# qdPM User Guide

*This Guide has been developed to help you use qdPM.  If you want advice on how to configure it then please refer to the qdPM Configuration Guide.*

*If you are a V7 user then we also recommend that you read Attachment A of this document to get an idea of what has changed.*

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.  If you have not yet done that then you need to do it before you can move on to actually *using* it.

When you think about how to use qdPM, you need to keep in mind its underlying concept of a walled garden around Projects.  People with access inside the wall have full access to functionality.  People outside the wall 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".

Finally, if you find you ever outgrow qdPM, then you can upgrade to qdPM Extended.
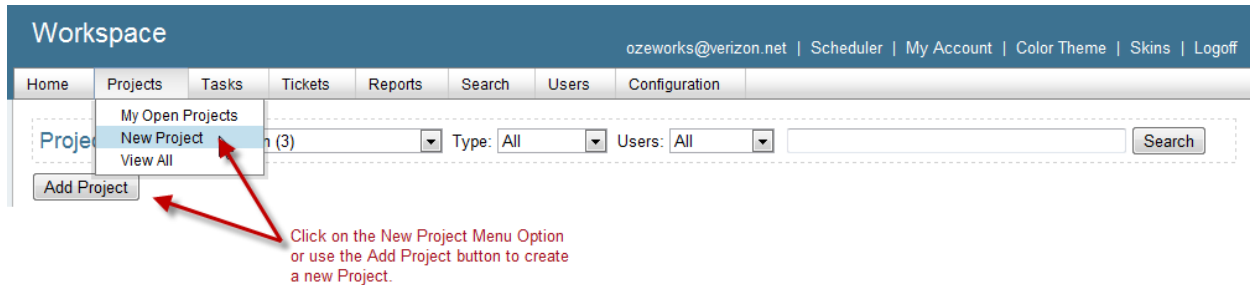
qdPM Team

December 2013
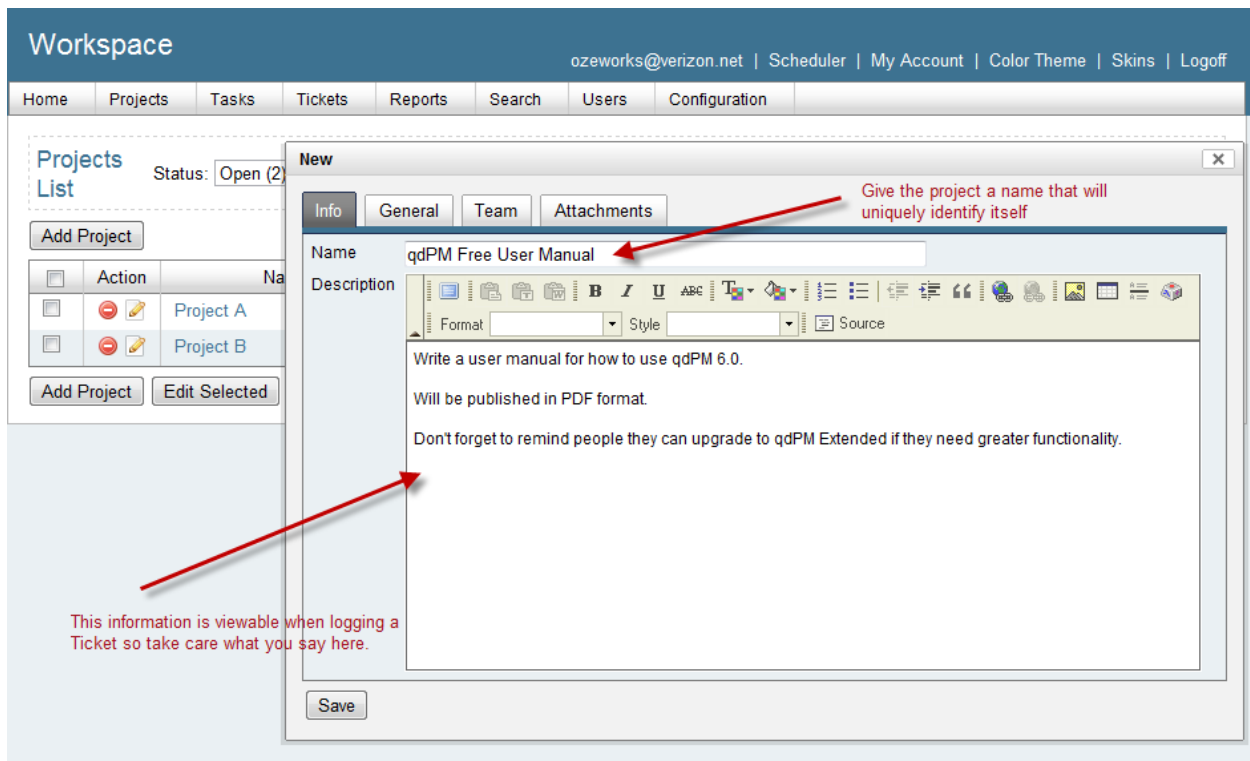
# Table of Contents

# Projects

## Setting up a New Project



Creating a new Project is easy.  You just use the New Project option on the Projects menu or click the Add Project button.

When you do you will be presented with a number of Tabs: Info, General, Team and Attachments, that need to be completed to fully define your project.

## Info Tab

A Project has a Name and a Description.  You need to give a project a meaningful name so that when seen in a Project List you can tell which project is which independent of whom the project is for. Therefore sometimes you need to include some form of customer identification.

The Project Description basically defines the purpose and scope.   It is meant as a summary.  However, you could enter the Project Brief or Statement of Work in this field.  Alternatively, formal planning documentation can be added as Attachments and a summary entered here.

The Project Name and Description can seen when people log Tickets and so can Attachments, so remember to be careful about what you write.

## General Tab



The General Tab allows you to identify the Project Status  and Project Type plus any Extra Fields you might have set up.

It is around this time, you suddenly realize that no matter how carefully you thought ahead and configured things to suit your projects, you do need some extra fields (or you need to upgrade to qdPM Extended).



Some fields you might want to add are:

1. Individual Roles such as Project Manager, Product Owner, Scrum Master and so on.
2. Start Date
3. End Date
4. Wiki URL if using an external wiki for project documentation.

If you add them then they show up on the General Tab.

qdPM Extended allows you to create additional Tabs you can use to organize extra fields.



In qdPM V8, we introduced a lot more Extra Field types:

● Date with calendar and time picker;  you can select date and time using JavaScript Calendar
● Date range with calendar picker;  you can select date range using JavaScript Calendar
● Textarea with WYSIWYG editor; WYSIWYG editor will be automatically added to this field.
● File for file upload
● Date with dropdown select
● Input URL Field for inputting clickable URLs

## Team Tab



Assigning the Team is as simple as ticking the box against each User. Once assigned you see should their details including photos in the RH column of your project details.

  Just a reminder from the configuration guide that it is a good idea for users to have their photos set up as it makes interaction far more personal. Make sure you load thumbnail size photos.

## Attachments

You can attach various documents to a Project.   How many you add is up to you.  How big they are is up to your hosting.

If you find you want to load documents that are larger than the maximum file size allowed on  your server or take longer to load than allowed  then you may need to increase these limits in your php.ini file.
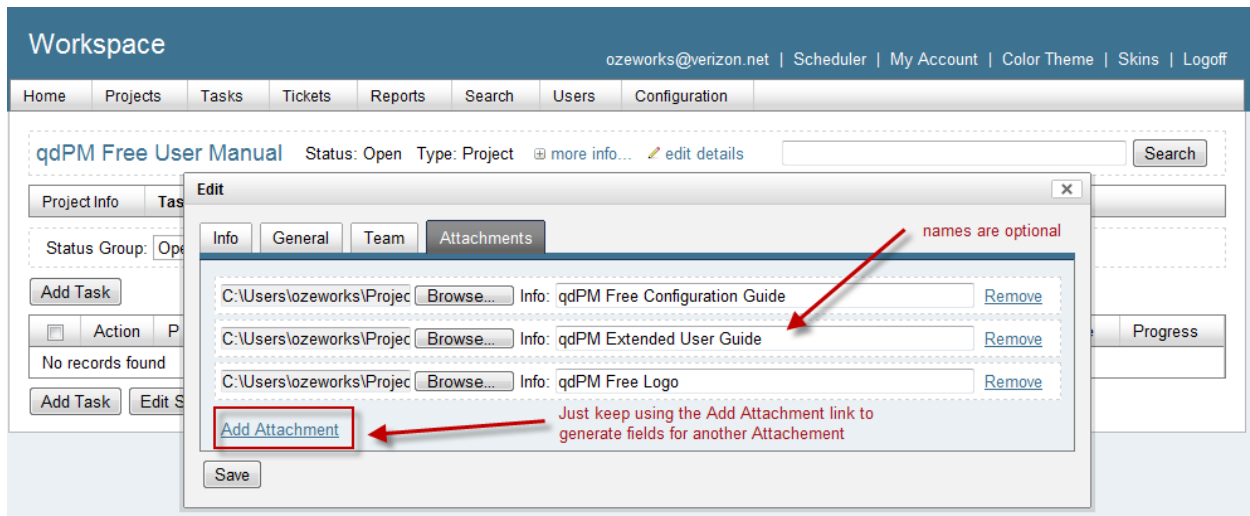


If you are using formal documentation management, you might want to set a policy regarding how this feature is used.  A simple policy is that any attachment at Project level, meaning listed in Project Attachments tab, must be formally approved (baselined) documents.   Documents that are works in progress (drafts) should be attached to the various Tasks that are producing them.  When the Task is completed and the document approved, its final version can be added to main Project Attachment tab. This kind of policy information can be added to the site wiki.

You can load more than one attachment at a time.  Simply browse to the source folder and select all documents to attach and they will all load creating one attachment per file.  You can then label each one if you want to make it clear what they are.  Make sure you wait until they are 100% loaded before saving.

Once loaded the Attachments are listed under the main Project Information on the Info Tab as well as under the Attachment tab.

 Watch for qdPM Extended V4 where we introduce formal Document Management.

# Project Methodology

Now it is time to think about how you are tackling the project ; how the work is to be broken up into Tasks and if you want to group these Tasks in any way to reflect the methodology you are using.

Your options are to do nothing and just have one long list of Tasks or create some Phases, Task Groups and/or Versions. You can get as organized as you want to create as many views as you want of the work that is to be done.

In qdPM Extended you can have Parent/Child Tasks to represent Activities. It's a bit like indenting tasks on a Gantt chart.

## Phases

Phases are optional.  You do not have to use them.  But if you are using a formal methodology they do tend to have Phases even if they are not called that.   (Some call then Stages)



You can set up a default phases for different methodologies under your Configuration.  If you have done that then you can pick the methodology and assign its phases to your Project.   In the above example we are adding the default Project Management phases.  After that you could add the Project specific Phases and/or delete any of the chosen default Phases that you don't need for this particular Project.

When adding a Phase, it is given a Name and Status. It can also have a Due Date which can be considered a milestone.

If it is a small project then Phases might be overkill.   Task Groups might be more than enough in terms of organizing tasks but just remember Task Groups don't have a Due Date.

## Task Groups

Task Groups are optional.  You do not have to use them.

If you are not using Phases and you do have a lot of tasks then you might want to consider using Task Groups as a way of organizing your tasks to give a more logical view of them.

You could group Tasks based on the team responsible for them such as Creative or QA  or the phase they belong to e.g. Testing.  You would also use them to represent the functional area or component the Task belongs to.

In Agile terms, a Task Group could be a Sprint and you could add an Task Extra Field to denote the component.

Watch for qdPM Extended V4 where Tasks can belong to more than one Task Group.



If you are using Task Groups then you simply give them a Name.  Unlike Phases or Versions, they do not have a Due Date.
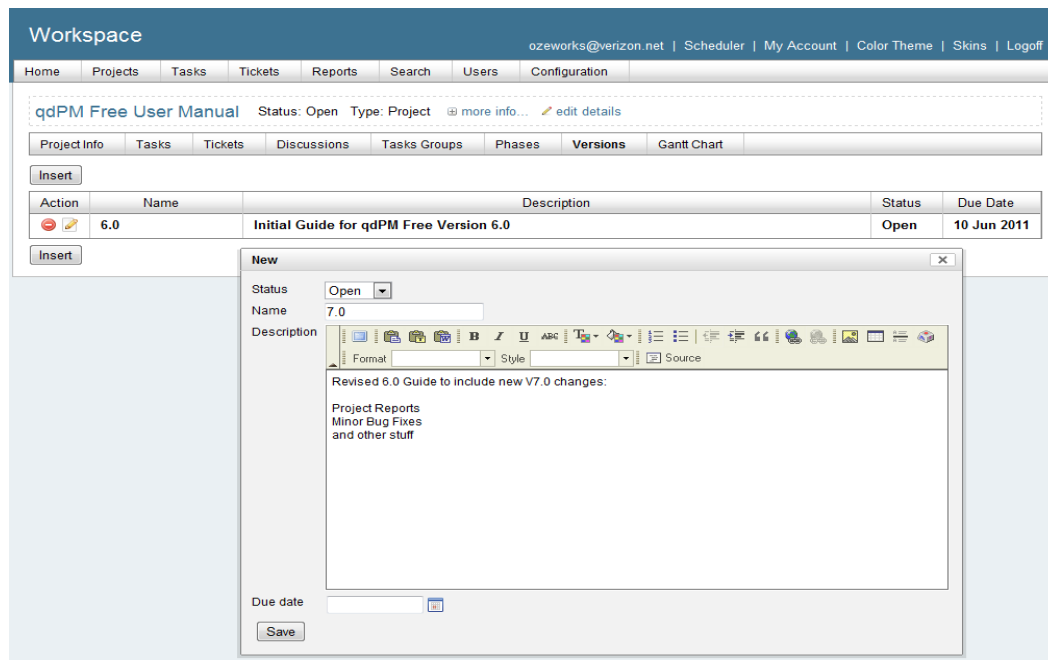
## Versions

Versions are optional. You do not have to use them.

Versions are useful for projects that are delivering in parts:

- If using an iterative approach, a Version can be considered an iteration or release.  For example, qdPM V9 would be a Version.

- If using a staged / build approach, a Version is the Stage.   For example, if building a three tower office complex, building Tower A would be a stage.
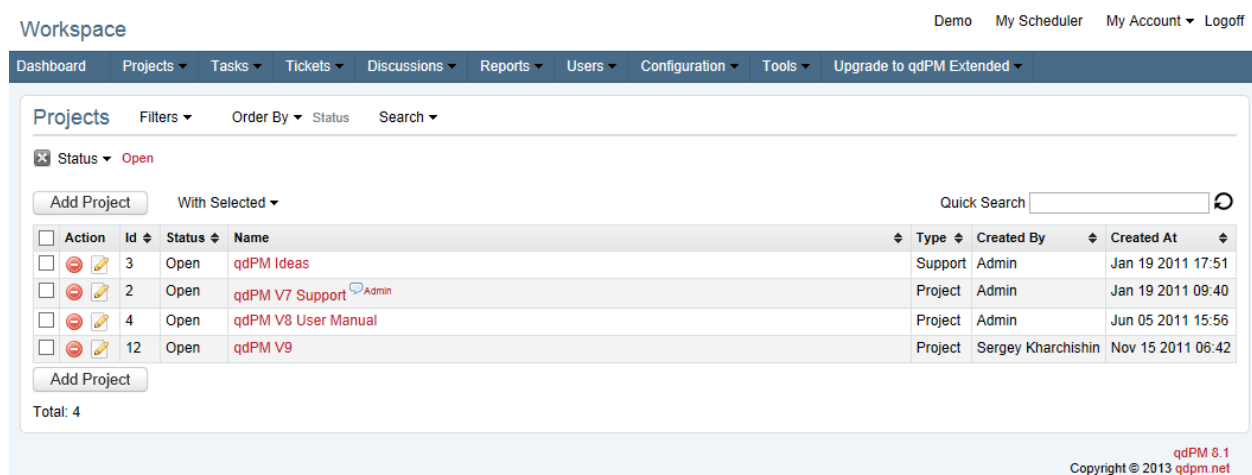


If using Versions, you simply create one giving it a Name, Status, Description and a Due Date.

## Managing Projects

### Open Projects

To see your Projects you can either click on the Projects menu heading or the View All in the drop down. You can use the Project Status filter to see only Open Projects.



Remember unless you are an Admin, you only see the Projects that you are assigned to.

## Searching for a Project

If your project list is long you can search for a project using the search function.  You can search in project name (default), its description and/or comments.

## Editing a Project

To edit a Project you can:

- click on the edit icon 🖉 next o the Project Name in a project listing to trigger a  popup window that will display its Details for editing
- you can go to the Project page  by clicking on the Project Name in a Project listing and use the 🖉 edit details link opens at window in which you can edit these details

## Adding Comments

You can add Comments to a Project when looking at the Project Info view.

For some Projects, it might be useful to use it for weekly project reporting and/or minutes of project meetings.

You could make a record of contract variations or milestones.

You can also use Comments to keep general information about a Project.

If you plan to record secure information like passwords we recommend you use the Project wiki and run qdPM under SSL.

A Comment is free format field that can be used for anything.   They can also have Attachments.

Project Comments are *not* seen by people logging Tickets.

## Deleting a Project

You can delete a Project via the Project Listing.  Deleting a Project deletes all records related to it. However uploaded images or attachments files are still on the server.

Often it is better to just close a Project than delete all history of it.

## Discussions

Before we move on to looking at Tasks, let's look at Discussions.

In V8, we have Extra Fields for Discussions.

A Discussion is basically an exchange of comments on a subject between one or more of the Project Team.  In addition to a conversation, you can also use a Discussion to keep a record of pretty much anything:

- meeting minutes
- research notes
- chat session (copy and paste an external chat session into the discussion description)
- daily stand up reports.

A discussion has a Name, Status, a list of people the discussion involves plus a description of what is being discussed.

From V8 onwards, discussions can have Extra Fields.

Discussions also can have Attachments.

You can also generate Discussions Reports.

Even though the discussion can be between two people, other people who have access to discussions and are on that project can contribute.  A discussion involving only one person could be considered as a "note".  Please review user access controls to see how can see a Discussion.

Please note that Discussions are at Project level only.  qdPM Extended  allows discussions at Ticket and Task level as well.

## qdPM V7 Support

Status: Open    Type: Project    More Info    Edit Details

| Project Info | Tasks ▾ | Tickets ▾ | **Discussions** ▾ | Tasks Groups ▾ | Versions ▾ | Phases ▾ | Reports ▾ |

### Need Help? [Open]

💬 Add Comment    ✏ Edit Details        More Actions ▾

Given the increasing scope of the project, do you think you are going to need additional resources to keep to schedule or is there enough slack in the plan to handle it?

[ Add Comment ]                                                    Search [                    ] ↺

| Action | Comment | Created At |
|---|---|---|
| | Looks like we'll be OK. We can review it again in a few weeks | Jun 05 2011 18:19 Alex |
| | Let me know Alex because I have some free time in the next two weeks and can possibly help out. | Jun 05 2011 17:57 Sonya |
| | I think there is enough slack but I won't be sure until I review the overall status end of this week. | Jun 05 2011 17:55 Alex |

[ Add Comment ]

You can leave discussions open as long as you like.  However to manage them it might be a good idea to create an Open Discussions Report to go on your Home page so you don't forget about them.

# Tasks

## New Tasks

In V8, we have reversed the meaning of Labels and Types to make Tasks consistent with other entities such as Project and Tickets.

Once you have set up your Project, the real work begins - setting up your Tasks.

There are numerous ways you can add a Task to a Project but let's look at the most traditional – adding a Task in Project View.



You can use the Add Task option on the Task drop down menu or one of the Add Task buttons located at the top and bottom of the Task List.

A Task has three tabs to define it: General, Time and Attachments.

## Task General Tab



A Task has a Name and a Description.  You need to make sure you give it a name that clearly identifies it in a Task List. The Description should be as comprehensive as possible so that the person undertaking the task understands what they are meant to do.  You don't want "huh?" to be their first reaction.

Tasks also have the following information fields all set up under Configuration Tasks:

- Type (prior to V8 this field was called Label)
- Status
- Priority
- Label (prior to V8 this was called Type)

all of which can be used in Task filters including on Reports.

Tasks can also have the following fields:

- Group, optional Task Group from the Tasks Groups tab
- Phase, optional Phase from the Phases tab
- Version, optional Version from the Versions tab
- Extra Fields as set up under Configuration Tasks Extra Fields.

For more information about Phases, Groups and Versions see the Project Methodology section.

Who the task is created by can set to either the person who added the Task or the person who will manage it.

Finally there is the issue of who the Task is assigned to. The assumption is that a Task is assigned to just one person.  However you can in fact assign it to more than one person by using the Select All link under Assigned to label.

You can check and uncheck any resources as required.

Please refer to the Configuration Manual for advice on setting up Task Status, Types, Labels and Priorities.

## Task Time

A Task can have:

- Estimated Time, the actual effort expected for this task (in hours)
- Start Date, optional Start Date
- Due Date, optional End Date
- Progress, optional percentage complete.

If you plan to use the Gantt chart report then you need to have a Start and End date for any Tasks you want to display on the report.

For more information about Progress, Estimated Time, State and End Dates see Task Comments section below.

## Task Attachments

Task Attachments work the same way as Project Attachments.

Attachments at Task level are generally related to the task specification meaning they are documents needed in some way to perform the Task.

 If a document is already loaded at Project level then don't reload it for the Task.  Just use the document link as a reference!

You can load more than one attachment at a time.  Simply browse to the source folder and select all documents to attach and they will all load creating one attachment per file.  You can then label each one if you want to make it clear what they are.  Make sure you wait until they are 100% loaded before saving the Task.

## Existing Tasks

### Comments

Task Comments have a General and Attachments tabs which correlate to the same Tabs at Task level with a little bit extra.

#### Comment General Tab



Within a Comment, you can update the Task Status, Priority, Label, Type and Due Date since all these items can change as the task progresses.

In addition you can update Progress and enter actual Worked Hours.  Percentage Completed has been left to manual calculation from a dropdown list incremented in 5% intervals.

A record of these changes is shown in the Comment once saved,



and in the right hand column



In the Task Details box, if the total Actual Time worked is greater than the Estimated Time then the over-run is shown in brackets.

If you want to track to overall To Go on a Task while it is in being worked on you can add a To Go field .
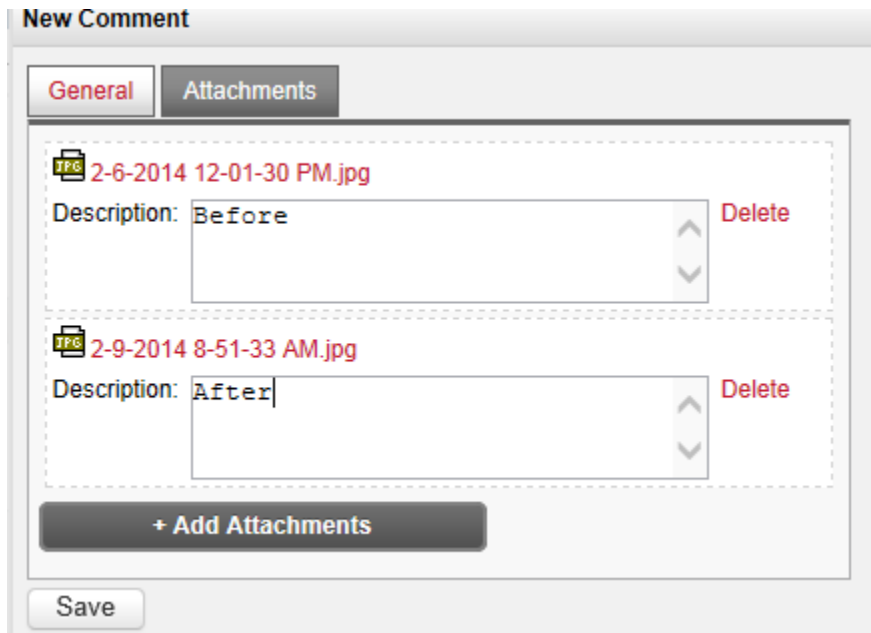
See the Time Report about how to track time at an organizational level.

Get qdPM Extended for more advanced tracking of actual effort.

*Comment Attachments Tab*

Task Comment Attachments work the same way as Project Attachments.



Attachments at comment level are generally related to the work in progress and feedback on work in progress.  In the context of document control, these are not controlled documents and would not be part of any baseline.
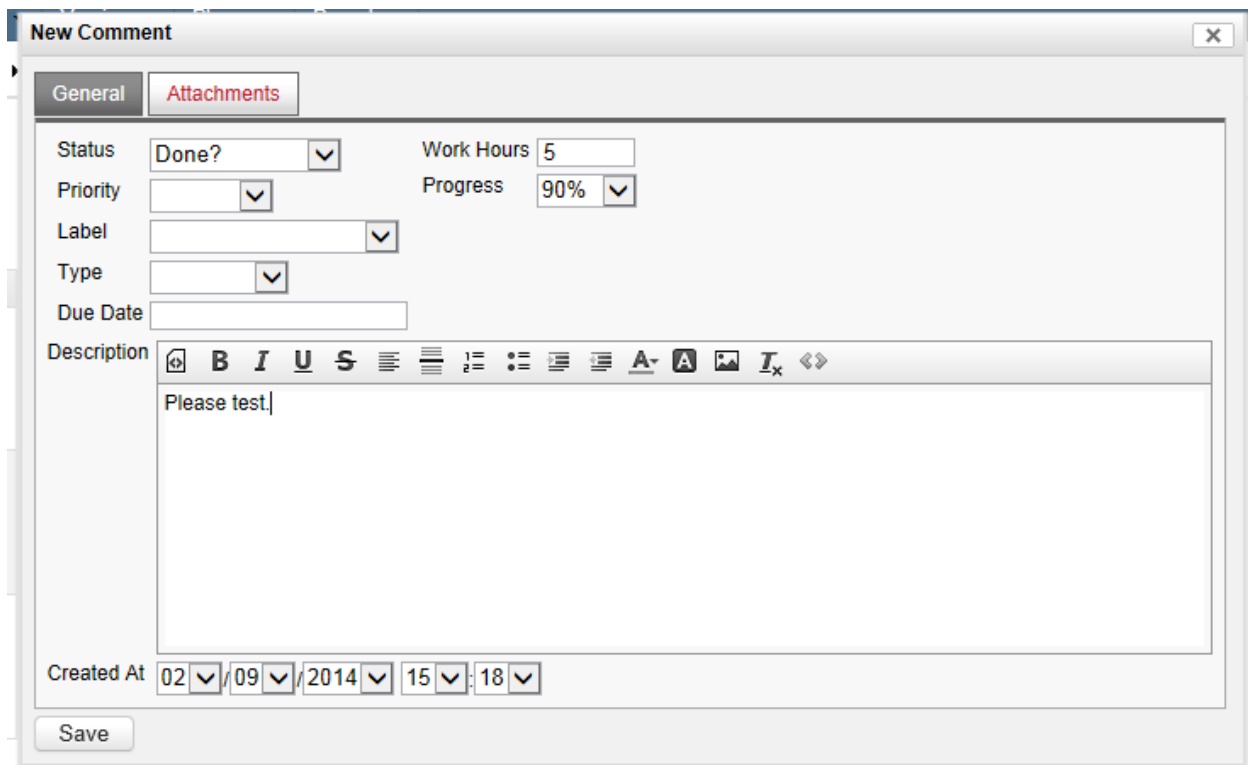
Remember, you can load more than one attachment at a time.  Simply browse to the source folder and select all documents to attach and they will all load creating one attachment per file.  You can then label each one if you want.  Make sure you wait until they are 100% loaded before saving the Comment.

## Editing a Task

You can edit any detail relating to a Task except the Date Created. However once work has started on the Task, it is not a good idea to change the Estimated Time unless a genuine mistake was made.

## Deleting a Task

If you delete a Task you delete all information about it.  However any Attachments or images loaded via the description editor are not deleted from the server.

## Tickets

### New Tickets



Anyone can create a new Ticket for a Project provided they are assigned to that Project.

When the Ticket is created, the Department owner is sent an email.   The person cresting the Ticket is not sent an email.  Since V8, you can also notify another team member about the Ticket meaning they will also be sent an email.

When the Department Manager responds, then person who created the Ticket is sent an email.

If someone else on the Project posts a Comment on a Ticket from then on they too will be emailed when comments are made on the Ticket.

When creating a Ticket you decide which Department it is for.  You also need to choose which Type of Ticket you are creating.  The Status is generally set to New.   To define the Ticket you enter a Subject and a Description.

You can also have Extra Fields like in the above example.  Here there is a Related Ticket field where you could paste the URL of another  Ticket.  For instance, someone who responds to this Ticket might decide

that an earlier Ticket relates to this one or they might decide that the Ticket covers a topic that would be better dealt with by its own Ticket and/or another Department  and so create another Ticket.

Like Tasks, Tickets can have Attachments.  How Ticket attachments are treated as part of your document control/baseline is up to you.   They can be approved documents you would add attach to the Project or working documents that would you link in a Task.

## Editing a Ticket

A Ticket can be edited at any time.  Generally the only fields that get updated are the Department,  Type or Status.

Sometime when people log Tickets they are not sure what Department to assign it to.  A common action on handling a Ticket is to comment that you intend to assign the Ticket to another Department.  In doing so you add a Comment and then edit the Ticket and change the Department.

You might also want to change the Type of Ticket it is.  If you are tracking statistics on Ticket Types you want to make sure they are classified accurately.  Sometime people reports "issues" which are in fact not issues at all but simply requests for change. Also different Departments can have different Ticket Types so if you change Department you might also have to change Type.

Ticket Status tracks the Ticket workflow.  In addition to being opened and closed, you might want to track where in the organization/workflow the Ticket is.  For example, you might raise a Task for the Support group to action the Ticket and then change the Ticket status to "waiting on Support".  Or the Ticket might be completed but you are "waiting on client" to verify this.

## Creating Ticket Tasks

If any work is to be done on a Ticket beyond responding to it, then you need to create a Task.  You can create a Task quite easily. Simply navigate to the More Actions filter and choose "Related Tasks".
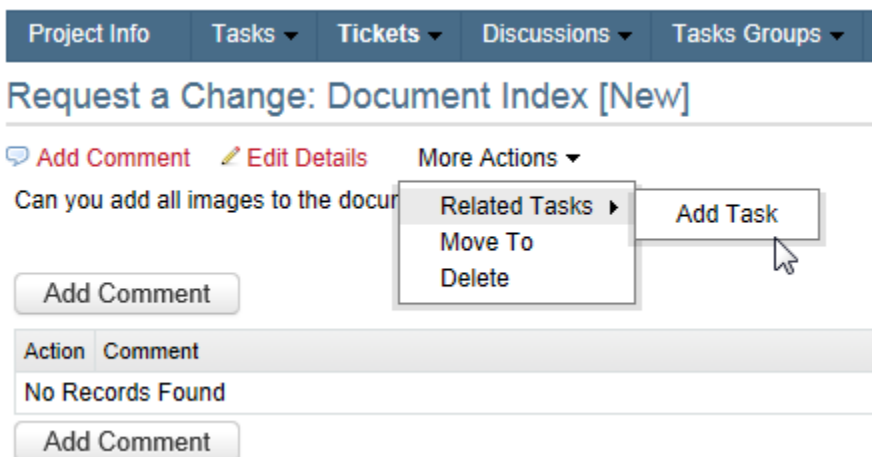
You can automatically copy content from the Ticket with one click.



qdPM Extended lets you link existing Tasks to Tickets

## Ticket Comments

Anyone on the Project can comment on a Ticket.  Once they comment on the Ticket they will get emailed all further comments.

If you edit a comment a new email will be generated so take care when editing a Comment just to fix typing mistakes.

## Moving Tickets

When someone is assigned to more than one project sometimes they can add a Ticket to the wrong one. Or you might even be using two projects to support the one customer with one project being a pipeline of ideas and the one being the implementation of those idea. In which case you would move a Ticket from one project to another as part of the normal workflow.



Moving a Ticket can be done via the Ticket List or when editing the actual Ticket.
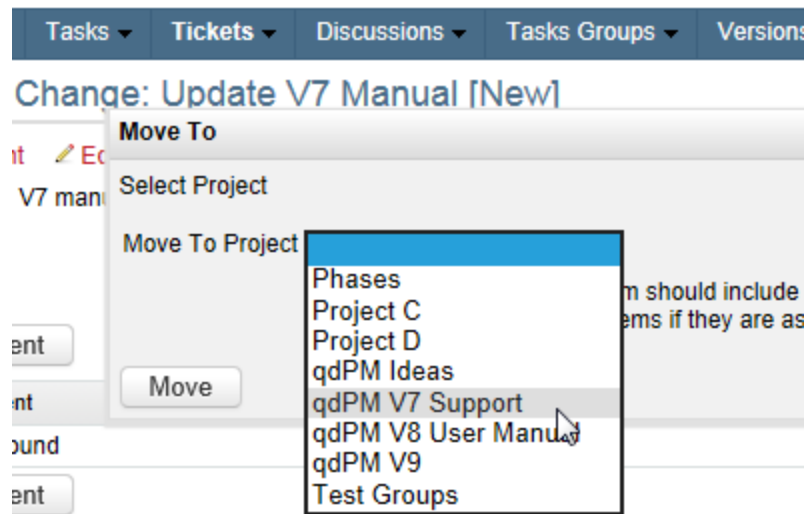
You just select the project from the Dropdown list and click the Move button.

## Deleting a Ticket

If you delete a Ticket you delete all information about it excluding Related Tasks.  Any Attachments or images loaded via the editor are not deleted from the server.

Because the Department owner is emailed about new Tickets, it is not a good idea to delete a Ticket. If you delete it then they will then wonder where it went!  Best practice is to close the Ticket rather than delete.  However you might want to delete duplicates.

# Reports

Reports are the way you populate your Dashboard (Home page).

You can create reports about Project, Tasks, Tickets and Discussions.  You can give each report a Name and decide if you want to display it on your Dashboard and/or in the associated menu.
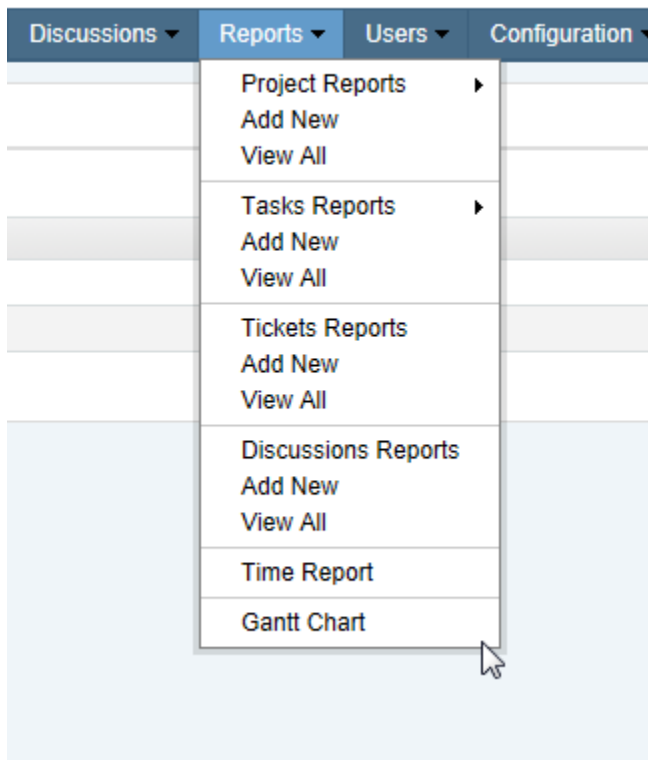


One point to note is that reports are individual to the user.  If you create a report you cannot share it with another user.  Therefore if your organization wants to use common reports then you need to set up the report (s) when you set up each user.   In this case, it might be a good idea to have an inactive user account that is used as a template,

In addition to user generated reports, there are two special reports:  Users Time Report and the Gantt Chart which are only accessible via the Report menu.

Finally, when selecting report filter values from a drop down, you can select more than one value  by using the CTRL key.

qdPM Extended allows you to create common reports to show on all Dashboards.

## Project Reports



Project Reports are a handy way of grouping Projects. They tend to be placed on the Project menu rather than on the Dashboard.

If you are a Manager you might want to group Projects based on Type and Status.  For instance you could create a report to list open Support Projects.

If you manage a Portfolio or Program then you might be interested in specific Projects in which case you would manually pick them from the Projects list using the CTRL key to create a report to group them into each Portfolio or Program like the example above.

If you are Team Member you might want a report showing all Projects where you are in the Team or play a special role in the Team such as Team Leader or Scrum Master. This one might be one you add to your Dashboard.

# Task Reports



Task Reports are more complex than Project Reports because you have so many more parameters to play with. Whether you place the report on the Dashboard, Task menu or just leave it listed under the Task All Reports function really depends on its purpose.

Most people would create a report that looks at Open Tasks assigned to them and put it on their Dashboard.

If you are a Manager you might want to look at all Open Tasks for a particular Project or a particular Project Types. This is a report that would probably go on your Dashboard also.

Whoever checks work might have a report on Done? Tasks so they can verify they are in fact done.  This is another report that would be on a Dashboard.

If you have open tasks that have an open status of something like "hold" or "monitor" then you might create a separate report for them and add it to your Task menu rather than your Dashboard.

If you have to bill your customer for certain tasks at the end of each month then this would be a report that stayed on the Task Reports menu and got updated each month to change the date range on the Extras tab.

# Ticket Reports



An open Ticket report is a Dasboard must have. It is basically your Ticket queue.

A manager might have a report showing all Open Tickets.

Each person who manages a Department might have a report for all Open Tickets for that Department. However some department managers might prefer to have a report for different groups of Projects such as a Portfolio, Program or Customer to get a clearer view on demand.

Other people who are not department managers but who are on the team of projects that use Tickets can also create a Ticket reports.

 Tickets are not assigned to anyone only Tasks are.  However if you want to show who is managing the Ticket (other than the Department Manager),  you can create an extra field called "Assigned" and enter the person's name.  (In qdPM Extended you can set up a dropdown list of names).

## Discussion Reports

If you use Discussions then an open Discussion report is a handy way of keeping tracks of where that discussion is up to.



Discussions can also be used a Private Note, meaning it is only assigned to you. So having a Report of these is a good idea.

# Time Report



Tracking time is easy. You simply add a Comment to a Task and record how much time was spent on it. However accounting for time is harder.  People work a different number of hours per week.  People have sick days, vacation days and then there are public holidays where everyone has time off.

The best way to account for time is to normalize a week to a certain number of hours such as 40 hours and then track those 40 hours.  Anything under or over is a d*iscrepancy* you need to investigate.

With this approach, everyone account for all their time whether they work or not.  To support this you would create an Administrative Project with Tasks to cover:

- Holidays such as a New Year's Day
- Vacation
- Sick or Personal Days
- Unpaid Time
- Training
- Administrative Tasks such as timesheets
- Pre-sales activities

and so on.

In any given week a person would allocate their time to actual Project Tasks they worked on and for the balance of the 40 hours allocate it to the relevant Administrative Project Task.

# Gantt Chart
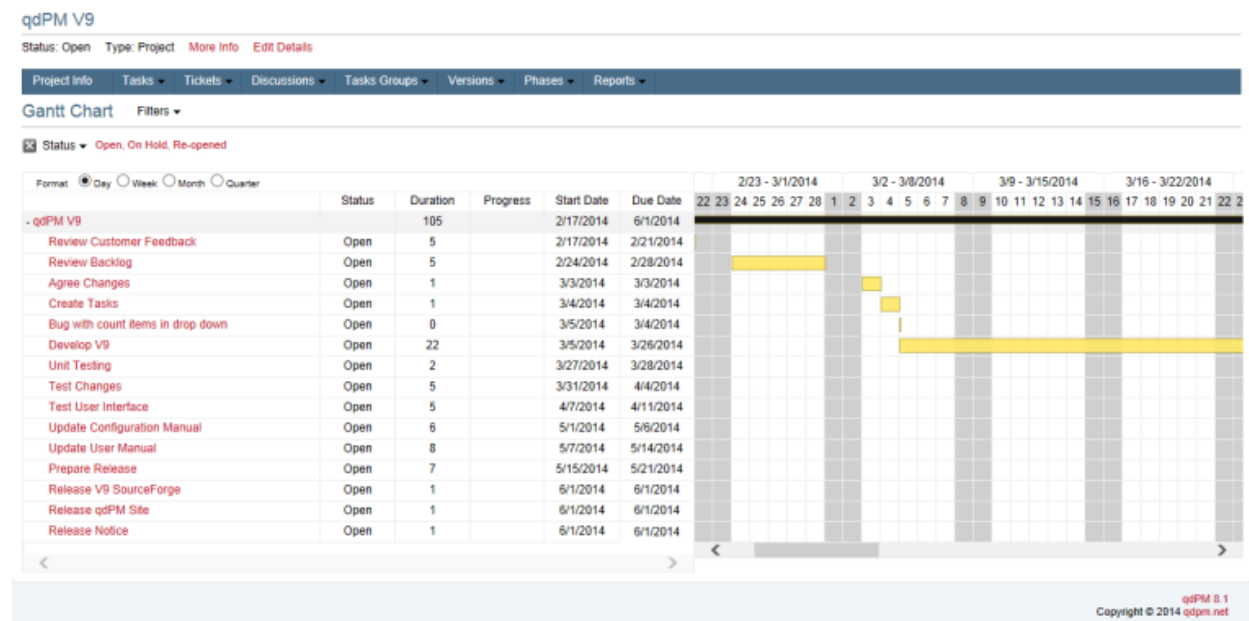


The Gantt Chart is report only. Unlike Ms Project and other WBS driven project management tools, data cannot be manipulated on this chart. However you can click on a Task to update it.

The report works off that Due Date. If you do not enter a Start Date then it assumes a duration of one day based on the Due Date. So you need to enter a Start Date if you want to reflect the actual Duration of the Task based on its Estimated Time and other factors.

The Project Percentage complete works off the number of Tasks completed rather than Estimated Time or Actual Work. Therefore if you have 5 Tasks and 3 are 100% complete then the Project is 60% complete.

# Appendix A – V8 Upgrade Notes

## Users Access Configuration

We added the following new access options for Tasks, Tickets and Discussions:

### View Own Only

View own only means users can view items where they are assigned but they cannot manage them.

For example, User "QA Support" with View Own Only:

- will be able to view Projects where they are on the Team
- will be able to view Tasks to which they are assigned
- will be  able to view Tickets belonging to their Department only
- will be able to view Discussions to

### Manage Own Only

User can manage (Create/Edit/Delete) items where the user is assigned or owner.

## Send email to users groups

There is option to send email to users groups which allows to you to select one or more user groups.

## LDAP

This feature enables LDAP authentication and creates users in a database that successfully authenticate

## Task Labels and Types

We have reversed the usage of these fields to be consistent with "types" as they relate to Project and Tickets.

## Extra Fields

Added extra Fields for Projects and Discussions

## New extra fields types

- Date with calendar and time picker;  you can select date and time using JavaScript Calendar
- Date range with calendar picker;  you can select date range using JavaScript Calendar
- Textarea with WYSIWYG editor; WYSIWYG editor will be automatically added to this field.
- File for file upload
- Date with dropdown select
- Input URL Field for inputting clickable URLs