qdPM Configuration Guide

This Guide has been developed to help you configure qdPM after you have installed it.

If you have not looked at the installation notes you may not be aware of some application level settings that can be changed. Please read the qdPM installation.

If you want advice on how to use qdPM once it is configured then refer to the qdPM User Guide.

Once you have installed qdPM, the next step is to configure it to suit the type of projects that you manage and who will be working on them.

To do this properly you need to understand that qdPM supports the concept of a walled garden around Projects. People with access inside the wall have full access to functionality. People outside the wall can only access Tickets. Generally, people inside the wall do actual work on the project. People outside the wall don't – they are only interested in its outcome and in that sense you can think of them as the "customer".

So before you start you need to think about the type of projects you will be undertaking, who they are for, who will be working on them and what kind of work they will be doing.

Once you do, you may find that qdPM does not quite meet all your needs, in which case we suggest you invest in qdPM Extended.

qdPM Team

October 2011

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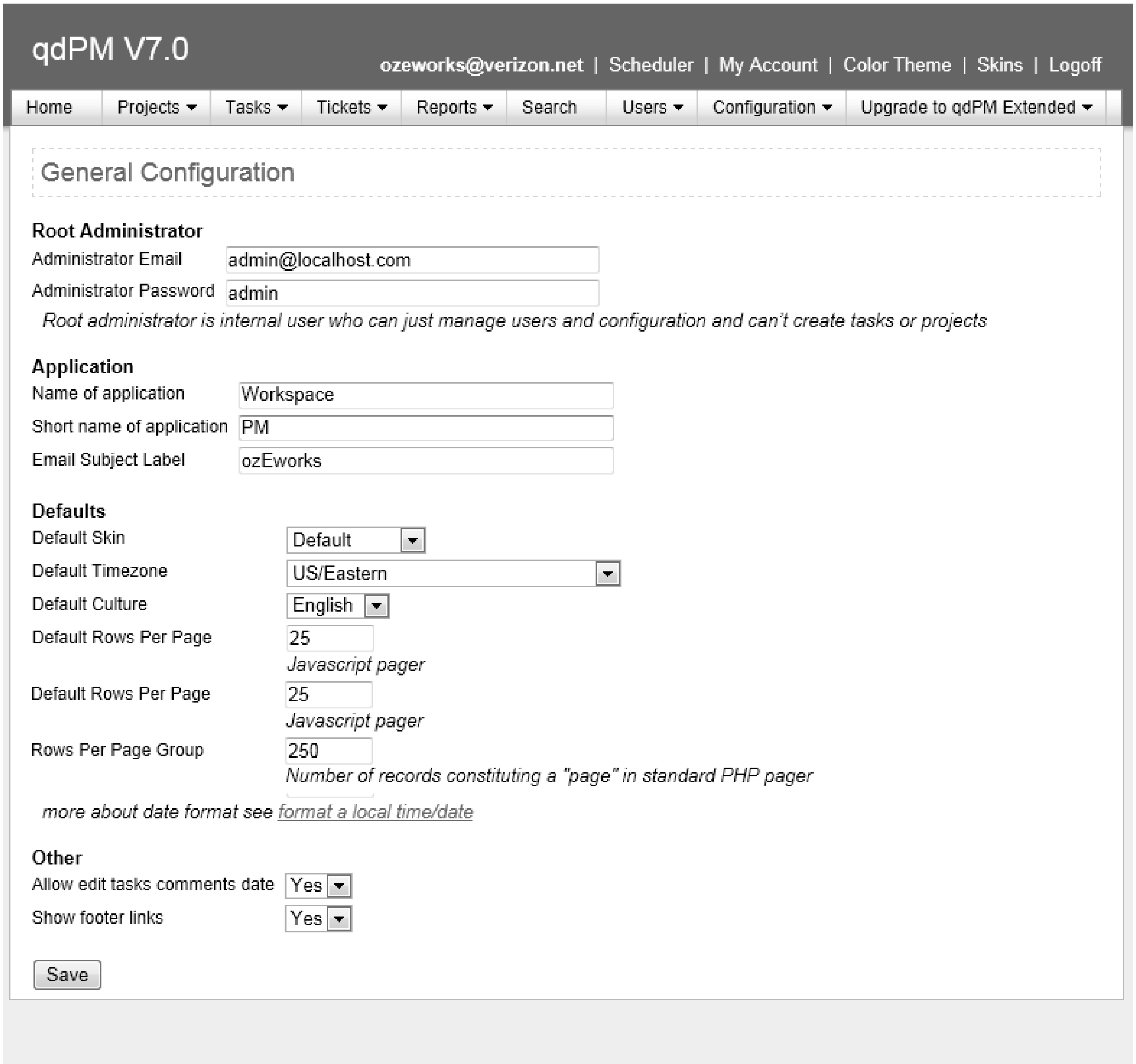
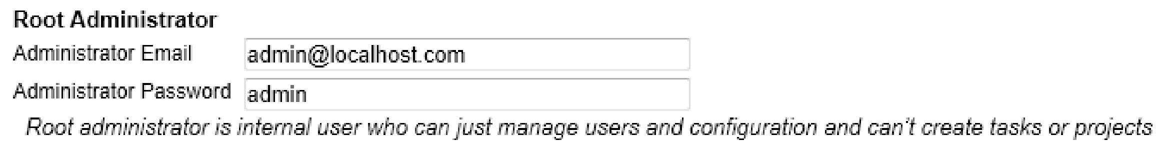
General Configuration

There are some application level configuration items to be set before you start using the software.[1]



[1] . In earlier versions these used to be in the 'core/apps/frontend/config/app.yml' .

Root Administrator

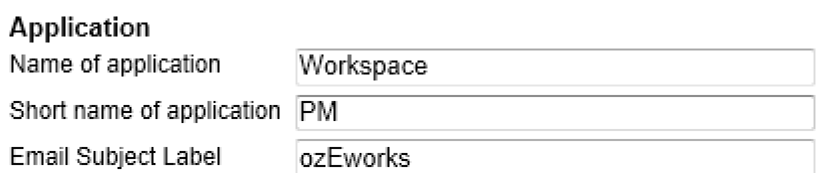


This is the overall administrator for the application. Generally this is set to whoever installed it and/or is responsible for it at software level. You cannot use an email address you intend to assign to a User.

FAQ: *I login as administrator and can't add projects. I can just manage configuration and users. Why?*

The root administrator is internal user who can manage configuration and users only, you have to create other users with the rights to allow manage projects, tasks and so on.

Application Name



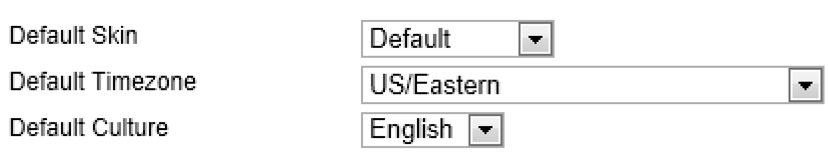
Name of Application: the name you want to call your application e.g. “Workspace”; it will show in the header of the page.

Short Name of Application: the Name you want to abbreviate it to e.g. PM

Email Subject Label: the prefix that is added to the beginning of the Email Subject field e.g. ozEworks; can be left empty.

General Defaults

Localization

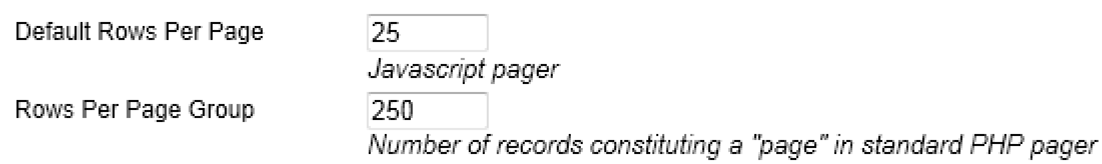


Default Skin: the template that will be used; they are stored in css/skins/. You can choose one of the many provided or create your own.

Default Time Zone: the Time Zone you want to use chosen by location.

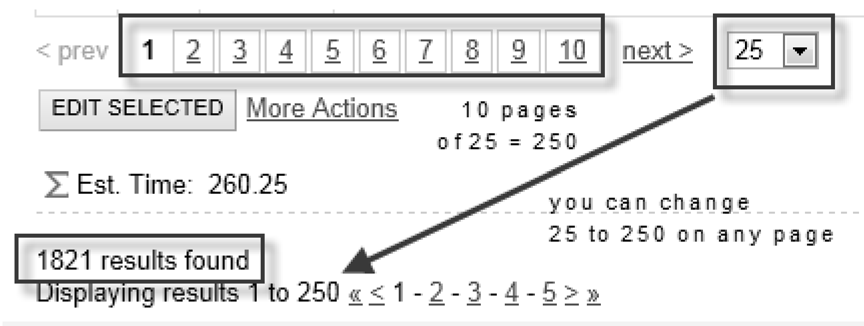
Culture: You can define the default language which is then used as the default for all users unless it is changed at user level. It is also used when a user is not logged in, that is, on the login page.

Paging



Default Rows Per Page: This is the number of records that will be shown [2] when viewing a page; users can change how many records are shown up to the Rows Per Page Group limit.

Rows per Page Group: This is the number of records that are paged for display. [3]The number is limited by memory.



In the above example, you can see that there are 1821 results retrieved. They will be placed into groups of 250 rows so there will be 8 groups: 7 * 250 rows and 1 * 71 rows. Each group is displayed with 25 rows per page so each will have up to 10 pages. Users can change the 25 via the drop down to show to show all 250 at one time.

Dates

qdPM captures full date/time stamp. How it is displayed is up to you. The main setting is the Date Format which is the standard format for all dates except Comments. It defaults to just Date without Time.

For instance, you can use *d M Y* for *Day Month Year* as in 30 11 2011 or, if American, use *M d Y* for *Month Day Year* as in 11 30 2011.

You can add the time. *H:i* will display as a *24 hour clock* such as 13:25. *h:i:A* will display as a *12 hour clock with AM/PM suffix* as in 1:25 PM.

[2] A page is used in the context of the javascript pager. You can have more than one javascript page being shown on a web page e.g. on the Dashboard

[3] This function uses the php pager and it is limited by memory as to how high it can be set.

Just remember if you decide to add the Time, the Calendar Picker only pick the Day Month Year so you would need to add the time once you picked the Date.

Comment Dates

Comment Dates are treated as an exception. The default Comments Date Format is set to Date + Time since it is generally important to know the time a comment was entered.

In addition to being able to control how comment dates are displayed, you are also able to control if they can be manually entered. The main reason for this is to allow recording of Actual Time. Actual Time spent on a Task needs to be entered on the day. Since people often forget to enter it on the day allowing the Comment Date to be manually entered allows people to enter time in the past.

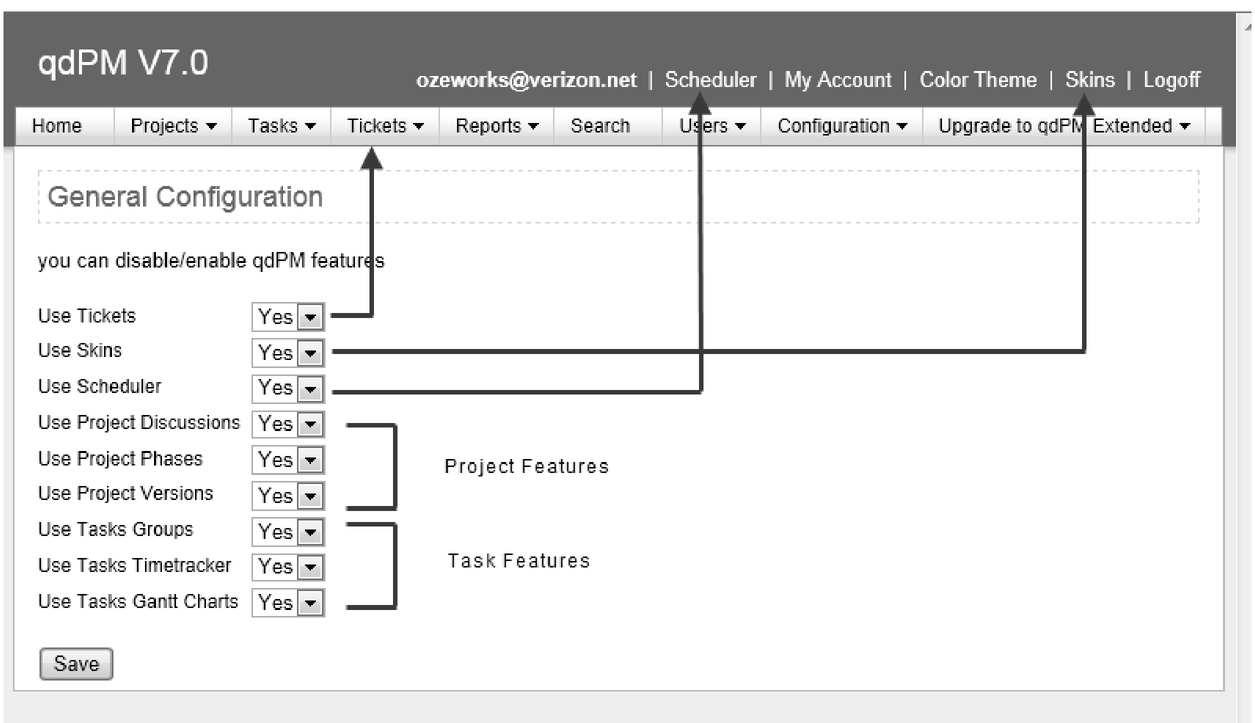
If you are not tracking Actual Time then you can keep this setting at No.

qdPM Links

Show footer links controls if the qdPM links to our support site and so on are displayed.

Features

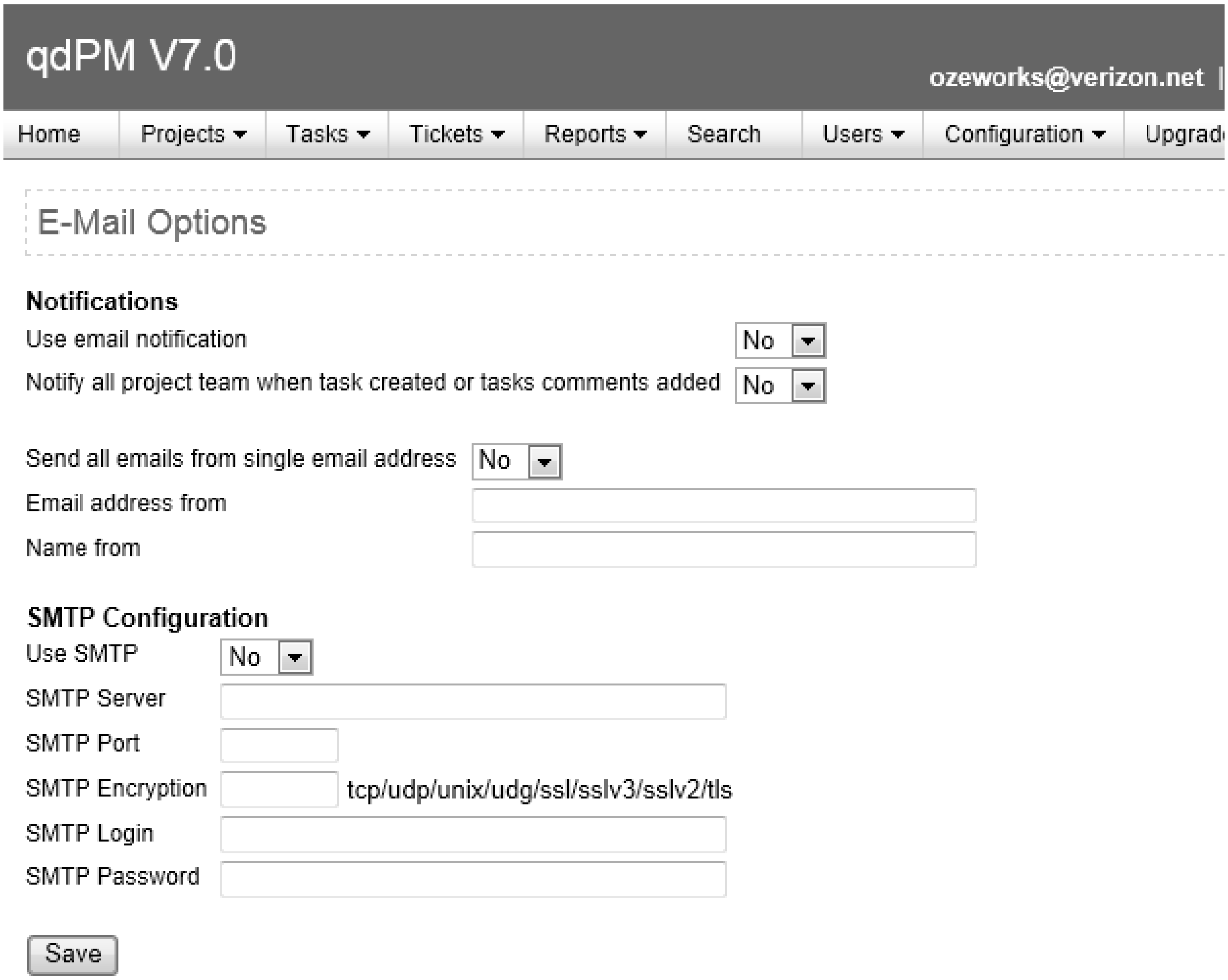
You can turn features on or off. This hides the feature from the menu. They still display in the Users Groups configuration and needs to be controlled there as well.



Before you decide if you want to use these Features or not, you might want to read more about them in the qdPM User Manual.

Email Usage and Setup

qdPM uses email to keep users up to date on various events. You can control if it is used and, if so, how emails are sent.



Notifications

Use Email Notification: You can set it ON to use this function or set it to OFF to stop emails from being generated.

Notify All Project Team: You can set this to ON to notify the entire team when a task is created or a task comment is added. If set to OFF then only the person who created the task and the person(s) assigned to the Task get notified.

Send All Email From Single Email Address: you can use a single email address to send emails from or you can use the email address of the person triggering the event e.g. the person who commented on the Task.

Email Address From: This is the email address you want to use if you set the Send All Email From Single Address to YES. It can be any email address. Using a generic no-reply address can avoid people replying to the email instead of coming to qdPM to post a comment.

Single Name From: This would be the name of the person whose email address it is or left empty.

STMP

You can use SMTP when sending email from a Single Email Address.

Use STMP: default is OFF. If you want to use it you need to turn it to ON and then configure the remaining fields.

SMTP Server: enter the mail server for example mail.yourhost.net

SMTP Port: generally this is Port 25 but it can be other ports depending on the Hosting Company/ ISP

SMTP Encryption: For SSL or TLS encryption to work your PHP installation must have appropriate OpenSSL transports wrappers. You can check if "tls" and/or "ssl" are present in your PHP installation by using the PHP function stream_get_transports(). If no encryption is used then leave empty.

SMTP Login: your mail server login

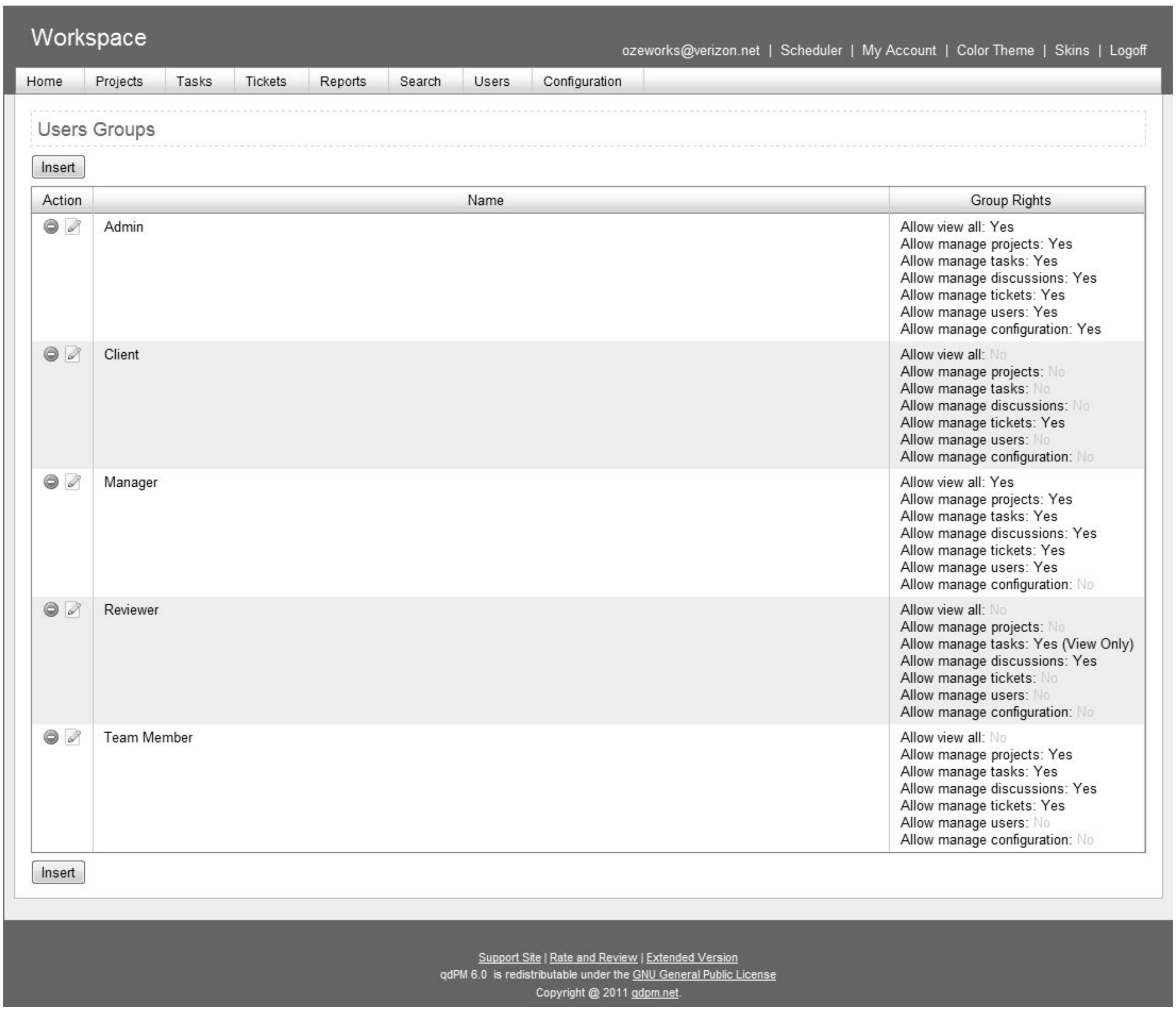
SMTP Password: the login password

User Configuration

User Groups

This is about who is using qdPM and what functionality they can access within it. A User belongs to only one User Group. They cannot be in more than one Group.

So this is not about role they might play on a specific Project. The role they might play on a Project can vary from project to project. One day they might be the manager of a project, another they might be a team member. So they need to be assigned to the *highest* level of access they will need.



Admin: The default User Group is Admin. The Users assigned to this group have full control over the qdPM configuration. You can assign “real” users to this group or you can create a generic Admin user for which one or more people within your organization hold the user email/password.

Generally the people who need Admin access are the person who installs qdPM and the head of project management such as the company owner, projects director or head of the Project Management Office. Whether you create one shared user or have individual accounts is up to you.

Managers: You need a group for the people who will be creating and managing Projects. They should be able to do everything except configure qdPM.

Team: You need a group for people who will be performing the project Tasks. They should be able to do everything except create Projects.

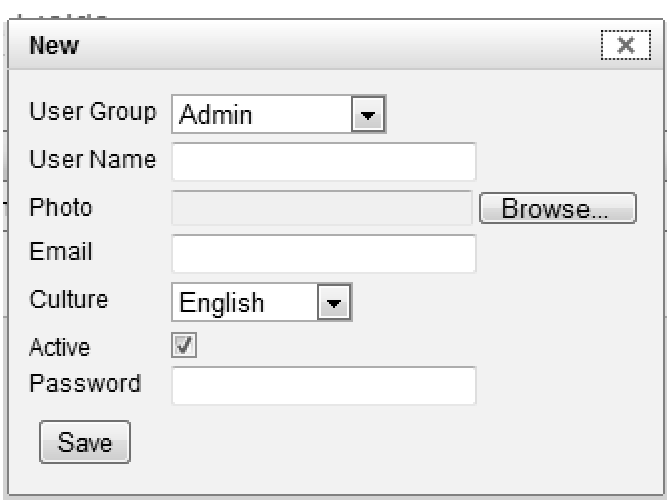
If you want them to communicate directly with the Clients, you should allow them to create Tickets. If not, then don't. If some can communicate with Clients and some can't then maybe you want to create a Team Leader group who can and a Team Member group who can't.

If you do create a Team Leader Group then you might want to allow Team Leaders to create Tasks but not allow Team Members to do so. But before you do, remember this is a collaboration tool aimed at a co-operative style of management. If you stop people creating Tasks then you might be defeating the purpose.

Even so you might want to break the Team Member group down further. You might have people who perform Tasks and people who only discuss (review, consult, advise on) Task deliverables/outcomes. So you might want a Review Group who can participate at a discussion/comment level only.

Clients: You need a group for the people who are outside the wall and will be creating Tickets.

Users



When you create a User, you need the email address they want to use for qdPM emails. They can always change it later to another one, if needs be.

You assign them to a Group and give them a User Name and a Password which will be emailed to them as soon as you press <save>. Plus you need to identify the language (Culture) they use.

Optionally, you can load a photo of them or they can do this later themselves. We recommend that people use photos because it helps personalize communications. So we also recommend a head shot of the person. Smiling helps. Something you'd like to see on your driver's license. Not a photo for a dating website.

You can also make User Active (so they can log in) or Inactive (meaning they can't anymore).

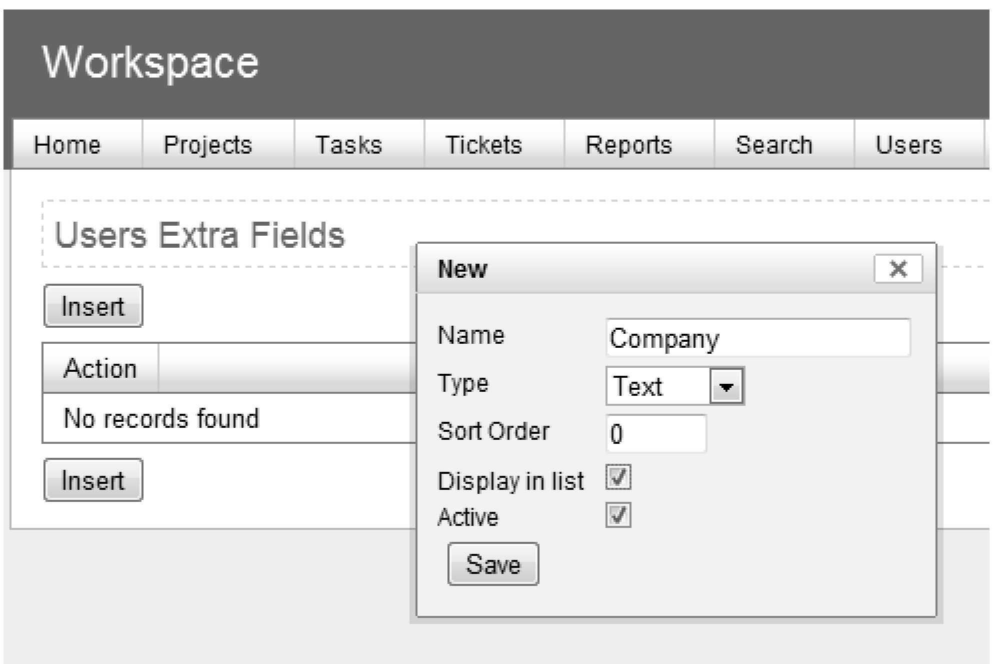
FAQ: *I added users and I created a project. When adding task I can't select user from "Assigned To" field, why?*

Users have to be assigned to the Project Team before we can assign them to Tasks.

User Extra Fields

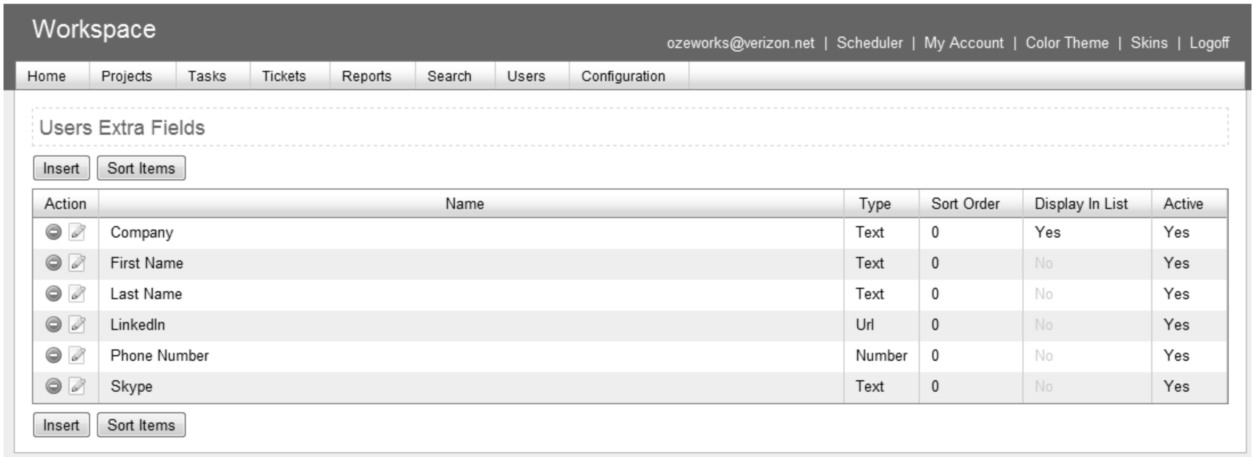
You can collect extra information about Users by adding Extra Fields to the User Configuration.

Extra Fields can be added at any time but it is better to start out with the important ones from the beginning since people rarely go back and update their information.



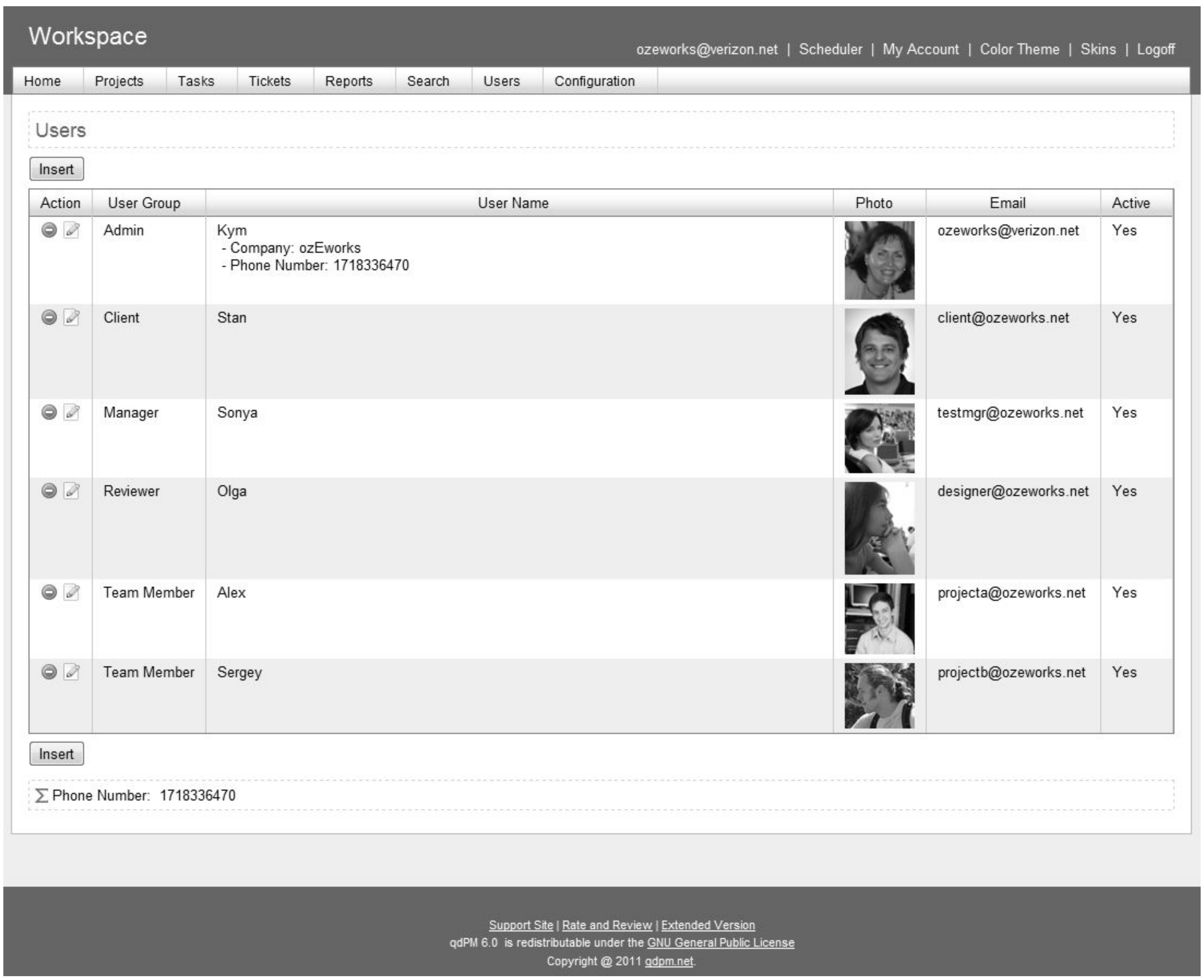
In addition to a Name, the extra field has a Type. You can choose from a Number, Text, Date or URL. The field can be flagged to display in lists and to be active or inactive.

So what would you use this for? If you want to use the Userid as a nickname then you might what to add a Name Field or even a First Name and Last Name Field. You might want to add Company name and their Phone Number, Skype Address and so on.



Action	Name	Type	Sort Order	Display In List	Active
	Company	Text	0	Yes	Yes
	First Name	Text	0	No	Yes
	Last Name	Text	0	No	Yes
	LinkedIn	Url	0	No	Yes
	Phone Number	Number	0	No	Yes
	Skype	Text	0	No	Yes

User List



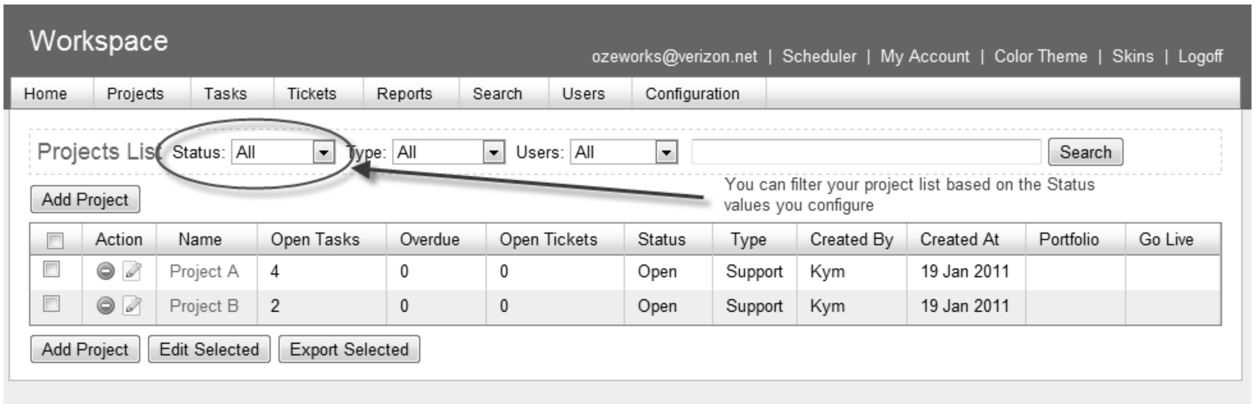
Action	User Group	User Name	Photo	Email	Active
	Admin	Kym - Company: ozEworks - Phone Number: 1718336470		ozeworks@verizon.net	Yes
	Client	Stan		client@ozeworks.net	Yes
	Manager	Sonya		testmgr@ozeworks.net	Yes
	Reviewer	Olga		designer@ozeworks.net	Yes
	Team Member	Alex		projecta@ozeworks.net	Yes
	Team Member	Sergey		projectb@ozeworks.net	Yes

You can see all users using the User Menu > View All option. They are shown in Group order and, within that, in alphabetical order.

Project Configuration

Project Status

Project **Status** is a way of filtering the Project Lists and selecting Projects for reports.



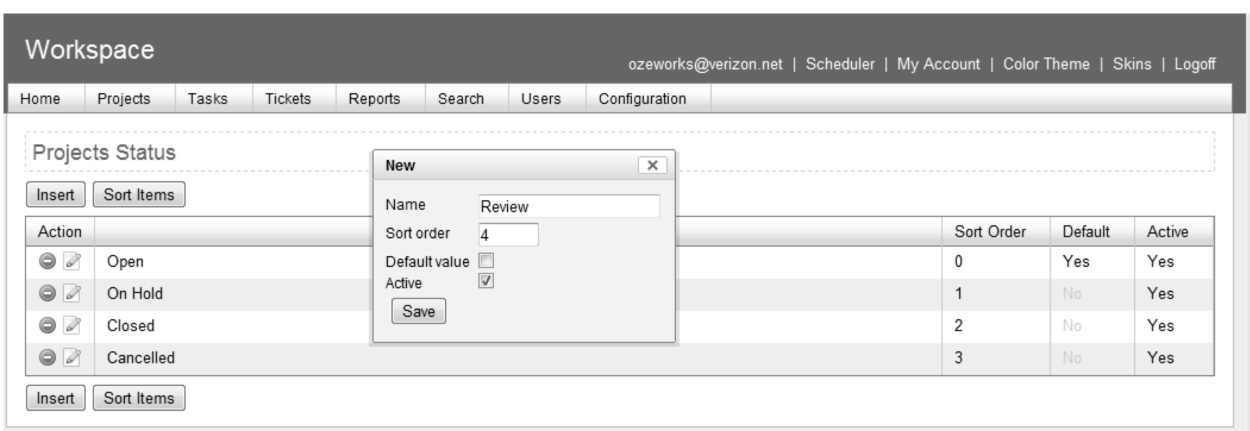
The most simple project life cycle is that a project is either being worked on or it is completed. So the obvious default statuses are **Open** and **Closed**.

Projects can also be put on hold for whatever reason and so **On Hold** is also offered as part of our default list. Plus they can be **Cancelled.**

However you can choose to add as many additional values as you like. For projects that are in the process of being planned, you could create a Pipeline or Planning status.

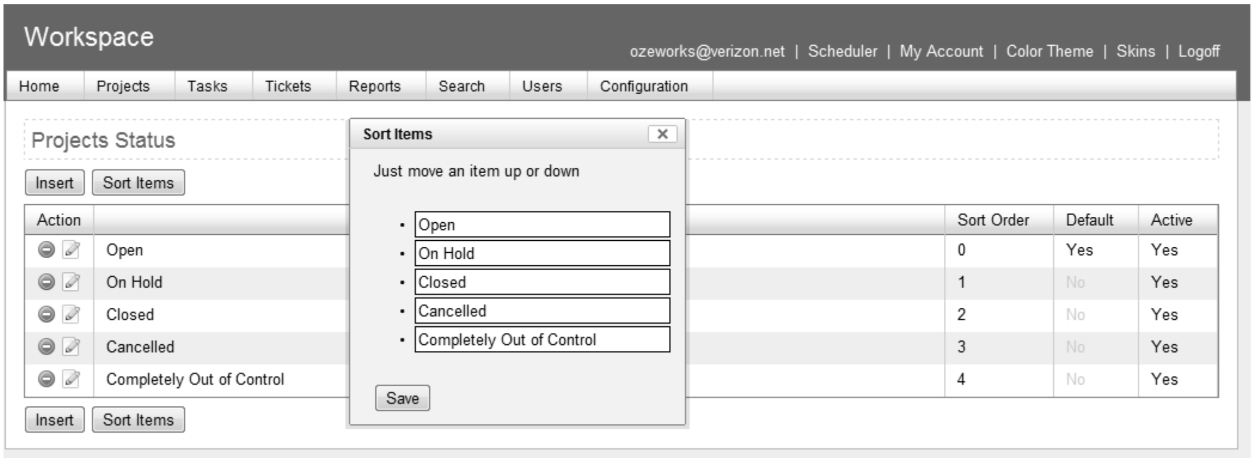
If you conduct post project reviews, you might want to signal that a project is under Review status before you close it.

It really all depends on the project management methodology you are using and how closely you want to track to its life cycle what you do here. However the more detailed you get, the less useful a filter it becomes.



A Project Status has a Name and Sort Order. You can flag one Status as being the Default value and you can also indicate if the Status is Active or Inactive.

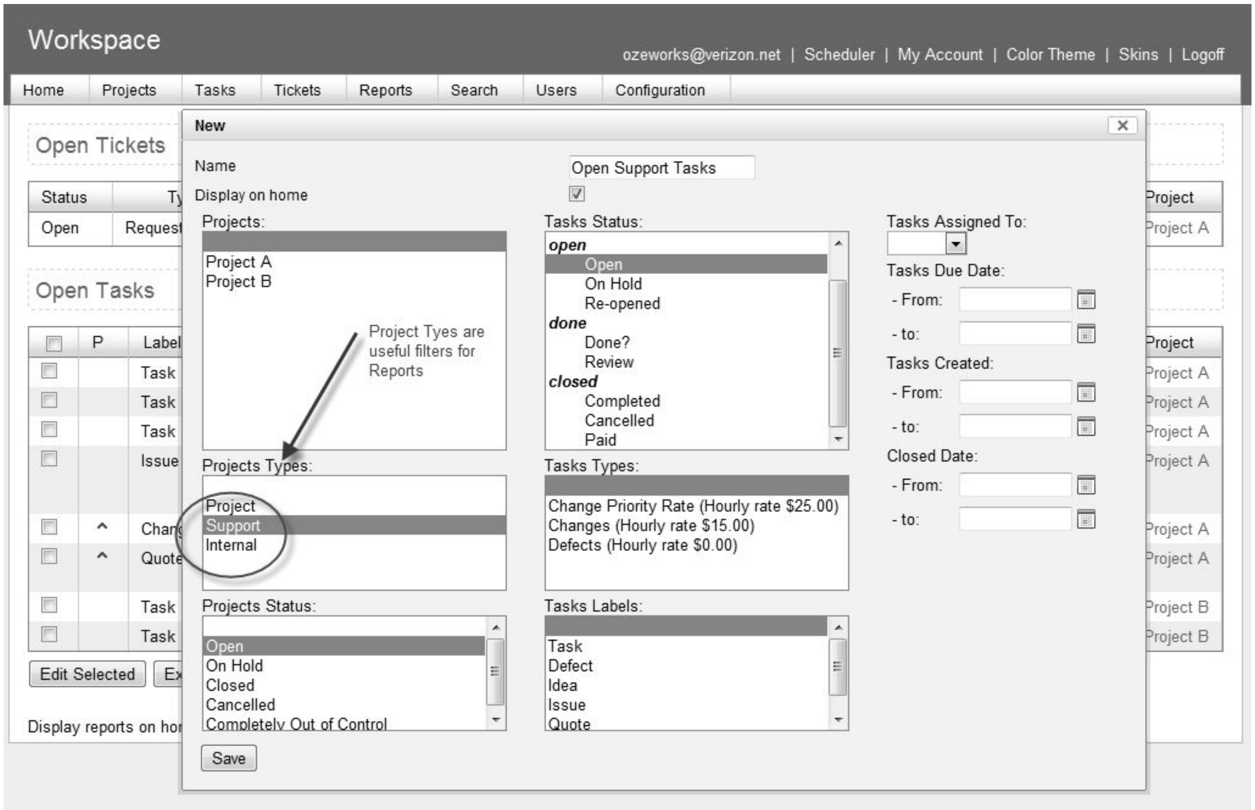
In addition to giving a manual sort value you can use the Sort button to sort the list using an AJAX drop and drag.



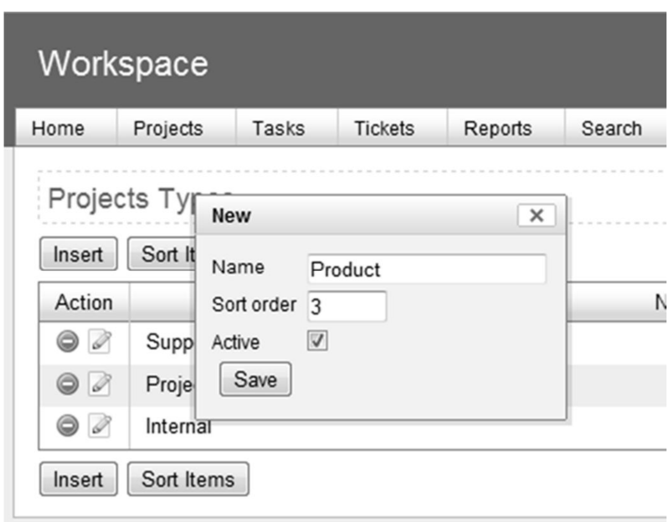
And just note that that adding a status of “Completely Out of Control” might not be a good idea.

Project Types

Project **Types** is a useful filter for reports as well as Project lists.



The type of project can vary as much as the industries that conduct them. Our default values focus on the IT services industry where we can be conducting a **Project,** doing miscellaneous **Support,** maintaining a **Product** or undertaking some **Internal** project that is not part of the overall revenue stream.

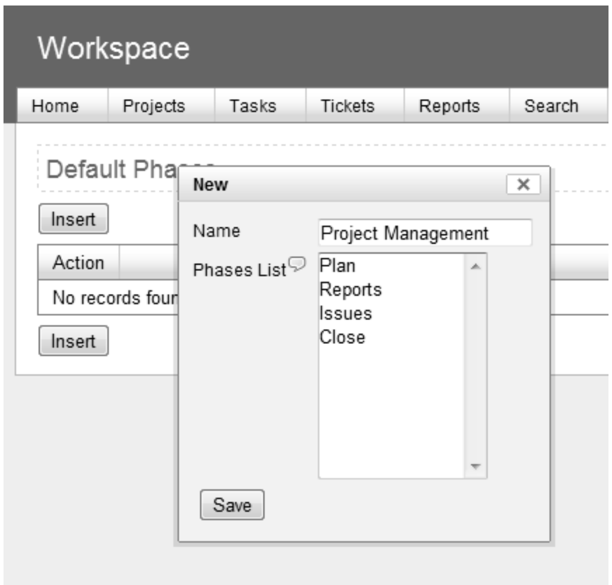


A Type has a Name, Sort Order and Active status.

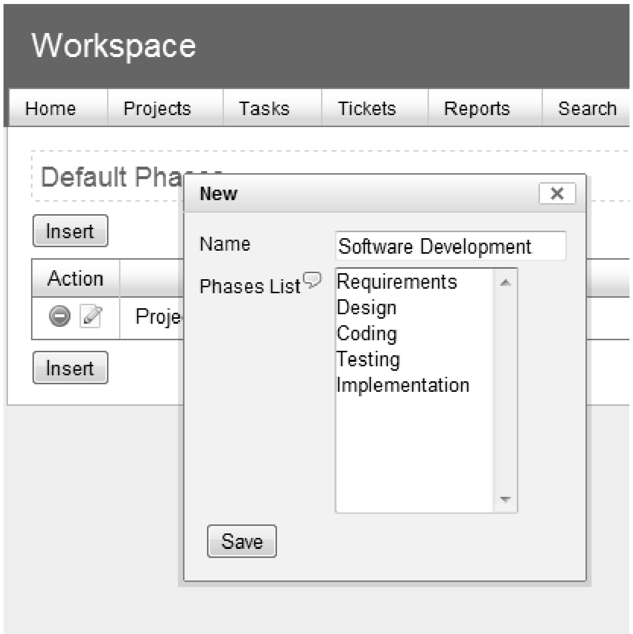
Project Default Phases

Projects are conducted in Phases as defined by the methodologies being used. Generally you are using a Project Management methodology plus a methodology to actually execute the project such as a Software Development Methodology (SDM). So the overall phases can be a combination of both.

If we use PMBOK as a guide then the default Project Management phases are: Initiation, Planning, Execution, Monitoring and Controlling and Closing.

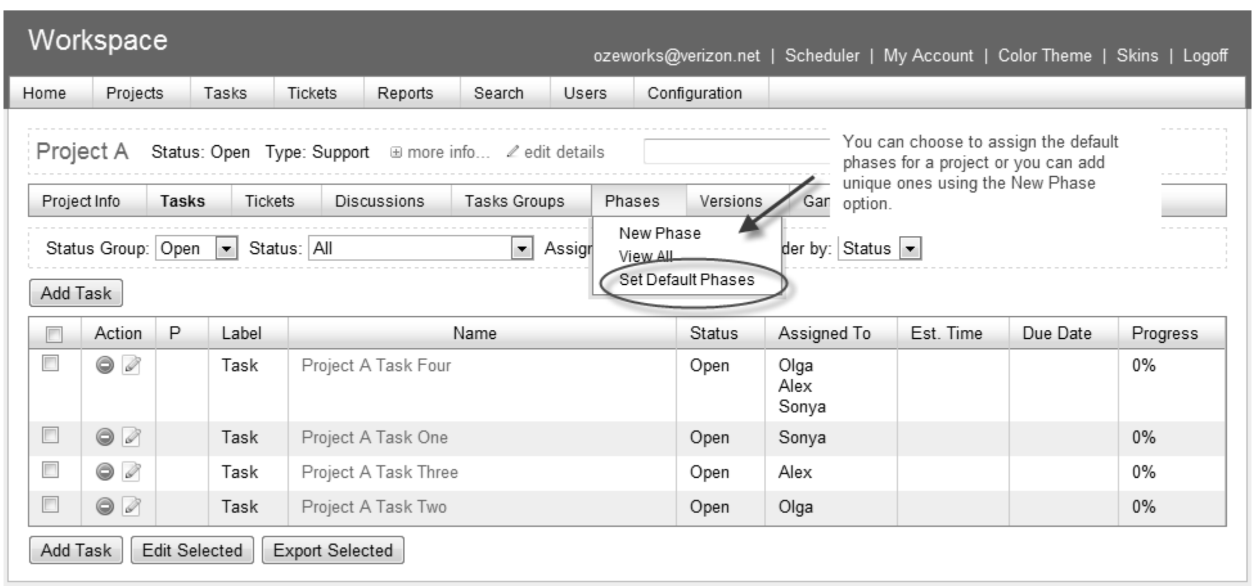


As mentioned above, Execution is in fact another methodology such as an SDM. So you can consider adding your default SDM Phases here to save you adding them over and over again.



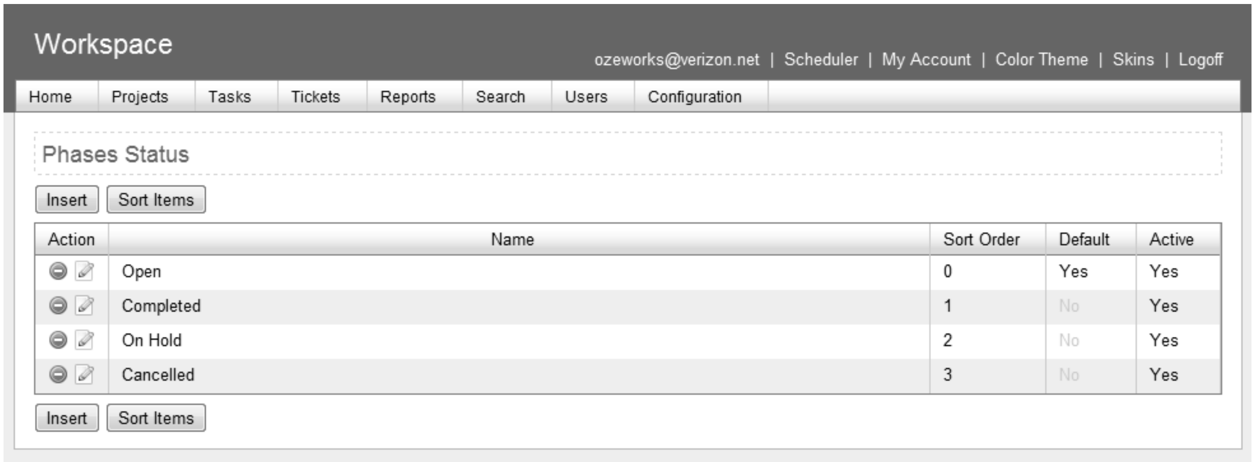
It is really up to you if and how you use this. It is completely optional.

Each Default Phase has a Name which can be used to indicate the methodology it represents. Then it has one or more Phases assigned to it.



Once you create Project, you can then assign Phases to it. In doing so, you can set them to these Default Phases.

Phases Status

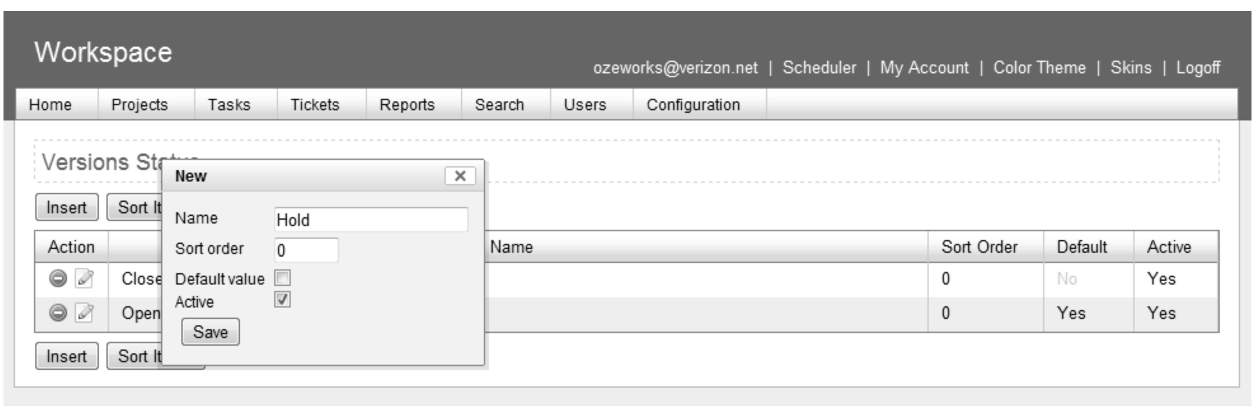


Like Projects, Phases also have a Status and we offer the same values of Open, Closed, On Hold and Cancelled.

Project Versions

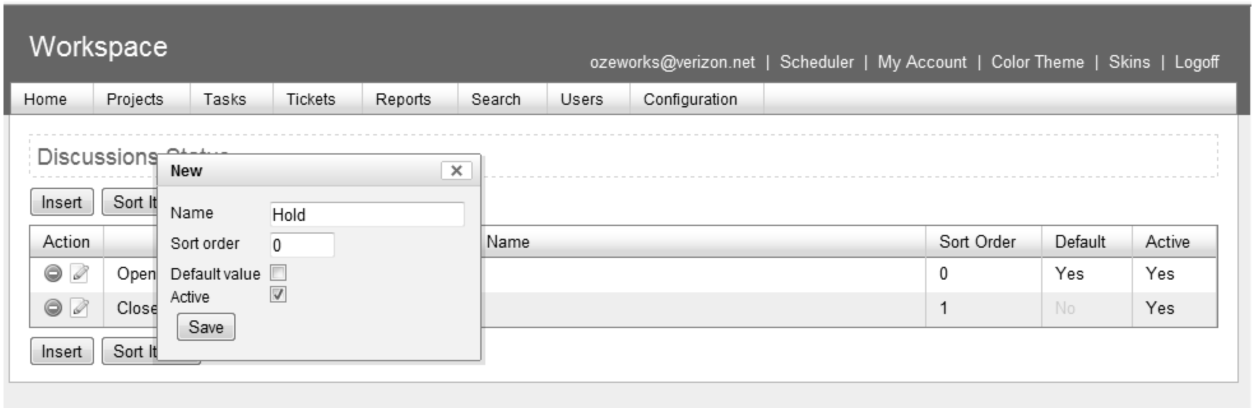
Project can have Versions. This is particularly useful if you are undertaking a staged or iterative approach to the project. For instance, you might be developing a software and plan to roll out different features in each version or you might in fact be building a multi-tower apartment complex.

If Phases are like dividing Tasks vertically into groups of related tasks then Versions are like slicing horizontally across the Phases to create layers of related deliverables.



Since versions are project specific there are no default values. However we do provide Version Statuses and again the proposed values are Open and Closed.

Project Discussions



In qdPM Free, discussions are held at Project level only. They also have a Status. We offer Open and Closed however you can configure more. If you want greater versatility regarding discussion then you need to upgrade to qdPM Extended.

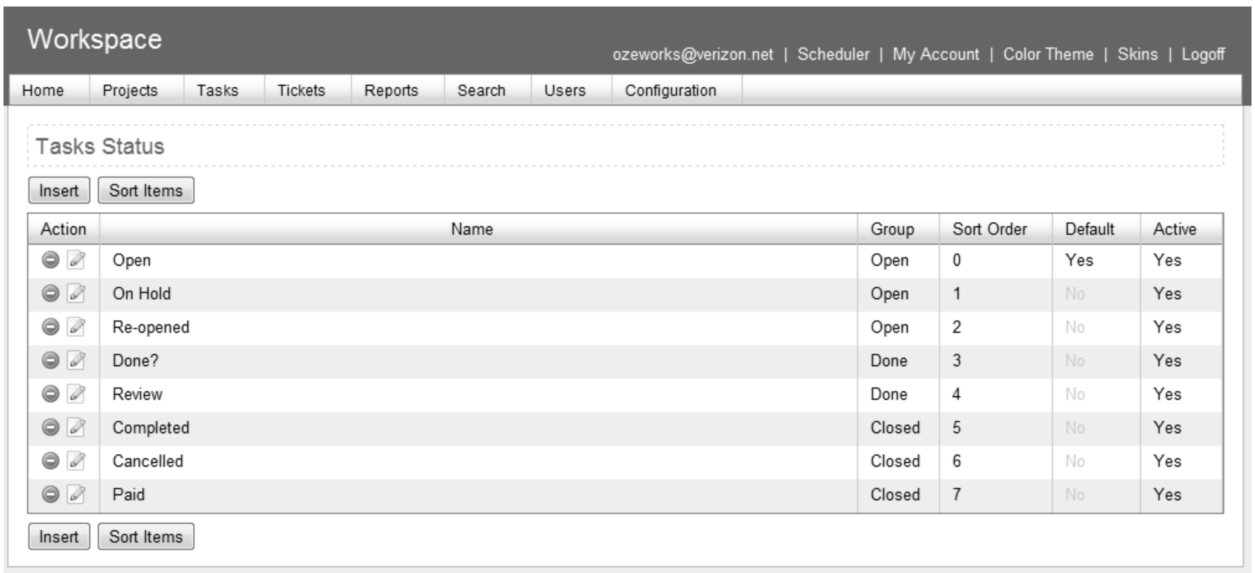
Tasks Configuration

Tasks Status

Task Statuses are a little different to the statuses already mentioned. Under Tasks, status values are grouped into Open, Done and Closed categories.

Our concept of "Done" is that the task has been performed by someone but someone else needs to check it to confirm it is in fact completed. As in "is that task done yet?" to which you get the answer "I think so but you need to check it". So, within qdPM, it's not really completed until it is closed.

How you set this up is largely a matter of organizational culture and how you talk about the status of a task.



Action	Name	Group	Sort Order	Default	Active
	Open	Open	0	Yes	Yes
	On Hold	Open	1	No	Yes
	Re-opened	Open	2	No	Yes
	Done?	Done	3	No	Yes
	Review	Done	4	No	Yes
	Completed	Closed	5	No	Yes
	Cancelled	Closed	6	No	Yes
	Paid	Closed	7	No	Yes

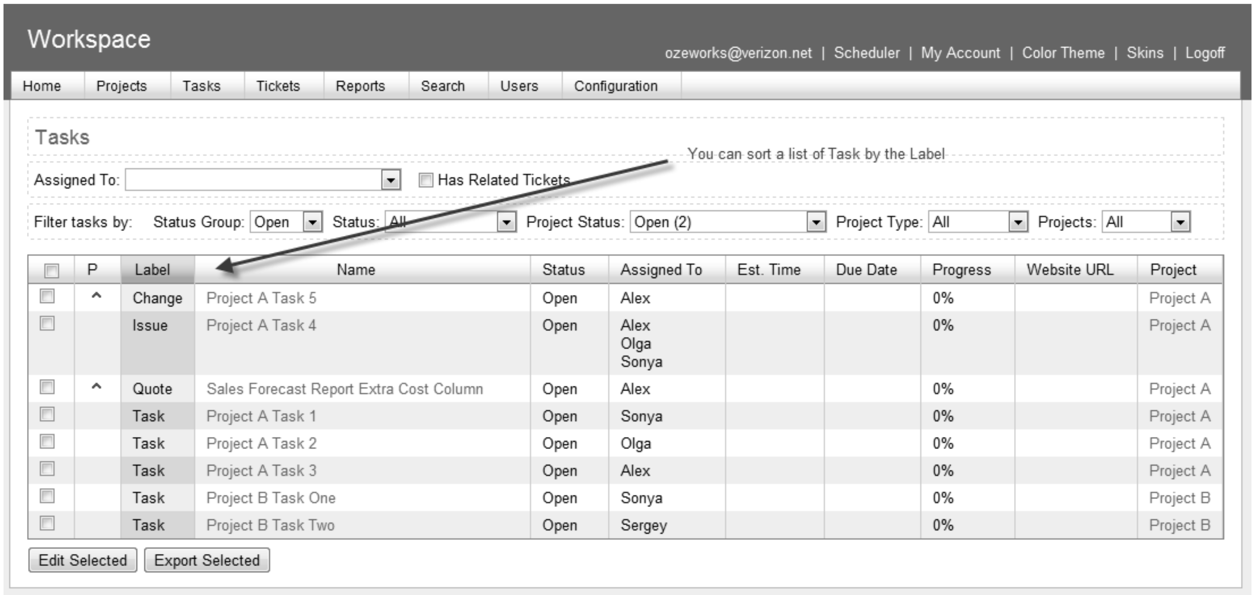
In the above example you can see that we have:

- **Open** as the default status
- **Re-opened** which implies it was once Closed but had to be opened again
- **On Hold** which means no-one is to work on it at present
- **Done?** with the question mark implying someone else on the team needs to check (another term might be Inspect but Done? seems to describe the situation better)
- **Review** which implies the project team think it is done but it's up to someone outside the team to confirm e.g. a QA Manager or a Client (internally we actually use the term "Waiting Assessment")
- **Completed** meaning it is in fact "done"
- **Cancelled** which means it no longer needs to be done
- **Paid** which is just an example of how you might want to manage the status post-completion.

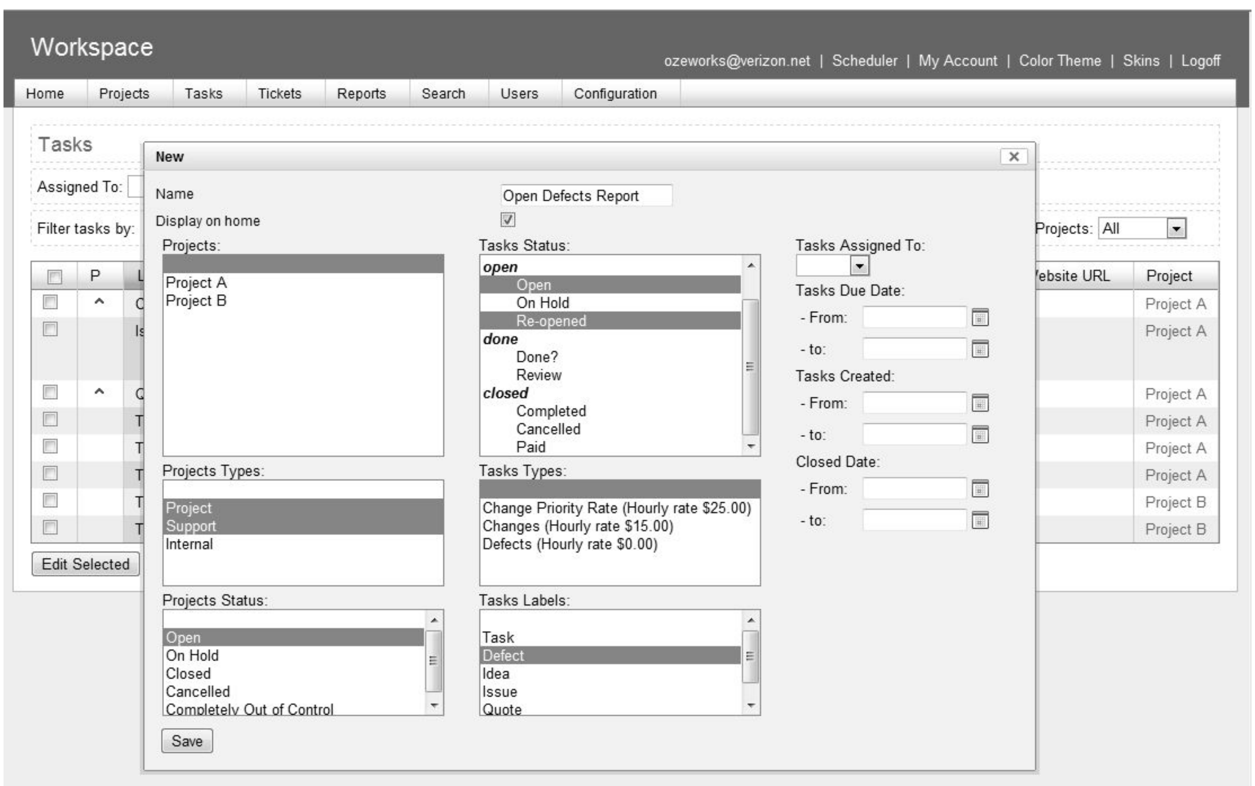
Of course there are many other status values that can be set to match many varied workflows for tasks.

Tasks Labels

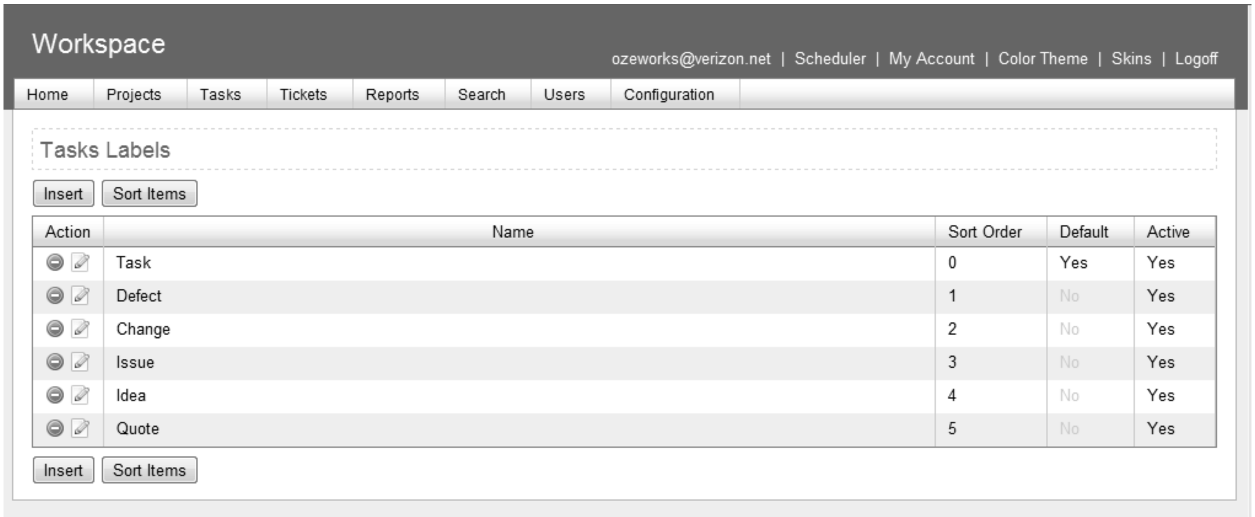
There are all kinds of Tasks and you can use the Task Label to differentiate between them.



For instance you can sort your Task list by the Label column.

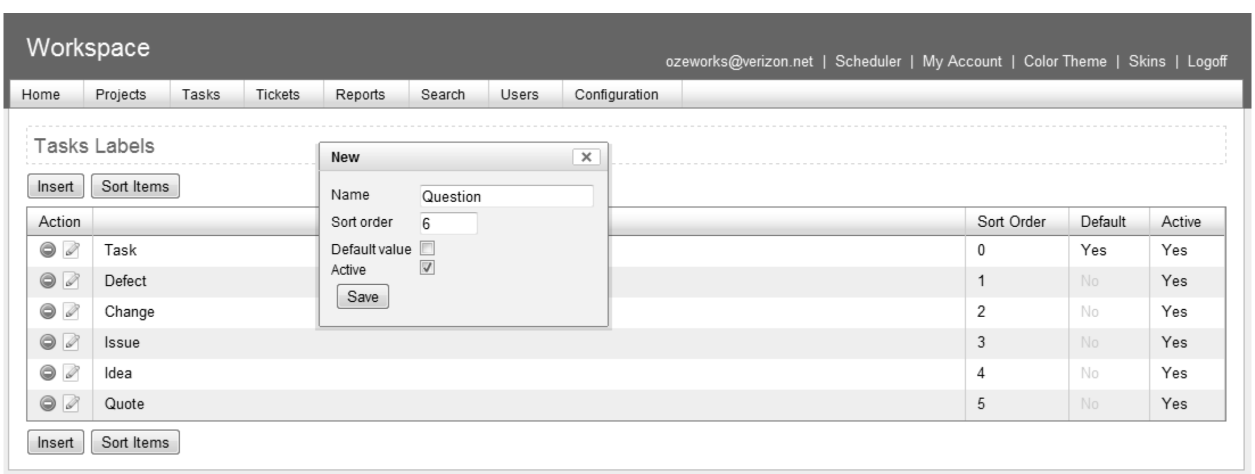


Or you can use it to create a specific Task Report.



In the above example, you can see we have:

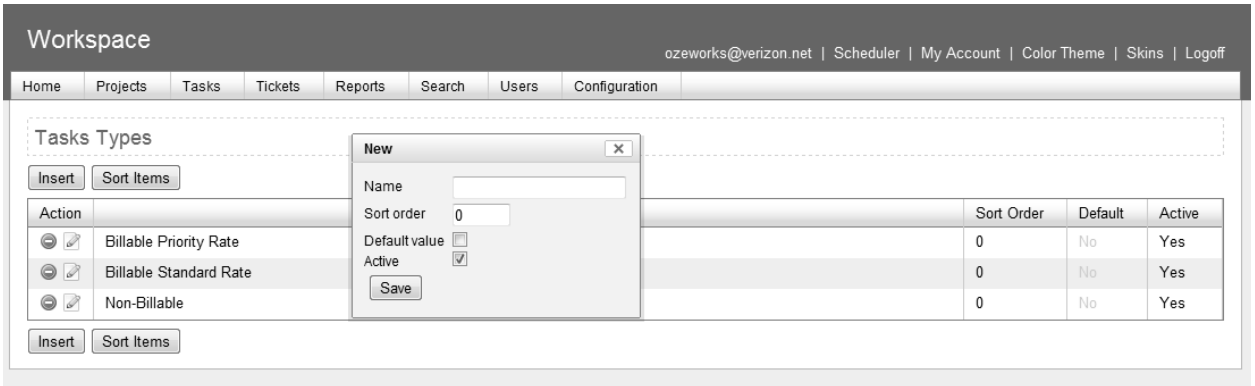
- **Task** which is a standard task which would have been part of the original plan
- **Defect** which is a task that was raised from testing, inspection or review
- **Change** which is a task that would not have been part of the original plan
- **Issue** which is a task that may not have specific deliverables but needs to be monitored or discussed and may trigger the other tasks to be created and/or changed.
- **Idea** which is a task may need to be discussed and if the idea is accepted could become a Quote or a Change
- **Quote** which is a task that needs to be scoped in terms of effort and possibly cost and if accepted could become a Change.



A Task Label has a Name, Sort Order, Default Value Flag and an Active Flag. Again you can use an AJAX sort.

Tasks Types

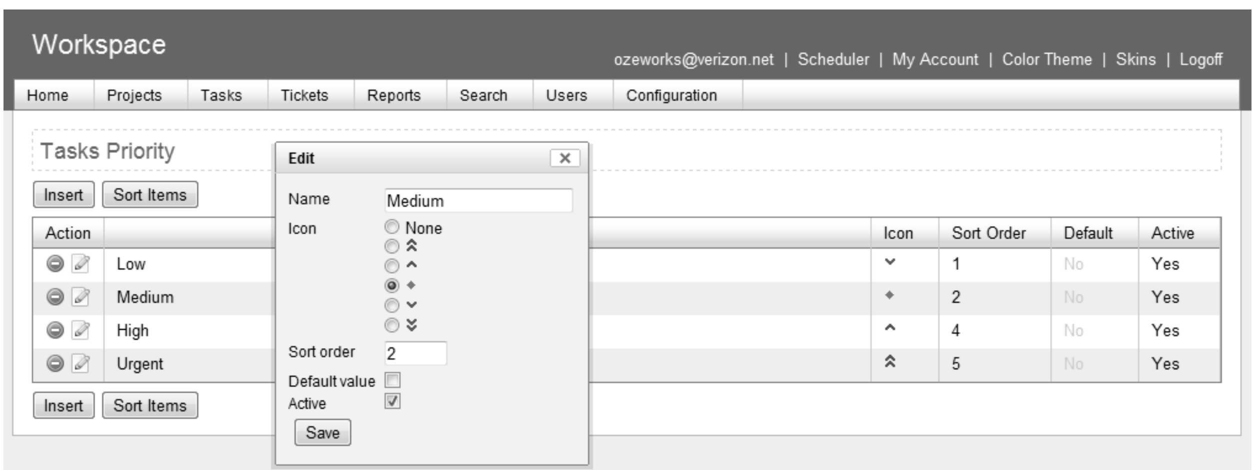
In addition to a Label, you can also classify tasks by Type. How you use this is completely up to you. It is not used for Task list sorting but it can be used for reports.



Internally we use it to flag whether the task is Billable or not. But you might want to use it to identify the organization groups that owns it e.g. PM, Design, Development, QA/QC and so on.

A Type has a Name, Sort Order, Default Value flag and an Active Flag. You can also use the AJAX sort.

Tasks Priorities

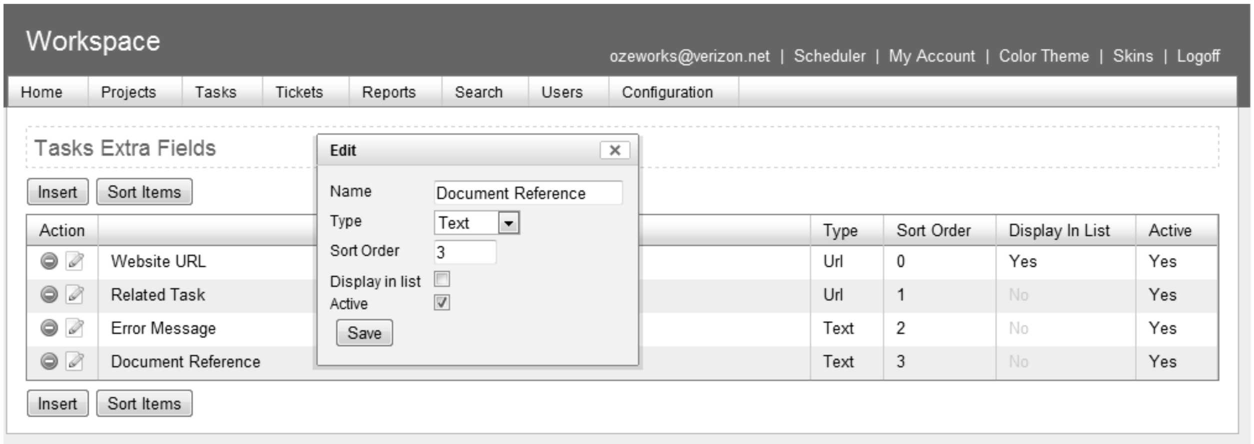


Tasks always have a priority. Common values are Low, Medium, High and Urgent. Where someone has two tasks assigned to be done by the same date then the priority helps them decide which should be done first.

A Priority has a Name, Sort Order, Default and Active flags but it also has an icon to visually depict urgency.

Tasks Extra Fields

Like Projects, you can add extra fields to define your tasks even further.



In defining a new field you can give it a Name, Type, Sort Order and flag if it is to be displayed in the Task List and if it is still Active or not.

The types of fields can be Number, Text, Date or URL. URLs are handy for referencing online documentation or perhaps the URL at which an error occurred.

You can even use a URL to reference another Task e.g. a related Task. But please note if you need a concept of Parent/Child tasks or Activities, you need to upgrade to qdPM Extended.

Tickets Configuration

Tickets Departments

Tickets are created for specific Departments. It depends how you use Tickets and how your organization is structured to provide service as to what Departments you create. You could:

- Set up one Department
- Set up a Department for each Project Manager
- Set up a Department for each Portfolio/Program
- Set up a Department for each organizational group such as Sales, Customer Service, Technical Support and so on.

Regardless, you do need to set up at least one Department. And before you decide you need to understand how Departments are related to Projects.

Setting up Departments is basically about controlling:

- which Departments are shown in the Department dropdown when logging a Ticket for a Project
- who gets notified within your organization that the Ticket has been logged.

So each Department has one person *assigned* to it and they are the ones who will get notified when the Ticket is logged. That person is a User. A Department can have only one User assigned to it **but** a User can be assigned to *more than one* Department. A User can also assigned to *more than one* Project. So it can get complicated if you don't take *the multiplicity factor* into account.

The Department User must be assigned to a Project team before anyone from that Project can log a Ticket for that Department. If they are not on the Project team then that Department is not listed as an option when logging the Ticket for that Project.

However when someone logs a Ticket they are logging it for a specific Project. Regardless, they will be offered all Departments that anyone on that Project is assigned to.

For example, if Alex is the nominated Department User for Hosting Support *and he is assigned to Project A but not to Project B then only Project A users will be able to log a Ticket for* Hosting Support *department. When logging a Ticket for Project B,* Hosting Support *won't be offered as a Department in the drop down.*

For example, if Kym is the nominated Department User for USA Customers *and Sergey is the Department Manager for* International Customers *and both are on Project A when logging Tickets for Project A users will be offered both Departments in the dropdown.*

For example, if Kym is the nominated Department User for Project A *and Sergey is the nominated Department User for* Project B *and both are on* Project A *then anyone logging a Ticket for Project A will be offered both* Project A *and* Project B *in the Department dropdown.*

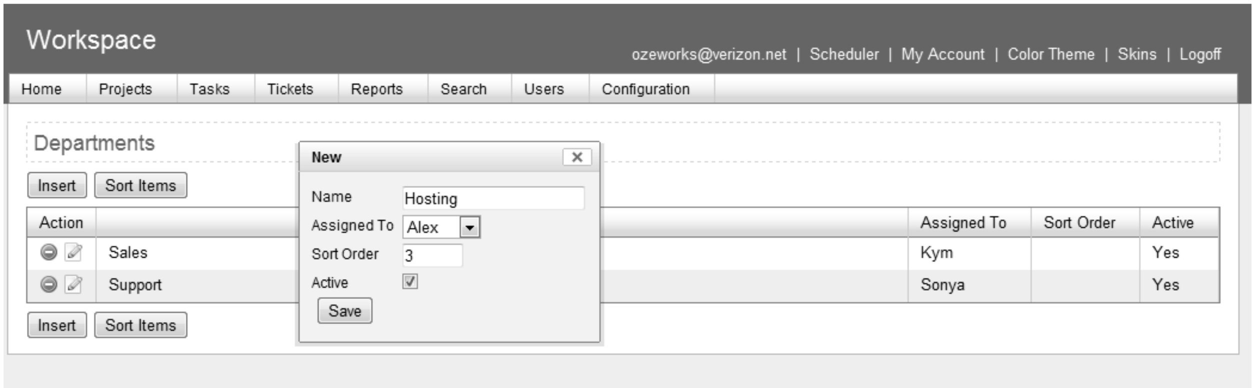
When a Ticket is logged the nominated Department User is notified. After that anyone who responds to the Ticket will also be notified including the person who logged it.

Whoever assigned to a Department can change day to day, hour to hour, shift to shift.

But just remember Departments are more about who is emailed that a Ticket has been logged more than anything else. Anyone on the actual Project can respond.

Plus Tickets can have related Tasks so in the background more people can work on a Ticket than simply those who directly respond.

In reality most users, when offered multiple Departments, tend to leave it default to the first one shown so whoever first responses to the Ticket might need to change the Department.

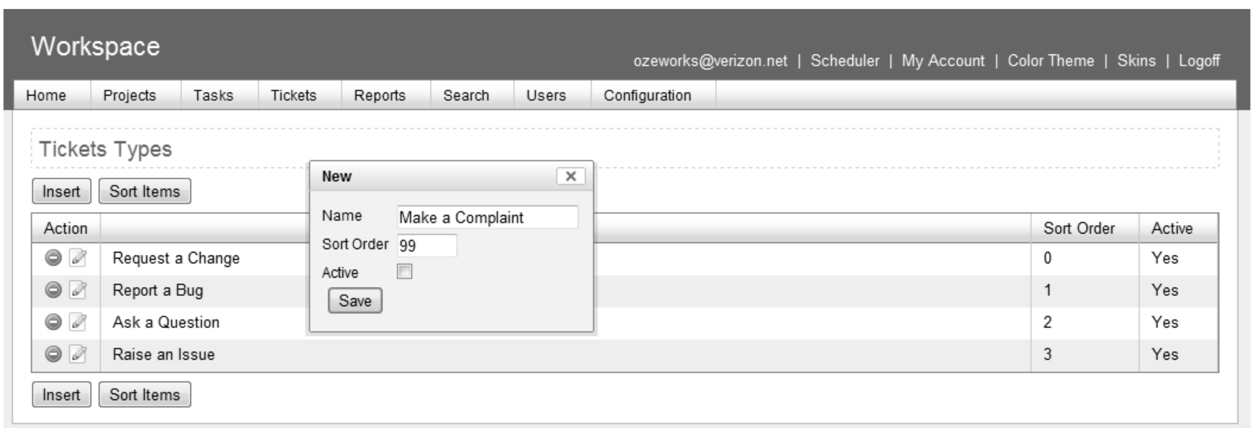


After all that explanation, Departments really only have a Name, Assignment (Manager) as well as a Sort Order and Active flag.

FAQ: W*hen I try to add a ticket, the department dropdown is empty. Why?*

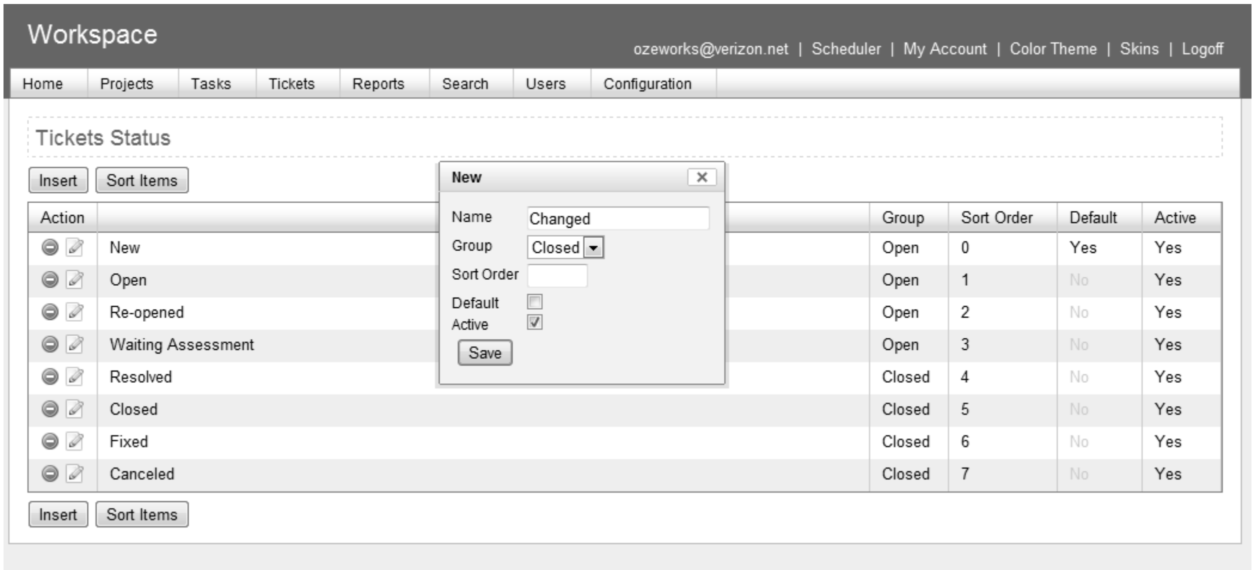
Each Department has a user who basically runs it. The user has to be on the Project Team for which the Ticket is being logged for their Department to show. If no-one on the Project Team manages a Ticket Department then no Departments will be displayed.

Tickets Types



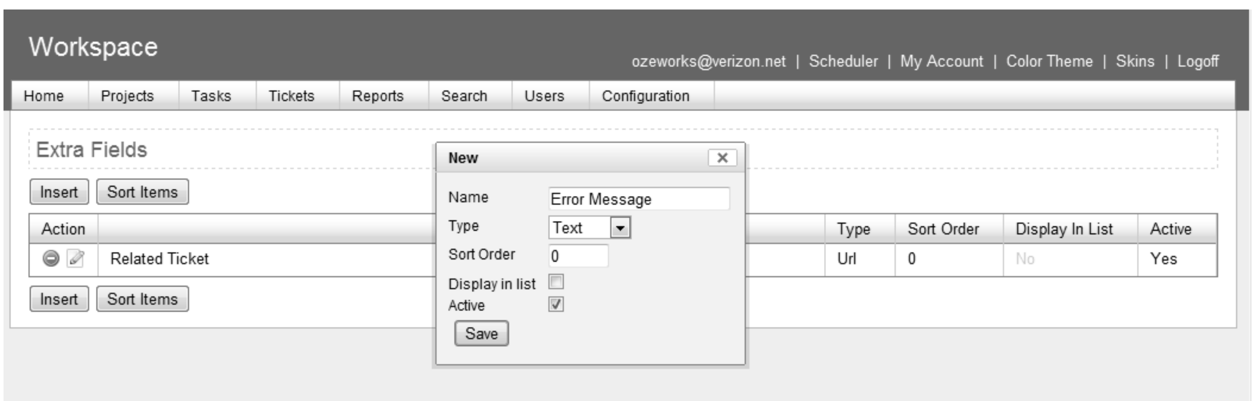
Tickets have a Type. And again quite often users ignore this when creating them. So if you plan on using Type as a report filter then you need to review the type of the Ticket as well as its Department when responding to a Ticket so they are tagged correctly. And remember the Type of Ticket might legitimately change as it is managed. What starts out as Ask a Question might in fact become a Request for Change or Raise an Issue might become Report a Bug.

Tickets Status



Tickets have a Status. Like Tasks, statuses are grouped but for Tickets they are only Open or Closed; there is no "Done?" stage.

Tickets Extra Fields



Tickets can have extra fields which are useful when you want to prompt users to provide specific information such as an Error Message or a website URL. In the above example you can see a "Related Ticket" field so you can link one Ticket to another to handle instances of duplicate Tickets or Tickets that were Closed and rather than being re-opened a new Ticket being created.

The bottom line on Tickets is to keep it simple, not rely solely on email notifications regarding the logging of new Tickets but rather monitor your Ticket queues by Project as well as by Department.