



Technical Documentation

Installation Guide



The Projects and Portfolio Management Open Source Tool



INVESTMENT,
PORTFOLIO
AND PROJECT
MANAGEMENT



RISK, CHANGE
AND KPI'S
MANAGEMENT



INFORMATION
INTEGRATION
CENTER



DESIGNED BY
AND FOR
PROJECT
MANAGERS



ORIENTED TO
PMI AND ISO
STANDARDS



OPEN
SOURCE
WITHOUT
LICENSE FEE

For any help or questions, please see our **TALAIA OpenPPM** team @ sales@talaia-openppm.com

Thank you for downloading **OpenPPM!!**

We offer you 2 options to install your **OpenPPM** software:

- **Easy Installation** (*recommended for non-technical users*): you deploy a virtual machine with all the components included. (Application Server, Data Base and OpenPPM)
- **Customized Installation** (recommended for advanced users only): you deploy all the elements separately allowing you to choose:
 - Virtual Machine
 - Data Base (Maria DB, MySQL or Oracle)
 - Tomcat Version (v.7 or higher)

This installation Guide Contains:

- Section I Installation Guide
 - Section I-A: Easy Installation Guide
 - Section I-B: Customized Installation Guide
- Section II: Configuration: Admin + OPA Settings
- Section III: User Guide

Section I: Installation Guide

Section I-A:Easy Installation Guide

Before getting started make sure that you have downloaded the .OVA file at the following link:

http://www.mediafire.com/file/dyys5msoxvp2sp2/OpenPPM_Community.ova

Due to the file size, the download might take between 30 to 40 minutes.

• **System Minimum Requirements**

In order to be able to deploy **OpenPPM**, we recommend that your system complies with the following minimum requirements:

- 4 GB Disk Space
- 3 GB Memory
- Virtual Technology Capability

Step I: Installation Virtual Machine

In order to deploy your **OpenPPM** you need to install a Virtual Machine and import the OVA file downloaded from SourceForge which contains:

- CentOS 7
- MariaDB 5.5
- Tomcat 7
- OpenJDK 1.7.0_79
- OpenPPM Community

In order to install the Virtual Machine the following steps must be followed:

• **Access your BIOS**

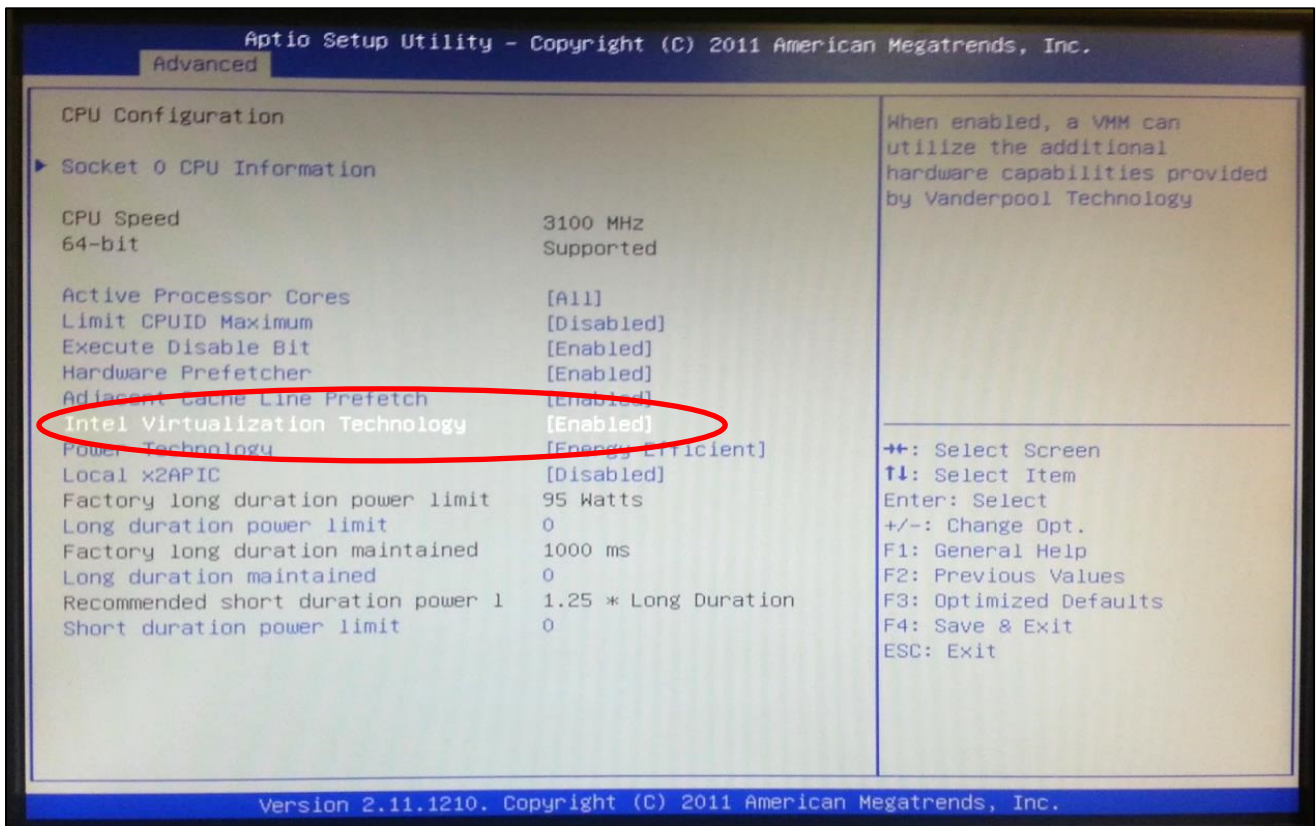
To install **OpenPPM**, you have first to deploy a virtual machine and therefore enable the virtualization technology feature of your system, if using a laptop or PC



To do so, start your computer and press the indicated key on your screen to enter your BIOS configuration settings.

Please refer to your product manufacture which will indicate you how proceed further with your computer. (Usually the indicator key to enter your BIOS appears on the first screen and stays only for few seconds, PAY ATTENTION!). The press key is likely to be: F1, F2, F3, Esc or Delete key.

As an example we had attached a print screen sample:



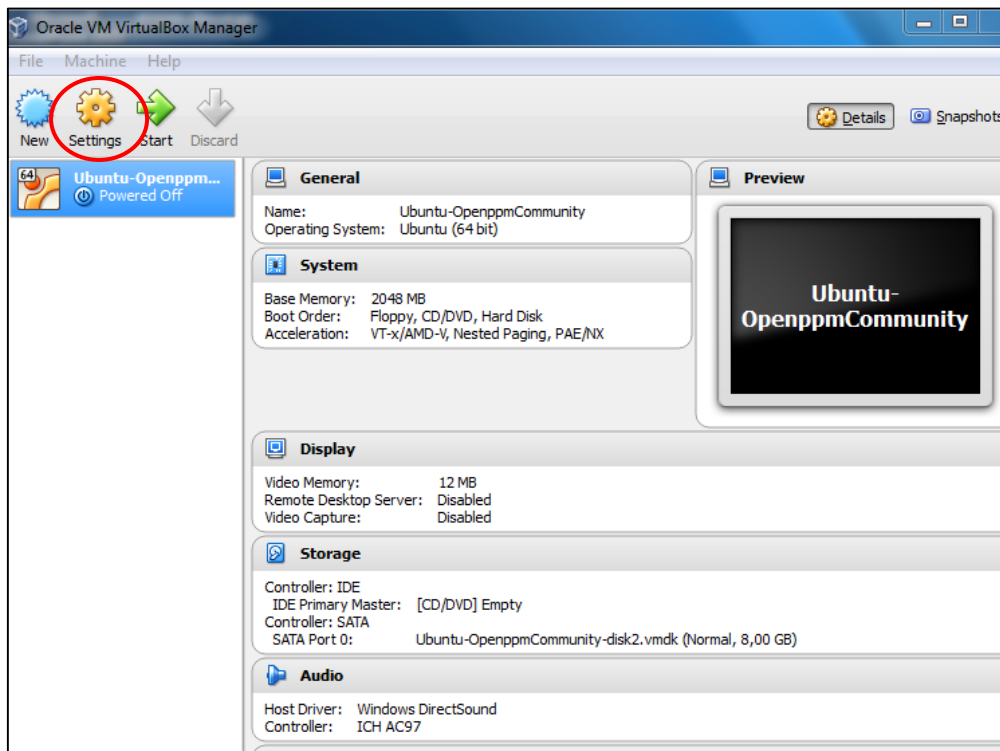
• Download Virtualbox

- Go to the following website: <https://www.virtualbox.org/>
- Download the latest version of the VirtualBox:

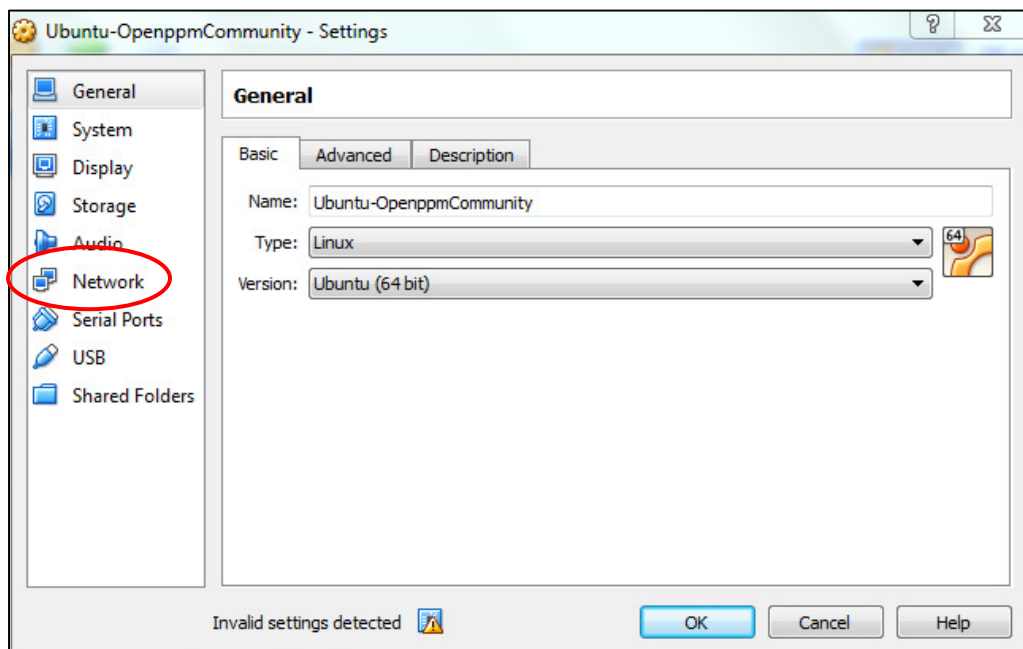


- **Configure your Virtual Machine**

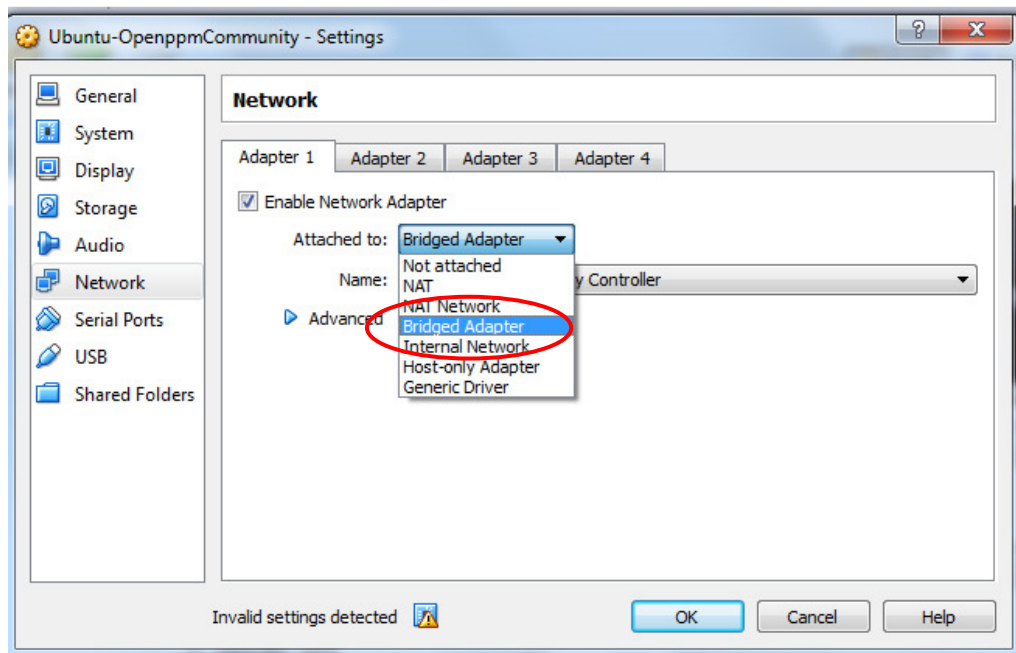
- Enter to the Oracle VM VirtualBox Manager. Go to settings:



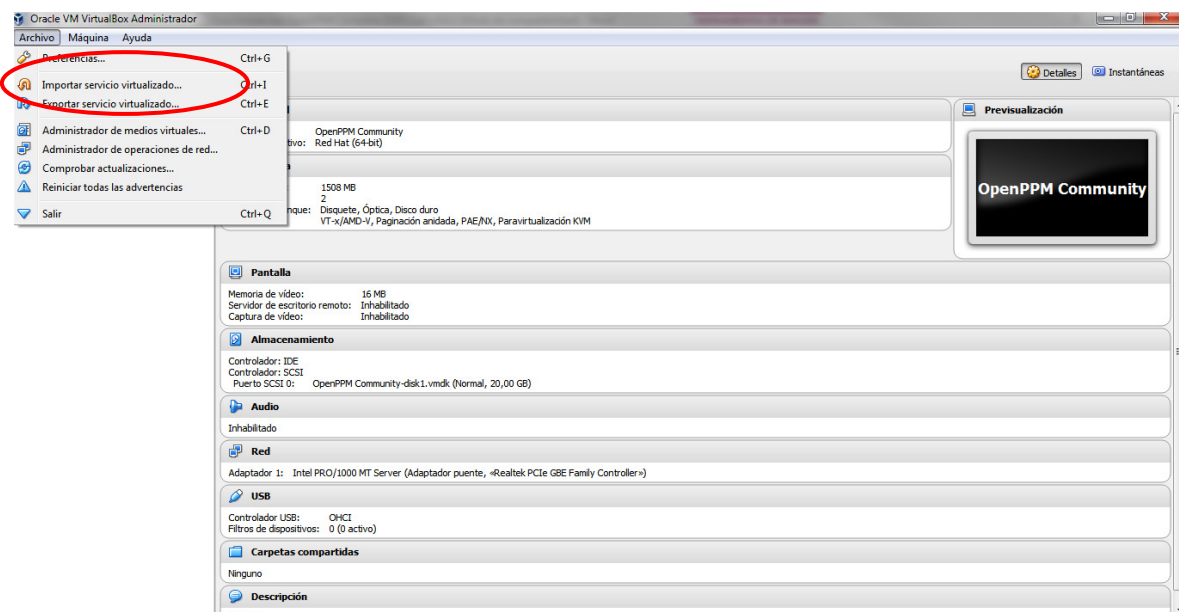
- Then Go to network:



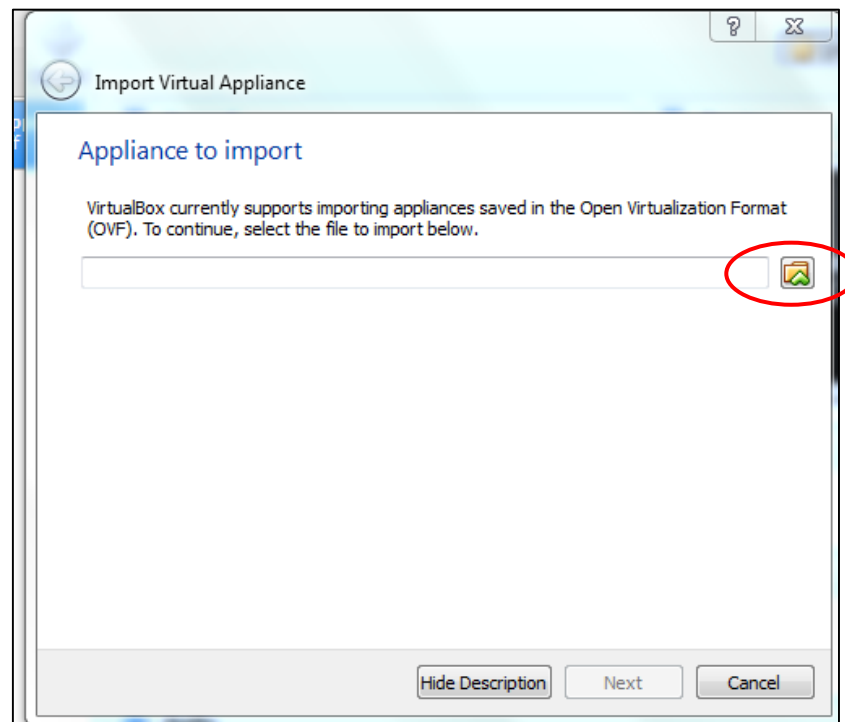
- Enable Network Adapter and choose attached to Bridged Adapter.



- Import Virtual Service uploading the OpenPPM Community.ova file that you have downloaded from MediaFire



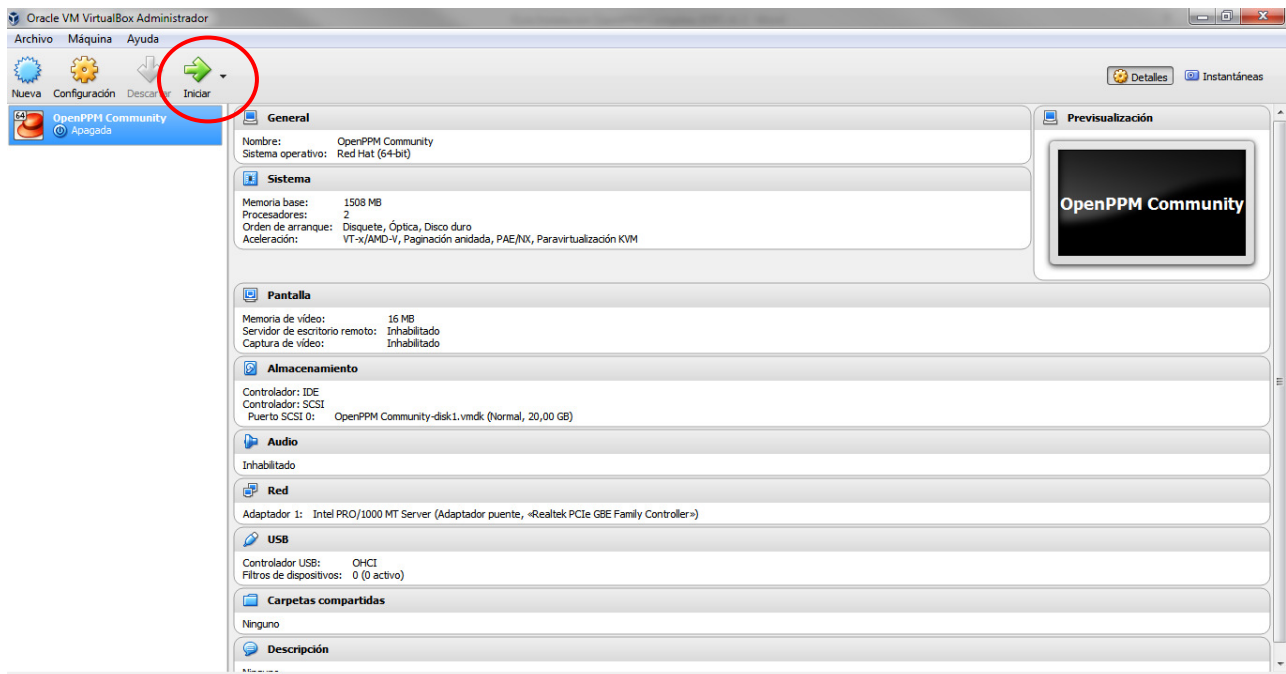
- Double-Click to open the file.



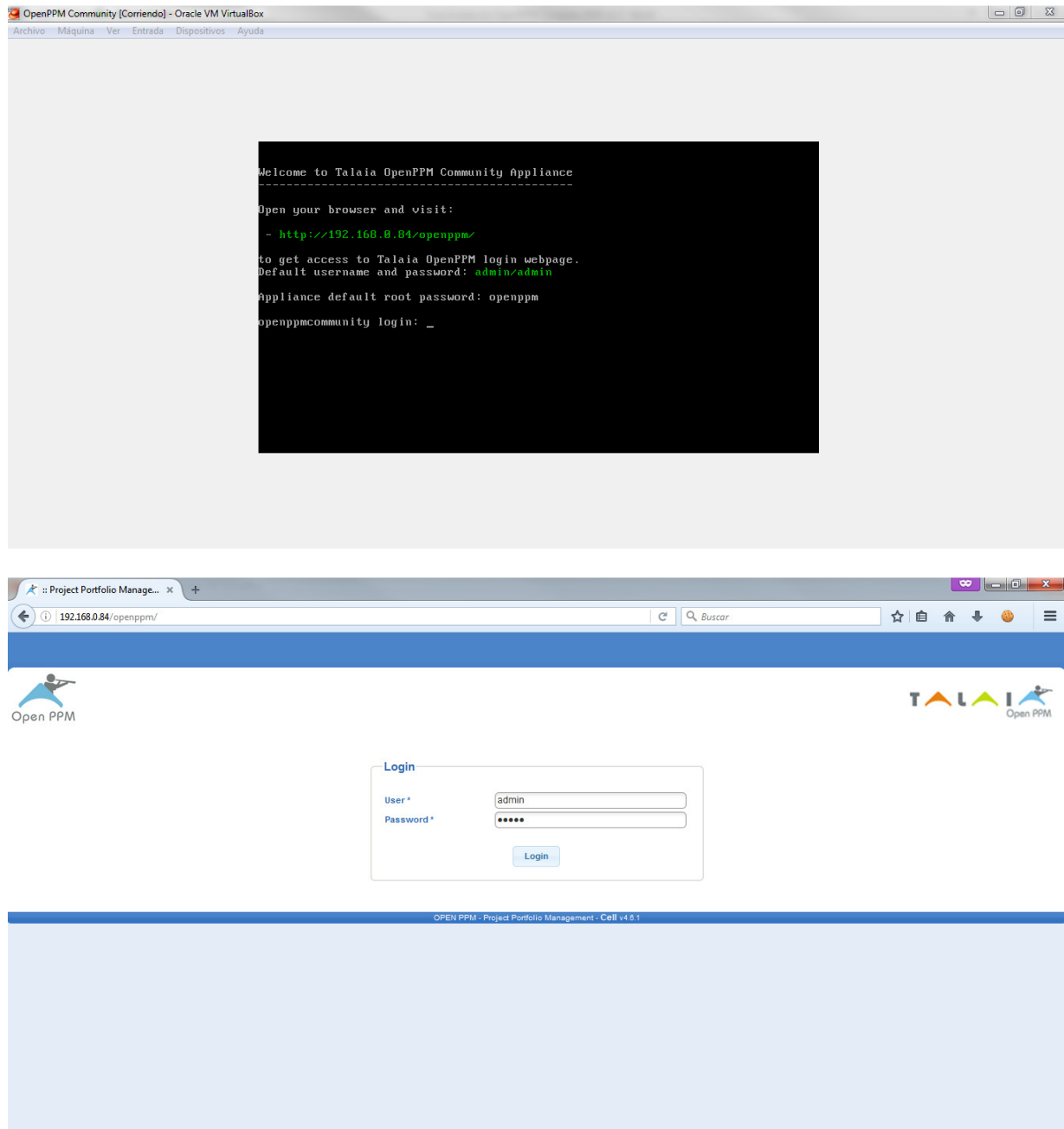
Click on  Button

Once the import is completed you will be able to see the virtual machine on the list.

- Click on start to launch the virtual machine:



Once you have started the Virtual Machine, a screen will appear with all the information to launch the application through your web browser



Section I-B:- Customized Installation Guide for MariaDB Database

This document describes the installation process of **OpenPPM**.

• **Requirements**

Hereunder is our minimum requirement recommendation to install **OpenPPM** based upon:

- 150 + active users
- 200 + active projects
- **Hardware:** **OpenPPM** can be deployed on a physical or virtual machine:
 - Virtual Machine
 - 2 Virtual CPU
 - Physical CPU: Quad Core @ 2.6 GHz Xeon4 or similar.
- **Software:** Our certified and therefore recommended software configuration is the following:

Operating System	Ubuntu Server	v.10.04.3	4 GB RAM
	Linux RedHat Enterprise	v.6.3	
Application Server	Apache Tomcat	v.7.0.29 or higher	2 GB RAM
Programming Language	Java	v.1.7 or higher	
Database	MariaDB	v5.5 or higher	
	mySQL	v.5.1 or higher	
	Oracle	v.10g or higher	
Hypervisor	VMWare		
Web Browser	IE, Chrome, Firefox. Safari		

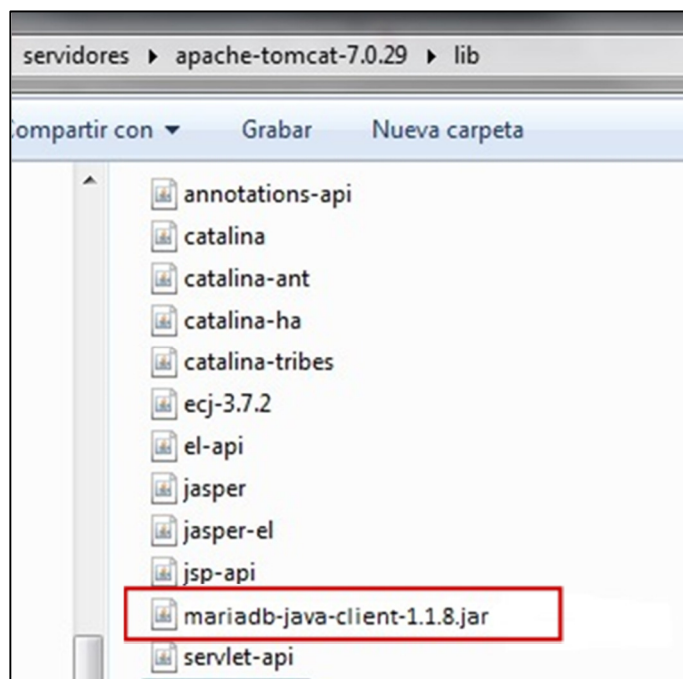
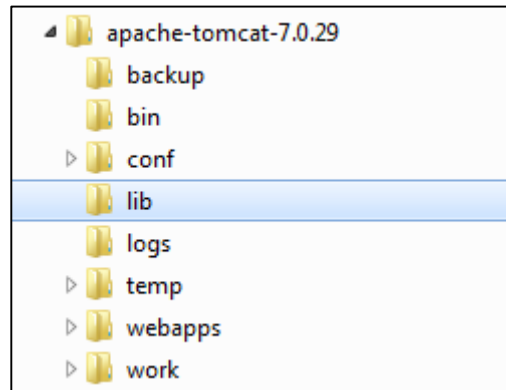
Nevertheless, **OpenPPM** could be installed with any other Operating System compatible with APACHE TOMCAT application server, and any other database apart from the ones certified above. If this is the case, please, contact us.

• **Apache Server installation**

Download the application server from <http://tomcat.apache.org/download-70.cgi> and choose the distribution depending on the operating system of the server that will host **OpenPPM**.

- **JAVA – MariaDB Connector Installation**

For a MariaDB setting it is necessary to include the connection library (mariadb-java-client-1.1.8.jar) to the folder “Tomcat 7.x/lib/” as shown:



• Database Connection Settings

You will find attached a connection database example of an XML (openppm.xml). This file needs to be modified to adapt to the specific database setting of the new installation.

```
<?xml version='1.0' encoding='utf-8'?>
<!--
-->
<!-- The contents of this file will be loaded for openPPM application -->
<Context>
  <watchedResource>WEB-INF/web.xml</watchedResource>
  <Realm className="org.apache.catalina.realm.JAASRealm"
    appName="OpenPPMweb"
    userClassNames="es.sm2.openppm.auth.PlainUserPrincipal"
    roleClassNames="es.sm2.openppm.auth.PlainRolePrincipal"
    useContextClassLoader="true"/>
  <Resource name="jdbc/openppmDB"
    auth="Container"
    type="javax.sql.DataSource"
    username="openppm"
    password="openppm"
    driverClassName="org.mariadb.jdbc.Driver"
    url="jdbc:mariadb://localhost:3306/openppm?autoReconnect=true"
    maxActive="50"
    maxIdle="0"
    testWhileIdle="true"
    timeBetweenEvictionRunsMillis="600000"
  />
</Context>
```

IP address : Port / Scheme

Note 1: The file will always be named “openppm.xml” (and please, double-check that it is the same name shown in the .war file, i.e. openppm.war) and it needs to be placed in the Tomcat folder: conf/catalina/localhost

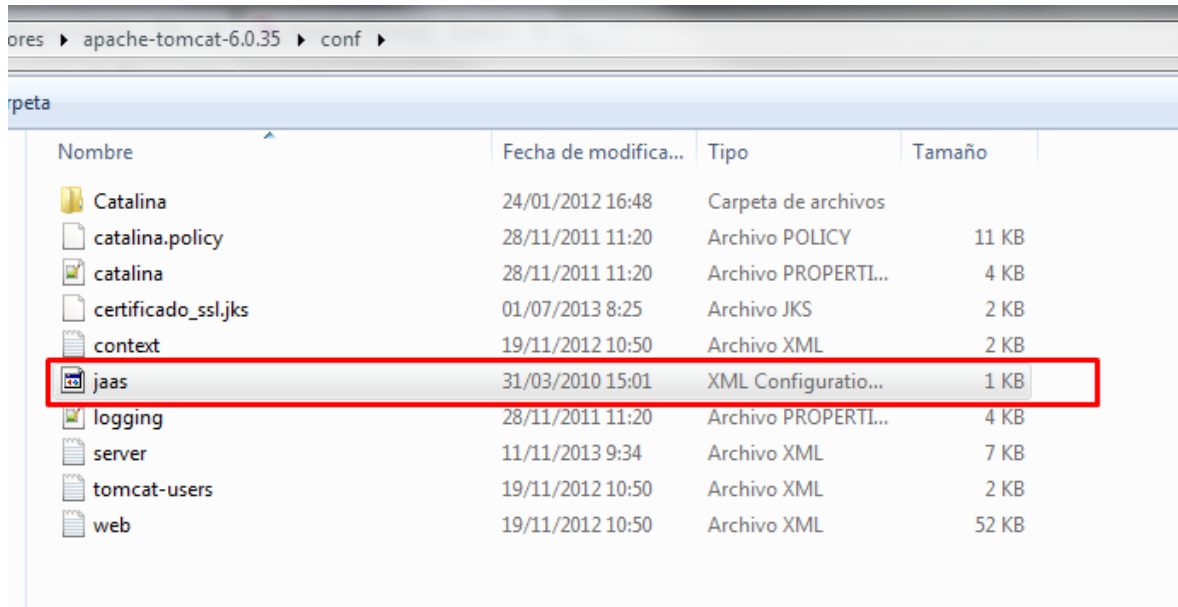
• Tomcat Settings (Security, Memory and Encoding)

In the “openppm.xml” file, if the **OpenPPM** security is internal to the application, the security information lines can be found as shown:

```
<?xml version='1.0' encoding='utf-8'?>
<!--
-->
<!-- The contents of this file will be loaded for openPPM application -->
<Context>
  <watchedResource>WEB-INF/web.xml</watchedResource>
  <Realm className="org.apache.catalina.realm.JAASRealm"
    appName="OpenPPMweb"
    userClassNames="es.sm2.openppm.auth.PlainUserPrincipal"
    roleClassNames="es.sm2.openppm.auth.PlainRolePrincipal"
    useContextClassLoader="true"/>
  <Resource name="jdbc/openppmDB"
    auth="Container"
    type="javax.sql.DataSource"
    username="openppm"
    password="openppm"
    driverClassName="org.mariadb.jdbc.Driver"
    url="jdbc:mariadb://localhost:3306/openppm?autoReconnect=true"
    maxActive="50"
    maxIdle="0"
    testWhileIdle="true"
    timeBetweenEvictionRunsMillis="600000"
  />
</Context>
```

Internal Security Configuration Data

Moreover, the “jaas.config” file is provided during the first installation and should be copied in the “Tomcat 7.x/conf/” path



Nombre	Fecha de modifica...	Tipo	Tamaño
Catalina	24/01/2012 16:48	Carpeta de archivos	
catalina.policy	28/11/2011 11:20	Archivo POLICY	11 KB
catalina	28/11/2011 11:20	Archivo PROPERTL...	4 KB
certificado_ssl.jks	01/07/2013 8:25	Archivo JKS	2 KB
context	19/11/2012 10:50	Archivo XML	2 KB
jaas	31/03/2010 15:01	XML Configuratio...	1 KB
logging	28/11/2011 11:20	Archivo PROPERTL...	4 KB
server	11/11/2013 9:34	Archivo XML	7 KB
tomcat-users	19/11/2012 10:50	Archivo XML	2 KB
web	19/11/2012 10:50	Archivo XML	52 KB

A file called setenv.xx is included in the Tomcat download files where xx will depend if the application server operating system is Linux or Windows (Linux .sh and Windows .bat) where the “jaas.config” refers to. It is necessary to check if the path to the folder is correct:

- -Djava.security.auth.login.config="/Tomcat absolute path/conf/jaas.config “

Also check encoding and memory adjustments:

- -Dfile.encoding=UTF8
- -Xmx1024m -XX:MaxPermSize=512m -server

If you wish to change the security type (LDAP, Mix or External) you have to refer to the **OpenPPM** Administration panel, once the application is deployed.

• OpenPPM Application Deployment

In order to deploy the application **for the first time**, the following steps need to be executed (**once points 1.2 to 1.5 of this guide are done**):

1. Create the user “openppm” in the database.
2. Import the export file (e.g. installationdump20140430.sql) from the root of the “scripts” folder & Execute ALL the scripts, one by one, contained in the script folders (ex: from 4.07 to 4.0.8, etc...) in the CHRONOLOGICAL Order
3. Give rights to the user “openppm” (created in point 1) in the “openppm” database (the import of the export creates automatically such database).
4. Copy the “openppm.war” folder in the “Tomcat 7.x\webapps\” folder
5. Start the Tomcat application server
6. Go to the Browser and check it works (it takes a little time to start)

- **OpenPPM Application Update**

If you have already installed OpenPPM and need to update your version, then the following steps need to be executed:

1. Stop the application server Tomcat
2. Do a Backup of the database
3. Execute the scripts attached with the new version
4. Delete Tomcat temporary files in the following way:
 - “Tomcat 7.x\webapps\” → Delete “openppm” folder.
 - “Tomcat 7.x\logs\” → Delete the “logs” folder content (NOT the folder)
 - “Tomcat 7.x\work\Catalina\localhost\” → Delete “openppm” folder
 - “Tomcat 7.x\logs\” → Delete the “logs” folder content (NOT the folder)
5. Copy the NEW “openppm.war” file in the “Tomcat 7.x\webapps\” folder
6. Start the Tomcat application server: go to the Tomcat folder bin/ and execute startup file (.shsiestá en linux o .bat en windows)
7. Go to the Browser and check it works (it takes a little time to start)

Section II: **Configuration Admin** **+ OPA Settings**

Section II: Configuration: Admin + OPA Settings

Now that you have deployed **OpenPPM** let's get started !!

In order to start using your new **OpenPPM** application you need to follow a 2 Step process to define a basic configuration enabling the basic functionalities of your product.

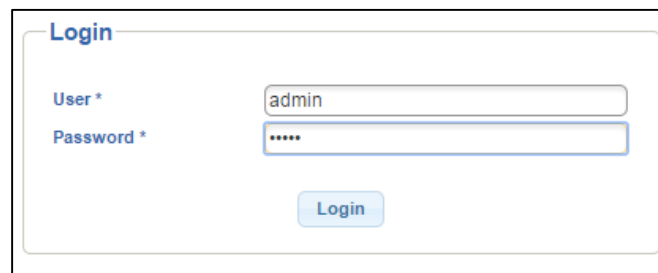
Step 1: Create a Performing Organization and a Default User:

In **OpenPPM**, a Performing organization (PO) is similar to your company department or division where projects are executed. Here is what you need to do to create a PO:

- **Log in as Admin:**

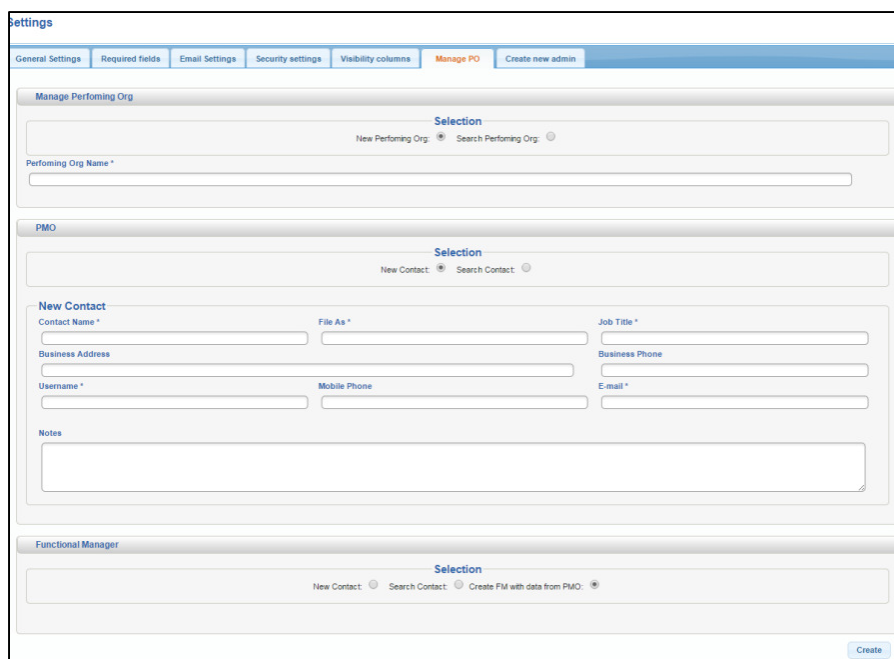
By default, an administration user is created with the following default credentials:

User: admin
Password: admin



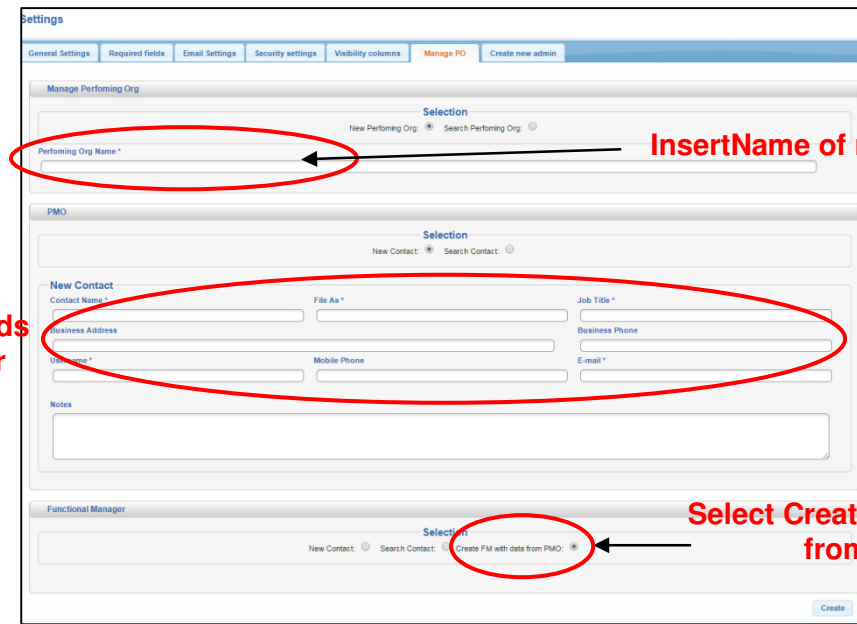
The screenshot shows a login form with the title "Login". It contains two input fields: "User *" with the value "admin" and "Password *" with masked characters "*****". Below the fields is a "Login" button.

- **Go to Manage PO Tab:**



The screenshot shows the "Settings" application with the "Manage PO" tab selected. The form is titled "Manage Performing Org" and includes a "Selection" section with radio buttons for "New Performing Org" (selected) and "Search Performing Org". Below this is a "Performing Org Name *" input field. The form also includes a "PMO" section with a "Selection" section for "New Contact" and "Search Contact". The "New Contact" section has fields for "Contact Name *", "File As *", "Job Title *", "Business Address", "Business Phone", "Username *", "Mobile Phone", and "E-mail *". There is also a "Notes" text area. At the bottom, there is a "Functional Manager" section with a "Selection" section for "New Contact", "Search Contact", and "Create FM with data from PMO". A "Create" button is located at the bottom right of the form.

- Create a new PO and a PMO & Functional Manager User:

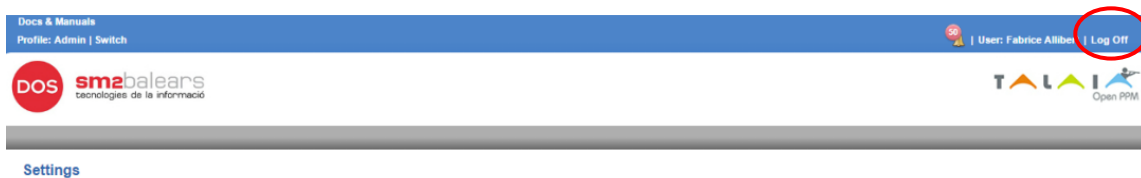


InsertName of new PO

Fill in the Mandatory fields (*) to create a new user

Select Create FM with data from PMO

- Then, Log Off



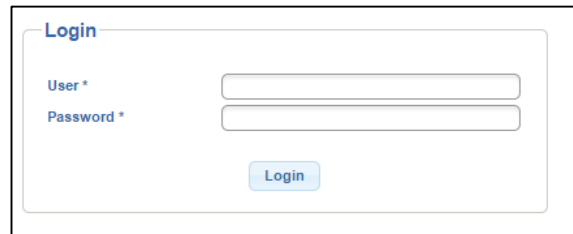
Log Off

Step 2: Define Basic Configuration Settings:

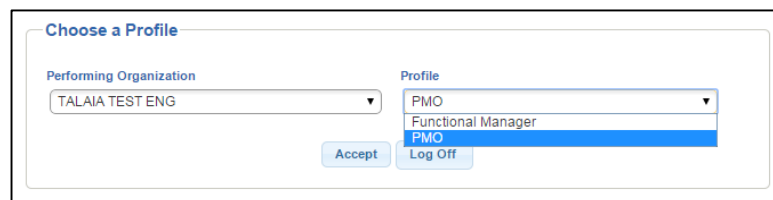
Log-In **OpenPPM** with the newly created user.



By default and before you activate the Notification features:
Password is always the same as username.



Choose the PMO profile as it is the only profile able to access the Organizational Process Assets Settings:



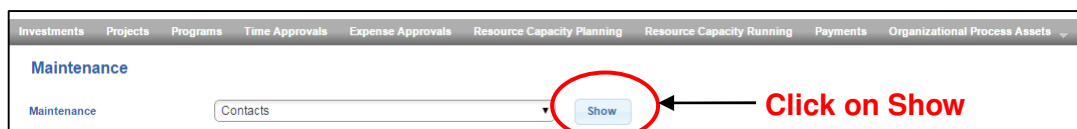
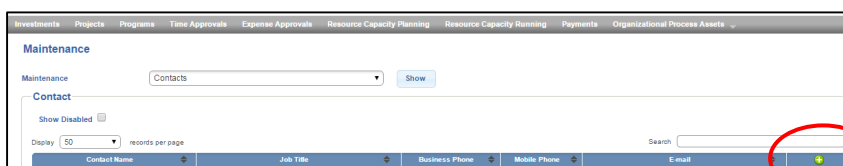
As a minimum configuration, you should at least define the following:

- Users with Profile PMO, Program Manager, Project Manager and Investment Manager
- Create a default Program

• Go to Organizational Process Assets / Maintenance:

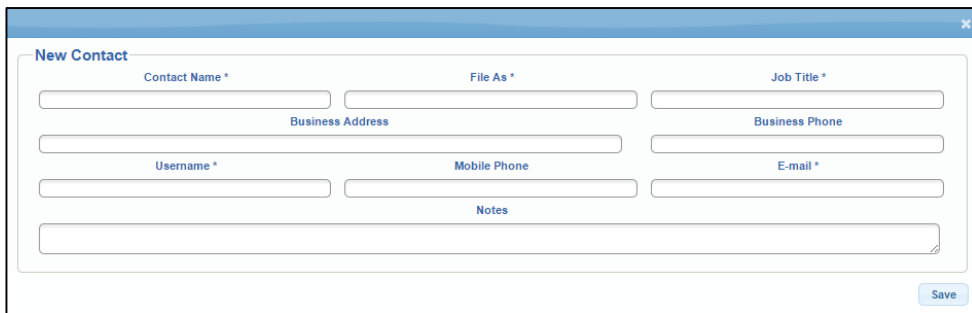


• Create new Users (Contacts):

Click on  Button

- Fill New User (Contact) Details



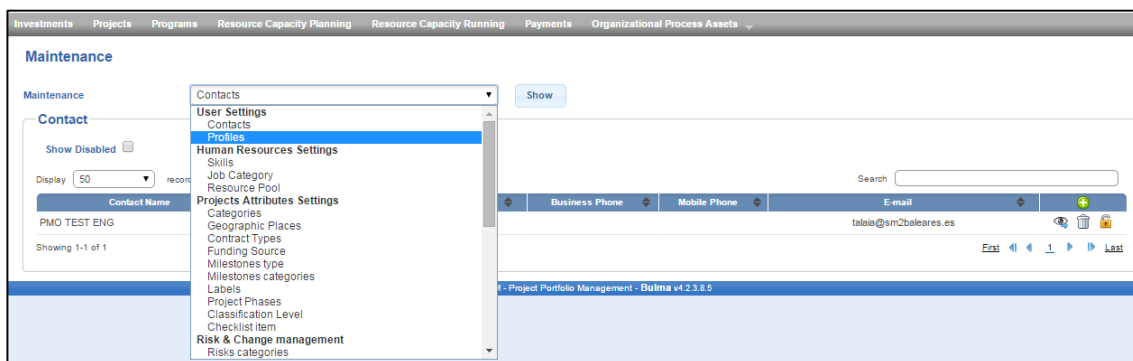
The 'New Contact' form contains the following fields:

- Contact Name *
- File As *
- Job Title *
- Business Address
- Business Phone
- Username *
- Mobile Phone
- E-mail *
- Notes

A 'Save' button is located at the bottom right.

- Repeat those steps to create every new users of **OpenPPM**.

- Add Profile to User

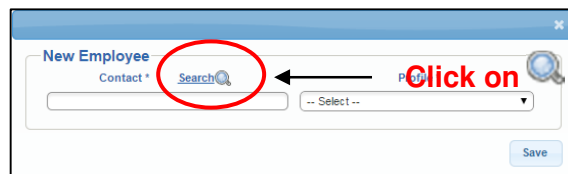


The 'Maintenance' window shows a list of contacts. The 'Contact' tab is selected. The list includes columns for Contact Name, Business Phone, Mobile Phone, and E-mail. A search bar is at the top right. The status bar at the bottom indicates 'Project Portfolio Management - Dulma v4.2.3.8.5'.



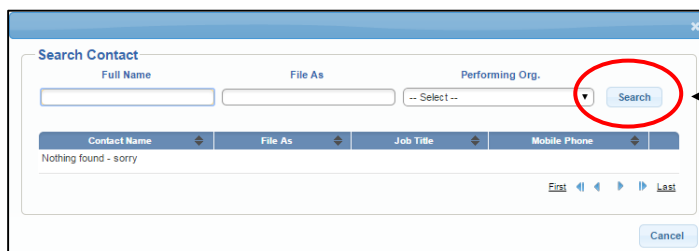
The 'Maintenance' window shows a list of employees. The 'Employee' tab is selected. The list includes columns for Contact, Resource Pool, Performing Org, Profile, Provider, Cost Rate, and Date. A search bar is at the top right. A red circle highlights a green '+' button at the bottom right of the list.

Click on  Button



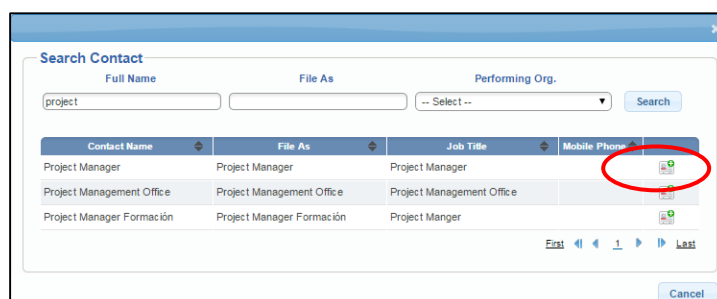
The 'New Employee' form has a 'Contact' dropdown and a 'Search' button (magnifying glass icon). A red circle highlights the 'Search' button. A 'Save' button is at the bottom right.

Click on  Button



The 'Search Contact' form has fields for Full Name, File As, and Performing Org. A red circle highlights the 'Search' button. The results area shows 'Nothing found - sorry'.

Click on Search Button

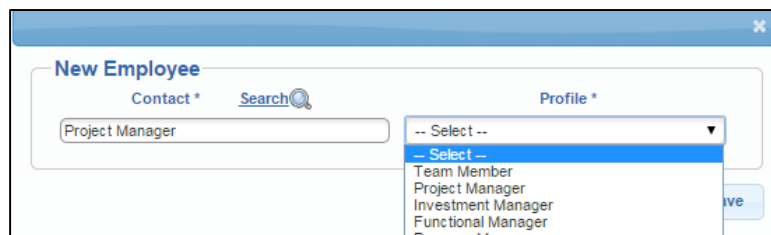


The 'Search Contact' form shows search results for 'project'. The results table has columns: Contact Name, File As, Job Title, and Mobile Phone. A red circle highlights a green '+' button in the Mobile Phone column of the first row.

Contact Name	File As	Job Title	Mobile Phone
Project Manager	Project Manager	Project Manager	
Project Management Office	Project Management Office	Project Management Office	
Project Manager Formación	Project Manager Formación	Project Manger	

Click on  Button of the User you want to add a Profile to

- Assign Profile to user



The 'New Employee' form has two main sections: 'Contact' and 'Profile'. The 'Contact' section has a text input field with 'Project Manager' and a 'Search' button. The 'Profile' section has a dropdown menu with 'Team Member', 'Project Manager', 'Investment Manager', and 'Functional Manager' as options.

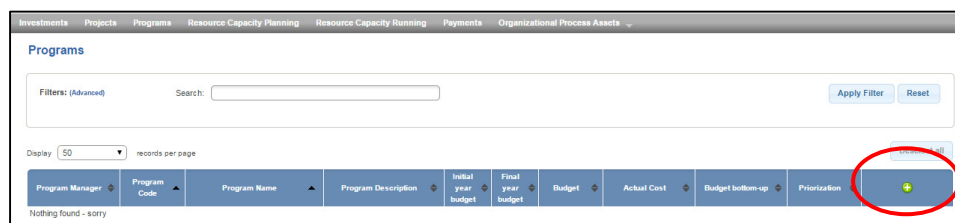


: You can add as many profiles per user as you want

- Create a default Program



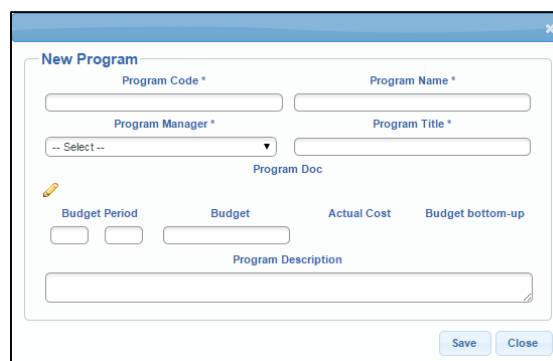
The navigation bar shows several tabs: 'Investments', 'Projects', 'Programs', 'Resource Capacity Planning', 'Resource Capacity Running', 'Payments', and 'Organizational Process Assets'. The 'Programs' tab is circled in red.



The 'Programs' list table has columns: Program Manager, Program Code, Program Name, Program Description, Initial year budget, Final year budget, Budget, Actual Cost, Budget bottom-up, and Priorization. A green '+' button is circled in red at the bottom right of the table.

Click on + Button

- Fill in all mandatory fields to create a Program:



The 'New Program' form has several mandatory fields marked with an asterisk (*): 'Program Code', 'Program Name', 'Program Manager', and 'Program Title'. There are also fields for 'Program Doc', 'Budget Period', 'Budget', 'Actual Cost', 'Budget bottom-up', and 'Program Description'. The 'Save' and 'Close' buttons are at the bottom right.

More Advanced Configuration Settings

Organizational Process Assets Settings

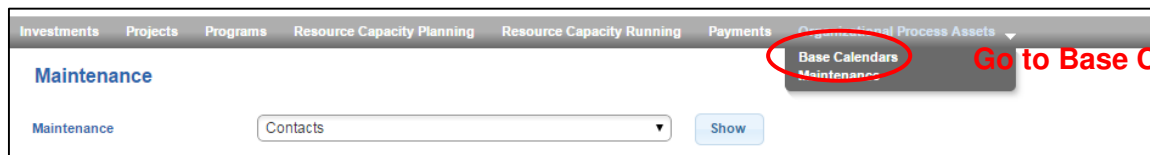
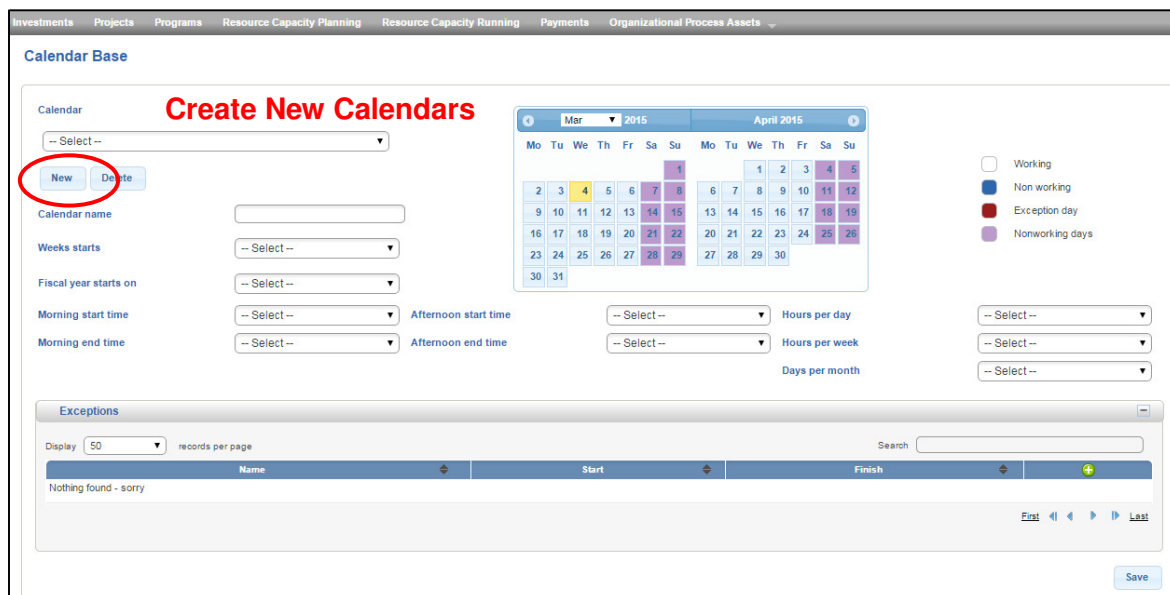
There are more parameters that you can configure from the Organizational Process/Maintenance.

- **Human Resources Settings**

If you want to use the Human Resources functionalities than you need to:

- Define a Resource Calendar
- Define Skills
- Define Job Categories
- Assign a Resource Manager Profile
- Create a Resource Pool
- Assign a Team Member Profile

- **Define Resource Calendar**

Create New Calendars

Calendar: -- Select --

New **Delete**

Calendar name:

Weeks starts: -- Select --

Fiscal year starts on: -- Select --

Morning start time: -- Select -- Afternoon start time: -- Select -- Hours per day: -- Select --

Morning end time: -- Select -- Afternoon end time: -- Select -- Hours per week: -- Select --

Days per month: -- Select --

Exceptions

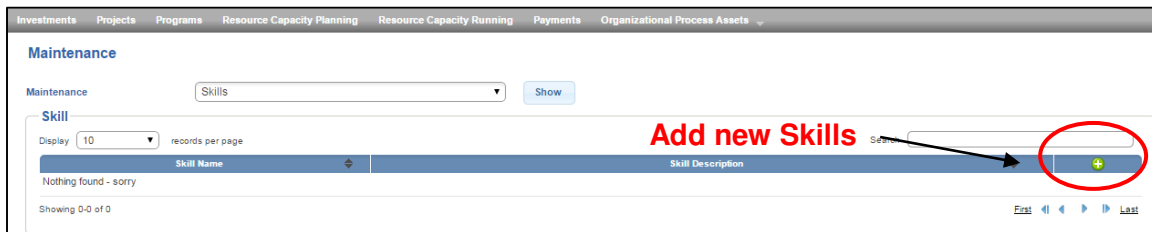
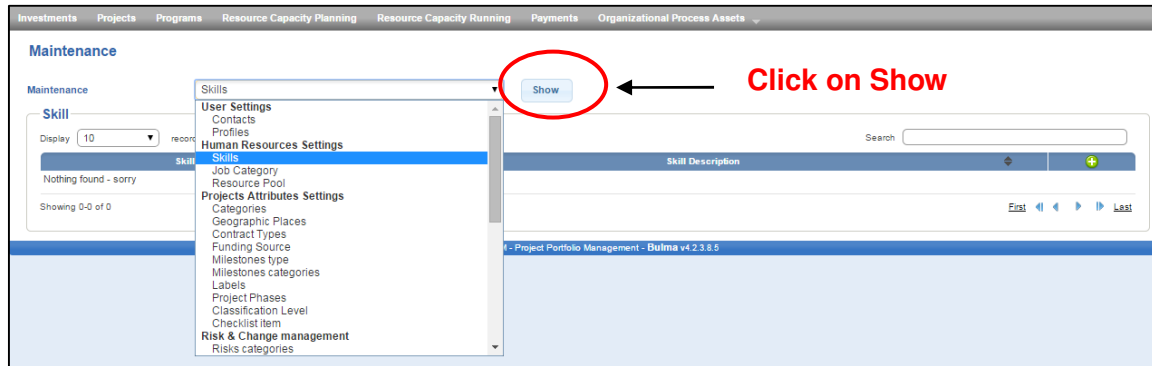
Display: 50 records per page

Name	Start	Finish	
Nothing found - sorry			

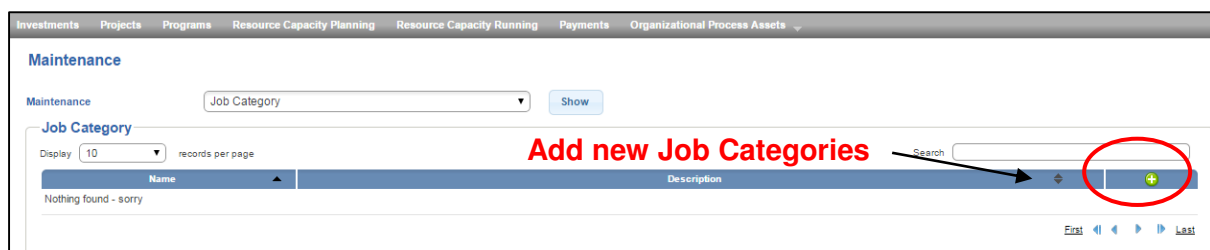
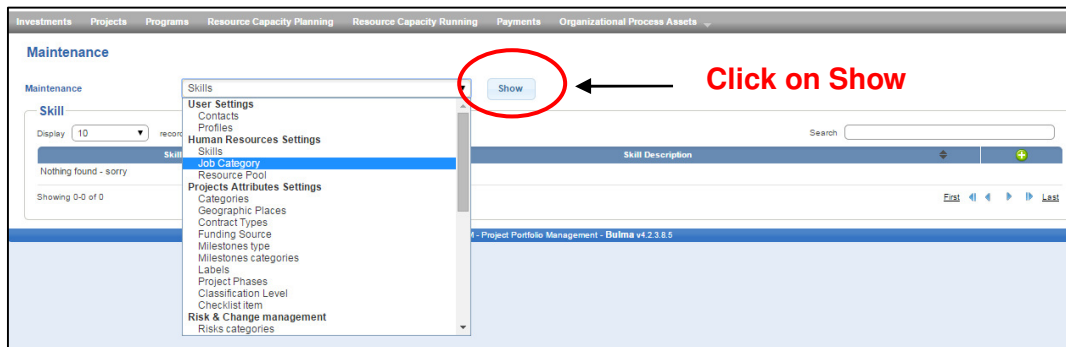
First | Previous | Next | Last

Save

• Define Skills



• Define Job Categories



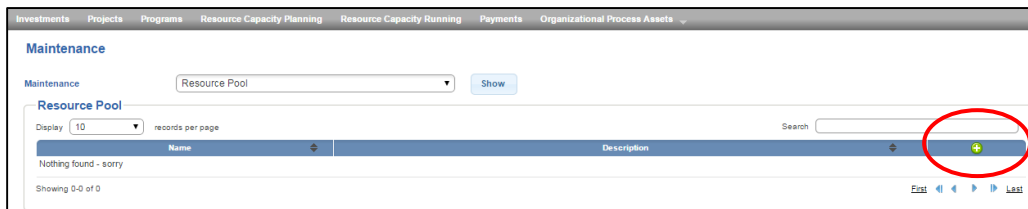
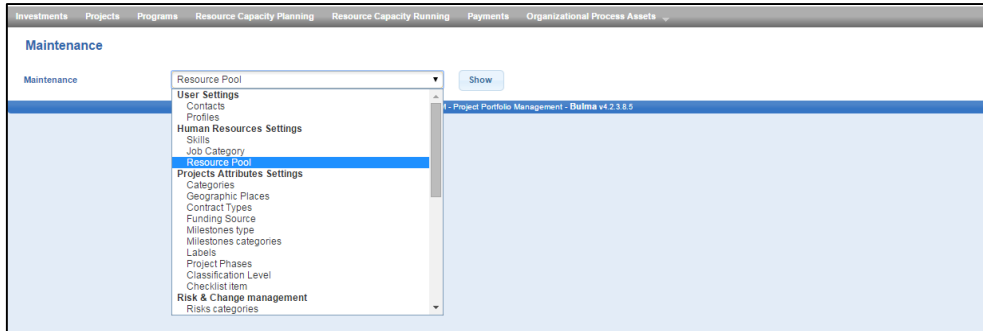
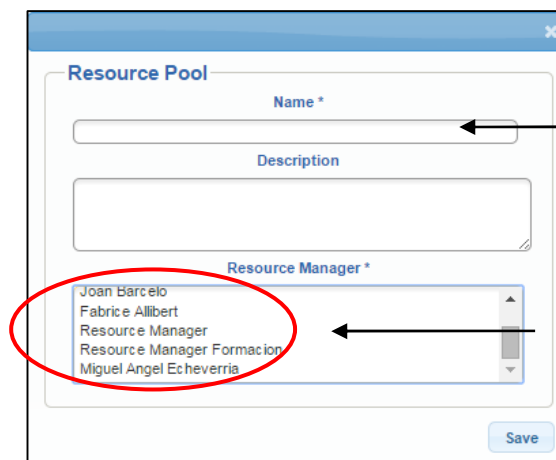
• Assign a Resource Manager Profile

- Assign a Profile Resource Manager to a newly created user or to an existing user.

- **Create a Resource Pool**

Create a Resource Pool and assign the Resource Manager to the Resource Pool as follow:

- Go to **Maintenance / Resource Pool**

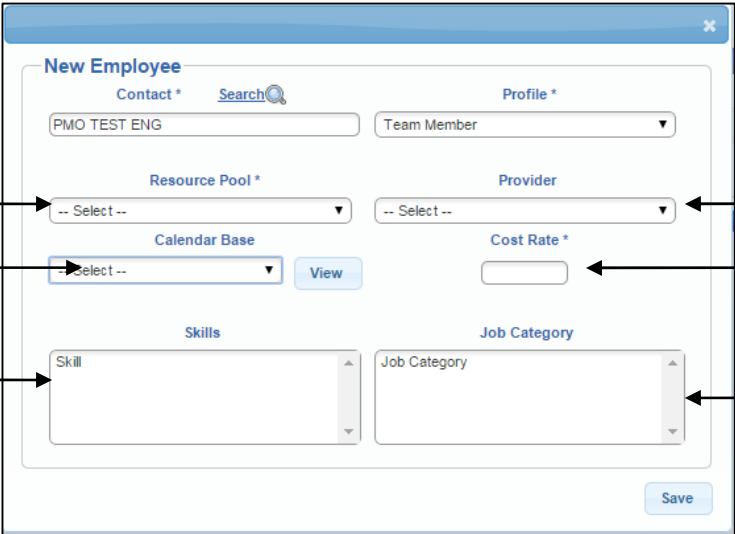
The screenshot shows the 'Resource Pool' form. It contains fields for 'Name *', 'Description', and 'Resource Manager *'. A red circle highlights the 'Resource Manager *' dropdown menu, which lists several names: Joan Barcelo, Fabrice Allibert, Resource Manager, Resource Manager Formacion, and Miguel Angel Echeverria. A red arrow points to this dropdown with the text 'Select a Resource Manager'. Another red arrow points to the 'Name *' field with the text 'Add a Resource Pool'. A 'Save' button is located at the bottom right of the form.

Add a Resource Pool

Select a Resource Manager

- **Assign a Team Member Profile**

Assign a Team Member Profile to a newly created user or to an existing user.



Assign to a Resource Pool → Resource Pool * (dropdown menu)

Select a Calendar for this Resource → Calendar Base (dropdown menu)

Choose one or more skills to associate → Skills (multi-select dropdown)

Assign to a Provider → Provider (dropdown menu)

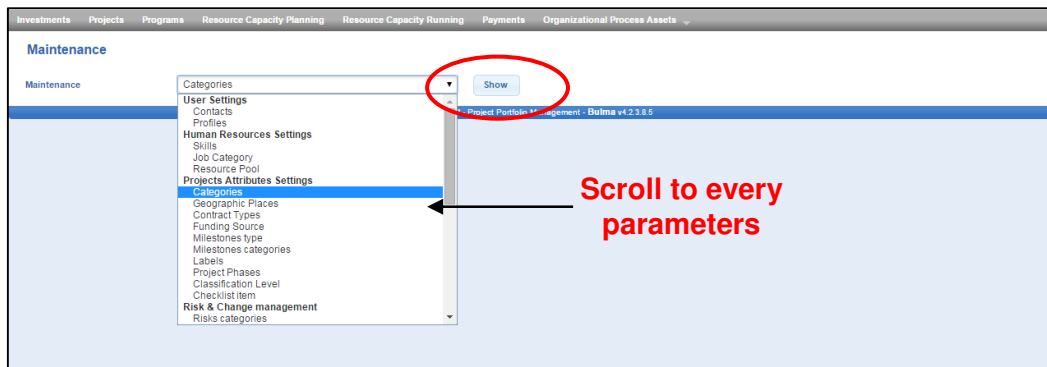
Define default Cost Rate → Cost Rate * (text input)

Choose one or more Job Category to associate → Job Category (multi-select dropdown)

Buttons: Search, View, Save

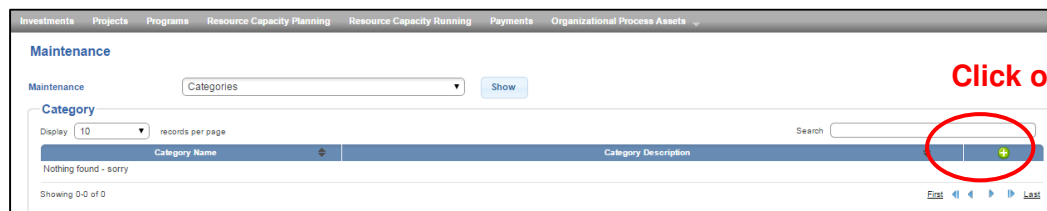
- **Project Attributes Settings**

In the Project Attributes Settings you can define all the parameters that you will be able to associate to your projects or Milestones.
Attributes can be Single (S) or Multiple (M) choice selection.



Categories dropdown menu is highlighted with a red circle and a red arrow pointing to it.

Scroll to every parameters → Points to the list of settings: Geographic Places, Contract Types, Funding Source, Milestones type, Milestones categories, Labels, Project Phases, Classification Level, Checklist item, Risk & Change management, Risks categories.



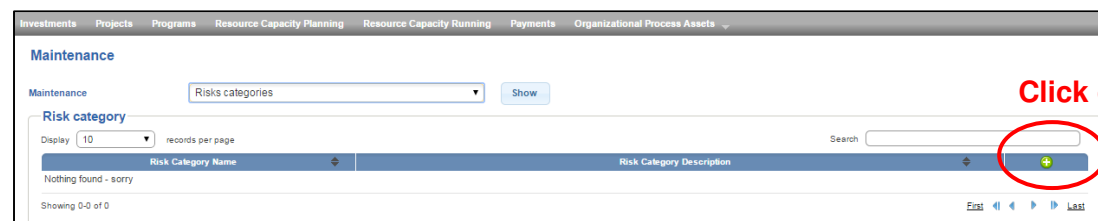
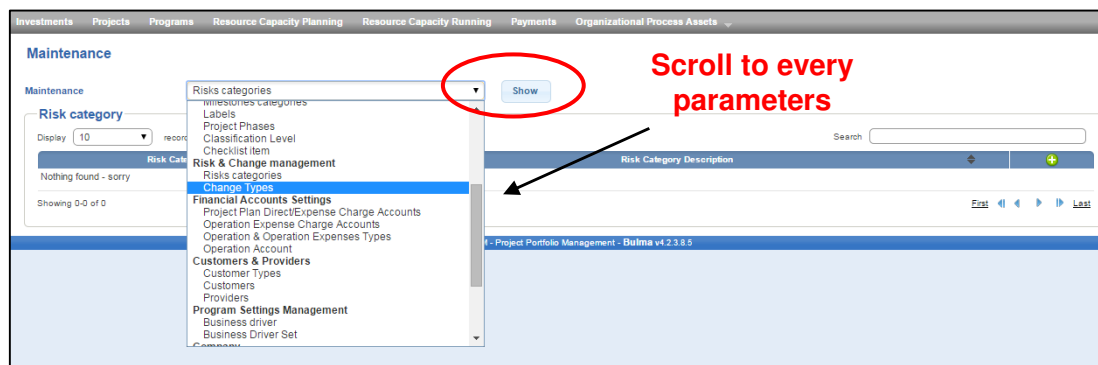
Category dropdown menu is highlighted with a red circle and a red arrow pointing to it.

Click on + Button → Points to the green plus button in the bottom right corner of the table.

- **Define Categories (S)**
- **Geographic Places (S)**
- **Contract Types (S)**
- **Funding Source (M)**

- Milestones Type (S)
- Milestones Categories (S)
- Labels (M)
- Project Phases (S)
- Classification Level (S)
- Check List Items (M)
- **Risk & Change Management Settings**

In the Risk & Change Management Settings you can define parameters that you will be able to associate to identified Risk and to the Change Management Requests



- Risk Categories (S)
- Change Management Types (S)

- **Financial Account Settings**





















- **Project Plan Direct/Expense Charge Accounts**

Click on  Button to add Direct or Expense Charge Accounts

Maintenance Project Plan Direct/Expense Charge Accounts Show

Project account

Display 10 records per page

Project account Description	Cost type	
Personal Expenses	Direct	 
Outsourcing	Expense	 
Infrastructure	Expense	 
Licensing	Expense	 
Diets	Expense	 
Trips	Expense	 
Guards	Direct	 
Travel Allowances	Direct	 
Trips	Direct	 
Risk	Expense	 

Showing 1-10 of 13

First 1 2 Last

The Project Charge Accounts are used in the following section of **OpenPPM**:







- **Project / Plan / Cost Detail Plan / Expenses:**

Allowing the Project Manager to define authorized expenses associated to a project

Cost Detail Plan

Expenses



Display 10 records per page

Charge account	Description	Value	
Accommodations, hotels, travels	Expenses	3,000.00	 
Outsourcing	PPM consultant	7,000.00	 
Infrastructure		2,000.00	 

First 1 Last

Direct Costs



Display 10 records per page

Charge account	Description	Value	
Wages		35,000.00	 

First 1 Last

Reserves

Display 10 records per page

Value	Description	
1,000.00	Contingency reserve	 

First 1 Last

Finance Chart

Expenses Modal:

Expenses

Charge account * Project Charge Account: Expense Value *

Description

Save Close







- **Project / Plan / Cost Detail Plan / Direct Costs**

Allowing the Project Manager to define direct costs associated to a project

Cost Detail Plan

Expenses



Display 10 records per page

Charge account	Description	Value	
Accommodations, hotels, travels	Expenses	3,000.00	 
Outsourcing	PPM consultant	7,000.00	 
Infrastructure		2,000.00	 

First 1 Last

Direct Costs



Display 10 records per page

Charge account	Description	Value	
Wages		35,000.00	 

First 1 Last

Reserves

Display 10 records per page

Value	Description	
1,000.00	Contingency reserve	 

First 1 Last

Finance Chart

Direct Costs Modal:

Direct Costs

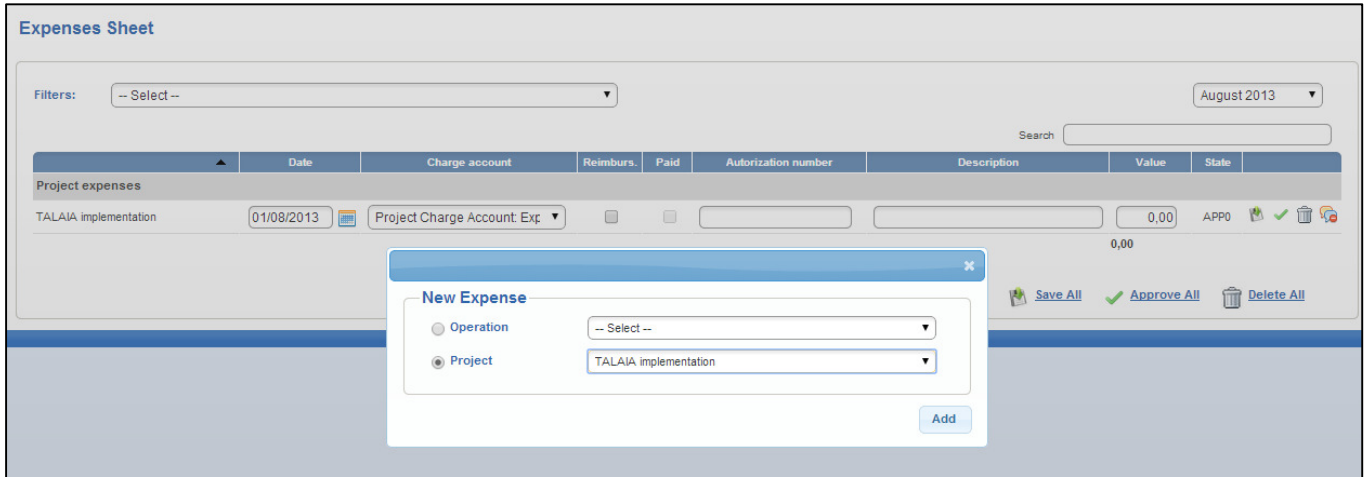
Charge account * Project Charge Account: Direct Value *

Description

Save Close

- Expenses Sheet / Project

Allowing the Resources (Team Member) to declare expenses to predefined Expenses accounts to a project



Expenses Sheet

Filters: -- Select -- August 2013

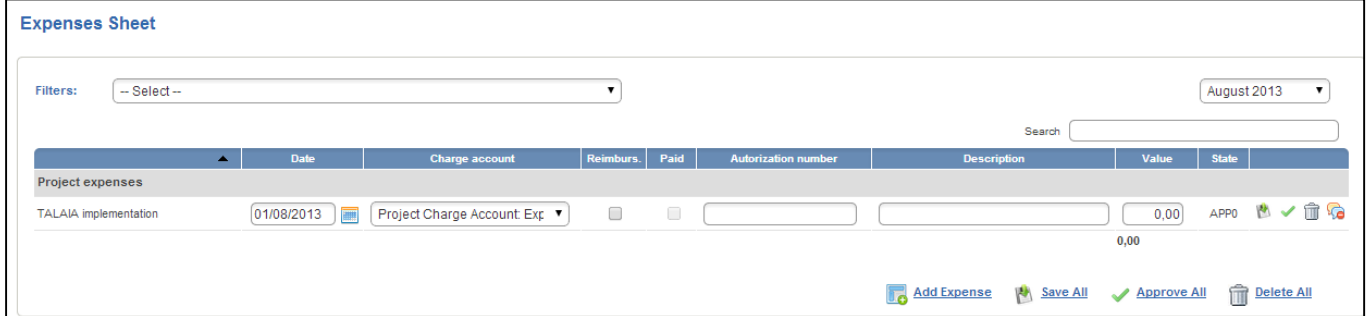
Date	Charge account	Reimburs.	Paid	Autorization number	Description	Value	State
01/08/2013	Project Charge Account: Exp				TALAIA implementation	0,00	APP0

New Expense

☐ Operation -- Select --
☒ Project TALAIA implementation

Add

Save All Approve All Delete All



Expenses Sheet

Filters: -- Select -- August 2013

Date	Charge account	Reimburs.	Paid	Autorization number	Description	Value	State
01/08/2013	Project Charge Account: Exp				TALAIA implementation	0,00	APP0

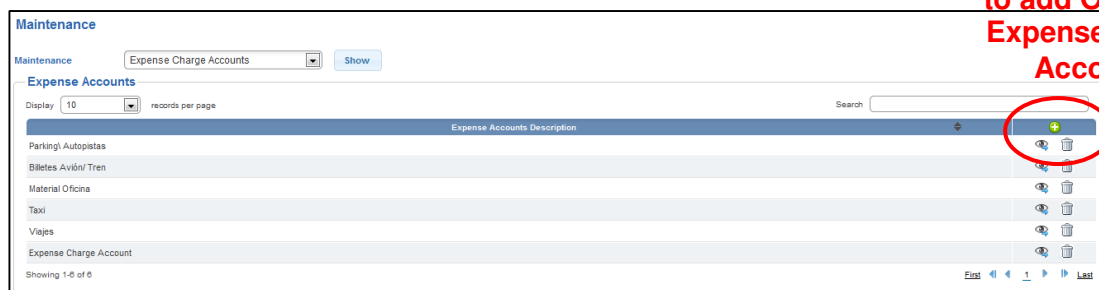
Add Expense Save All Approve All Delete All



Only Project Expenses Accounts defined in the Project/Plan/Cost Detail Plan/Expenses will be available in the Dropdown field

- **Operation Expense Charge Accounts**

Click on + Button to add Operation Expense Charge Accounts



Maintenance

Maintenance Expense Charge Accounts Show

Display 10 records per page

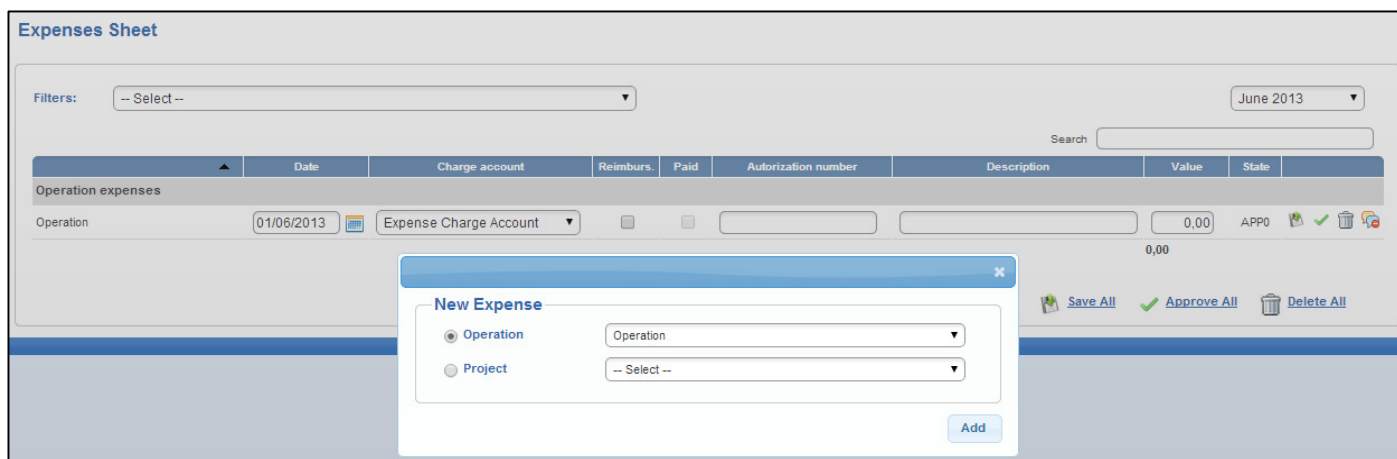
Expense Accounts Description	
Parking/ Autopistas	+ -
Billetes Avión/ Tren	+ -
Material Oficina	+ -
Taxi	+ -
Viajes	+ -
Expense Charge Account	+ -

Showing 1-6 of 6

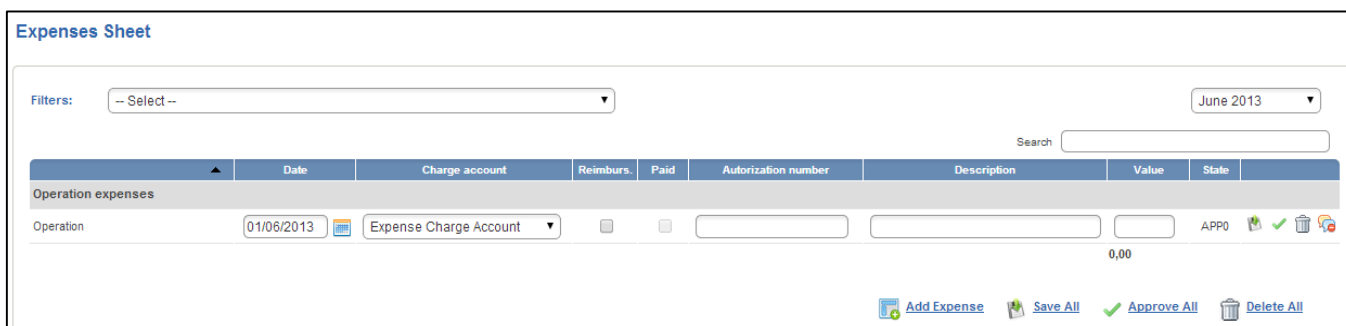
The Expense Charge Accounts are used in the following section of **OpenPPM**:

- Expenses Sheet / Operation

Allowing the Resources (Team Member) to declare expenses to non project activities (Operation Expenses)



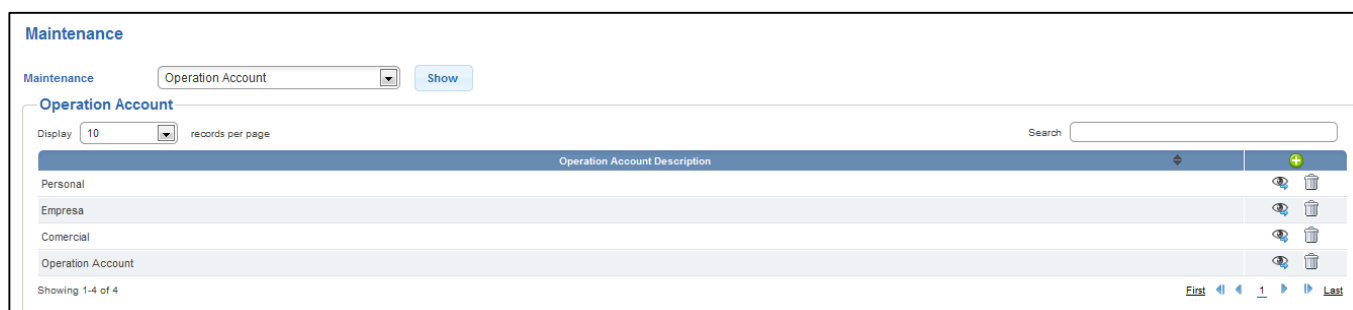
The screenshot shows the 'Expenses Sheet' interface. At the top, there's a 'Filters' dropdown set to '-- Select --' and a date selector for 'June 2013'. Below this is a table with columns: Date, Charge account, Reimburs., Paid, Authorization number, Description, Value, and State. The table shows one entry for 'Operation' on '01/06/2013' with a value of '0,00'. A 'New Expense' modal dialog is open in the center, allowing selection between 'Operation' and 'Project' with corresponding dropdown menus. At the bottom right of the modal is an 'Add' button. Below the table, there are buttons for 'Save All', 'Approve All', and 'Delete All'.



This screenshot shows the 'Expenses Sheet' interface without the 'New Expense' modal. It displays the same table as the previous screenshot, with the 'Operation' entry. At the bottom of the interface, there are buttons for 'Add Expense', 'Save All', 'Approve All', and 'Delete All'.

- **Operation Account Types**

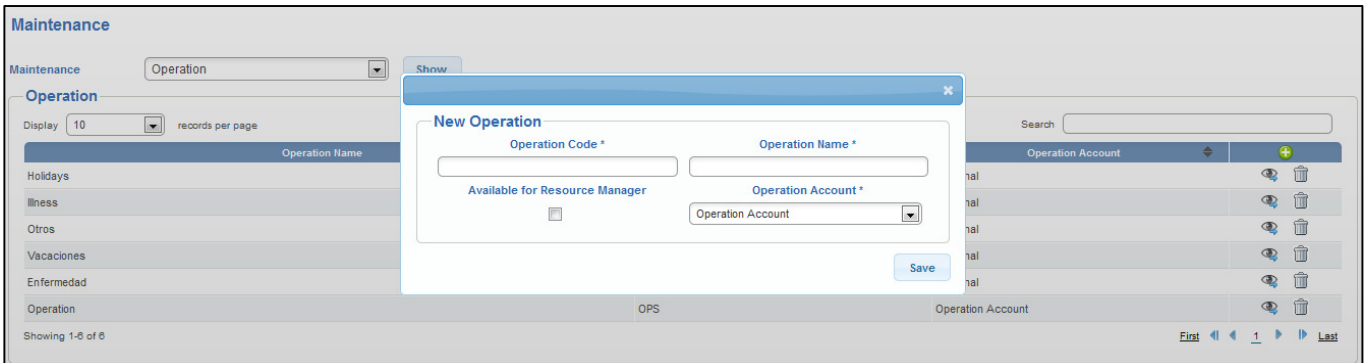
In order to create Operation, it is necessary to establish first the Operation accounts



The screenshot shows the 'Maintenance' interface. At the top, there's a 'Maintenance' dropdown set to 'Operation Account' and a 'Show' button. Below this is a section titled 'Operation Account' with a 'Display' dropdown set to '10' and a 'records per page' label. A table lists four types of Operation Accounts: Personal, Empresa, Comercial, and Operation Account. Each row has a search icon and a delete icon. At the bottom right, there are navigation buttons: 'First', '1', and 'Last'.

- **Operation Accounts**

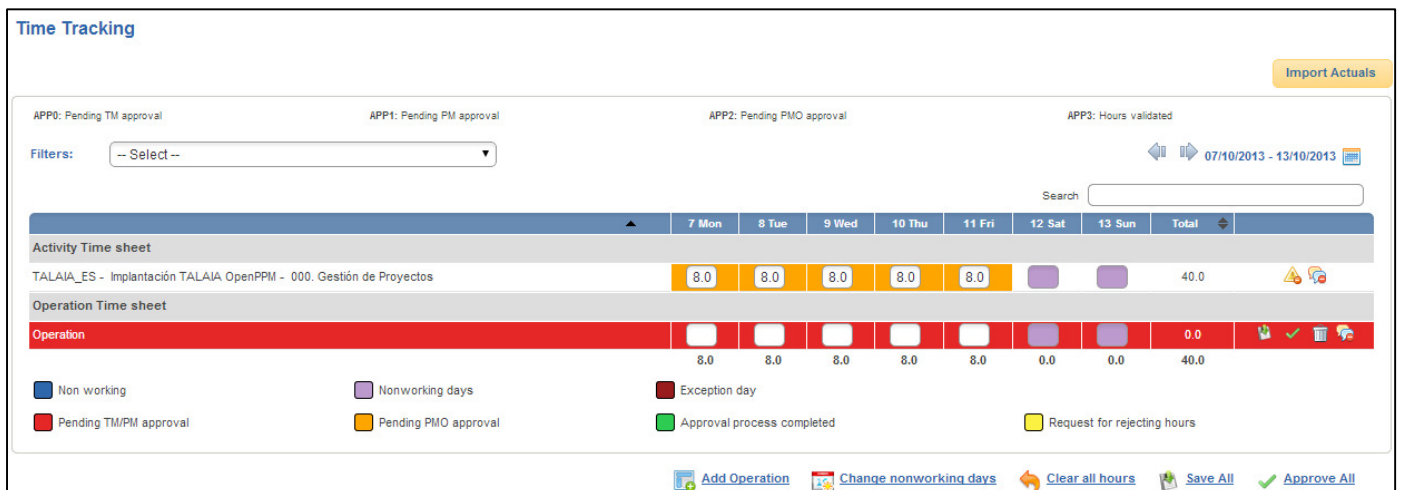
The Operations Account Types are linked to the Operation Accounts:



The Operations are used in the following section of **OpenPPM**:

- Time Tracking:


Allowing the Resources (Team Member) to declare hours to non project activities (Operation Activities)



- **Customers & Providers Settings**

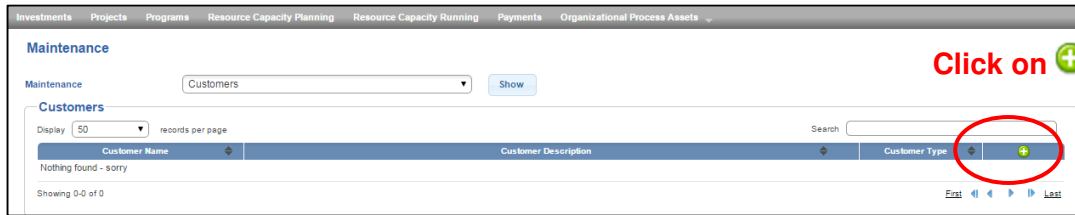
- **Customer Types**

Allow the possibility to associate customers to a customer type:



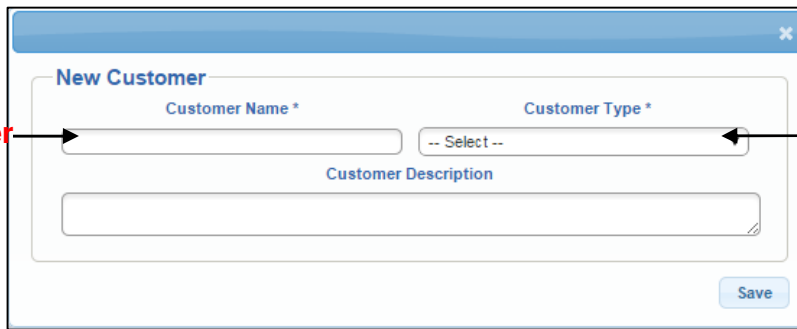
- Customers

The list of Customers is common to all the Performing Organization



Click on + Button

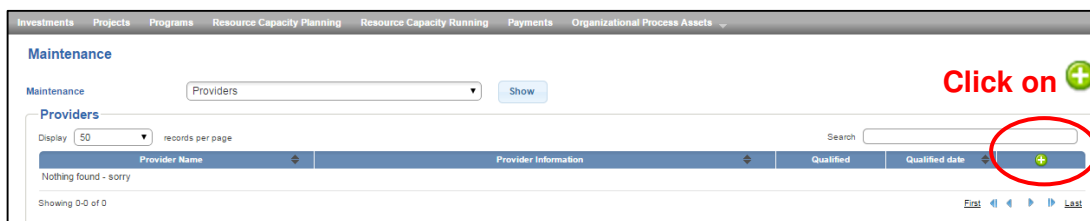
Add a New Customer



Associate Customer to a Customer Type available in the drop down list

- Providers

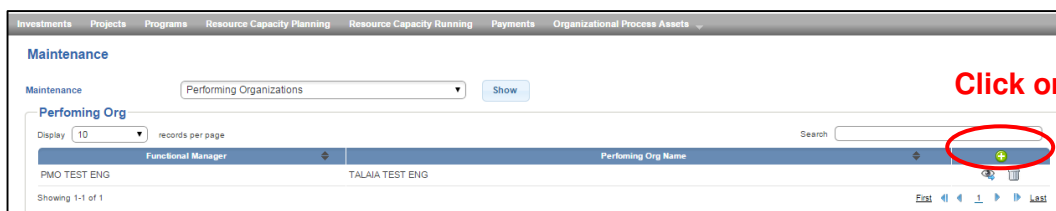
The list of Providers is common to all the Performing Organization



Click on + Button

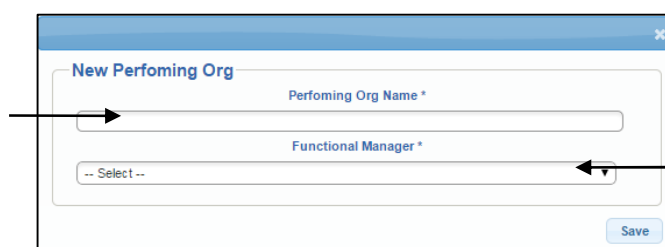
- Company Settings

- Performing Organizations



Click on + Button

Add here new PO name

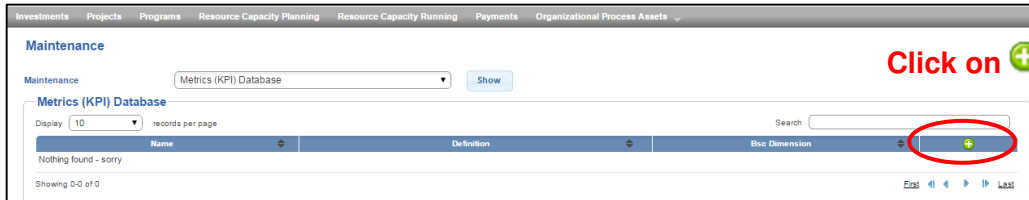
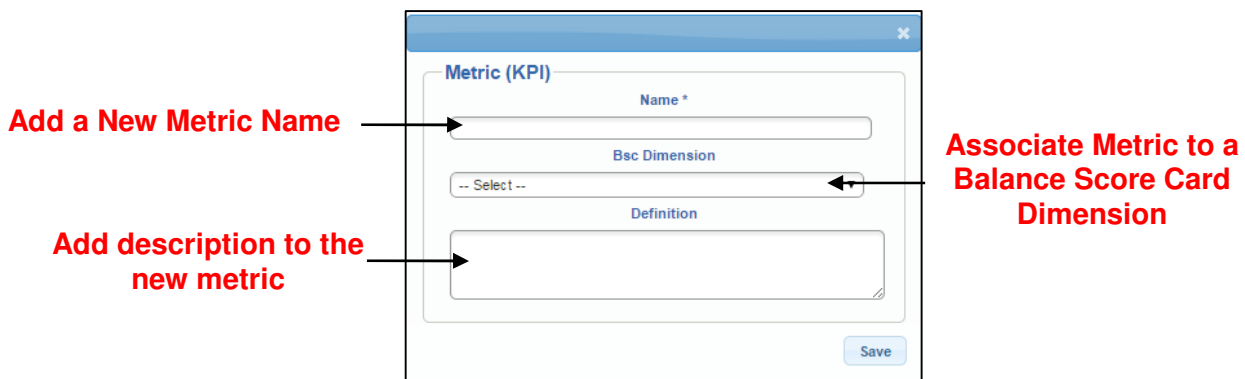


Choose Functional Manager from List

- **Templates& Indicators Settings**

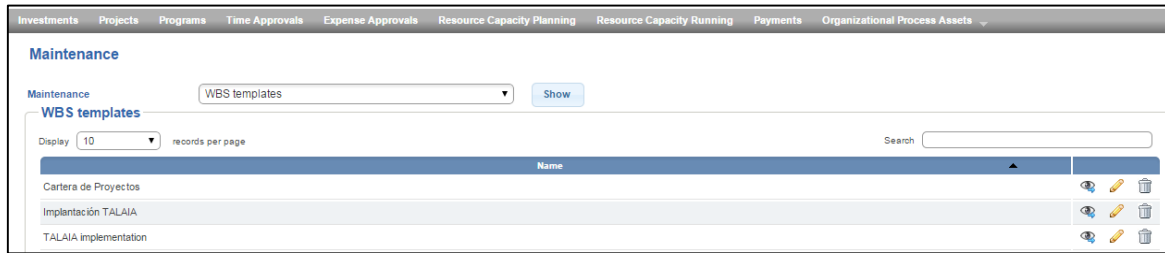
- **Metric KPI Database**

Allow to define KPIs Templates that can be attached to Projects when planning your Project KPIs Indicators:

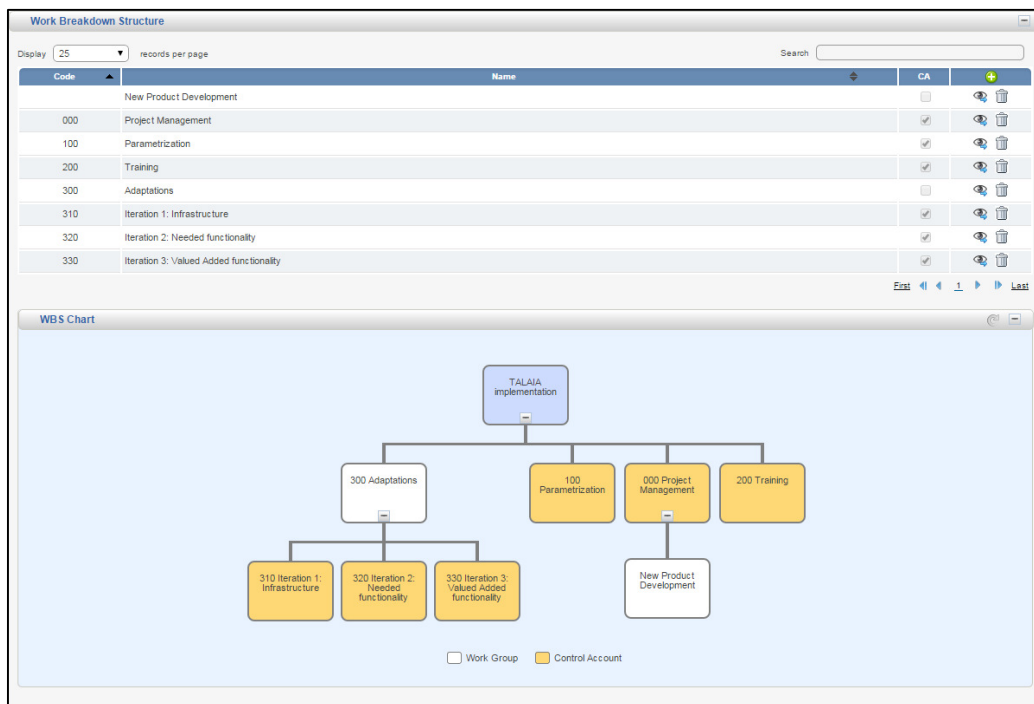
• WBS Templates

Once a project is initiated, you will be able to view, edit or delete Template WBS:



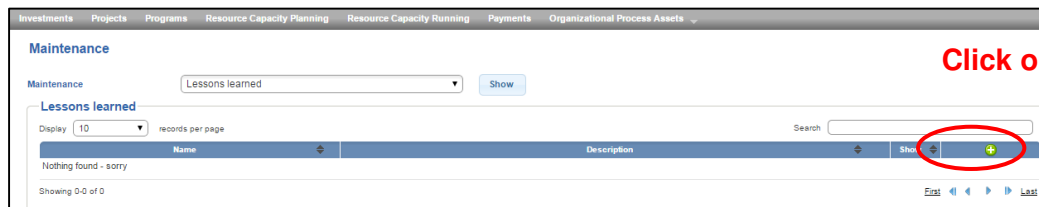
The screenshot shows the 'Maintenance' section with a dropdown menu set to 'WBS templates'. Below the dropdown is a 'Show' button. The main area displays a table of WBS templates with columns for Name, CA, and a set of icons (eye, pencil, trash). The table lists three templates: 'Carters de Proyectos', 'Implantación TALAIA', and 'TALAIA implementation'.

Name	CA	Icons
Carters de Proyectos		Eye, Pencil, Trash
Implantación TALAIA		Eye, Pencil, Trash
TALAIA implementation		Eye, Pencil, Trash



• Lessons Learned

In the Closing Tab, you are able to associate Lessons Learned to each individual projects choosing from the list defined:


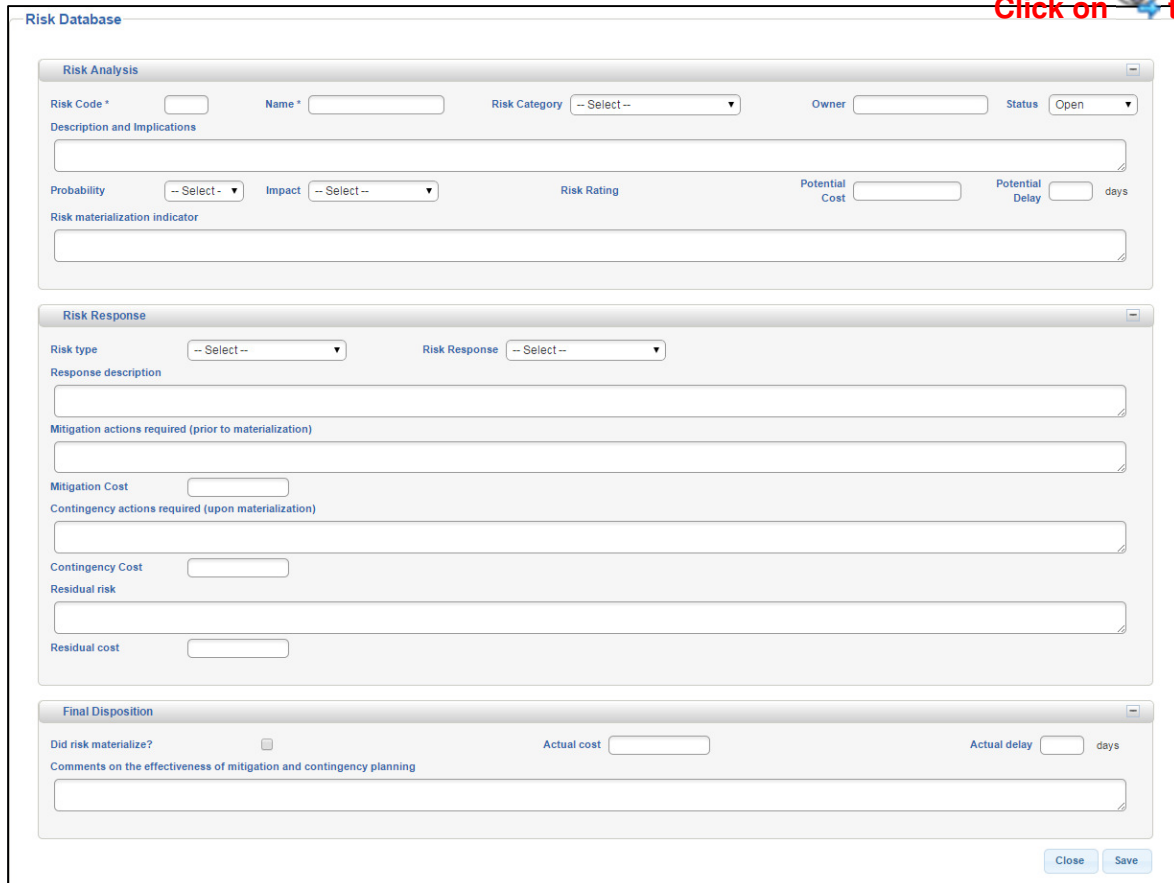


The screenshot shows the 'Maintenance' section with a dropdown menu set to 'Lessons learned'. Below the dropdown is a 'Show' button. The main area displays a table of lessons learned with columns for Name, Description, and a set of icons (eye, pencil, trash). The table is currently empty, showing 'Nothing found - sorry'. A red circle highlights the '+ Button' in the table header, with a red arrow pointing to it and the text 'Click on + Button'.

Name	Description	Icons
Nothing found - sorry		

- **Risk Database**

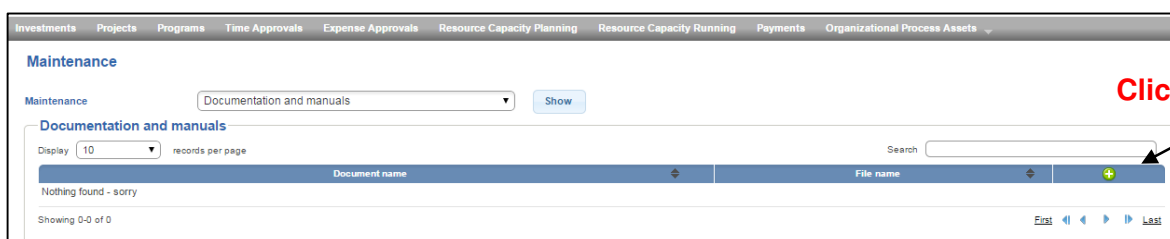
You can define Risks and Project Managers can import them to their projects. Therefore, in this section you are able to create new risks or edit exported risk defined in projects:

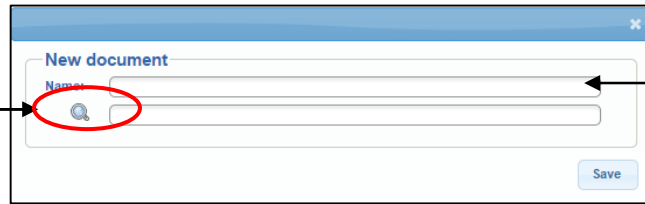
- **Other Settings**

- **Documentation & Manuals**

You can add documents in **OpenPPM**, available for users to download



Browse to Upload



A dialog box titled "New document" with a close button (X) in the top right corner. It contains a text input field with a "Name:" label. A red circle highlights a magnifying glass icon inside the input field. Below the input field is a "Save" button.

Type Document Name

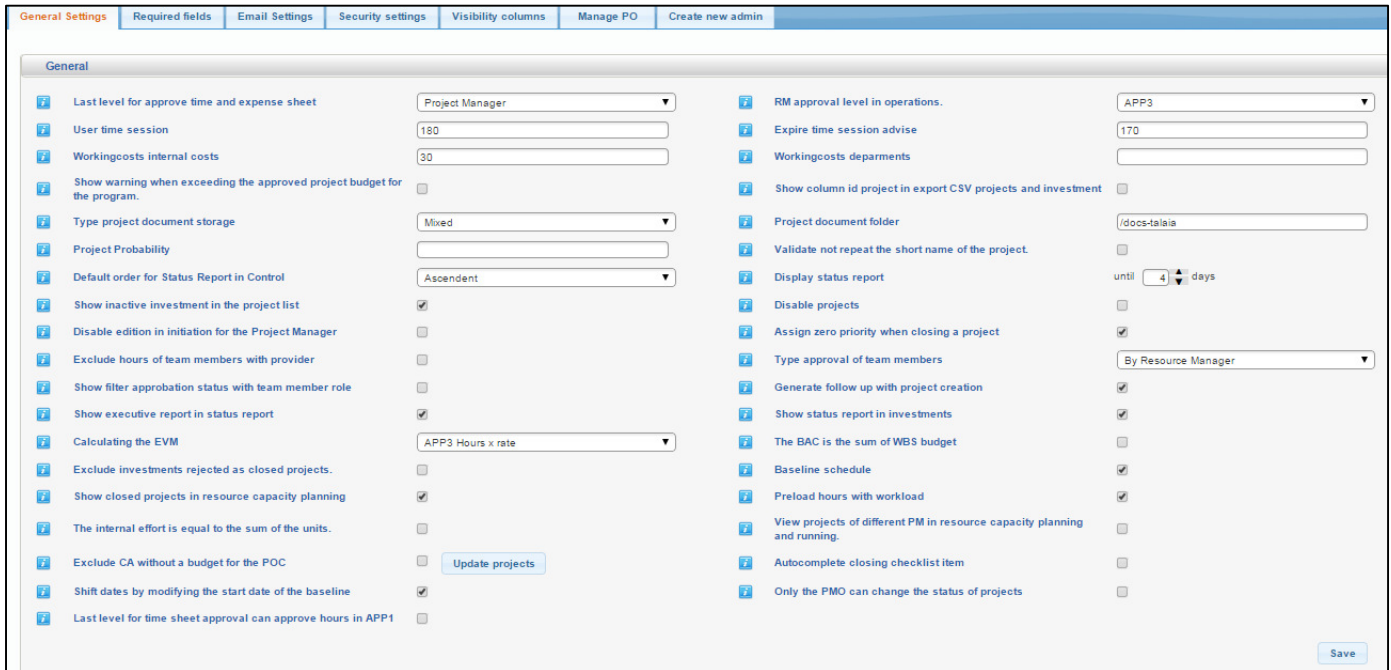


A blue footer bar containing the text "Docs & Manuals" (circled in red), "Profile: PMO - TALIA TEST ENG | Switch", a notification bell icon with the number "16", and "User: PMO TEST ENG | Log Off".

Administration Panel Settings

In the administration Panel, using the admin profile, you are able to manage different parameters settings that apply for all the Performing Organization of **OpenPPM**.

General Settings



- **Last Level of Approval for time and expense sheet**

Allow to define the Time and Expense sheet Approval Process by defining the last level of approval:

- 3 Steps Process: TM → PM → PMO
- 3 Steps Process: TM → PM → FM
- 2 Steps Process: TM → PM

- **RM Approval level for Operations Accounts**

Allow to define the Validation Level of the Resource Manager when reporting Operation on the Team Member Resources Calendar.

- APP0: Follow the defined Time and Expense Sheet approval process
- APP3: Directly Validated by the Resource Manager without further validation process

- **User Time Session**

Set the number of minutes defining OpenPPM default user time session

- **Expire Time Session Warning**

Set the number of minutes defining OpenPPM user time session message warning display

- **Default “Unit Rate” Direct Cost**

Allow to define the default “unit rate”, when adding a Direct Cost in the Project Charter in the Initiation Tab

- **Default “Department” Direct Cost**

Allow to define the default “department”, when adding a Direct Cost in the Project Charter in the Initiation Tab. This field can be a multiple choice option. Separate by “,” when entering more than one choice.

- **Alarm program budget**

When checked, display a warning message when total approved projects budgets exceed program budget

- **Project ID in CSV Export**

When checked, in investment and project panels, the unique project ID will appear in the CSV export

- **Document storage type**

Allow to define ways to associate documentation to OpenPPM:

- Link: Only allow to add links to document
- File System: Only allow to upload document
- Mixed: allow both ways

- **Document Folder Path**

When File System or Mixed document storage types are defined, allow to define the folder path where uploaded document will be stored.

- **Project probability**

Allow to define investment/projects probability levels from 0 to 99. Separate by “,” when entering more than one choice.

- **Duplication project short name**

When checked, **OpenPPM** will not allow duplicated projects short names

- **Sort Status Report**

In the control tab, allow to define how to sort status report.

- **Status Report Display**

In the control tab, allow to set a maximum number of days before planned date, a status report is visible and can be filled

- **On Hold Investment Display**

When checked, OpenPPM will show investments that are in status On Hold

- **Disable Option**

When checked, and when deleting a project OpenPPM will disable it and keep the record in the database instead of erasing it.

- **Initiation Tab Edition Option for Project Manager**

When checked, the Project Manager will not be able to edit Initiation Tab data once investment has been approved.

- **Change priority closing project**

If checked, project priority will be automatically set to 0 once project status change to closed

- **Team Members associated with Providers**

If checked, for Team Members that are initially associated with a Provider, OpenPPM will not add their declared hours in the Actual Cost (Control Tab)

- **TM assignation approval process**

OpenPPM allows 3 different approval processes for Team Member assignation validation:

- By Resource Manager: All assignation requests go through the Resource Manager approval process
- Automatic: All assignation requests by the PMs are automatically approved without going through the RM validation
- Automatic only when TM = PM: All assignation requests go through the Resource Manager approval process, except when the PM assigns himself to an activity.

- **TM Assignation Status**

If checked, Team Member will be able to view Project in Capacity Planning, using Assignation Status filter (Assigned, Pre-Assigned, Released, Proposed, Turned Down)

- **Status Report Follow up Date**

If checked, Follow up date of Status Report will be created automatically as per Plan Value follow up date created in Planning Tab.

- **Executive Report**

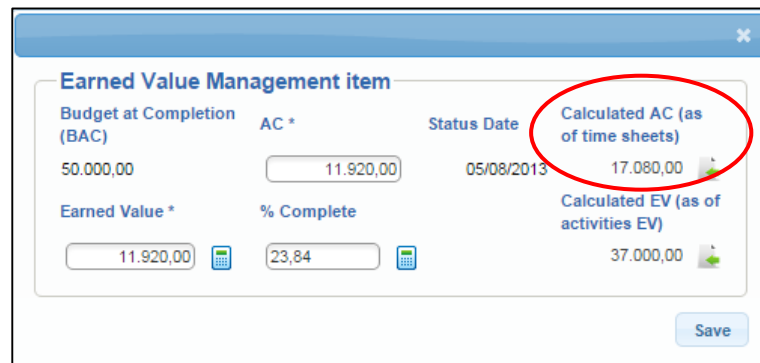
If checked, Executive Reports will appear with Status Reports in the Control Tab

- **Status Report**

If checked, Status Reports will appear in the investment Tab

- **AC Calculation in EVM**

OpenPPM allows 2 ways to show AC for EVM Calculation in the Control Cost / Earned Value Management



Earned Value Management item			
Budget at Completion (BAC)	AC *	Status Date	Calculated AC (as of time sheets)
50.000,00	11.920,00	05/08/2013	17.080,00
Earned Value *	% Complete	Calculated EV (as of activities EV)	
11.920,00	23,84	37.000,00	

Save

- Hours in APP3 x Sell Rate: The AC will be the validated hours of each Team Member multiplied by their respective sell rates
- Internal Resources + Providers: The AC will be the validated hours of each Team Member multiplied by their respective sell rates + EV of subcontracted activities

- **BAC = WBS Budget**

By default, BAC used for EVM calculation is the BAC field from the Initiation Tab. Instead, if checked, BAC will be the sum of WBS budgets from the Plan Tab.

- **Exclude Rejected Projects**

If checked, rejected projects (therefore with status closed) will not appear when filtering by closed status.

- **Baseline**

If checked, projects baseline will be the ones indicated in the Initiation Tab. Otherwise OpenPPM will define the baseline as the minor and major dates as registered in the Scheduling of the Plan Tab.

- **Closed Projects in Resource Capacity Planning**

If checked, OpenPPM will show closed projects in the resource capacity planning view

- **Hours Preview**

If checked, Team members will see the daily planned hours per activity as per the percentage of workload defined and assigned by the Project Manager

- **Internal Effort**

If checked, OpenPPM will automatically sum up the internal effort which is the result of the unit rates of all the direct costs

- **Multi PM view of Resource Capacity Planning & Running**

If checked, Project Managers will have visibility of the Resource Capacity Planning & Running of projects of other Project Managers from the same PO.

- **CA without Budget**

If checked, Control Account Activities without budget are excluded from the Percentage of Completion calculation

- **Checklist Item auto-complete**

If checked, Date and Responsible fields will be auto completed. Date will be today's date and responsible will the user's name.

- **Projects Baseline Modification**

If checked, when projects baseline get modified in the initiation Tab and a planning is already done, OpenPPM will update and shift activities baseline, milestones dates and Follow up dates according to the modification.

- **Projects Status Change**

If checked, only PMO profiles will be able to change project status.

Customization

Customization

In Resource Capacity Planning to marking the background color of the cell depending on the % Assignment, using a scale of three levels:

Level 1	30 %	Background color		Text color	
Level 2	60 %	Background color		Text color	
Level 3	100 %	Background color		Text color	
Out of range		Background color		Text color	

Save

In this section, you can define color scheme that will be shown in the Resource Capacity Planning panel.

Required Fields

General Settings	Required fields	Email Settings	Security settings	Visibility columns	Manage PO	Create new admin
<input checked="" type="checkbox"/> Category	<input type="checkbox"/>	<input checked="" type="checkbox"/> Functional Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/> Sponsor	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Budget Year	<input type="checkbox"/>	<input checked="" type="checkbox"/> Priority	<input type="checkbox"/>	<input checked="" type="checkbox"/> Project Phase	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Classification Level	<input type="checkbox"/>					

[Save](#)

By adding a check in the box, you can define more minimum field, apart from the one defined by default (mark with a *) by **OpenPPM**, that are mandatory to create a new investment/project.

Email Settings

Email configuration	
<input checked="" type="checkbox"/> SMTP Host	<input type="text" value="smtp.gmail.com"/>
<input checked="" type="checkbox"/> SMTP User	<input type="text" value="openppm@gmail.com"/>
<input checked="" type="checkbox"/> SMTP No Reply	<input type="text" value="no-reply@openppm.com"/>
<input checked="" type="checkbox"/> SMTP Port	<input type="text" value="587"/>
<input checked="" type="checkbox"/> SMTP Pass	<input type="password" value="*****"/>
<input checked="" type="checkbox"/> SMTP TLS	<input checked="" type="checkbox"/>

Before that **OpenPPM** can generate email, notification, you need to link it to a mail server by completing the fields of this panel

Notifications	
<input checked="" type="checkbox"/> Mail Notification	<input type="checkbox"/>
<input checked="" type="checkbox"/> Language notifications	<input type="text" value="English"/>
<input checked="" type="checkbox"/> Notification of projects delay	<input type="checkbox"/>
<input checked="" type="checkbox"/> Notification of projects planned dates change	<input type="checkbox"/>
<input checked="" type="checkbox"/> Notification of assignment team member	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification of projects status change	<input type="checkbox"/>
<input checked="" type="checkbox"/> Notification of change of phases in projects	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification rejected hours	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification of assignment operation	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification of project assignment	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Expiration notification investments in progress	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification of projects control dates change	<input type="checkbox"/>
<input checked="" type="checkbox"/> Team member update notification	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification removal milestone plan	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification request rejected hours	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification of approving operations	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification of change Geographic Area in projects	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Notification of project approval	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Timesheet change status notification	<input type="checkbox"/>

in: days

OpenPPM allows enable/disable specific notifications. The Mail Notification check, activate or deactivate all notifications as a whole then each notifications can be activated/deactivated individually.

Security Settings

General Settings	Required fields	Email Settings	Security settings	Visibility columns	Manage PO	Create new admin
Parameters configuration of security						
<input checked="" type="checkbox"/> Authentication type	<input type="text" value="BBDD"/> <input type="text" value="LDAP"/> <input type="text" value="Mixed"/> <input type="text" value="External"/> <input type="text" value="External with LDAP search"/>					

[Save](#)

OpenPPM allows different authentication modes:

- **BBDD:** Database authentication only
- **LDAP:** LDAP authentication only
- **Mixed:** LDAP and Database authentication
- **External:** authentication through external system (ex: CAS)
- **External with LDAP Search:** authentication through external system and new user creation through LDAP

Visibility Columns

Columns for Investment List		
<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Accounting Code
<input checked="" type="checkbox"/> Short Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Budget
<input checked="" type="checkbox"/> Probability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Baseline Start
<input checked="" type="checkbox"/> Start date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Finish date
<input checked="" type="checkbox"/> External cost	<input checked="" type="checkbox"/>	<input type="checkbox"/> Budget at Completion (BAC)
<input type="checkbox"/> Planned Start Date	<input type="checkbox"/>	<input type="checkbox"/> Planned Finish Date
		<input checked="" type="checkbox"/> Name
		<input checked="" type="checkbox"/> Priority
		<input checked="" type="checkbox"/> Baseline Finish
		<input type="checkbox"/> Internal effort
		<input type="checkbox"/> Program

You can define which columns are visible in the Investment module list view by adding a check.

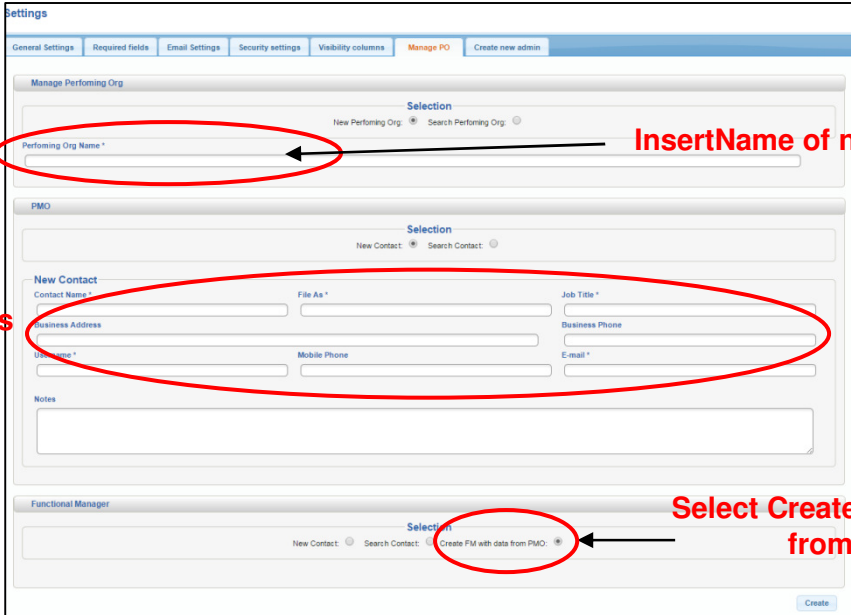
Columns for Project List		
<input checked="" type="checkbox"/> RAG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Status
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Short Name
<input checked="" type="checkbox"/> Priority	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> % Complete
<input checked="" type="checkbox"/> Baseline Finish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Start date
<input type="checkbox"/> Internal Effort	<input type="checkbox"/>	<input type="checkbox"/> External Cost
<input type="checkbox"/> KPI	<input type="checkbox"/>	<input type="checkbox"/> Budget at Completion (BAC)
<input type="checkbox"/> Planned Start Date	<input type="checkbox"/>	<input type="checkbox"/> Planned Finish Date
<input type="checkbox"/> Classification Level	<input type="checkbox"/>	<input type="checkbox"/> Accounting Code
		<input checked="" type="checkbox"/> Budget
		<input checked="" type="checkbox"/> Baseline Start
		<input checked="" type="checkbox"/> Finish date
		<input type="checkbox"/> Actual cost
		<input checked="" type="checkbox"/> Project Manager
		<input type="checkbox"/> Category

You can define which columns are visible in the Project module list view by adding a check.

Others		
<input type="checkbox"/> Show workingcosts quarters	<input type="checkbox"/>	<input type="checkbox"/> Show all documents at every stage of the project.
		<input checked="" type="checkbox"/> Show project initiating external costs

You can define other elements to be visible in different areas of the software by adding a check.

Manage PO



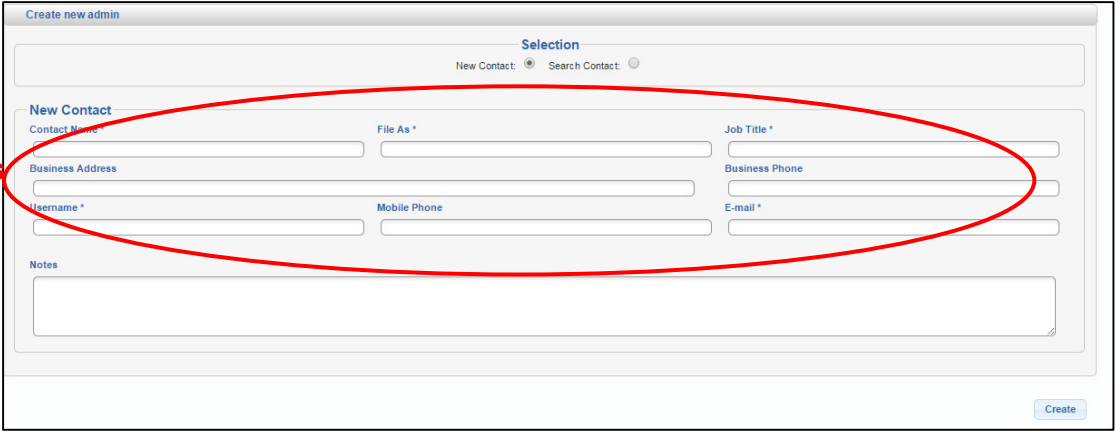
InsertName of new PO

Fill in the Mandatory fields (*) to create a new user

Select Create FM with data from PMO

You can create new PO's and associate a PMO and a FM from new or existing users.

Create New Admin



Fill in the Mandatory fields (*) to create a new user

You can give new Admin profile and permission to newly created users or to existing users.

Section III: User Guide

Section III: User Guide

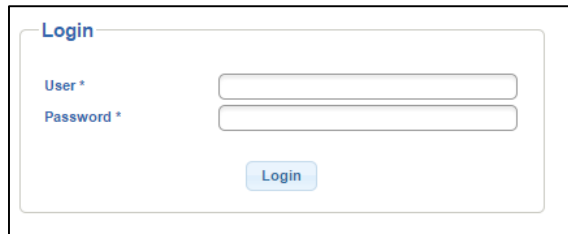
This section describes the experience of managing a project from the creation until the end of the project. This is a simple project that has 1 month duration with 2 activities and a budget of € 10,000.

Even though this example is far from a typical project, this sample describes the main features of management and how they can collaborate through **OpenPPM** different profiles such as: PMO, Program Manager, Project Manager and Stakeholder.

1 Step: PMO creates a new project:

Step1 begins when someone in the organization with a PMO profile creates a new project with the minimum basic information required.

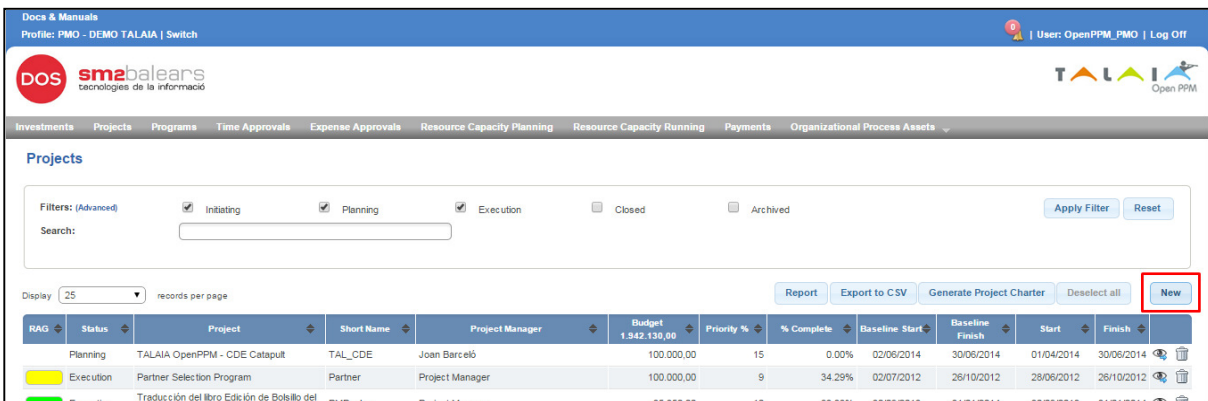
- **Login as PMO:**



The login form is titled "Login" and contains two input fields: "User *" and "Password *". Below these fields is a blue "Login" button.

- **Create a new project:**

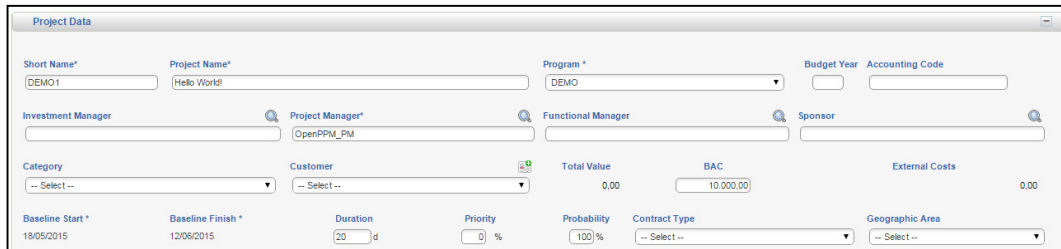
The menu **Projects** module will pop up as default. Here you can create a new project by clicking on the button **New**.



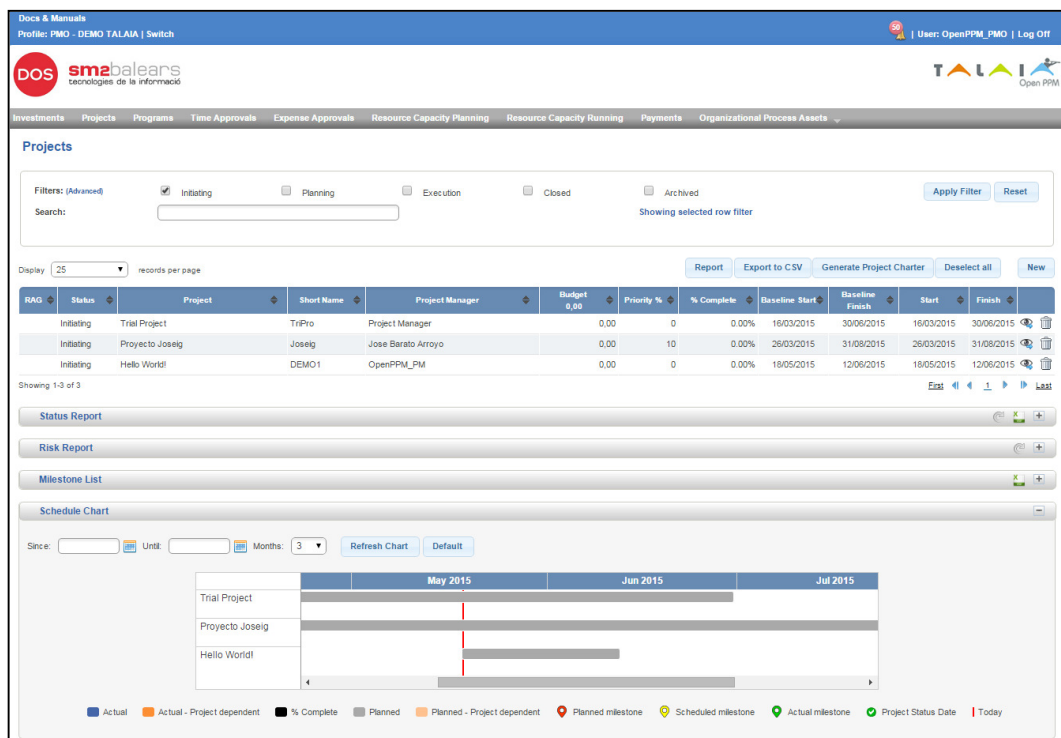
The screenshot shows the Open PPM interface. At the top, there's a navigation bar with "Docs & Manuals" and "Profile: PMO - DEMO TALAIA | Switch". Below this is a header with the "DOS sm2balears" logo and a user profile "User: OpenPPM_PMO | Log Off". A main navigation menu includes "Investments", "Projects", "Programs", "Time Approvals", "Expense Approvals", "Resource Capacity Planning", "Resource Capacity Running", "Payments", and "Organizational Process Assets". The "Projects" module is active, showing a list of projects with filters (Initiating, Planning, Execution, Closed, Archived) and a search bar. A table displays project details with columns: RAG, Status, Project, Short Name, Project Manager, Budget, Priority %, % Complete, Baseline Start, Baseline Finish, Start, and Finish. A "New" button is highlighted in the top right corner of the project list area.

RAG	Status	Project	Short Name	Project Manager	Budget	Priority %	% Complete	Baseline Start	Baseline Finish	Start	Finish
Planning		TALAIA OpenPPM - CDE Cataput	TAL_CDE	Joan Barceló	100.000,00	15	0.00%	02/06/2014	30/06/2014	01/04/2014	30/06/2014
Execution		Partner Selection Program	Partner	Project Manager	100.000,00	9	34.29%	02/07/2012	26/10/2012	28/06/2012	26/10/2012
Execution		Traducción del libro Edición de Bolsillo del	OLDBook	Project Manager	35.350,00	10	83.33%	30/09/2013	31/01/2014	30/09/2013	31/01/2014

- Create a project by completing the minimum basic information (Only * fields are mandatory at this stage to create the project)



At this stage, the PMO profile can visualize that a new project has been created with the initiating status in the project module:



Notice that in that same high level view, down in the Schedule Chart graph, the planned baseline project dates already appear.

To continue managing this project as a Project Manager, exit the tool by Logging Off as PMO

Step 2: PM completes the initiating information:

The PM profile assigned to the project, can now access the tool and continue the work, by for example completing the charter and registering the stakeholders.

- **Login as PM:**

Login

User *

Password *

By entering **OpenPPM**, this PM will be able to check in the Project list on the Project that has been assigned to him:

Filters: (Advanced) ☒ Initiating ☐ Planning ☐ Execution ☐ Closed ☐ Archived Apply Filter Reset

Search: Showing selected row filter

Display 25 records per page Report Export to CSV Generate Project Charter Deselect all

RAG	Status	Project	Short Name	Project Manager	Budget 0.00	Priority %	% Complete	Baseline Start	Baseline Finish	Start	Finish
	Initiating	Hello World!	DEMO1	OpenPPM_PM	0.00	0	0.00%	18/05/2015	12/06/2015	18/05/2015	12/06/2015

Showing 1-1 of 1

Status Report Risk Report Milestone List Schedule Chart

Since: Until: Months: 3 Refresh Chart Default

May 2015

Jun 2015


Jul 2015

Aug 2015

Hello World!

Planned 18/05/2015 - 12/06/2015

Actual Actual - Project dependent % Complete Planned Planned - Project dependent Planned milestone Scheduled milestone Actual milestone Project Status Date Today

If you click the  icon you can enter the details of management:

Projects
Time Approvals
Performance Appraisals
Resource Capacity Planning
Resource Capacity Running

DEMO1 (DEMO1)

Initiation
Plan
Risk
Control
Procurement
Closure

Status	Program	Program Manager	Project Manager	Accounting Code	Initiation Date	Planning Date	Execution Date	Closing Date	Archived date
Initiating	DEMO	OpenPPM_PGM	OpenPPM_PM		13/03/2015				

Project Data

Stakeholders

Project Charter

Funding Source

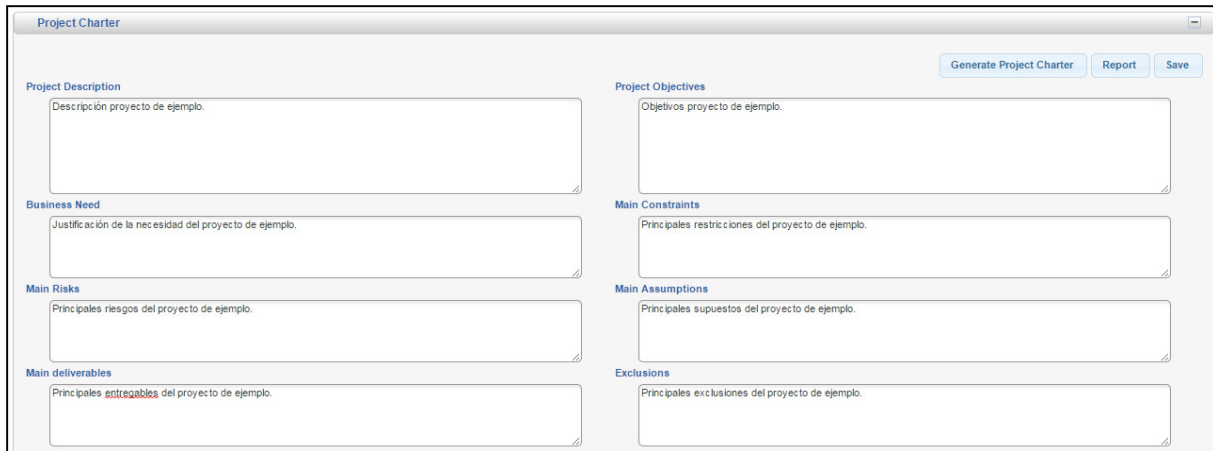
Labels

Executive Report

Process Log

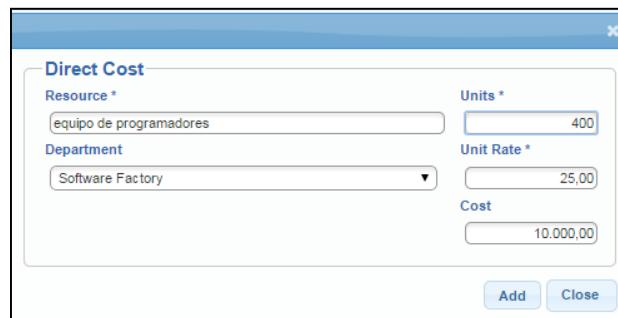
- **Generating the Project Charter**

In the "Initiation" tab you can complete the information related to project management:




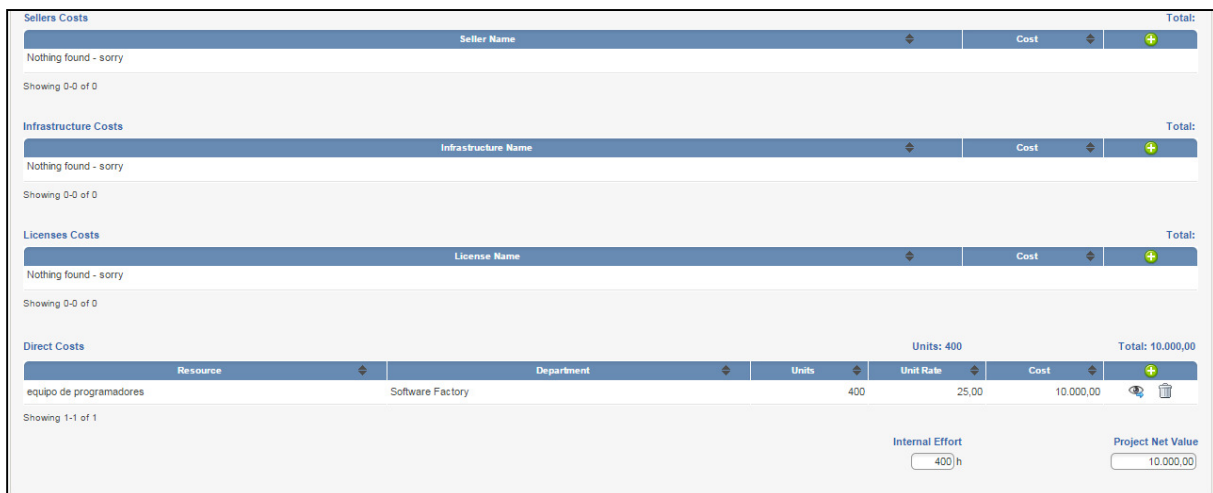
The Project Charter form is divided into two columns. The left column contains sections for Project Description, Business Need, Main Risks, and Main deliverables. The right column contains sections for Project Objectives, Main Constraints, Main Assumptions, and Exclusions. Each section has a text area for input. At the top right, there are buttons for 'Generate Project Charter', 'Report', and 'Save'.

The charter may also contain financial information. For example, if a budget magnitude is estimated for 400 hours a team of programmers at 25 € / h, in the section on direct costs this information can be entered:




The Direct Cost form has a blue header. It contains fields for Resource * (equipo de programadores), Department (Software Factory), Units * (400), Unit Rate * (25,00), and Cost (10.000,00). At the bottom right, there are 'Add' and 'Close' buttons.

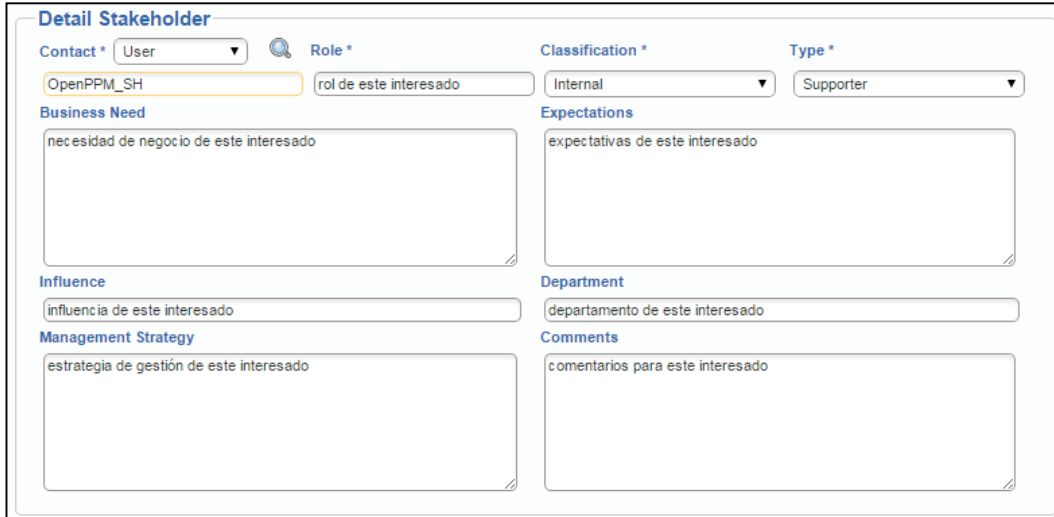
By Clicking on the  button, this cost will be reflected in the charter. If it's the only cost and there are no further expenses, you can enter the net budget and hours of effort planned for this project:



The Costs summary table shows four categories: Sellers Costs, Infrastructure Costs, Licenses Costs, and Direct Costs. Each category has a table with columns for Name, Cost, and a plus icon. The Direct Costs table is expanded, showing a single entry for 'equipo de programadores' from 'Software Factory' with 400 units and a cost of 10.000,00. At the bottom right, there are fields for 'Internal Effort' (400h) and 'Project Net Value' (10.000,00).

- **Identify Stakeholders:**

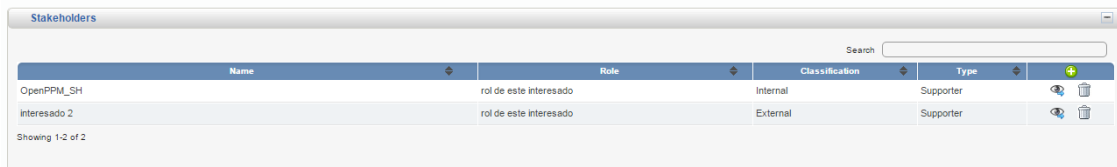
In the "initiation" tab, the PM opens the Stakeholders panel. Press the  button to add a new one. It will be added as a "user" who is interested to have access to the project through **OpenPPM**:



The "Detail Stakeholder" form contains the following fields:

- Contact ***: User (dropdown)
- Role ***: rol de este interesado (text input)
- Classification ***: Internal (dropdown)
- Type ***: Supporter (dropdown)
- Business Need**: necesidad de negocio de este interesado (text area)
- Expectations**: expectativas de este interesado (text area)
- Influence**: influencia de este interesado (text input)
- Department**: departamento de este interesado (text input)
- Management Strategy**: estrategia de gestión de este interesado (text area)
- Comments**: comentarios para este interesado (text area)

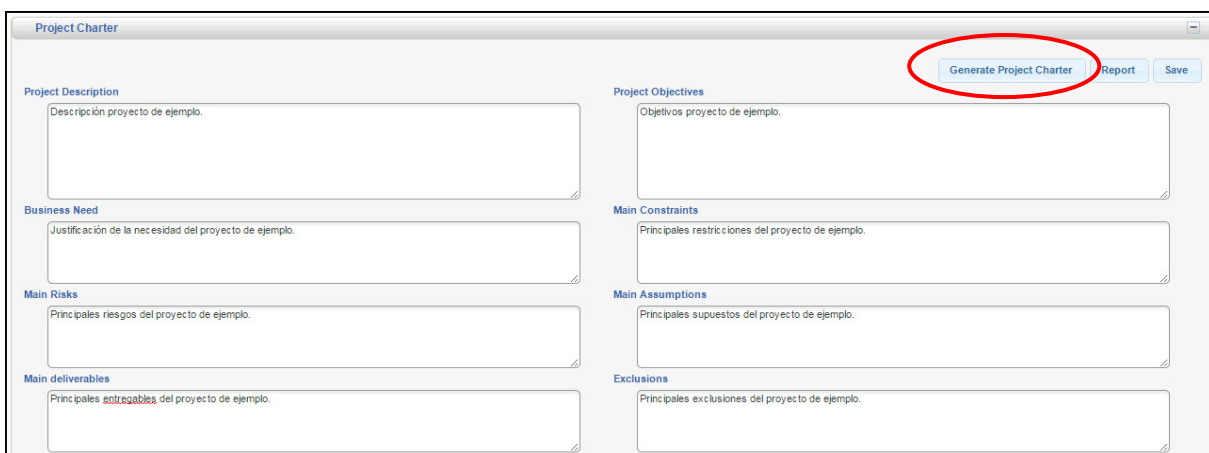
Then add another stakeholder in a "nominal" mode, that is, without being a user of the tool. In the next picture you can see the two stakeholders identified so far:



Name	Role	Classification	Type
OpenPPM_SH	rol de este interesado	Internal	Supporter
Interesado 2	rol de este interesado	External	Supporter

Showing 1-2 of 2

Once the requirements have been collected, the PM may generate the project charter by clicking the Generate project Charter button:



The "Project Charter" form contains the following sections and fields:

- Project Description**: Descripción proyecto de ejemplo.
- Project Objectives**: Objetivos proyecto de ejemplo.
- Business Need**: Justificación de la necesidad del proyecto de ejemplo.
- Main Constraints**: Principales restricciones del proyecto de ejemplo.
- Main Risks**: Principales riesgos del proyecto de ejemplo.
- Main Assumptions**: Principales supuestos del proyecto de ejemplo.
- Main deliverables**: Principales entregables del proyecto de ejemplo.
- Exclusions**: Principales exclusiones del proyecto de ejemplo.

Buttons: **Generate Project Charter** (circled in red), **Report**, **Save**.

The Project Charter document generated can be saved and stored it in the **OpenPPM** document repository, by uploading the document or through a URL link if you decide to use a third party ECM (ex: Dropbox, Google drive, Alfresco, etc..)

• Planning the scope:

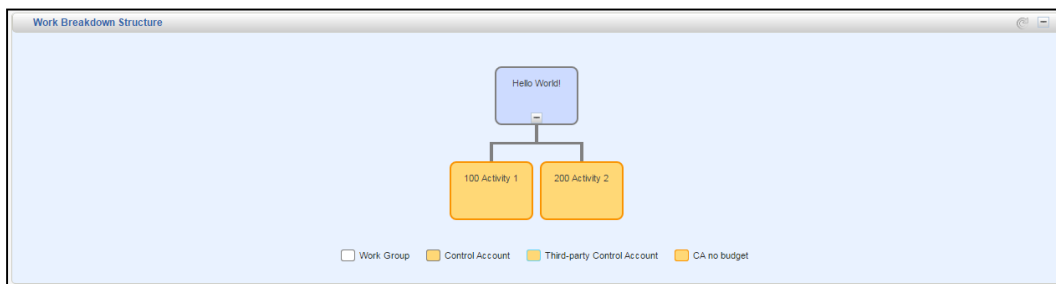
Let's now go to the Plan tab and start planning the project itself. For simplicity, we will suppose that the project has only two work packages in the WBS. In the Plan Scope portlet, you should enter the data as shown in this table:

Code	Name	WBS Dictionary	CA	Budget
	Hello World!		<input type="checkbox"/>	10,000.00
100	Activity 1		<input checked="" type="checkbox"/>	7,500.00
200	Activity 2		<input checked="" type="checkbox"/>	2,500.00



In order to enter work breakdown package, the Control Account (CA) of the project should be unchecked.

Note that the last two nodes have been marked as control accounts. The combined budgets of control accounts match the budget stated in the Project Data section project (BAC = 10000 €). The graphical representation of the WBS can be seen by opening the Work Breakdown Structure panel:

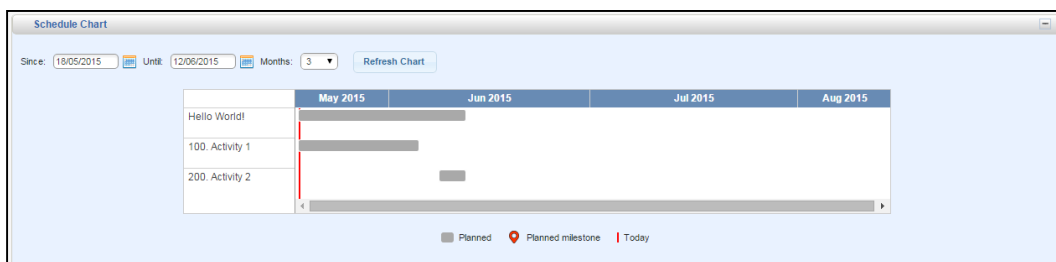


• Schedule Planning:

In the activity list of the Schedule portlet, you can enter the dates for the beginning and end of the two activities:

Activity Name	Baseline Start	Baseline Finish
100 Activity 1	18/05/2015	05/06/2015
200 Activity 2	08/06/2015	12/06/2015

The graphical representation of the schedule can be viewed by opening the Timeline panel:



To continue managing this project as a Stakeholder, who has an interest to know how the project is going, exit the tool by Logging Off as PM

Step 3: Stakeholder displays the project information:

The Stakeholder profile that has been assigned to the project, can access to the tool and view information that has so far introduced by the PM.

- Login as Stakeholder:**

Login

User *

Password *

Login

As a Stakeholder, you can see the information recorded in the Project Charter of the project:

Sellers Costs

Total:

Seller Name	Cost	
Nothing found - sorry		

Showing 0-0 of 0

Infrastructure Costs

Total:

Infrastructure Name	Cost	
Nothing found - sorry		

Showing 0-0 of 0

Licenses Costs

Total:

License Name	Cost	
Nothing found - sorry		

Showing 0-0 of 0

Direct Costs

Units: 400

Total: 10.000,00

Resource	Department	Units	Unit Rate	Cost	
equipo de programadores	Software Factory	400	25,00	10.000,00	

Showing 1-1 of 1

Internal Effort

Project Net Value

400 h

10.000,00

You will also see (always in “reading mode” meaning not allowed to make changes) information related to scope and schedule planning, etc.

To follow with the project lifecycle and with the approval of the project by the PMO, exit the tool by Logging Off as SH

Step 4: PMO approves the project:

- Login as PMO:


Login

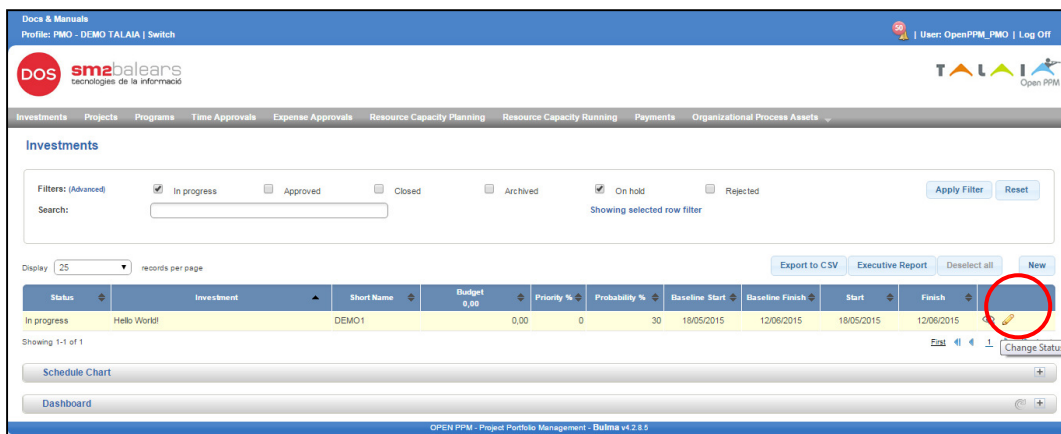
User *


Password *

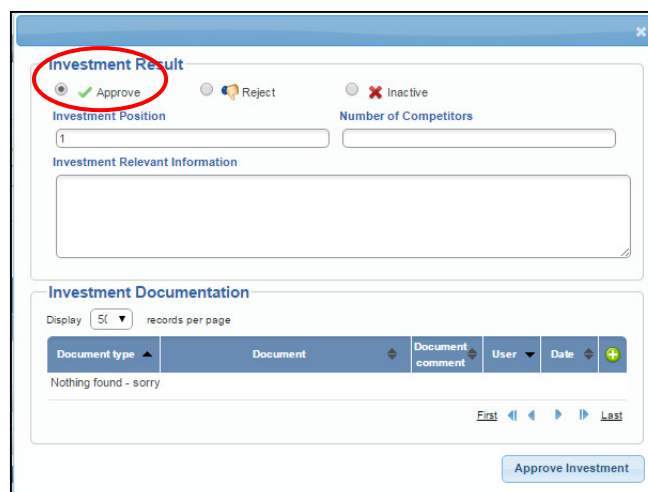
Login

- Project Approval:

- Go to the Investment Module
- Click on the  on the right side of the project line to Edit Status Change:



The PMO can change the status of the Project to  approve:



To follow with the project lifecycle and with the detail planning of the project by the PM, exit the tool by Logging Off as PMO

Step 5: PM Completes the Detail Planning:

- **Login as PM:**

Login

User *

Password *

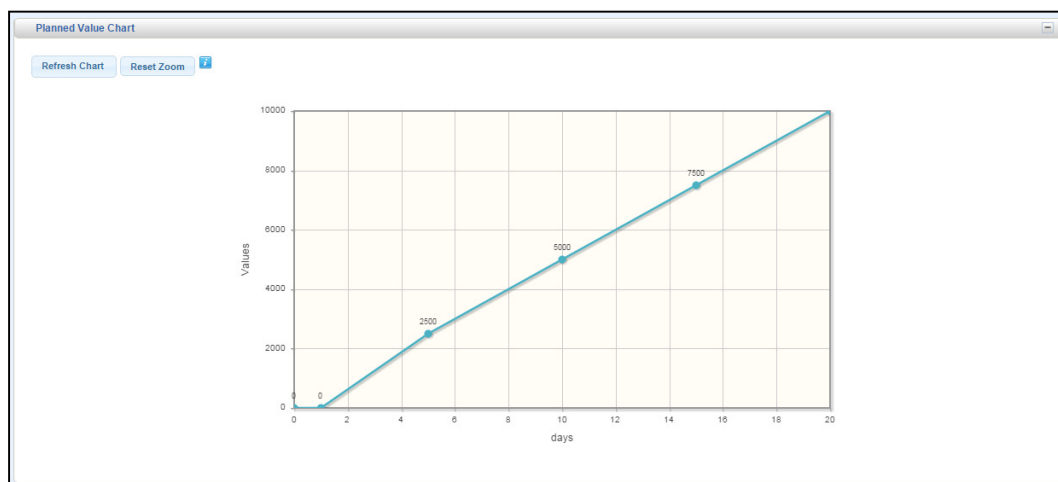
Login

- **Plan Costs:**

In the Plan tab, in the Plan Costs/Planned Valueportlet, you can enter the tracking dates (follow up date) and the planned value for each follow up date:

Plan Costs			
Funding			
Planned Value			
Display 50 records per page			
Followup Date	Days to date	Value	
18/05/2015	1	0,00	
22/05/2015	5	2.500,00	
29/05/2015	10	5.000,00	
05/06/2015	15	7.500,00	
12/06/2015	20	10.000,00	

In the Planned Value Graph, you are now able to the graphical representation of the cost baseline of your project:



- **Going from Plan to Execution Status**

The PM can now click on the Proceed to Execution button situated at the bottom of the Plan Tab to “run” the project. Other Tabs like "Control" and "Close" are now also available.

Documentation Project Planning

Display 50 records per page

Document type	Document	Document comment	User	Date
Nothing found - sorry				

First | Previous | Next | Last

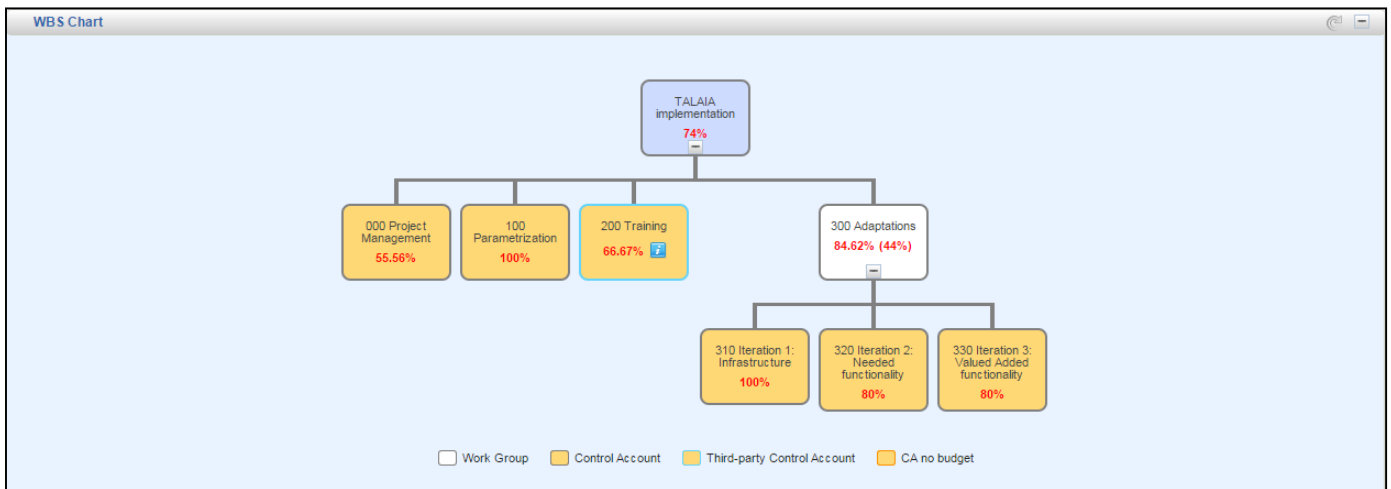
[Import MS Project Baseline](#)
[Export to project file](#)
[Proceed to Execution](#)
[Export to Redmine](#)

Step 6: Project Control:

When the project is in an execution phase, as a PM, you can now control your project by introducing real information in order to compare what is happening versus what you planned initially. Like this, you are able to manage and take decision in order to achieve the project objectives.

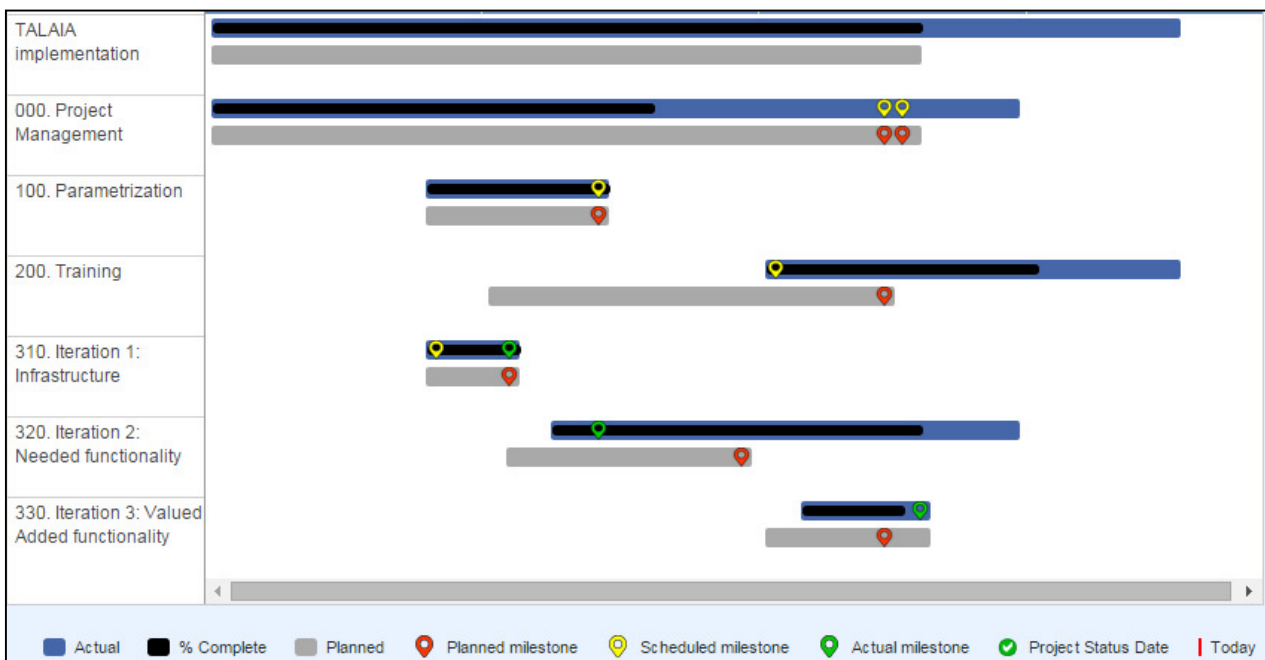
Control Scope:

In the Control Scope you can report Percentage of Completion (POC) of your project activities and visualize your project progress:



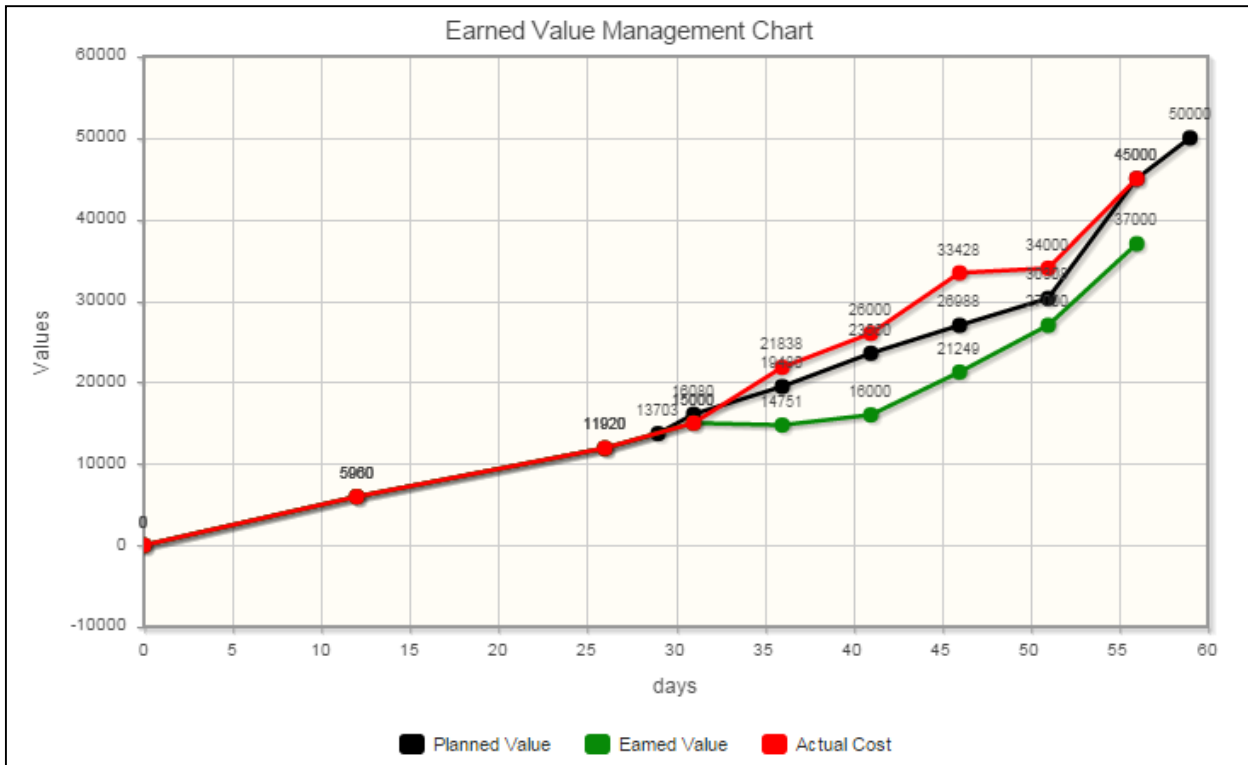
Control Schedule:

By updating your real start and finish activities dates, you can see project and activity baseline deviation as well as if your milestones are in line to your planning.



- Control Costs


From a cost management point of view, you can use the Earn Value Management Standard in order to control your earn value, actual costs and get an Estimated at Completion result.



Step 7: High Level Project Tracking Information:

- PM reports a first summary of the status of the project:**

The PM can now access the portlet "Control/Status Report" to report that, in our example, so far the project is "on track with no issue to report" in the areas of cost, schedule and risk, and the overall situation is "kickoff done without complications." By clicking the "Save" button this information will be recorded.

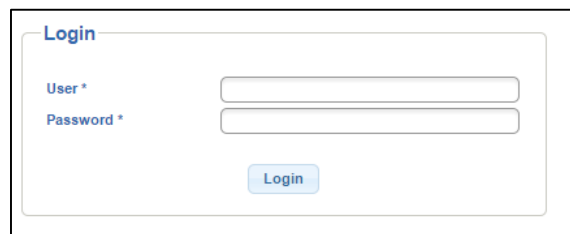


The screenshot shows the "Status Report" form with the following details:

- Date:** 18/05/2015
- Buttons:** New, Report
- General:** Status (Green), Description: kick off realizado sin complicaciones
- Risk:** Status (Green), Description: ningún problema que reportar
- Schedule:** Status (Green), Description: ningún problema que reportar
- Cost:** Status (Yellow), Description: ningún problema que reportar
- Save:** Button at the bottom right.

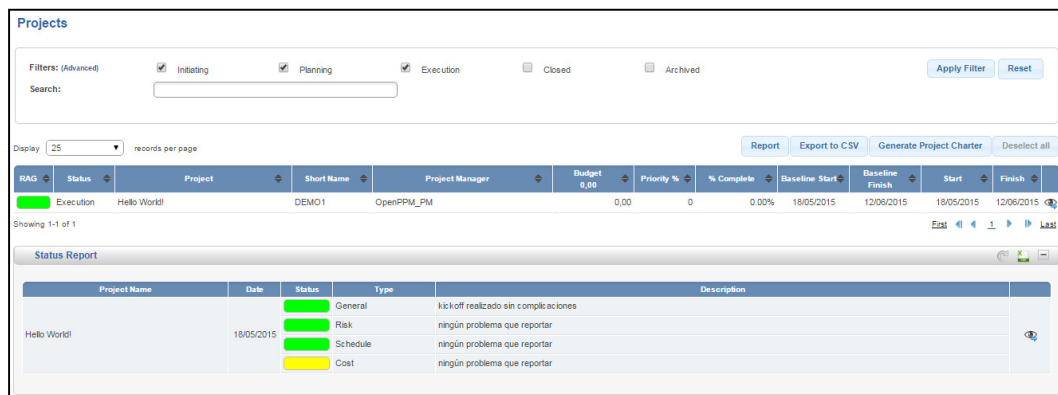
To follow with the project lifecycle and see how Stakeholders can keep track of the project progress, as by the update of the PM, exit the tool by Logging Off as PM.

- Login as Stakeholder to review the summary of the status of the project:**



The screenshot shows the "Login" form with the following details:

- Fields:** User *, Password *
- Button:** Login



The screenshot shows the "Projects" table and the "Status Report" portlet.

Projects Table:

RAG	Status	Project	Short Name	Project Manager	Budget	Priority %	% Complete	Baseline Start	Baseline Finish	Start	Finish
Green	Execution	Hello World!	DEMO1	OpenPPM_PM	0.00	0	0.00%	18/05/2015	12/06/2015	18/05/2015	12/06/2015

Status Report Portlet:

Project Name	Date	Status	Type	Description
Hello World!	18/05/2015	Green	General	kick off realizado sin complicaciones
		Green	Risk	ningún problema que reportar
		Green	Schedule	ningún problema que reportar
		Yellow	Cost	ningún problema que reportar

Another user with permission to view project information (e.g.: PMO) would get the same high level view.

To follow with the project lifecycle and see how the PM can finalize and close the project, exit the tool by Logging Off as SH.

Step 8: Project Closing:


- **Login as PM:**

Login

User *

Password *

Login

The PM accesses the project details by clicking on the  icon. Then he reaches the Closure tab.

In the panel "Closure Report", the PM can enter information about the results and objectives achieved or detail root causes if the project was canceled in an earlier stage.

Closure Report

Project results

Goal achievement

☐ Project canceled

Save

Working Hours

Resource	Department	Planned hours	Actual hours
equipo de programadores	Software Factory	400	0

Showing 1-1 of 1

In the "closing checklist" panel, the PM can mark certain activities as completed (depends on each organization, to match a specific methodology):

Closing checklist

Display 10 records per page

Search

Name	Description	Comments	Date	Completed	Owner
Invoice				<input type="checkbox"/>	
Closing Report				<input type="checkbox"/>	
Customer Project Delivery Approval				<input type="checkbox"/>	

First
1
Last

Lessons learned are also available to link to the project for future exploitation by the organization:

Lessons learned

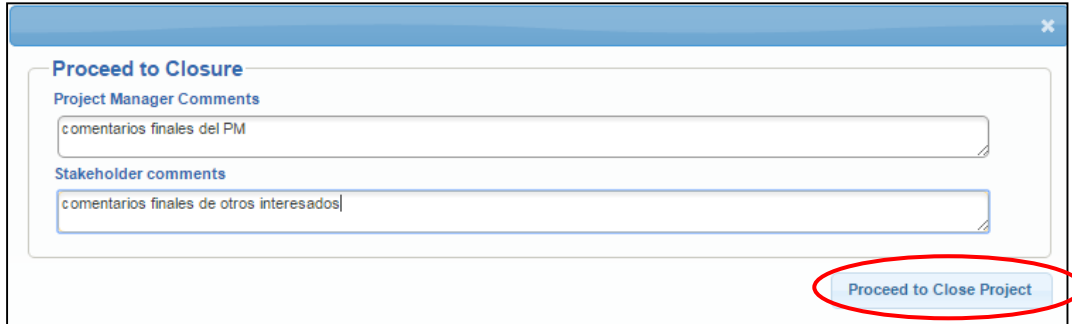
Display 10 records per page

Search

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Finally, by pressing the "Proceed to Closure" button, a pop-up window appears to enter the final notes of the performance:

A screenshot of a web application window titled "Proceed to Closure" with a close button (X) in the top right corner. The window contains two text input fields. The first field is labeled "Project Manager Comments" and contains the text "comentarios finales del PM". The second field is labeled "Stakeholder comments" and contains the text "comentarios finales de otros interesados". At the bottom right of the window, there is a blue button labeled "Proceed to Close Project" which is circled in red.

Note: Once status is changed to "Closed" the PM cannot edit anymore information (only PMO can). Though a project finalized may be re-opened, and move back to an execution status if required by the PM. This action can only be performed by the role PMO.