the contact must connect to the application.
- You must then define the **User name** and **Profile** fields.
- The contact will then also appear in the “Users” list.

See: *Ressource Contact User*

Section Allocations to project

Allows to allocate your contact to a project

see: *Allocations*

Section List of subscription for this contact

You can see the items followed by your contact in this section

▼ List of subscriptions for this contact show closed items





type	id	name
Product Version	 #7	WebApps V3.0
Project	 #1	project one
Ticket	 #2	Enter some quotes on filed names : error Message
Ticket	 #4	Performance down

Fig. 14: list of elements followed by your contact

Section Miscellaneous

if the box is checked, the contact will not receive the mails sent to the team

12.1.7 Calendars

Concepts

- *Resource calendar*

This tool allows to define calendars.

The screenshot displays the configuration for a standard calendar. The main title is "Standard calendar #2 - 80%, out on wednesdays".

- Description:** id # 2, name "80%, out on wednesdays", closed
- Week days off:** A table with columns for Sunday through Saturday. Sunday, Wednesday, and Saturday are checked.
- Year:** 2021. Import this year from calendar: default. Mark Every: Monday as off days.
- Bank of Off days:** A table with columns for name, month, day, and off day calculated from easter day. Entries include Easter, Ascension, Pentecost, Holy Friday, and Christmas (December 25).
- Calendar days:** A grid for the year 2021, showing days from F1 to F31 and W1 to W31. The grid highlights specific days like W27, M24, and S25.

- It allows to define exceptions to the default definition.
- In default definition, week days are days work and weekend days are days off.
- You can change the standard calendar or create other calendars by allowing any day of the week to be a holiday

Note: Exceptions can be defined for the current year and the next years.

Default calendar

A calendar named “default” is already defined. Days off defined in this calendar is displayed in Gantt, real work allocation and diary. By default, weekend days are indicated as non-working days and cannot be unchecked via calendars. You must go to global settings > work time section > Open day and select your choice (on or off) in the drop-down list opposite the day. The default calendar cannot be deleted.

A specific calendar can be created to define days off and work to a particular resource.

- It is possible to import exceptions definition of a calendar in another.
- You can also import the public holiday
- Existing exceptions of current calendar are not changed.

Note:

- The calendars are not linked.
- You have to re import the definition to apply changes.

Bank Of OFF Days

Holiday bank definition that can be easily added each year.

▼ Bank of Off days

Copy bank off days from calendar default ▼

	name	month	day	off day calculated from easter day
✎ ✖	Easter			Easter
✎ ✖	Ascension			Ascension
✎ ✖	Pentecost			Pentecost
✎ ✖	Holy Friday			Holy Friday
✎ ✖	Christmas	December	25	

Add bank off days to calendar
Clear old and add bank off days to calendar

Click on + to create a public Holiday

Definition of Off days in the Bank ✕

name

month

day

off day calculated from easter day

Cancel
OK

Fig. 15: Bank OFF days

A Pop Up open and you can defined the Off day

Week days off

- By default, Saturday and Sunday are non-working days
- Check the boxes corresponding to non-working days if the default settings do not suit the structure of your company

Year

- Select the calendar year to create.

Year field

- Create the calendar from the specified year with all the features of the calendar called.

Button Import this year from calendar

- Copy exceptions of the selected year of the selected calendar into current calendar.

Calendar days

A calendar of selected year is displayed to give a global overview of the exceptions existing.

- In white: days work.
- In gray: days off.
- In red: exception days work.
- In blue: exception days off.
- In bold: current day.

Just click on one day in the calendar to switch between off and work day.

Calendar on project

This calendar is not cumulative with resource calendars and it does not have priority.

the schedule attached to the project is ideal when managing by duration and to be operated on activities without assigned workload.

If the workload exists over a period where the project calendar indicates unavailability, but the resource's calendar has a calendar that indicates availability, then this resource will indeed be planned.

12.2 Clients

The client is the entity for which the project is set.

It is generally the owner of the project, and in many cases it is the payer.

It can be an internal entity, into the same enterprise, or a different enterprise, or the entity of an enterprise.

The client defined here is not a person. Real persons into a client entity are called "*contacts*".

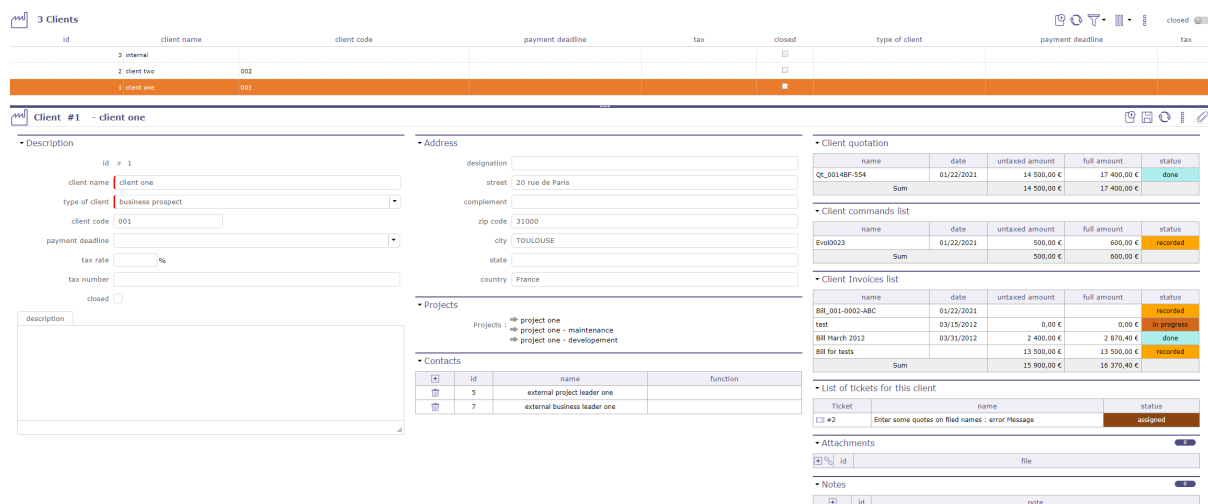


Fig. 16: Clients screen

Section Description

Other sections

- Attachments
- Notes

Table 5: Required field

Field	Description
<i>Id</i>	Unique Id for the client.
<i>client name</i>	Short name of the client.
<i>Type of client</i>	Type of client.
<i>Client code</i>	Code of the client.
<i>Payment deadline</i>	The payment deadline is stated on the bill for this client.
<i>Tax</i>	Tax rates that are applied to bill amounts for this client.
<i>Tax number</i>	Tax reference number, to be displayed on the bill.
<i>Closed</i>	Flag to indicate that the client is archived.
<i>Description</i>	Complete description of the client.

Address section

Full address of the client.

Projects section

List of projects related to the client.

Contacts section

Displays the names of client-related contacts.

▼ Contacts






	id	name	function
	5	external project leader one	
	7	external business leader one	

Fig. 17: Contacts section

You can create the contacts directly on the contact screen.

But you can create the contacts directly into the contact section.

- Click on  to create the contact
- Click on  to delete the contact

When you want to add a contact, the window with the existing list of clients is displayed.

You can select or create a contact from this window, the information will be reflected directly in the contact screen.

Client quotation, client commands list and client bill list

These sections allow you to have a summary of the various financial documents concerning the client selected.

You find the list of quotes, orders and invoices of this client in tables for easy reading

Note: To display these sections, you must set the options “list quotes, commands and bills on client form” on yes in the global parameters but also in the user parameters.

See: *Global Parameters* See: *Users Parameters*

List of tickets

This section allows you to see all open tickets for the selected client.

Note: To display these section, you must set the options “display tickets at client level” on yes in the global parameters but also in the user parameters.

See: *Global Parameters*

▼ Client quotation

name	date	untaxed amount	full amount	status
Qt_0014BF-554	01/22/2021	14 500,00 €	17 400,00 €	done
Sum		14 500,00 €	17 400,00 €	

▼ Client commands list

name	date	untaxed amount	full amount	status
Evol0023	01/22/2021	500,00 €	600,00 €	recorded
Sum		500,00 €	600,00 €	

▼ Client Invoices list

name	date	untaxed amount	full amount	status
Bill_001-0002-ABC	01/22/2021			recorded
test	03/15/2012	0,00 €	0,00 €	in progress
Bill March 2012	03/31/2012	2 400,00 €	2 870,40 €	done
Bill for tests		13 500,00 €	13 500,00 €	recorded
Sum		15 900,00 €	16 370,40 €	

Fig. 18: Financial monitoring sections

▼ List of tickets for this client

Ticket	name	status
#2	Enter some quotes on filed names : error Message	assigned

Fig. 19: List of tickets for this client

12.3 Customer relationship management

ProjeQtOr offers the ability to manage your leads across multiple screens, allowing you to track your targets from the moment they show interest in your business to the moment they decide to use your services.

12.3.1 The Prospects

Record all the leads you wish to track here. Numerous fields are available in the description and details sections to describe and provide the necessary and relevant information for your follow-up and follow-ups.

In the Lead Processing section, you can use the convert button to move your lead from your clients to your contacts.

Your lead's company name will automatically be converted to a client, and their first and last name will be converted to a contact.

Possible duplicate prospect

When you encounter a potential duplicate, enter it in this section.

Lead source

The prospecting source is linked to leads and prospecting events. You provide details of how you conducted your prospecting: in person, by phone, online, by email, etc. This source must be the same for both the prospect and your prospecting event so that we can link the event to the prospect.

Lead event

List the sales events that have allowed or will allow you to find and follow up with your new prospects.

Trade shows, networking events, telephone prospecting, online prospecting—no matter the source, there are no entry limits.

Types of prospect events

Prospecting actions allow you to record the actions you take with each of your prospects. Whether it's a follow-up, sending documents or letters, organizing events or conferences, you can record them as you go along, at the date and time of your choice, to keep a brief history of the actions taken.

When you enter a prospecting action for a prospect, these action types are displayed in the actions list, and you simply have to select one of the types.

When you hover over a prospecting action, if a description has been entered, a tooltip appears so you can view it without clicking on the edit box.

Domains / Positions and decision makers

On this screen, record the different areas of activity your clients are part of, the different positions they hold within them and whether or not they are decision-makers.

12.4 Providers

Allows to manage provider list.

Section Description

Other sections

- *Attachments*
- *Notes*

Table 6: Required fields

Field	Description
<i>Id</i>	Unique Id for the provider.
█ <i>Name</i>	Provider name.
Type of provider	Type of provider.
Provider code	Code of the provider.
Payment deadline	The payment deadline is stated for this provider.
Tax	Tax rate applied for this provider.
Tax number	Tax reference number.
<i>Closed</i>	Box checked indicates that the provider is archived.
<i>Description</i>	Description of the provider.

Section Address



Full address of the provider.

Section Contact

Displays the names of provider-related contacts.

You can create the contacts directly on the contact screen.

But you can create the contacts directly into the contact section

- Click on  to create the contact
- Click on  to delete the contact

12.5 Recipients

The recipient is the beneficiary of bill payments.

Recipients are mainly defined to store billing information.

Section Description

Table 7: Required fields

Field	Description
<i>Id</i>	Unique Id for the recipient.
Name	Short name of the recipient.
Company number	Company number, to be displayed on the bill.
Legal notice	Legal notice for the recipient.
Tax number	Tax reference number, to be displayed on the bill.
Tax free	Flag to indicate that tax is automatically set to zero for this recipient.
Contact name	Name of contact for the recipient.
Contact email	Email of contact for the recipient.
Contact phone	Phone of contact for the recipient.
<i>Closed</i>	Flag to indicate that the recipient is archived.

Section International Bank Account Number

Field	Description
Bank	Bank name.
International number (IBAN)	IBAN for the recipient.
Bank code (BIC)	BIC for the recipient.
National account number	Full account number defining the BBAN account code.

Section Address

Full address of the recipient.

12.6 Organizations

Management of organizations

- Management of organizations allows to edit the structure of the company in the frame of organizations (Departments, Units, Location, ...)
- The organization summarizes the data of the projects in progress for the organization.

Depending on the profile, you can limit the visibility of resources to people in the same organization or team as the current user.

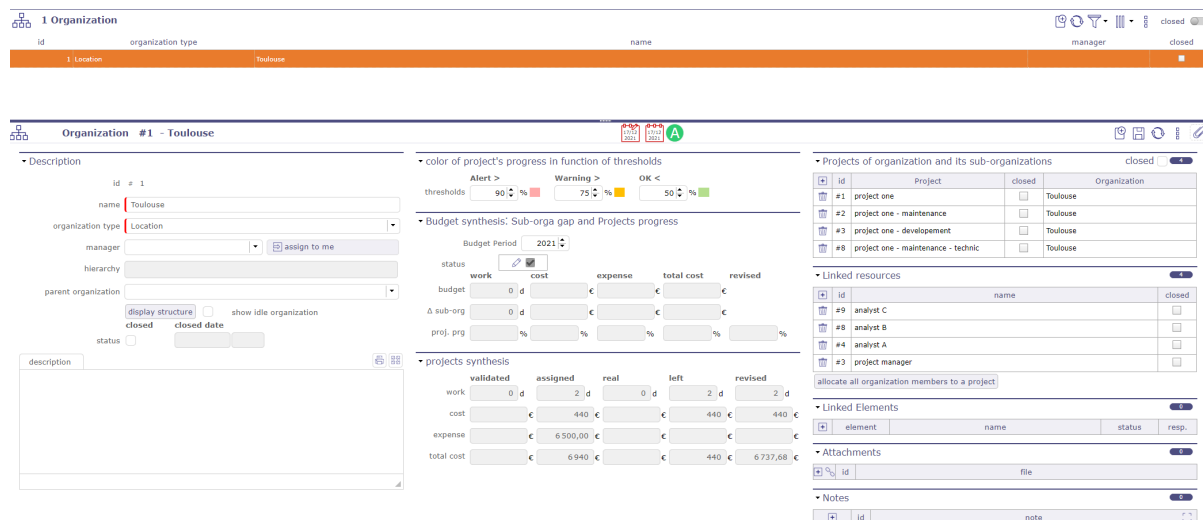


Fig. 20: Organization global view

Section Description

Other sections

- *Current project*
- *Linked element*
- *Attachments*
- *Notes*
- *Organization*

Table 8: Required fields

Field	Description
<i>Id</i>	Unique Id for the Organization.
Name	Short name of the Organization.
Organization type	Type of organization.
Manager	Manager of organization.
Hierarchy	list of parents organizations.
Parent organization	parent organization.
Display the structure	Displays the structure of the selected organization in a popup.
Show idle organization	Show closed organizations in the structure display.
Closed	Box checked indicates the organization is archived.
Closed dates	Displays the closing date and time of the organization.
Description	Description of the organization

Display the structure

Click on the button to open a pop-up which will display in a more graphic way the structure of the organization you have selected.

Print preview		
Send document to printer		
name	organization type	manager
#1 TOULOUSE	Location	
#2 DIRECTION	Department	
#3 TECHNIQUE	Department	
#4 Dev	Unit	
#5 Support	Unit	
#6 Expert	Department	

Fig. 21: Structure display

Project Synthesis

▼ projects synthesis

	validated	assigned	real	left	reassessed
work	0 d	10,5 d	7 d	15,5 d	22,5 d
cost	0 €	3 910 €	3 000 €	5 910 €	8 910 €
expense	0,00 €	6 500,00 €	6 297,68 €	0,00 €	6 297,68 €
total cost	0 €	10 410 €	9 297,68 €	5 910 €	15 207,68 €

Fig. 22: Project financial synthesis

This section displays a summary of the costs recorded on the projects related to the selected organization.

Projects of organization and its sub-organizations

In this section you will find the list of projects and sub-projects linked to the selected organization.

A button allows you to display or hide closed organizations.

▼ Projects of organization and its sub-organizations closed 4








	id	Project	closed	Organization
	#1	project one	<input type="checkbox"/>	Toulouse
	#2	project one - maintenance	<input type="checkbox"/>	Toulouse
	#3	project one - developement	<input type="checkbox"/>	Toulouse
	#8	project one - maintenance - technic	<input type="checkbox"/>	Toulouse

Fig. 23: list of projects and its sub-projects

Linked resources

This section allows you to see the resources attached to the selected organization.

- Click on  to add a new resource in the organization
- Click on  to delete a resource of the organization
- Click the `allocate all organization members to a project` button to assign all of an organization's resources to a project.
- The project assignment pop-up opens and allows you to choose your resources.

See: *Allocations section*

Linked elements

This section allow you to linked any element of ProjeQtOr to the selected organization.

See: *Linked Elements section*

Attachments

This section allows you to attach elements external to the selected organization. Whether documents or url addresses.

See: *Attachments section*

Notes

This section allows you to add notes on elements linked to the selected organization

See: *Notes section*

HUMAN RESOURCES

13.1 Humans Resources

Important: Documentation

The human resources module was developed by an external contributor SALTO CONSULTING. The explanations below have been taken from the instructions, provided in French only, with the module. * [French documentation](#) on the implementation of regulated absences is available on the [download page](#).

The HR module was created in order to be easily adapted to French law, but it can be fully parameterized according to the rights of any country.

This section allows to manage the society's Humans Resources.

This system comes in addition to the standards of the management of absences.

Used to manage absences that must be validated, controlled and have values to be regulated according to French law.

Start to define the:

- *Employee and the manager*
- *Leaves types*
- *Employment contract type*

You can choose the leave entitlement standard for each type of contract. The employee may reserve periods of leave of absence according to his rights.

you will be able to manage:

- The quantities acquired over a period of time.
- The period of validity of a quantity of absence.
- The possibility to take earlier absences over the period being acquired.
- The number of days before and after which the absence request can be made.
- Define specific acquisition rules.
- validate or reject an absence request.

Note: A project dedicated to these regulated absences is created and makes it possible to store the requested days of absence as planned time and the days of absence validated as working time thus making it possible to integrate these absences in the planning.

Note: The calculation of the number of days represented by absence is done on the basis of working days.

The working days are defined in *Global Parameters* and *calendar* associated with employee: holidays, non-working days.

13.1.1 Environmental parameters

The properties below is visible only when the *HR module* is enabled.

Employee

An employee is a *Resource* whose property “**is an employee**” is checked in the screen resources.

Once the resources are registered as employees, you assign them to an absence manager.

This same manager will be able to manage his employees from the employees screen.

The employee can see the person who manages his leave periods.

Each time an employee is defined, a default contract is automatically created on the entry date of the resource if it is filled in.

If the date is not specified, the current date on creation is retrieved.

Important: A calculation error may occur if the entry date is not entered. In this case, on the resource screen:

1. uncheck the box **is an employee**,
2. fill in the date of entry,
3. save,
4. check again **is an employee**.

The calculation of the rights will then be reset with the new date.

Employee manager

A manager is a resource whose properties “**is an employee**” and “**is absence manager**” are checked.


The management of an employee is dated, which allows to change manager or temporarily delegate management to another manager (absences).

A manager must be an employee.

An employee manager can make absence requests in lieu of employees.

He can validate or reject employee absentee requests that he manages.

Important: The absence manager manages the absences of the employees attached to him. He does not have access to the module settings. He does not have an administrator role.

 **Resource #1 - admin**

email address

capacity (FTE)

standard calendar

profile

organization

team

phone

mobile

fax

entry date

is a contact

is a user

is an employee


is a student

is outsourced


is manager of leaves

closed

Fig. 1: Box “is an employee” and “is manager of leaves” is checked

 **Employee Manager #3 - project manager**

▼ Description

id # 3 photo : 

real name

initials

email address

organization

standard calendar

team

phone

mobile

description

is a resource

closed

▼ Bulk add for employees managed

All of organization and sub-organization :

All of organization :

All of team :

It self inculed :

start date :

end date :

Add

▼ Employees managed








	name	start date	end date	closed
 	analyst A			<input type="checkbox"/>
 	analyst B			<input type="checkbox"/>
 	analyst C			<input type="checkbox"/>

Fig. 2: Manager Screen

Leave system Administrator

He is the administrator of the Leave System. He will define Leave Types, Contract Types, ...

In order to be able to manage and configure the human resources module after its installation, you must access the *global parameters*.

A special additional HR section allows you to define the administrator of absences and regulated rights.

If an employee does not have a manager, the administrator of the Regulated absence module acts as manager.

The administrator is obligatorily a leave manager

Warning: When a resource is no longer “used”, all the elements of the Regulated absence module are deleted by the module:

- Assignments to activities associated with type of absence
- Time spent generated following validated absence requests
- Planned times generated due to absence requests not yet validated
- Absence requests
- Acquired rights
- Contracts
- Links with his managers

Leaves Dashboard

A dashboard is available to absence managers

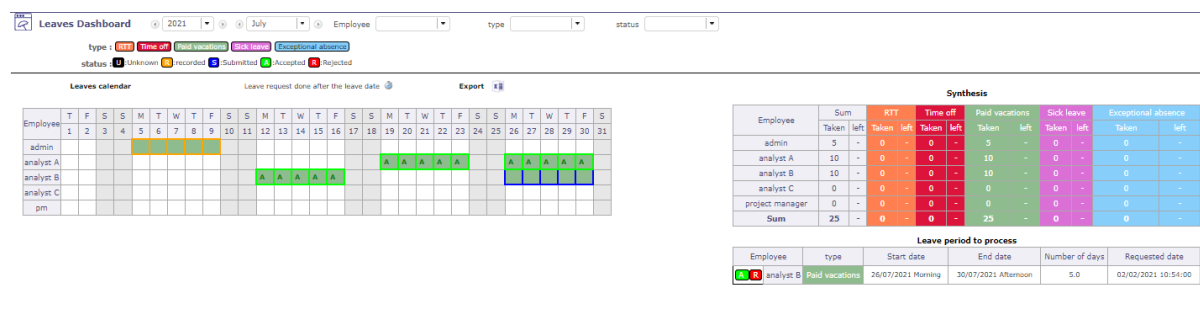


Fig. 3: Leaves dashboard


The filter bar allows you to filter the information presented in the dashboard



Fig. 4: Filter bar

Leaves Calendar displays informations based on filters applied by managed employee



The  tells you that the request was made late

You can export the calendar into Excel format

Synthesis

The synthesis is also displayed according to the filters selected beforehand, and gives the number of days remaining to be taken by type of leave and managed employees

Leave period to process

In this section, appears the list of absences to be processed, that is to say under the “recorded” status

Leaves types

This part allows you to create the types of absences regulated.

A corresponding activity (= name of absence type) is created on the project dedicated to absences management.

All employees (resource registered as employee) are assigned to this activity

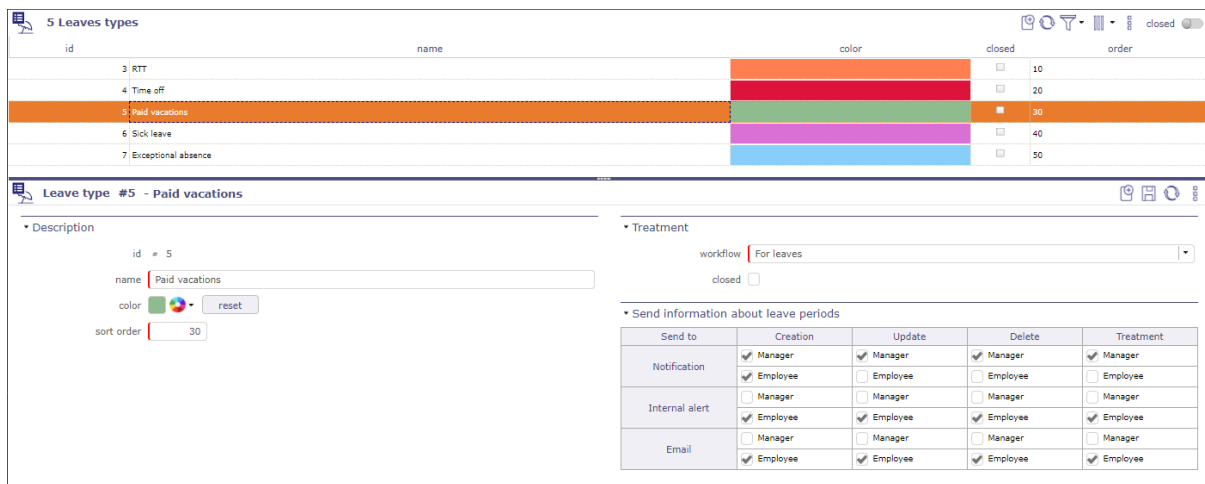


Fig. 5: Leaves types screen

- You can choose the workflow that will be attached to human resources
- you can defined who received an internal alert or an email on the creation, the update, the delete and/or the treatment of the leaves

See also:

More detail about **Contractual values**, see *Earned rights*

13.1.2 Employment contract type

This section allows you to create the different contracts that are in effect in your company

The types of contracts allow to have rules of acquisition of different regulated absences according to the contract of employment of an employee

You can only have one type of default contract

Note: example in France

- Executive contract = No acquisition rule
- Full-time frame contract = RTT
- Part time frame contract = No RTT

- etc.

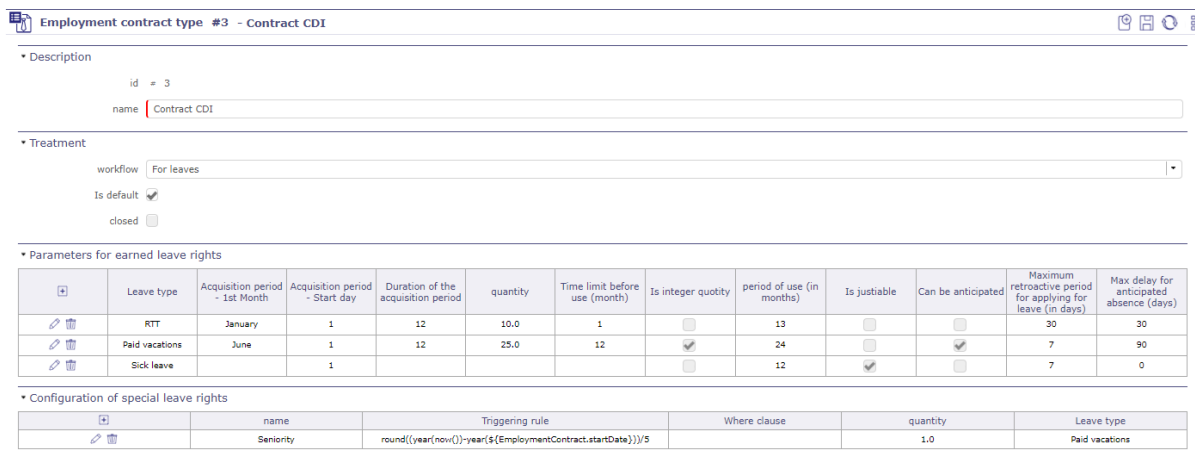


Fig. 6: Screen of Employment contract type

See also:

More detail about **contractual values**, see *Earned rights*

Parameters for earned leave rights

- In this section you can define which types of regulated absences will be attached to this type of contract.
- If you have created several types of regulated absences and attached them to all your contracts (check box **on default** or **on everything**), these types will be visible in this section.

If you are missing types of absences, you can create them from this screen:

- Click on the button
- A pop up opens and proposes to fill in the same fields as on the screen of the types of regulated absences

See also:

More detail about **Specific values**, see *Earned rights*

Configuration of special leave rights

Special acquisition rules are rules that can not be expressed with the values of the standard acquisition rules

custom earned rules:

Define the special acquisition rule based on the attribute values of a ProjeQtOr entity.

This rule follows the vocabulary of the SQL language

Input of acquisition rights parameters
✕

Leave type :

Acquisition period - 1st Month :

Acquisition period - Start day :

Duration of the acquisition period :

quantity :

Time limit before use (month) :

Integer quotity :

period of use (in months) :

Maximum retroactive period for applying for leave (in days) :

Max delay for anticipated absence (days) :

Is justiable :

Can be anticipated :

Fig. 7: Special leaves rights

Employment contract type #3 - Contract CDI

id = 3
name = Contract CDI

Workflow: For leaves
Is default:
closed:

Leave type	Acquisition period - 1st Month	Acquisition Start	period of use (in months)	Is justiable	Can be anticipated	Maximum retroactive period for applying for leave (in days)	Max delay for anticipated absence (days)
RTT	January		13	<input type="checkbox"/>	<input type="checkbox"/>	30	30
Paid vacations	June		24	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	90
Sick leave			13	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	0

Configuration of special leave rights

name	Triggering rule	Where clause	quantity	Leave type
Seniority	round((year(now)) - year(8 (EmploymentContract.startDate))) / 5		1.0	Paid vacations

Fig. 8: Special leaves rights

where clause

Condition of application of the special right

this clause follows the vocabulary of the SQL language

Important: for help with the SQL functions you can use, click on the section bar **help on clause input**

A new part appears and proposes drop-down menus with prerecorded SQL queries

Quantity

Number of additional acquired days calculated following the application of the special acquisition rule

This rule follows the vocabulary of the SQL language

Leave type

The type of regulated absence to which will be attached, the rule of special absence.

13.1.3 Employment contract end reason

Allows you to record the different types of end of contract.

Note: Why end a contract?

- Resignation
- Change of the status (non management -> management)
- Change of the quotomy (100% -> 80%)
- Going to retire...

These different reasons may lead to changes in the rules governing the acquisition of the rights of absence.

13.1.4 Leave Rights earned

On this screen, you can see your leaves rights earned since your contract's beginning.

id	Employee	type	start date	end date	quantity	Left quantity	closed
26	admin	Paid vacations	01/06/2021	31/05/2022	10.0	10.0	<input type="checkbox"/>
25	analyst C	Time off					<input type="checkbox"/>
24	analyst B	Time off					<input type="checkbox"/>
23	analyst A	Time off					<input type="checkbox"/>
22	project manager	Time off					<input type="checkbox"/>
21	admin	Time off					<input type="checkbox"/>
20	analyst C	RTT	01/06/2021	31/05/2022	2.0	2.0	<input checked="" type="checkbox"/>
19	analyst B	RTT	01/06/2021	31/05/2022	10.0	10.0	<input type="checkbox"/>
18	analyst A	RTT	01/06/2021	31/05/2022	10.0	10.0	<input type="checkbox"/>
17	project manager	RTT					<input type="checkbox"/>

Description		Treatment		Attachments	
id	# 20	Init with contractual values		file	
Employee	analyst C	start date	01/06/2021	Notes	
Leave type	RTT	end date	31/05/2022	id	note
		quantity	2		
		Left quantity	2		
		Last update	01/03/2021		
		closed	<input type="checkbox"/>		

Fig. 9: Leaves rights earned

The start and end dates correspond to the period on which the days of leave are calculated

The numbers of the acquired and left days to each types

If your holidays over the reference period and according to the type of leave, then the checkbox “closed” is validated.

You no longer have this type of holiday available and can not ask any more

13.1.5 Employment contract

You can see the details of the contracts and which employee is attached to them.

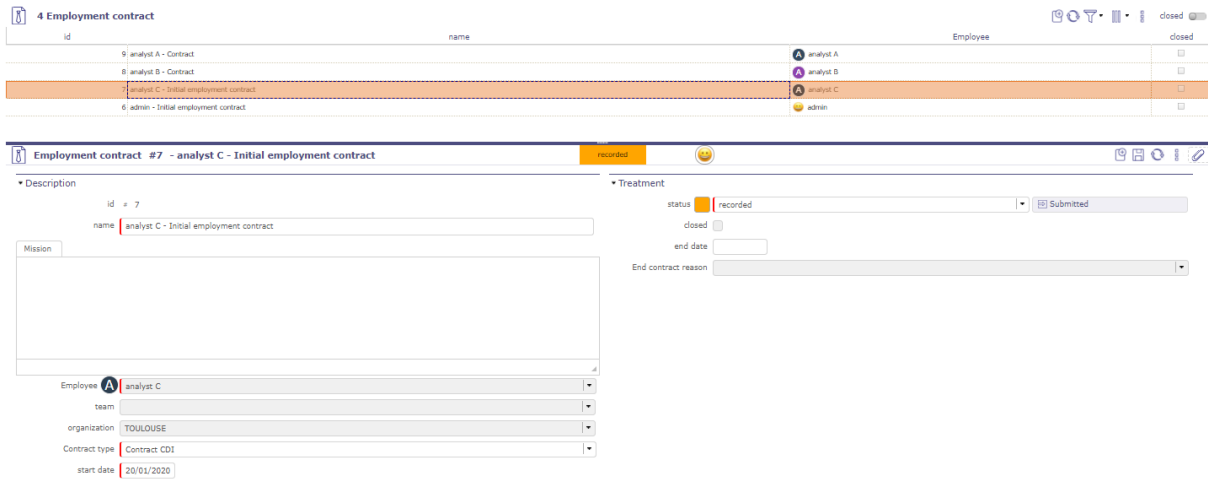


Fig. 10: Leaves rights earned

Regulated leaves parameters

The regulation of absences is based on the rights to take absences acquired over a given period.

It is therefore based on values to be given to attributes of regulation according to the type of absence (ex: Paid leave, RTT, sick leave, legal leave, etc.), and the type of contract associated with the employee (Ex: Full time, Part time).

General acquisition of rights

When you create a *Employment contract type*, you have several contractual values to fill in.

Warning: Check box “On default” and “on everything”

- If you check on “**default**” the entered values will be reflected on the default contract type only.
- If you check on “**all**” the entered values will be on all contract types.
- These values can not be changed after they are saved.

For any change, the creation of a new type of absence is necessary.

Fig. 11: Contractual values for the leaves type

Field	Description
start month period	month starting the reference period of paid holidays in your country.
start day period	day starting the reference period of paid holidays in your country.
period duration	The length of the period gives the number of months over which your reference period
quantity	the number of days of leave that will be paid during the period reference.
period of leave rights earned	the number of months before you can use your acquired days.
integer <i>quotity</i>	Possibility of rounding up earned leave.
validity duration	period during which the days of leave acquired will be retained. Beyond this period th
is justiable	defines if the absence must be the subject of a request for proof
can be anticipated	If leave can be taken before the vesting period
max delay for retroactive absence (days)	allows, or not, to record absences on paid leave after being actually absent.
max delay for anticipated absence (days)	Number of days before which an application can be made

Note: In France, an employee is entitled to 2 and a half days of leave per month of actual work at the same employer, wether 5 weeks per full year of work (from June 1st to May 31st)

Specific acquisition of rights

To integrate specific rights of absence, the concept of special rights has been put in place.

Usable entities are:

- Absences
- Employees
- Contracts
- Acquired rights

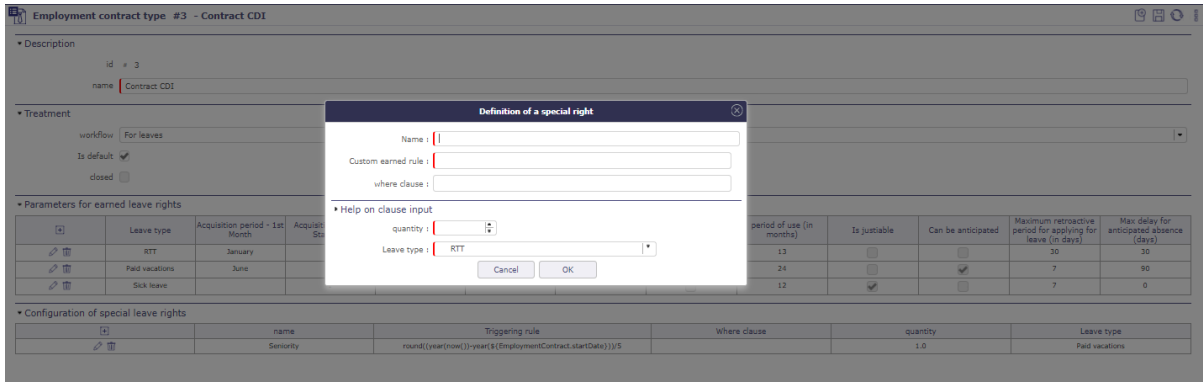


Fig. 12: Contractual values for the leaves type

Field	Description
Name	The name to give to the special right
custom earned rule	The rule allowing the calculation of a number of times to apply the quantity of right to absence
where clause	Condition of application of the special right
Quantity	The elementary quantity of the special right
Leave type	The type of absence to which the special duty applies

13.1.6 Absence recording

Leaves Calendar

Regulated absences are done either by the employees or by their manager

Absences can be recorded from the leaves calendar

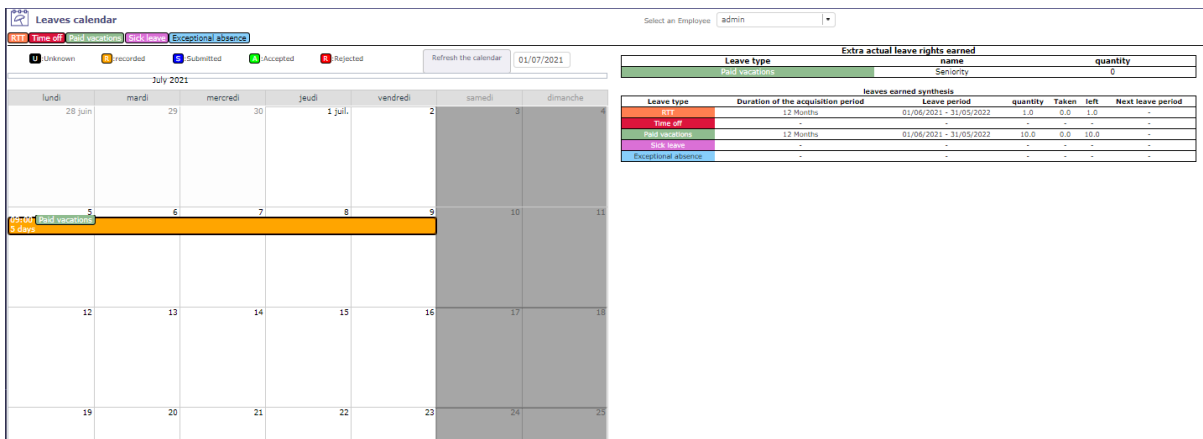


Fig. 13: Leaves calendar

To record or change your absences, double clicking on an existing date or absence

A pop up opens to display the properties of an absence (date and type of absence ...)

The type of absences visible in the drop-down list depend on those recorded in the employee's contract.

After validation, the holiday appears in the calendar.

The manager (and / or administrator) can validate or not, the leave of the employees.

When the leave period is rejected, it is impossible to add a new leave on these same dates

Fig. 14: Leaves attributs

The color of the holidays will change according to the validation.

Leaves Periods

Regulated absences are done either by the employees or by the manager of leaves.

Absences can be recorded from the leaves Periods screen.

id	Employee	type	start date	end date	No taken days	status	closed
11	admin	Paid vacations	05/07/2021	08/07/2021	5	Rejected	<input type="checkbox"/>
10	analyst B	Paid vacations	26/07/2021	30/07/2021	5	Submitted	<input type="checkbox"/>
9	analyst B	Paid vacations	12/07/2021	16/07/2021	5	Accepted	<input type="checkbox"/>
8	analyst A	Paid vacations	23/08/2021	27/08/2021	5	Accepted	<input type="checkbox"/>
7	admin	Paid vacations	16/08/2021	20/08/2021	5	Accepted	<input type="checkbox"/>
4	analyst A	Paid vacations	18/07/2021	30/07/2021	10	Accepted	<input type="checkbox"/>

Description		Treatment		Attachments	
id #	10	status	Submitted	Accepted	Rejected
Leave type	Paid vacations	transition	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
start date	26/07/2021	Employee	analyst B		
Leave start	AM <input checked="" type="checkbox"/> PM <input type="checkbox"/>	Request date time	02/02/2021 10:54		
end date	30/07/2021	closed	<input type="checkbox"/>		
Leave end	AM <input type="checkbox"/> PM <input checked="" type="checkbox"/>				
No taken days	5				
Nb of remaining days					
comments					

Fig. 15: Leaves periods

On this screen, you can save, edit, delete a holiday request, as in the holiday calendar.

The employee can record and submit his leaves.

Only the **Manager of leaves** and **Leaves system administrator** can change the status of a request for the absence of subject to accepted or rejected.

13.1.7 Leaves System

habilitation

Allows you to restrict or restrict the view of Human Resources module screens to employee profile types.

They can view - read - create - update and/or delete access

Workflows and values

- When you install the regulated absences module, a workflow for absences is created.
- You can edit and delete it like any other workflow.
- A new section is available in the list of values for the reports.
- The regulated leaves section allows you to determine the behavior of the absence workflow states.
- It can also trigger an alert and / or send mail

Leaves Status

With the activation of the HR module, an absence workflow is added with 3 states, which are accessible and customizable in the *automation systems*.

Recorded

Creation status. In this state all the data of the absence can be modified.

Submitted

This status means that the employee has sent his leave request to his hierarchy for validation.

Validated

State that only the manager and the administrator of the module can be enabled.

When the leave request is validated or refused, the status of the request cannot be changed

Cancelled

State that only the manager and the administrator of the module can be enabled.

The number of days the absence represents are not taken.

When the leave request is validated or refused, the status of the request cannot be changed

13.1.8 Skill Management

Skills management will make it possible to inform the skills of each resource with a very specific skill level.

You can then search for the appropriate resources for an activity at a given time for the skill of your choice.

Skills

Record the different skills that you find in your field of activity.

Skills can be split into sub-skills without level limitation.

The “display the structure” button allows you to display the SBS (skill Breakdown Structure) of the selected skill with an indentation of the sub-skills for better visibility.

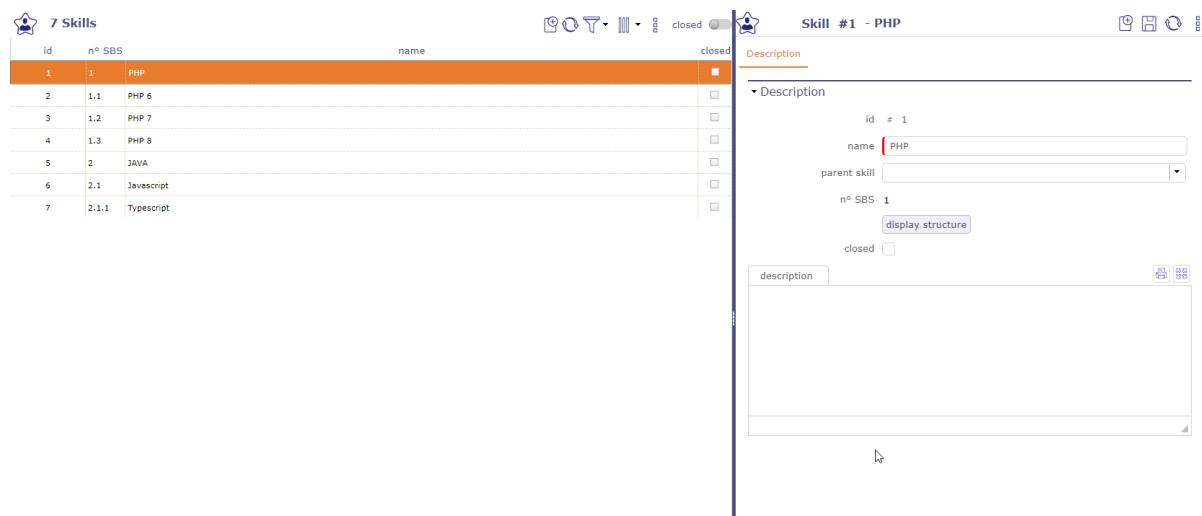


Fig. 16: Skill management screen

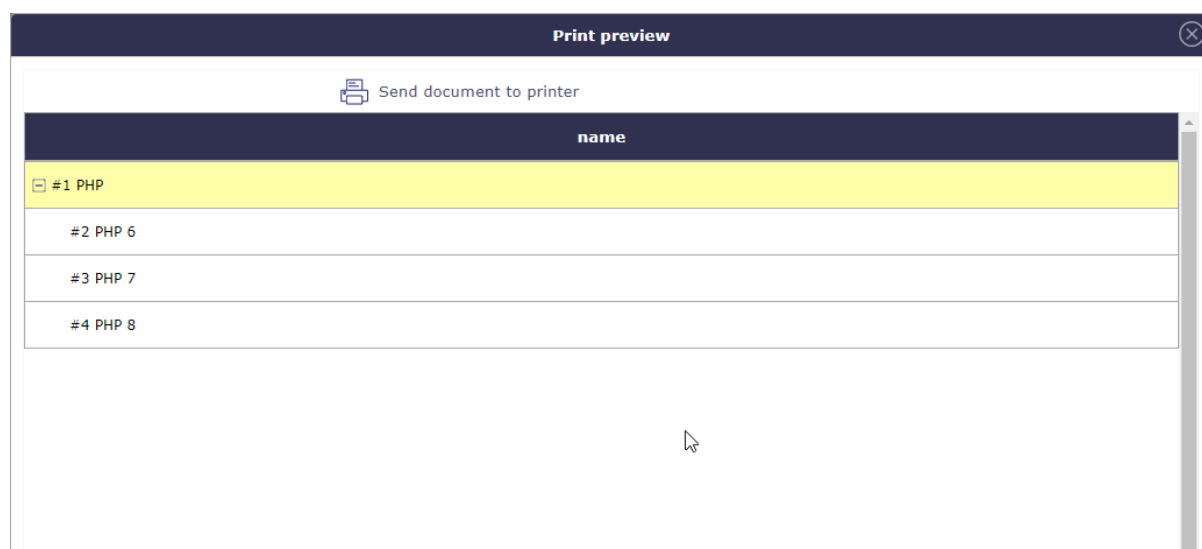


Fig. 17: SBS - Skill breakdown structure

Skills level

The Skill Levels screen allows you to save levels for each skill.

For example beginner, average, good, expert...

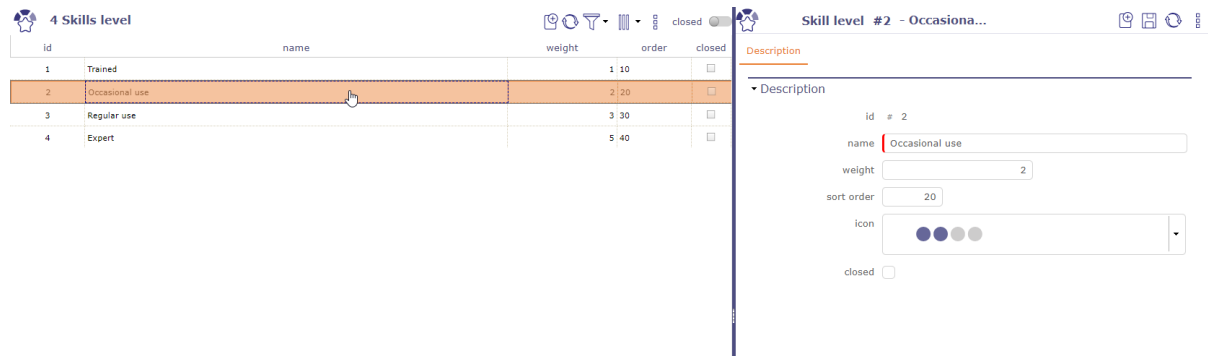


Fig. 18: Skill level screen

You then define for each of the resources the skills and the level associated with it.

You can select multiple different skills from the drop-down list using the control or shift keys.

An icon can be associated with the skill level. ProjeQtOr has provided icons for a maximum of 4 levels.

You can create your own icons and place them in `www\projektorVX.xx\view\icons`.

Skills resources

When skills and skill levels are defined, you can associate them with your resources.

Resources with skills will appear on the skill search screen.

Hierarchical skill

On this screen you see all the skills and their hierarchy. This is the complete structure of the structure for all skills combined.

You can move and rearrange them using the handles in front of the names.

The SBS (skill breakdown structure) breakdown indices are dynamic and will be modified according to the ascending order they occupy.

Search by skill and availability

When you need a particular skill over a period of time, the skill search screen displays all the resources.

Numerous filters will allow you to find the ideal resource based on the needs of the tasks to be carried out.

Resource #4 - analyst A

Description **Detail** Allocations

▼ Function and cost 1

main function

	function	cost	start date	end date
	Analyste	300,00 € / d		

▼ Variations in resource capacity 0

	id	capacity (FTE)	start date	end date

▼ Management of overbooking periods 0

	id	additional capacity (FTE)	start date	end date

▼ Incompatible resources 0

	id	name

▼ Support resources 0

	id	name	rate (%)

▼ Allocated assets 0

Type	Asset	Brand	Model

▼ Resource skills 5

	skill	skill level	use since	use until
	PHP	Regular use ●●●●○		
	GREP	Expert ●●●●●		
	PHP 6	Regular use ●●●●○		
	PHP 7	Occasional use ●●●○●		
	PHP 8	Trained ●●●○●		

Fig. 19: Resources screen with several skills and skill levels

Hierarchical skill parent skill Show closed items

n° SBS	Skill
1	PHP
1.1	PHP 6
1.2	PHP 7
1.3	PHP 8
2	JAVA
2.1	Javascript
2.1.1	Typescript

Fig. 20: Hierarchical skill screen

Filters

Skill et level

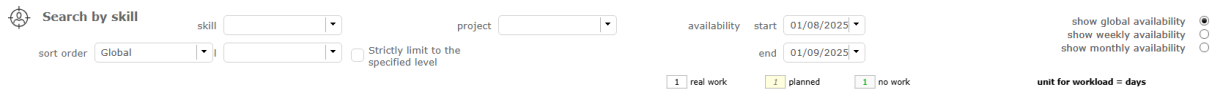


Fig. 21: Filters on search by skill screen

Select the skill you need. skill level is not mandatory but useful for more precision.

An initial selection is offered to you by providing only the skill.

You can rank the results obtained based on relevance and availability or globally by taking these two criteria into account.

Sorting will be done for each skill line.

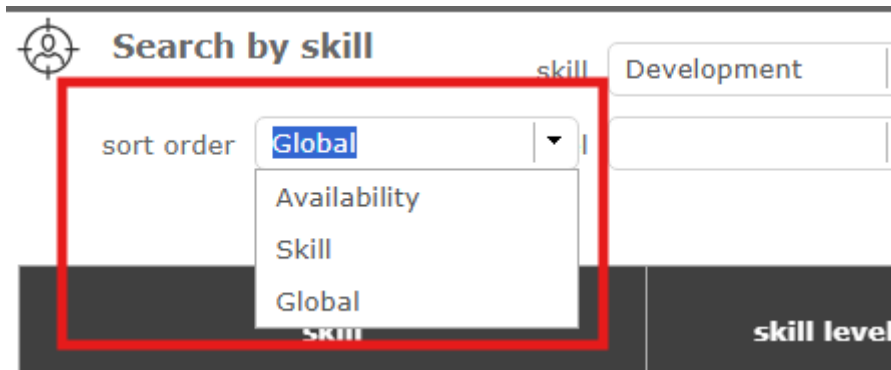


Fig. 22: Sort according to your needs

Selecting a skill level helps narrow down the list to more relevant results.

However, even if you choose a specific level, resources with the same skill but a different level might still appear.

This gives you alternatives in case the ideal resource isn't available during the required time period.

If you only want to see resources with the exact skill and level you selected, check the "Strictly limit to the specified level" box.


Dates and periods

The start and end dates are pre-filled and correspond to the current date for a period of one month.

If you choose a particular project, then the validated dates of the project are retrieved.

The corresponding resources are displayed and indicate their availability over the periods entered.

Click on  to assign a resource to the project of your choice.

Click on  to modify the assignment of the resource on the project.

Tip: The calculation of the relevance rate takes into account the resource parameters (FTE, planning, multi-project, etc.) and the level of skill requested.

The relevance rate is defined using a simple calculation. Availability rate x competence rate / 100.

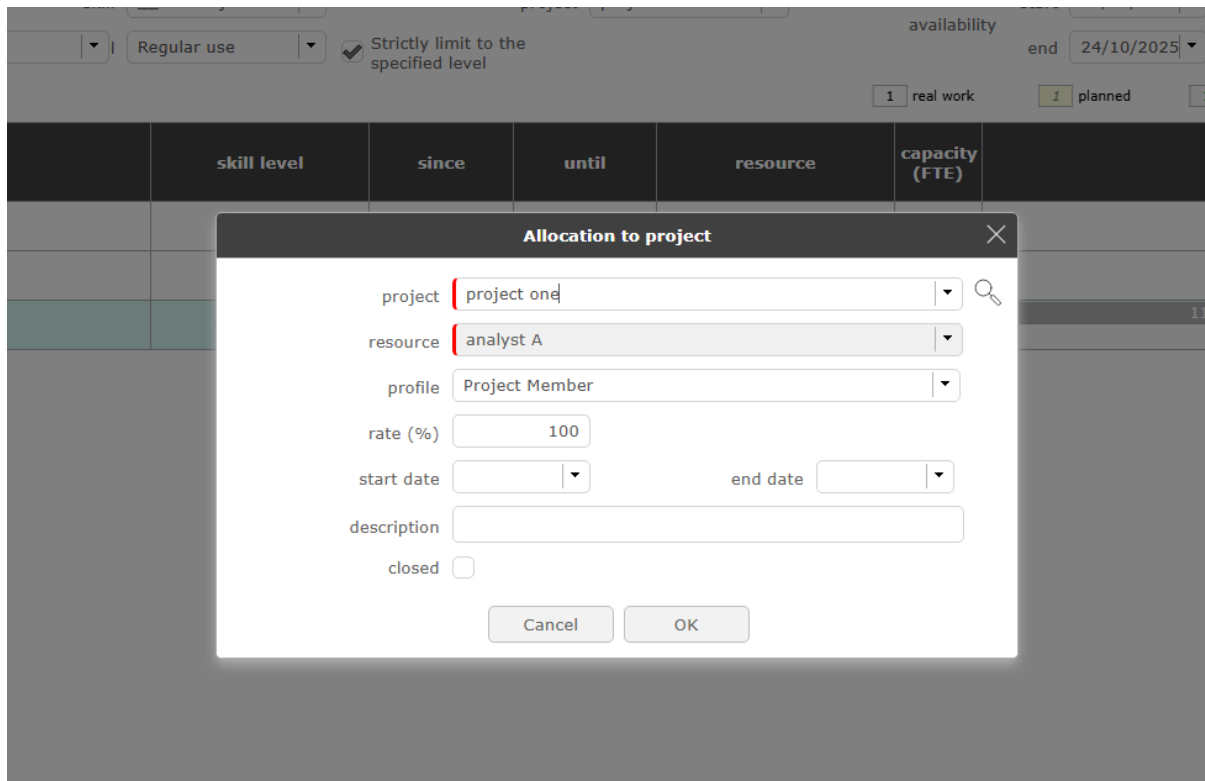


Fig. 23: Search by skill screen

Availability

You can view resource availability for a given skill in different ways.

Globally over the requested period :

Availability	
02/06/2022 - 02/07/2022	0
02/06/2022 - 02/07/2022	22
02/06/2022 - 02/07/2022	22

Fig. 24: Skill global availability

Per week over the requested period :

Monthly over the requested period :

Availability				
2022-23	2022-24	2022-25	2022-26	2022-27
1	5	5	5	5
2022-23	2022-24	2022-25	2022-26	2022-27
0	0	0	0.3	4
2022-23	2022-24	2022-25	2022-26	2022-27
1	5	5	5	5
2022-23	2022-24	2022-25	2022-26	2022-27
0	0	0	0.3	4

Fig. 25: Skill weekly availability

Availability	
2022-06	2022-07
15	6
2022-06	2022-07
0	4.3
2022-06	2022-07
15	6
2022-06	2022-07
0	4.3

Fig. 26: Skill monthly availability

Search by skill

ProjeQtOr offers a very simplified screen for searching for skills.

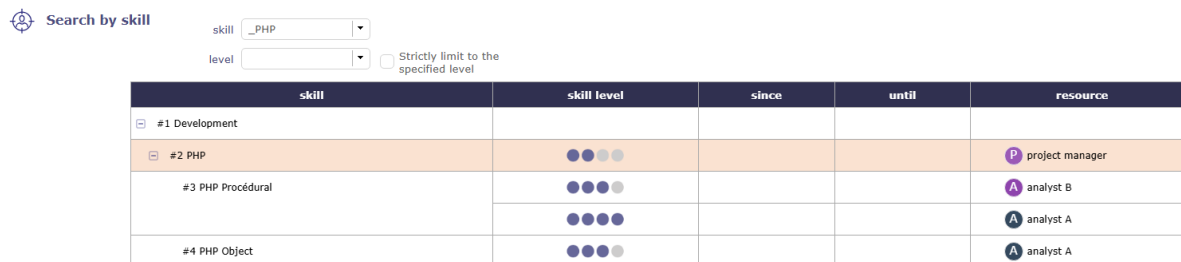


Fig. 27: simplified skills search screen

Availability information, dates and periods, as well as anything related to the project, is not available on this screen.

Search on activity

You can have a decision support directly on the activities.

You select the skills needed on the activity. Save them in the Details tab > “skill for activity” Section.

The skills are elements who can be copied in the copy options of an activity.



Fig. 28: Skills for activity

Once the skills are linked to the activity, in the assignments table, click on to add a resource in the assignment table.

Click on the magnifying glass in the popup to access the skills table.

A window opens to list resources that might meet your needs.

You’ll find the same list as for a skill search on the dedicated screen.

Click on the resource you want to assign to the activity.

Assignment
✕

resource 🔍

function

cost € / d

rate (%)

assigned work d

real work d

left work d

revised work d

closed

comments

Cancel
OK

Fig. 29: Skill for activity

Resource by searched skill
✕

resource	skill	relevance rate
A analyst C	 PHP 7	100%
A analyst B	 PHP 7	67%
A analyst A	 PHP 7	67%
A admin		0%
P project manager		0%

Cancel

Fig. 30: Resource search by skill

14.1 Plug-ins management


Plugins are complements for the ProjeQtOr application.

They add non-generic features to ProjeQtOr

You will find the complete list of plugins in the [ProjeQtOr online store](#)

Plug-in installation

The section **Installed plugins** lists the installed plug-ins.




 Plug-ins

▼ installed plug-ins

name	description	version	deployed date	deployed on	compatible since
screenCustomization	Customization of screens	V5.3	06/22/2019	V8.0.4	V6.4.4
translationApplication	TranslationApplication	V1.6	06/22/2019	V8.0.4	V6.5.0

▼ available plugins (local)

plug-ins (zip files) are searched in directory '/plugin'

file	date	size
   importProject_V1.0.zip	01/25/2021	231 KB

add local plugin file

▼ available plugins (remote)

feature not available on this version

Fig. 1: Plugin management screen

description of plugin (metadata)
✕

description

comments

unique code

installation SQL script

version

compatible since version

reload after install



Fig. 2: Description plug-in

Available plug-ins list

The section **Available plugins** allows to manage local plug-ins




▼ available plugins (local)

plug-ins (zip files) are searched in directory '/plugin'

	file	date	size
  	importProject_V1.0.zip	01/25/2021	231 KB

add local plugin file

Fig. 3: Add a plugin

- The **Browse** button allows to select plugin file .zip.
- The file will be uploaded and it will be added in plugin-ins list.
- Click on  to install plug-in.
- Click on  to display the description of plug-in.
- Click on  to remove the plugin from the installation table.
- Plug-in will be deployed during installation.
- The result of deployment will be available in the log file (See: *Administration Console*).
- Plug-in is removed from the list after installation.

15.1 Glossary

Action

Stocks are used in anticipation of risk. They serve to reduce the risks.

The analysis of these risks consists in defining actions. There are two types of actions:

- Preventive action aimed at removing the risk or
- Corrective action that has been earned on the occurrence of a risk

Activity

An Activity can be likened to the key stages of the project: it is the skeleton of your project that organizes the main phases of a project

- They have a start and end date
- They designed for the planning phases of a project
- They serve to organize the milestones and tasks of a project
- They can allocated to a or many resources
- They can be prioritized and have sub-activities

Administrator

An administrator is a *user* with “Administrator” profile. Has a visibility over all the projects.

Agile methods

Agile methods are groups of practices of piloting and realization of projects. They originate from the Agile manifesto, written in 2001, which uses the term ‘agile’ to refer to multiple existing methods

Assigned status

This status indicates that you have assigned a resource to an activity. This can trigger the automatic status change when you assign a resource for the first time on a schedulable element of ProjeQtOr if the global parameter is activated. If the assignment is already present or if you use the automatic assignment of the project team then the change of status will not be effective

Client

The client is the person on whose behalf the work is carried out. It is the sponsor and the one who bears the financial cost. The client is a natural or legal person, public law or private law

Closed

Closed is a micro state in ProjeQtOr

Flag to indicate that item is archived. Item will not appear in lists any more You can display them again by checking the box “Show closed items” You can setting their default display in the *user’s Parameters*

Contact

A contact is a person in a business relationship. A contact can be a person in the customer organization. Used as contact person for contracts, sales and billing. Contacts management is performed on *Contacts* screen.

Coordinator

coordinator is the person who oversees and reports. It corresponds to the accountable in the RACI method In ProjeQtOr, the responsible is the person who works.

CRON

cron is a program that allows users of Unix systems to automatically execute scripts, commands or software at a date and time specified in advance, or according to a cycle defined in advance.

CRUD

It is an English computer acronym for Create, Read, Update, Delete. It designates the four basic operations for data persistence, in particular the storage of information in a database.

Decision

A good decision helps move towards the end goal. It is in the general interest, the interest of the greatest number as well as in the interest of the project

a good decision is a suitable solution, put in place with the tools and resources available at a given moment.

Description

- This field allows to define a description on an item.
- Depending on the element type, name of field can be different.

See also:

GUI behavior

- It is possible to define that description field is mandatory.
- The element type screens allow to set this parameter to several elements.
- More detail, see: *Behavior section*.

Done

Done is a micro state in ProjeQtOr

- Flag to indicate that item has been done.
- Date of done is saved.
- A result can be specify.
- It is possible to require a result when the status change to “done”.

External reference

- This field allows fill free input.
- It uses to refer information from an external source.
- External reference value can be put in email message with **externalReference** special field.
- More detail, see: *Administration*

FTE

Full Time Equivalent The full-time equivalent (FTE) is a unit of measurement: a workload or more often, a capacity for work or production.

Gantt chart

Description The Gantt chart is a tool used in scheduling and project management and allowing to visualize in time the various tasks composing a project.

It is a representation of a connected graph, evaluated and oriented, which makes it possible to graphically represent the progress of the project

In Progress

- Flag to indicate that item has been taken into account.
- Date of handling is saved.
- This generally means that responsible has been named.

Id

- Every item has a unique Id, automatically generated on creation.
- Id is chronologically allocated, for all kind of items (Activity, Ticket).
- Id is shared for all projects and all types (i.e. incident) of the same kind items (i.e. Ticket).

Incident

Any event that is not part of the standard operation of a service and that causes, or may cause, an interruption or decrease in the quality of that service

Issuer

An issuer is a *user* who created the item.

See also:**Creation information**

The issuer name and creation date of an item are displayed in the *Creation information zone*.

Key Performance Indicator (KPI)

Indispensable to the project manager, an indicator makes it possible to evaluate a situation and to make an adapted decision. Key performance indicators measure the performance of your projects. You choose them together with your team. They must be simple, reliable, easily understandable by all and relevant

If the indicator is green, all is well, you will need to continue the actions in progress to maintain this good result. If the indicator is red, then you must take the necessary corrective action. If the indicator is orange, it should be monitored.

- Each indicator is associated with a specific goal.
- An indicator necessarily implies a decision.
- An indicator is never silent.
- A relevant indicator must be simple

Objective

An objective is a goal to achieve by carrying out different tasks. For example, building a new plant in order to produce more and meet the growing demand. It is essential to precisely define the goal (s) to reach so that you and your team know where you are going. A good goal must be *SMART*.

Origin

- Determines the element of origin.
- The origin is used to keep track of events (ex.: order from quote, action from meeting).
- More detail, see : *Origin field*.

PERT chart (Program Evaluation and Review Technique)

provides a practical method and means to describe, represent, analyze and logically follow the tasks and the network of tasks to be carried out as part of an action to be undertaken or to be followed. The PERT diagram represents the work schedule by a dependency graph. His network formalism focuses on the interconnection of the tasks to be performed and the calculation of critical paths.

An important difference with the Gantt chart is the conventional time scale of the PERT chart which represents a sequence of tasks and not durations or a calendar

Project

A project is defined as a finite set of activities and actions undertaken in order to meet a defined need within a set timeframe and within the limits of an allocated budget envelope

See: *project*

Project Leader

A project leader is a *resource* allocated to a project with a "Project Leader" profile. person responsible for leading a project and managing its smooth running. In general, he leads a team during the duration of the various projects for which he is responsible

Project manager

A project manager is a *resource* defined as the manager on a project.

See also:

Accelerator button

This button allows to set current user is the project manager. More detail, see: *Assign to me button*.

Project team

All *resources* allocated to a project.

Quotity

A quotity is the amount of a quota. This term of right refers to the fraction of a whole, a proportional sum in a share. A quota can be to pay or to collect.

RACI

R - Responsible - he realizes A - Accountable - he oversees and reports C - Consulted - he advises I - Informed - he is informed

In projeQtOr the accountable is defined as *coordinator*

Reference

- Reference is displayed after id, automatically generated on creation.
- Reference depends on defined format, see under “Format for reference numbering” section in *Global Parameters* screen.
- Default format defines a specific numbering format that can provide unique numbering sequence for each project and/or each type of items.

Requestor

A requestor is a *contact*. Used to specify the requestor for ticket, activity and requirement. Only contacts allocated to the selected project can be a requestor.

Responsible

A responsible is a *resource* in charge of item treatment. Usually, the responsible is set when the status of the item is In progress *Status*. Only resources allocated to the selected project can be a responsible.

seealso:

****GUI behavior****

It is possible to define that responsible field is mandatory on In progress status.

The element type screens allow to set this parameter to several elements.

Behavior section.

Set automatically the responsible

It is possible to set automatically the responsible.

Global parameters

Accelerator button

This button allows to set current user is the responsible.

Assign to me button.

Access rights

It is possible to define a combination of rights to permit access for elements the user is responsible for.

Access modes screen.

Resource

- Human or material resource involved in the projects.

- It is possible to define the resource availability to the projects.
- Resources management is performed on the *Resource* screen.

Result

- A result is a description of the treatment of an item.
- Usually, the result is set when the status of the item is done *Status*.

See also:

GUI behavior

It is possible to define that result field is mandatory on done status.

The element type screens allow to set this parameter to several elements.

Risks

The risk is a hazard, an undesirable event whose appearance is not certain, resulting in the possibility that the project does not achieve the objectives of:

- Completion date
- Costs
- Specifications (techniques, quality, performance , reliability ...)
- Others: Image of the company, environment, legal, social ...

The risk can put in danger the project, deviations from forecasts the making it unacceptable or totally unacceptable. We distinguished the risks exogenous (external at now ; suppliers, evolution regulation, political, social, meteorology...)

Quality

The Quality approach consists in finding the match between the answer to the needs of the project, the correct expression of these needs by adequate specifications which go through a careful listening of the customer, and a realization answering the expression of the needs.

User

- User is a person who logs into the application.
- User profile define general access rights. But it does not necessarily give access to project data.
- Users management is performed on the *Users* screen.

SLA

A service level agreement (SLA) is a contract between a service provider and its customers that documents the services that the provider will provide and defines the service standards that the provider is required to meet.

SMART

it is an acronym or mnemonic device that stands for 'Specific, Measurable, Acceptable, Realistic and Temporally Defined'. These terms apply mainly to the determination of the most suitable objectives in order to complete a given project. Setting appropriate targets will help accelerate project completion and improve its chances of success.

Status

- The status determines the life cycle of items.
- It defines the progress of the treatment of the item.
- Item is linked to a element type, element type is linked to a workflow.
- A workflow defines the possibility to go from one status to another one, more detail, see: *Workflow*.

Assigned status

- This status indicates that you have assigned a resource to an activity.

- This can trigger the automatic status change when you assign a resource for the first time on a schedulable element of ProjeQtOr if the global parameter is activated.
- If the assignment is already present or if you use the automatic assignment of the project team then the change of status will not be effective
- See: *Status*

In progress status

- This status specifies that the treatment of item is supported.
- A *responsible* can be determined or required.

Paused status

- This state indicates that item processing is in a paused state.
- Used for the processing of certain elements (activity, tickets ...)
- Allows you to exclude and purge the calculation from the schedule
- Recording these break times allows you to get more accurate treatment information

Done status

- This status specifies that the treatment of item is done.
- A *result* can be specified or required.
- It is possible to require a result when the status change to “done”.

Closed status

- This status indicates that the item is closed.
- This article is archived and will no longer appear in the lists.
- You can display these items by checking the “closed” option at the top right of the screen

Cancelled status

- This status specifies that the item is cancelled.

Ticketing

Ticketing is an anomaly tracking system : bugs, incidents, problems, requests...

WBS

- Work Breakdown Structure.
- Hierarchical position of the element in the global planning.
- WBS also defines the index of an item in the WBS structure. This index is calculated like paragraphs in a word document.

Work

- **Assigned:** The work initially planned for this resource to the task.
- **Left:** Assigned Work – Real Work
- **Real:** Sum of work done by this resource to the task.
- **reassessed:** Real Work + Left Work

<p>Warning: Except for some planning modes, the planning does not take into account the validated load but that affected.</p>
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Workflow

A workflow is the representation of a series of tasks or operations carried out by a person, a group of people, an organization, etc.

The term flow refers to the passage of an element, from one stage to another.