

OPENPROJECT

Draft Setup notes for Openproject

Setup – Draft Notes

Contents

Introduction	2
Application Installation	2
Configuring the Plugins	2
Configure the Help link	2
Configure the Costs Plugin	2
Configure the backlog Plugin	3
Updating Roles and Permissions	4
Adding a New Role	5
Workflow.....	5
Types	6
Work package statuses	6
Custom Fields.....	7
Enumerations.....	7
OpenProject Settings	8
Updating the General settings	9
Updating Display	9
Updating Authentication	9
Updating User General Settings.....	10
Project Settings	11
Work Package Tracking	11
Email Notification Page	12
Incoming Email Page	13
Repositories	14
LDAP Authentication.....	14
Colors Page.....	15
The Project Types Page	16
Adding New Project Types	16
Creating the backlog Story	25

Introduction

The following documents my approach to setting up OpenProject. I have done this as I cannot find any documentation that provides the “Start to Finish” plan to get a simple project server running with a guide to how it would be used.

There are lots of hints and FAQ’s but I need a quickstart guide.

There will be lots of revisions as I learn more about the flexibility of the application.

Application Installation

I am using Ubuntu 14.04 and have installed all the plugins except the translation and emoji plugins.

I have created a production only database and set up apache as well. This means there is very little seed data installed. Please note the apache setup is not secured as this is for my testing only. You will have to consult Google if you want to learn more about running this server in public.

My Installation notes can be found at

<https://www.openproject.org/topics/1768>.

It takes about 60 to 90 minutes to complete for an average Linux admin like myself

I have installed the server inside VMWare player (Free for non commercial user) and backed up the VMDK file so I have a roll back point. If you want to experiment with OpenProject, this approach works. VMware player has an option to import a vmdk file. Just make a copy of your template (backup) and run the “Open a Virtual Machine” workflow.

Configuring the Plugins

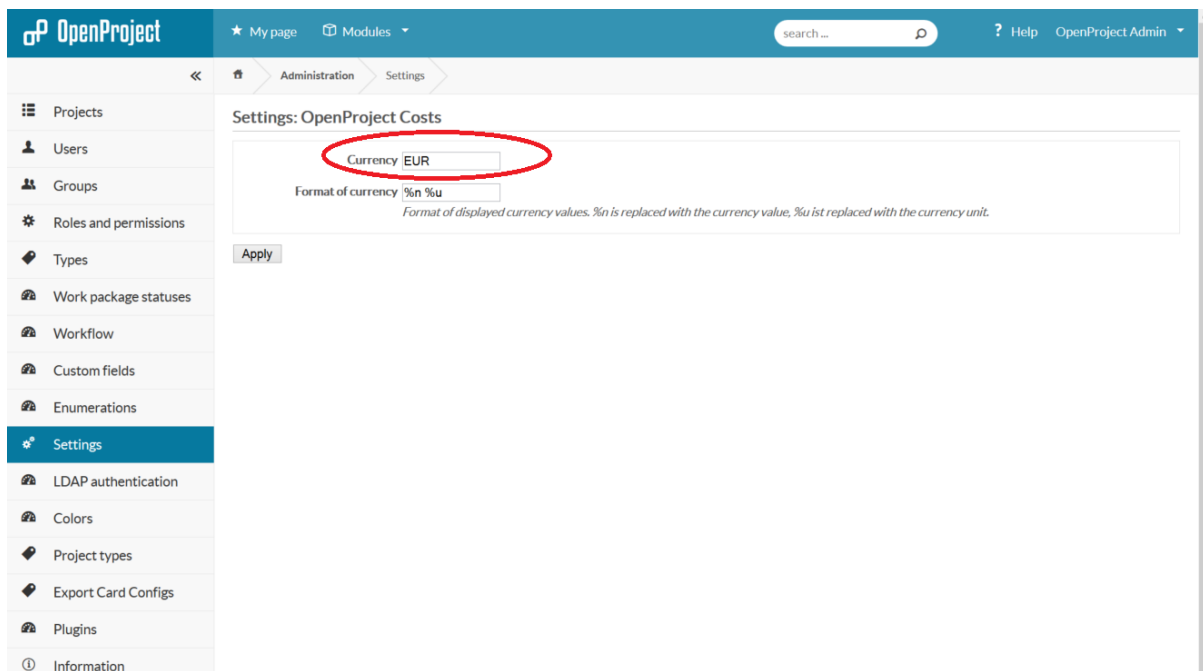
1. Using a web browser, open the project server on your local host or go the servers IP address if you are using Amazon or some other service provider
2. Login as admin pwd admin
3. Open the Administration Module
4. Go to the plugin page at the bottom of the menu.

Configure the Help link

Accept the default

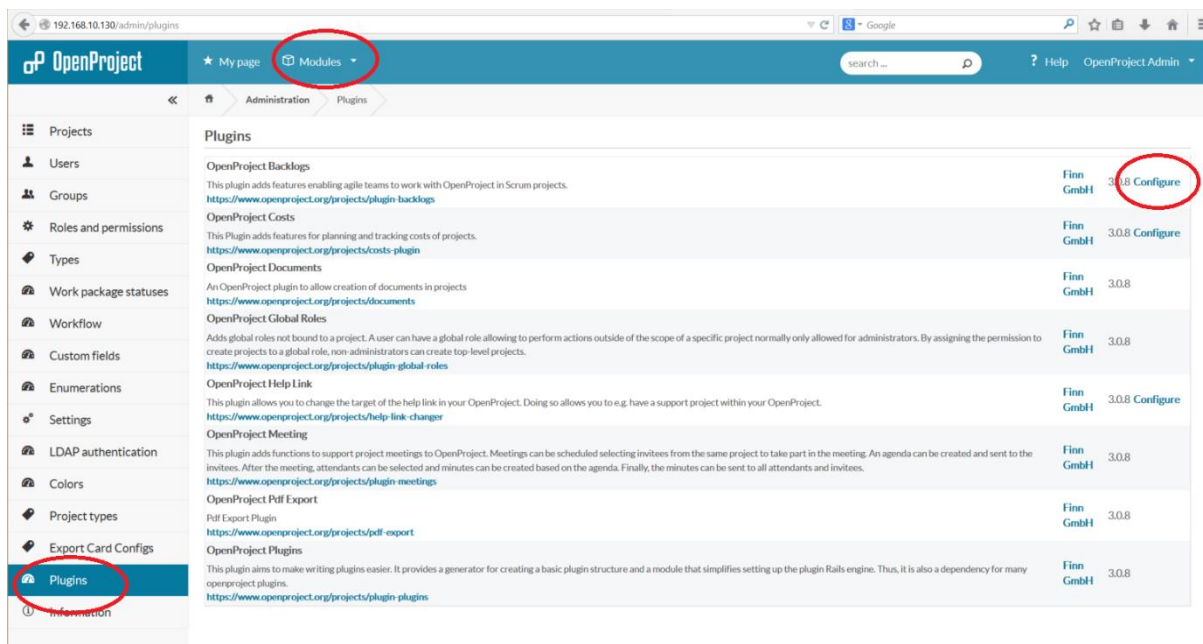
Configure the Costs Plugin

Can the currency symbol to the currency used by your company

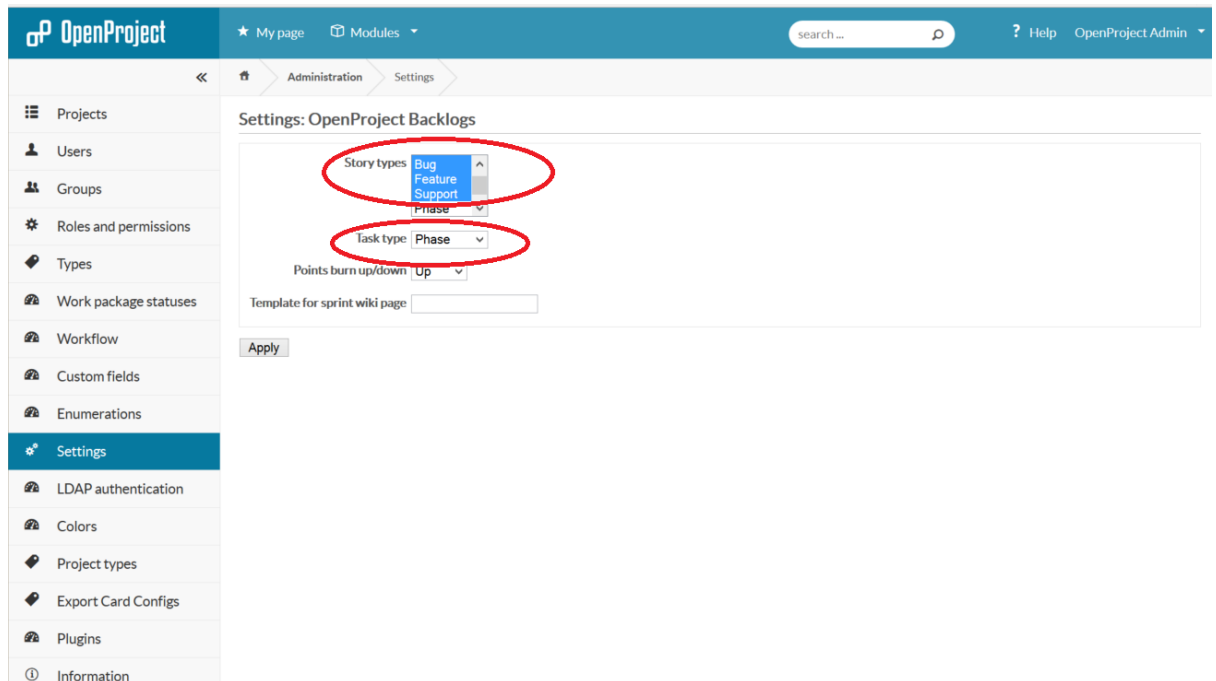


Configure the backlog Plugin

You access the configuration screen as below



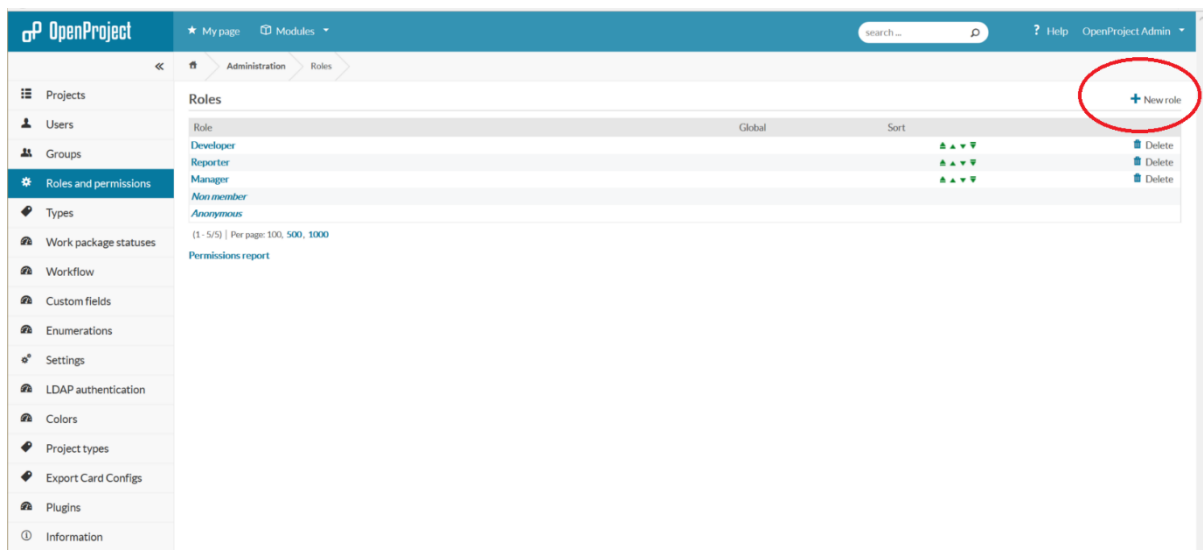
Use the shift button to select the group of project types that can be used in the initial story process. I use none, bug, feature and support. I used “phase” as the task type. I do not have sprint wiki template setup yet.



Press “apply” to save the choice you have made.

Updating Roles and Permissions

I am going to add a couple of specific roles used in traditional projects as well as a couple of SCRUM roles.



Adding a New Role

I am going to copy another roles workflow. It is important that you set up workflow as this will have a large effect on how OpenProject works. For example, you may have a testing role. You not allow the tester to create new tasks but you may allow them to change “in progress” to “feedback” or “rejected”. It will depend on the project framework you have setup in your company. I also have to set up the permissions for all the new plugins for all the current default roles as well.

OpenProject Administration Roles

Roles > New role

Name: PMO

Global Role: ☐

Work packages can be assigned to this role: ☒

Copy workflow from: Manager

Permissions

Project

- ☐ Edit project
- ☐ Select types
- ☐ Select project modules
- ☐ Create subprojects
- ☐ Manage members
- ☐ Copy projects
- ☐ Manage versions

Backlogs

- ☐ View master backlog
- ☐ Update stories
- ☐ Update impediments
- ☐ View taskboards
- ☐ Create tasks
- ☐ Update sprints
- ☐ Update tasks
- ☐ Create stories
- ☐ Create impediments

Forums

- ☐ Manage forums
- ☐ Delete messages
- ☒ Post messages
- ☐ Delete own messages
- ☐ Edit messages
- ☐ Edit own messages

Calendar

- ☒ View calendar

Cost Control

- ☐ View own hourly rate
- ☐ View cost rates
- ☐ Edit booked unit costs
- ☐ Edit Budgets
- ☐ View all hourly rates
- ☐ Book unit costs for oneself
- ☐ View Budgets
- ☐ Edit own hourly rates
- ☐ Book unit costs
- ☐ View booked costs
- ☐ Edit hourly rates
- ☐ Edit own booked unit costs
- ☐ View own booked costs

Documents

- ☐ Manage documents
- ☐ View documents

Workflow

I am not changing the workflow. When I set up the new roles I copied current workflows.

If you look at the developer workflow (press edit after you have selected the developer). You can see they have limited workflow

OpenProject

My page Modules

search...

Help OpenProject Admin

Administration Workflows

Workflow

Select a role and a type to edit the workflow:
Role: **Developer** Type: **none** ☒ Only display statuses that are used by this type

Edit

Current status	New statuses allowed					
	New	Resolved	Feedback	Closed	Rejected	In Progress
New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Resolved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Closed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Progress	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional transitions allowed when the user is the author +
Additional transitions allowed when the user is the assignee +

Save

Whereas the manager can control all the work packages and their status.

OpenProject

My page Modules

search...

Help OpenProject Admin

Administration Workflows

Workflow

Select a role and a type to edit the workflow:
Role: **Manager** Type: **none** ☒ Only display statuses that are used by this type

Edit

Current status	New statuses allowed					
	New	Resolved	Feedback	Closed	Rejected	In Progress
New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Resolved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Closed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
In Progress	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Additional transitions allowed when the user is the author +
Additional transitions allowed when the user is the assignee +

Save

Types

No Change

OpenProject

My page Modules


























search...

Help OpenProject Admin

Administration Types

Types

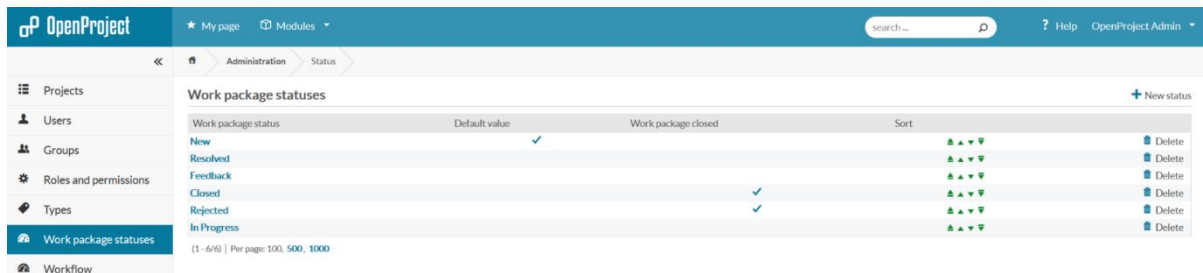
+ New type

Name	Color	Default value	Work packages displayed in aggregation	Work packages displayed as milestone	Sort	
Bug		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		  	 Delete
Feature		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		  	 Delete
Support		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		  	 Delete
Phase		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		  	 Delete
Milestone		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  	 Delete

(1 - 5/5) | Per page: 100, 500, 1000

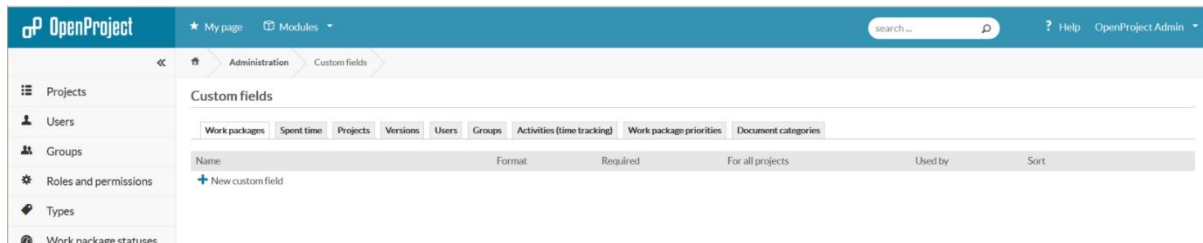
Work package statuses

No Change to the defaults. If you change these, then you will have to revisit your Roles and Permissions and your workflow to enable the new status to function inside the application.



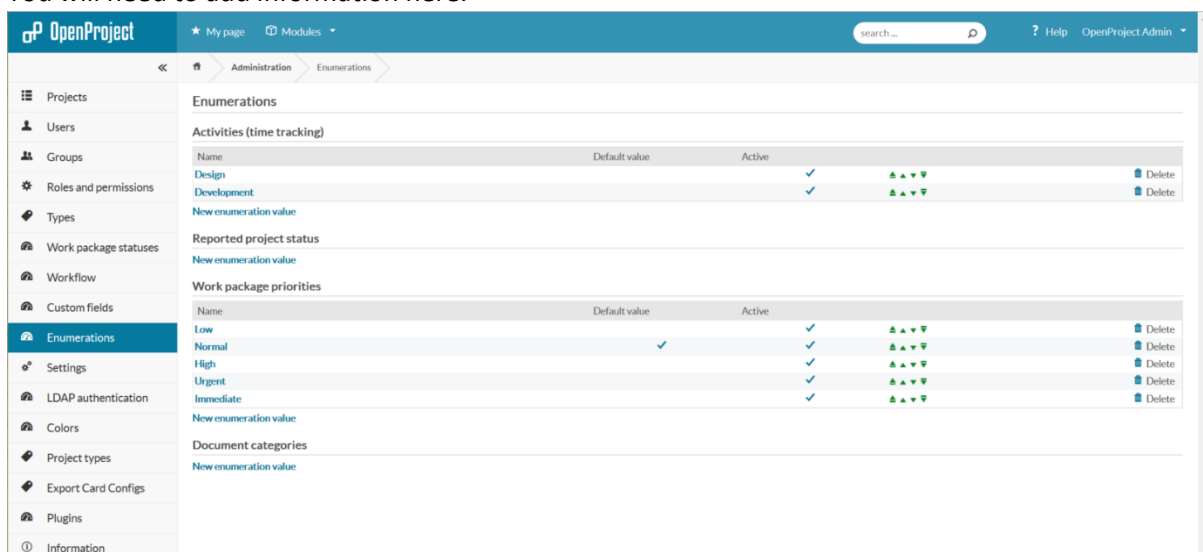
Custom Fields

I am not adding any custom fields. The development database is seeded with custom fields if you want to see how they work. I am sure that if you integrate into your companies systems, then you can use custom fields to match data, automate some reporting etc as well as track items that the business is specifically interested in.



Enumerations

You will need to add information here.



I will add more time tracking categories like Reporting, Change mgt, Training, Documenting, System mgt, Vendor mgt, Testing, Coding new features, Coding bug fixes as well as document categories

such as Design, Process, Finance, Workshop, Vendor, Reporting as examples. I will also add some project reporting statuses.

Successful update.

Enumerations

Activities (time tracking)

Name	Default value	Active		
Design		✓	▲ ▲ ▼ ▼	Delete
Development	✓	✓	▲ ▲ ▼ ▼	Delete
Testing		✓	▲ ▲ ▼ ▼	Delete
Training		✓	▲ ▲ ▼ ▼	Delete
Vendor Mgt		✓	▲ ▲ ▼ ▼	Delete
Project Reporting		✓	▲ ▲ ▼ ▼	Delete
Change Mgt		✓	▲ ▲ ▼ ▼	Delete

New enumeration value

Reported project status

Name	Default value	Active		
Install	✓	✓	▲ ▲ ▼ ▼	Delete
Release		✓	▲ ▲ ▼ ▼	Delete
Develop		✓	▲ ▲ ▼ ▼	Delete

New enumeration value

Work package priorities

Name	Default value	Active		
Low		✓	▲ ▲ ▼ ▼	Delete
Normal	✓	✓	▲ ▲ ▼ ▼	Delete
High		✓	▲ ▲ ▼ ▼	Delete
Urgent		✓	▲ ▲ ▼ ▼	Delete
Immediate		✓	▲ ▲ ▼ ▼	Delete

New enumeration value

Document categories

Name	Default value	Active		
Design	✓	✓	▲ ▲ ▼ ▼	Delete
Finance		✓	▲ ▲ ▼ ▼	Delete
Report		✓	▲ ▲ ▼ ▼	Delete
Process		✓	▲ ▲ ▼ ▼	Delete
Vendor		✓	▲ ▲ ▼ ▼	Delete

New enumeration value

OpenProject Settings

Select the settings option on the left main menu

OpenProject

My page Modules

search ...

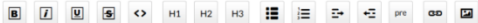
Help OpenProject Admin

Administration Settings

Settings

General Display Authentication Users Projects Work package tracking Email notifications Incoming emails Repositories

Application title: OpenProject

Welcome text:  ? Text formatting

Attachment max size: 5120 kB

Objects per page options: 100, 500, 1000
Multiple values allowed (comma separated).

Days displayed on project activity: 30 days

Host name: localhost:3000
Example: 192.168.10.132:3000

Protocol: HTTP

Text formatting: textile

Cache formatted text: ☐

Wiki history compression: none

Enable Feeds: ☒

Feed content limit: 15

Max size of text files displayed inline: 512 kB

Max number of diff lines displayed: 1500

Save

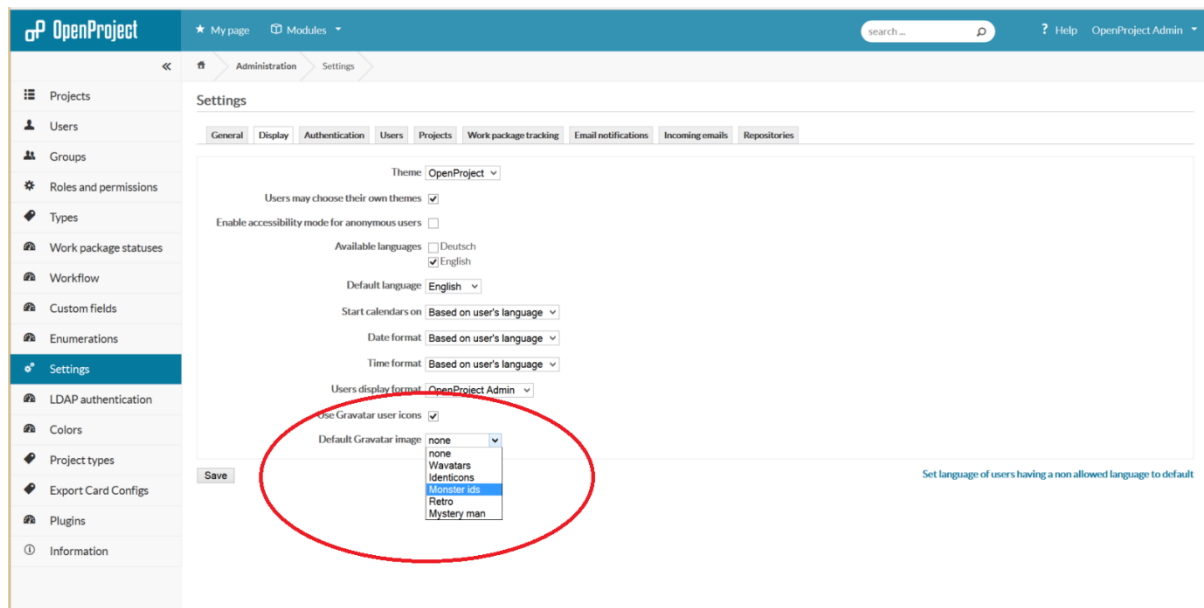
As you can see you have the option to update the general settings, Display, Authentication, Users, Projects, Work Package Tracking, Email Notification, Incoming Emails, Repositories.

Updating the General settings

I have not changed any of the defaults. I did add a small greeting to my Welcome text and put in the real ip address of the server (you would use a server name if your admins have set up the DNS or hosts file).

Updating Display

I allowed the use of icons to brighten up my site



Do not forget to press save after you have made changes in a screen.

Updating Authentication

I have kept the defaults

Groups

Roles and permissions

Types

Work package statuses

Workflow

Custom fields

Enumerations

Settings

LDAP authentication

Colors

Project types

Export Card Configs

Plugins

Information

General

Display

Authentication

Users

Projects

Work package tracking

Email notifications

Incoming emails

Repositories

General

Authentication required ☐

Self-registration manual account activation

Passwords

Minimum length 10

Active character classes ☒ uppercase
☒ lowercase
☒ special
☒ numeric

Minimum number of required classes 0

Number of days, after which to enforce a password change (disable with 0) 0

Number of most recently used passwords banned for reuse 0

Lost password ☒

Automated user blocking

Block user after this number of failed login attempts (disable with 0) 20

Time the user is blocked for (minutes) 30

Session

Autologin disabled

Session expires ☐

Other

Allow OpenID login and registration ☐

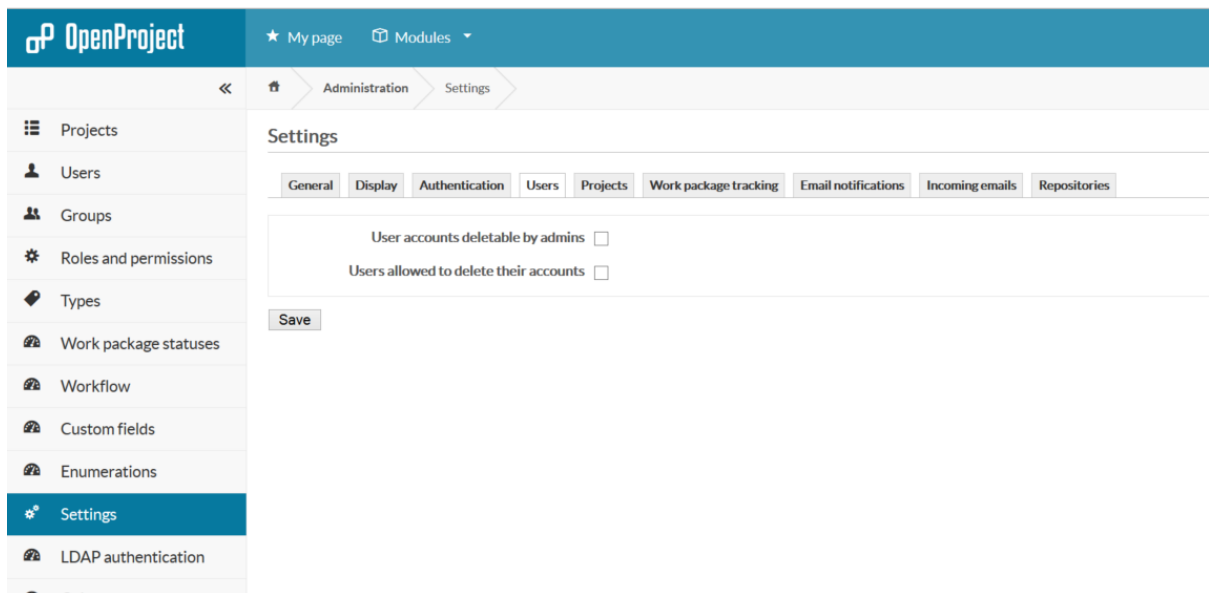
Log user login, name, and mail address for all requests ☐

Enable REST web service ☐

Save

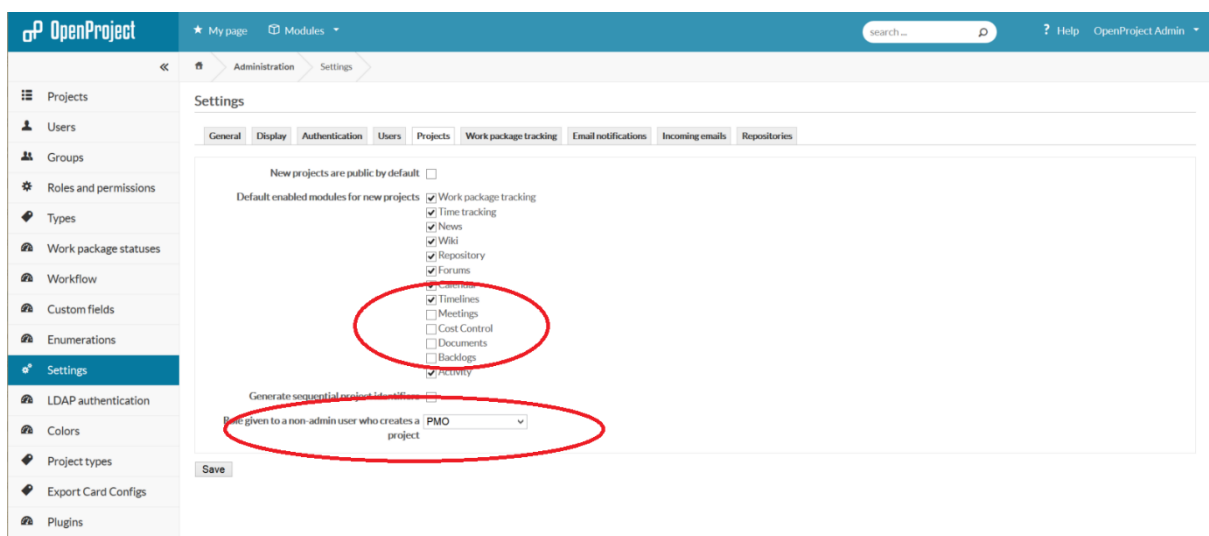
Updating User General Settings

I have kept the defaults



Project Settings

I have to update the plugins and add role that can create projects. I am going to allow the PMO to create new projects



Work Package Tracking

This is where you add fields to your work package tracking screens. I like to see % done and remaining hours, so I will tick those. I have made “Remaining Hours” (tick the second column...). You will also the customer fields here if you added any.

Projects

Users

Groups

Roles and permissions

Types

Work package statuses

Workflow

Custom fields

Enumerations

Settings

LDAP authentication

Colors

Project types

Export Card Configs

Plugins

Information

Settings

General

Display

Authentication

Users

Projects

Work package tracking

Allow cross-project work package relations

Allow assignment to groups

Display subprojects work packages on main projects by default

Use current date as start date for new work packages

Calculate the work package done ratio with

Work packages export limit

Customize the appearance of the work package lists

Work package properties	Display by default	Summable
Project	<input type="checkbox"/>	<input type="checkbox"/>
Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Parent	<input type="checkbox"/>	<input type="checkbox"/>
Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Priority	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Subject	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Author	<input type="checkbox"/>	<input type="checkbox"/>
Assignee	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Responsible	<input type="checkbox"/>	<input type="checkbox"/>
Updated on	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Target version	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Start date	<input type="checkbox"/>	<input type="checkbox"/>
Due date	<input type="checkbox"/>	<input type="checkbox"/>
Estimated time	<input type="checkbox"/>	<input checked="" type="checkbox"/>
% done	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created on	<input type="checkbox"/>	<input type="checkbox"/>
Budget title	<input type="checkbox"/>	<input type="checkbox"/>
Unit costs	<input type="checkbox"/>	<input type="checkbox"/>
Labor costs	<input type="checkbox"/>	<input type="checkbox"/>
Overall costs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Story Points	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Remaining Hours	<input type="checkbox"/>	<input type="checkbox"/>
Position	<input type="checkbox"/>	<input type="checkbox"/>

Save

Email Notification Page

Keep the defaults for now

My page

Projects

Modules

Administration

Settings

Projects

Users

Groups

Roles and permissions

Types

Work package statuses

Workflow

Custom fields

Enumerations

Settings

LDAP authentication

Colors

Project types

Export Card Configs

Plugins

Information

Successful update.

Settings

General

Display

Authentication

Users

Projects

Work package tracking

Email notifications

Incoming emails

Repositories

Emission email address

openproject@example.net

Blind carbon copy recipients (bcc)

☒

Plain text mail (no HTML)

☐

Default notification option

Only for things I watch or I'm involved in

Select actions for which email notifications should be sent.

☒ Work package added

☒ Work package updated

☐ Work package note added

☐ Work package status updated

☐ Work package priority updated

☐ News added

☐ Comment added to a news

☐ File added

☐ Message added

☐ Wiki page added

☐ Wiki page updated

Check all

Uncheck all

Emails header & Emails footer

English

Emails header

Emails footer

You have received this notification because you have either subscribed to it, or are involved in it.
To change your notification preferences, please click here: <http://hostname/my/account>

Save

Incoming Email Page

Keep the defaults for now

My page

Projects

Modules

Administration

Settings

Projects

Users

Groups

Roles and permissions

Types

Work package statuses

Workflow

Custom fields

Enumerations

Settings

LDAP authentication

Colors

Project types

Export Card Configs

Plugins

Information

Successful update.

Settings

General

Display

Authentication

Users

Projects

Work package tracking

Email notifications

Incoming emails

Repositories

Truncate emails after one of these files

Multiple values allowed (one line for each value)

Enable WS for incoming emails

☐

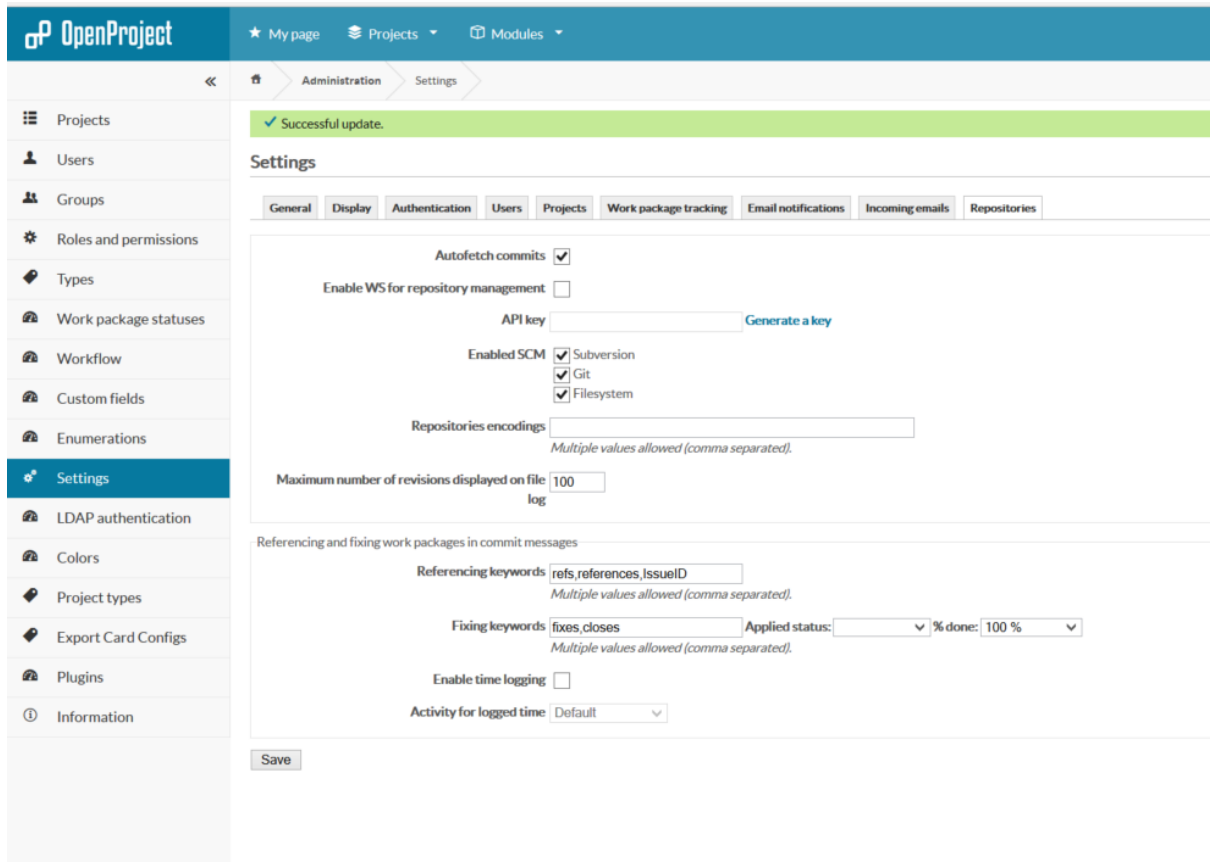
API key

Generate a key

Save

Repositories

I enabled time logging and made the default category “Development”



The screenshot shows the OpenProject web interface. The top navigation bar includes 'My page', 'Projects', and 'Modules'. The left sidebar lists various settings categories, with 'Settings' currently selected. The main content area is titled 'Settings' and has a sub-tab 'Repositories' selected. A green banner at the top of the settings area indicates a 'Successful update.' The 'Repositories' tab contains several configuration options:

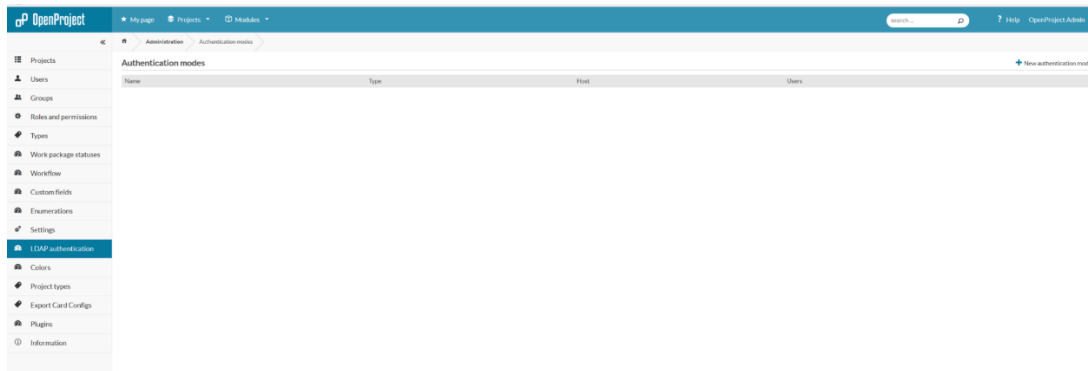
- Autofetch commits:** ☒
- Enable WS for repository management:** ☐
- API key:** A text input field with a 'Generate a key' button next to it.
- Enabled SCM:** Three checkboxes are checked: Subversion, Git, and Filesystem.
- Repositories encodings:** A text input field with the placeholder text 'Multiple values allowed (comma separated)'.
- Maximum number of revisions displayed on file log:** A text input field with the value '100'.
- Referencing and fixing work packages in commit messages:**
 - Referencing keywords:** A text input field with the value 'refs,references,IssueID' and the placeholder text 'Multiple values allowed (comma separated)'.
 - Fixing keywords:** A text input field with the value 'fixes,closes' and the placeholder text 'Multiple values allowed (comma separated)'.
 - Applied status:** A dropdown menu with the value '100 %'.
 - % done:** A dropdown menu with the value '100 %'.
- Enable time logging:** ☐
- Activity for logged time:** A dropdown menu with the value 'Default'.

A 'Save' button is located at the bottom of the settings area.

LDAP Authentication

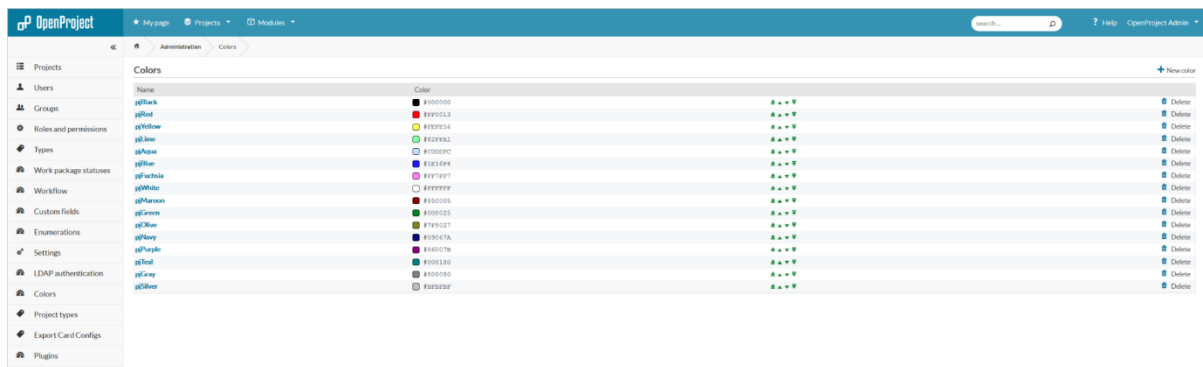
This is where you set up remote authentication using LDAP (connect to your Microsoft AD).

No Changes to the default as I am not going to use this option.



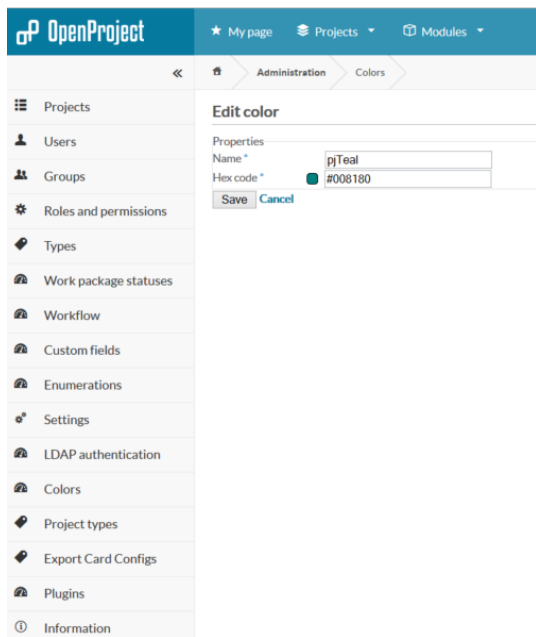
Colors Page

You can change the colour options on this page.



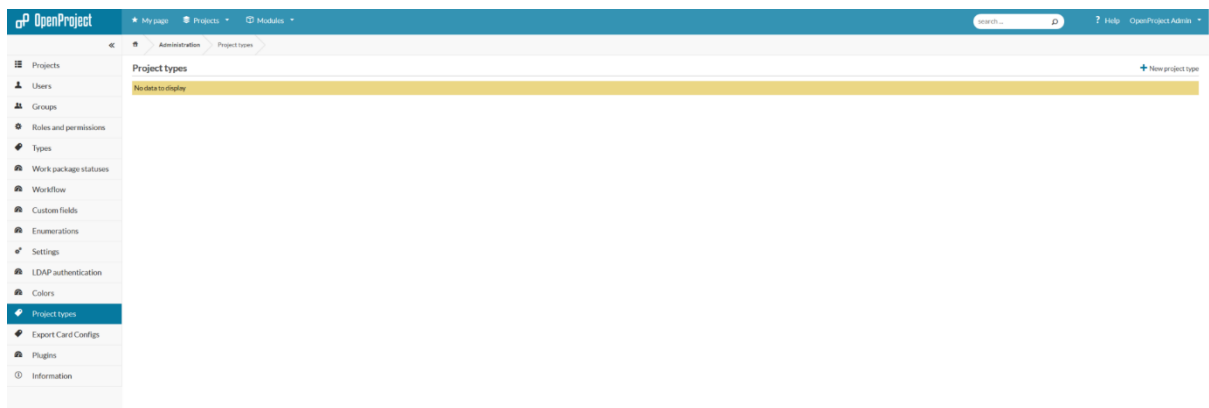
If you click on a colour you can edit its name and the colour. You might like to set up a new pastel set 😊

You will have to know the hex code for the colour. There are plenty of web pages which can provide this information for you if you have the RGB numbers.



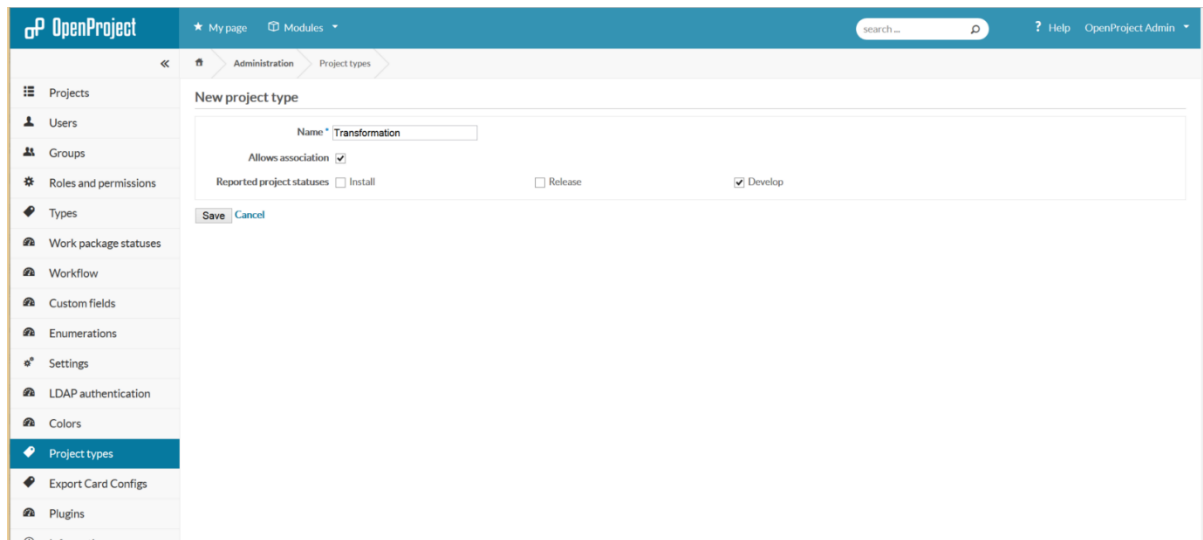
The Project Types Page

The default page has no project types set up. I will set up a couple e.g. “Infrastructure”, “Transformation”, “Software”, “Product Dev”, “New Product Rollout” just to provide additional reporting options and tracking.



Adding New Project Types

When you add a new project type, you also get the option to add the new reporting plugin statuses.

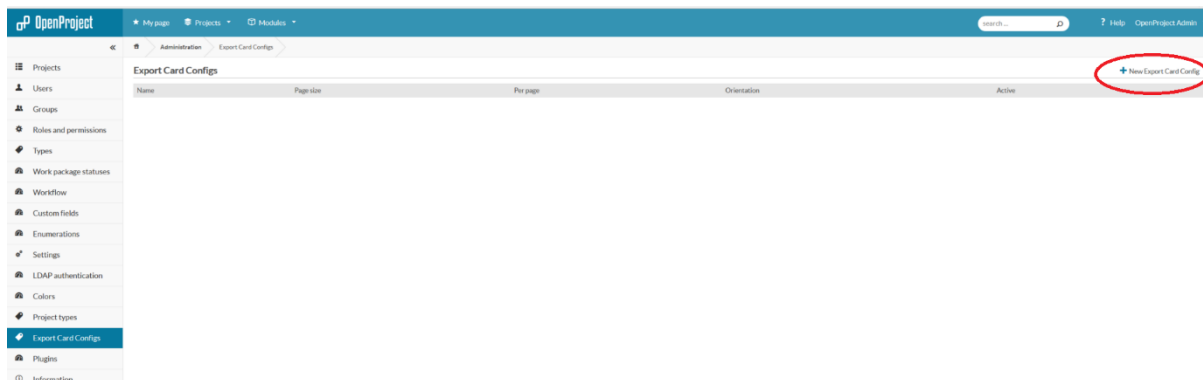


Export Card Configs

This item appears as I have loaded the PDF export plugin

The plugin page has an example YAML format to use so I will install that.

https://github.com/finnlabs/openproject-pdf_export



Add a New Export Config

My setup

OpenProject

My page Projects Modules

Administration Export Card Configs

Export Card Configs • New Export Card Config

Name: Standard Card Config

Description: Standard Card Config

Per page: 5

Page size: A4

Orientation: landscape

Rows:

```

{
  "group": {
    "has_border": false,
    "height": 200,
    "font": {
      "height": 10,
      "priority": 1,
      "outline": {
        "has_label": false,
        "min_font_size": 10,
        "max_font_size": 20,
        "font_size": 20,
        "font_style": bold,
        "text_align": left,
        "minimum_lines": 2,
        "render_if_empty": false,
        "width": 100,
        "font_size": 10,
        "font_weight": normal
      }
    }
  }
}

```

Create

Users Setup

This is where you add the project/program team members. This is independent of the roles they have. The roles are assigned when you assign the user to a project.

I will add some generic users for demonstration purposes.

Adding a User

OpenProject

My page Modules

Administration Users

Users

Filters: active (1) User: Apply Clear

Login	First name	Last name	Email	Administrator	Created on	Last connection	Status
admin	OpenProject	Admin	admin@example.net	✓	07/17/2014 05:19 PM	07/19/2014 12:08 PM	active

(1 - 1/1) | Per page: 100, 500, 1000

Administration > Users > Users » New user

Login * App1

First name * A

Last name * App1

Email * app1@myopenproject.ca

Language English

Administrator ☐

User Interface

Accessibility mode ☐

Authentication

Assign random password ☒
(sent to user via e-mail)

Password *
Must be at least 10 characters long.

Confirmation *

Enforce password change on ☒
next login

Email notifications

No events

I don't want to be notified of changes that I make myself ☐

Preferences

Hide my email address ☐

Time zone

Display comments In chronological order

Warn me when leaving a page ☒
with unsaved text

Theme OpenProject

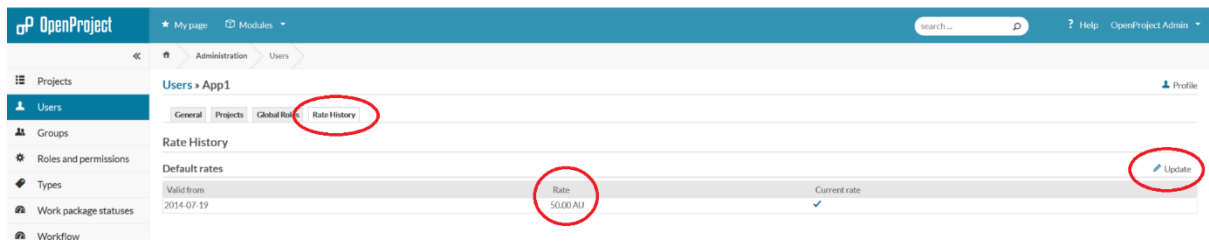
☐ Send account information to the user

Create Create and continue

I turn off all the email notifications as this is a test installation, but you may choose differently when in production. You can also use LDAP, but I have not looked into this and its effects on the user setup, so this is a local user at the moment.

Set the time zone so you get sensible messages and the calendar works properly.

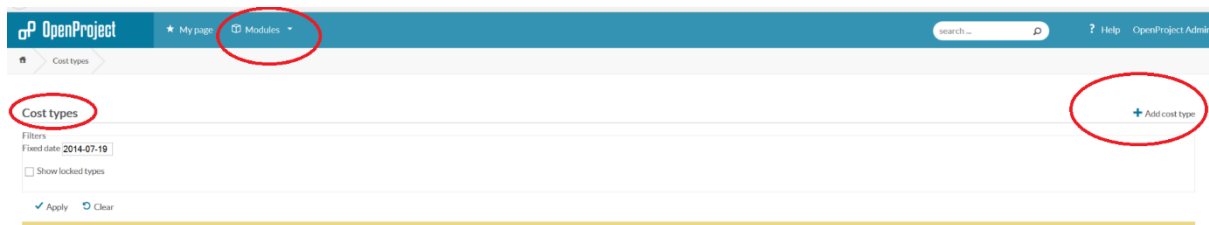
After you save, you see the users profile. At this point you can assign them to projects and set up roles. If you are going to run cost accounting for the project, you should set up an hourly rate for the users so you can track costs as well as hours in the project. Do not leave out the business owners and the SME's and Biz op people as you will want them involved in your projects.



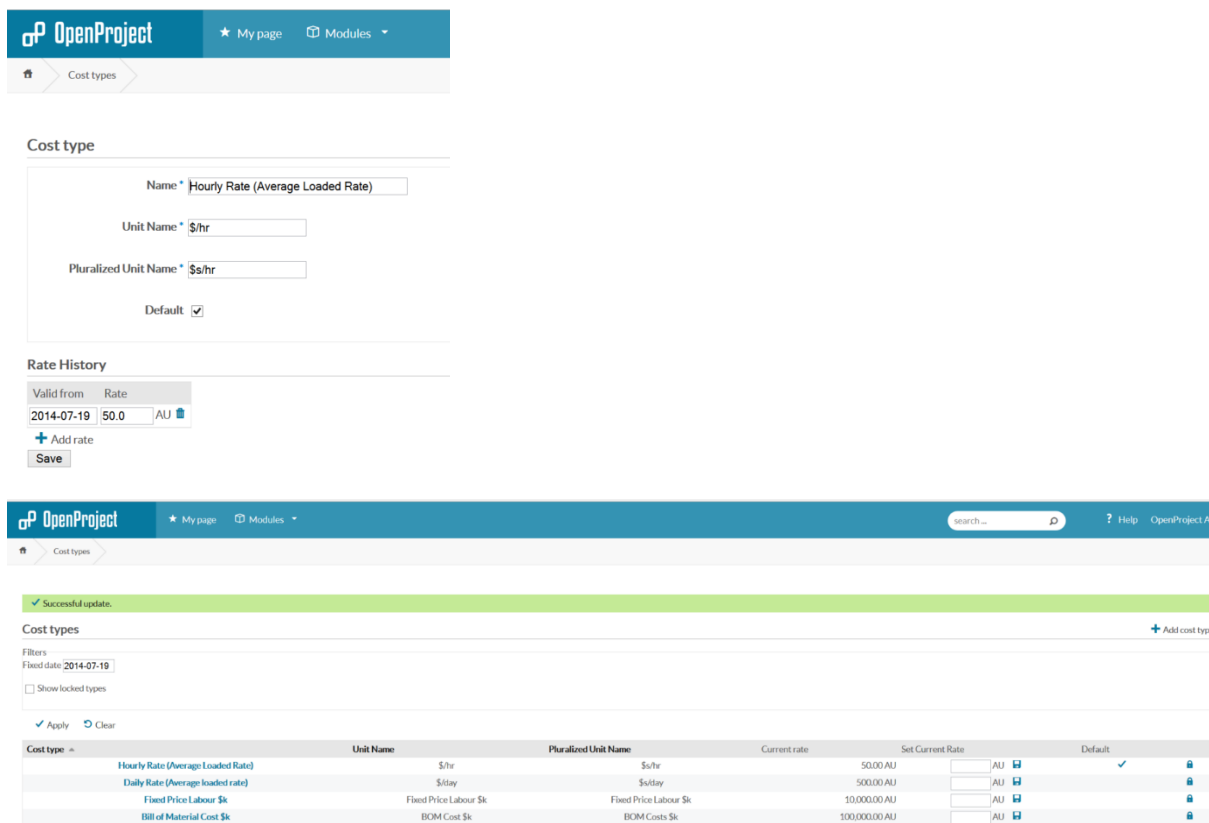
You can update the rate as you need to as costs change.

Costs Module Plugin

Add costs type in the costs module



Add hourly, and fixed cost types as suggestions.



Creating a Project

I have not added groups, so we will just go ahead and add a project.



I have included all the plugins for testing purposes

New project

Name * ERP System Update for New Product

Summary ERP System Update for New Product

Description **B** **I** **U** **S** **<>** **H1** **H2** **H3** **Table** **Code** **pre** **OD** **Image**
ERP System Update for New Product

Identifier * erp-system-update-for-new-product
Length between 1 and 100 characters. Only lower case letters (a-z), numbers, dashes and underscores are allowed, must start with a lower case letter.

Homepage

Public ☐

Project type

Modules (Check all | Uncheck all)

<input checked="" type="checkbox"/> Work package tracking	<input checked="" type="checkbox"/> Time tracking	<input checked="" type="checkbox"/> News	<input checked="" type="checkbox"/> Wiki	<input checked="" type="checkbox"/> Repository	<input checked="" type="checkbox"/> Forums
<input checked="" type="checkbox"/> Calendar	<input checked="" type="checkbox"/> Timelines	<input checked="" type="checkbox"/> Meetings	<input checked="" type="checkbox"/> Cost Control	<input checked="" type="checkbox"/> Documents	<input checked="" type="checkbox"/> Backlogs
<input checked="" type="checkbox"/> Activity					

Types (Check all | Uncheck all)

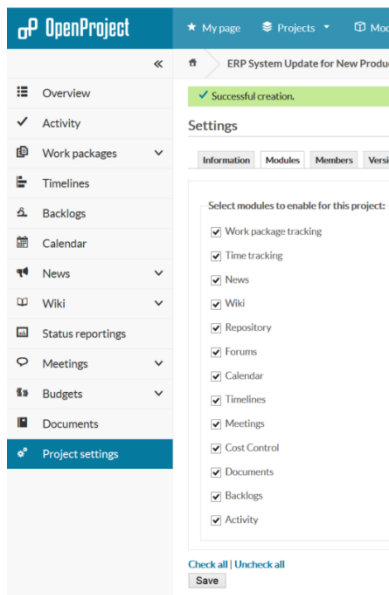
Active	Name	Work packages displayed in aggregation	Work packages displayed in roadmap	Work packages displayed as milestone
<input checked="" type="checkbox"/>	none	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Bug	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Feature	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Support	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Phase	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Milestone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save

After you save the information, you can then add people to the project, set up the forums, add Activity types, set up git, set up how the backlog will work, create work package categories.

I have all the modules turned on.

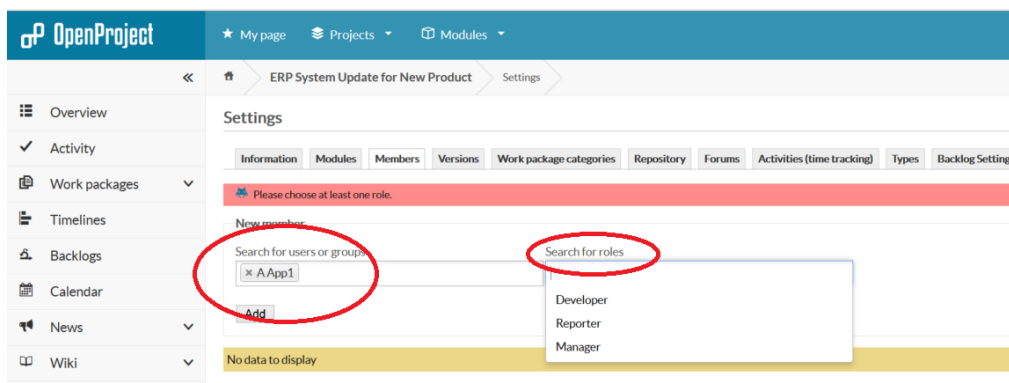
Project Modules



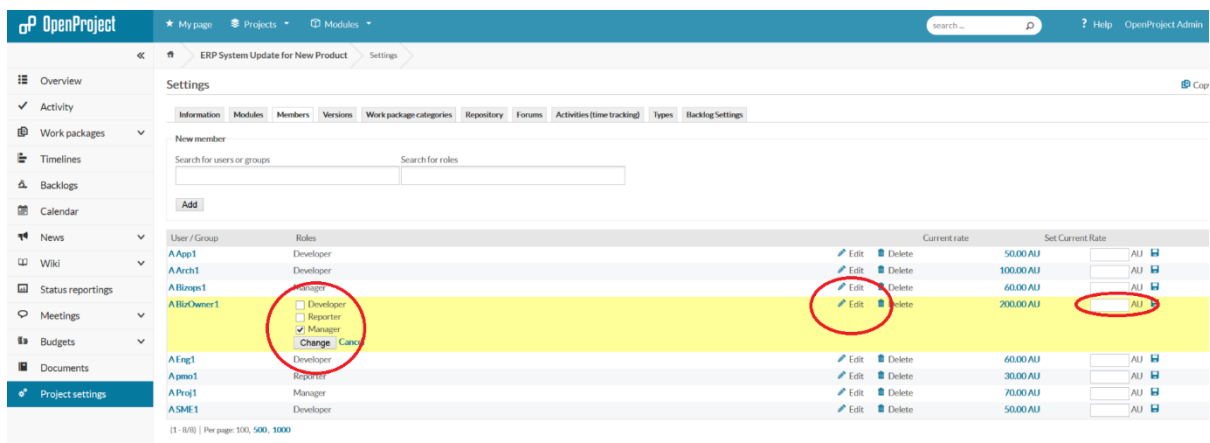
Project Members

I will add all the members now but in a real case, you will add the core team and add other later.

The page allows you to search for your team and you must add a role.

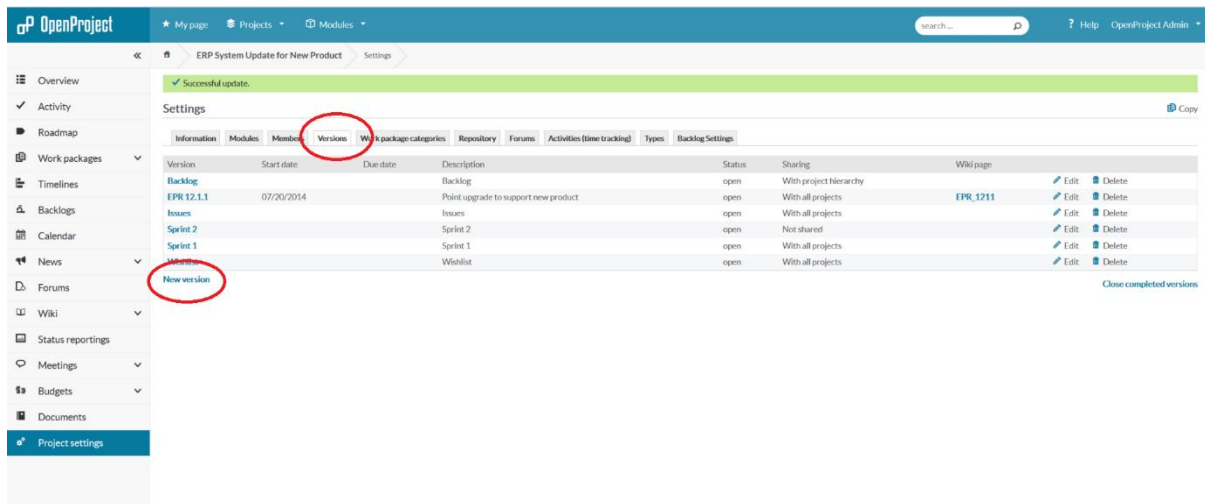


If you make a mistake, you can edit the settings. You can add specific rates as well at this point for the project team



Project Versions

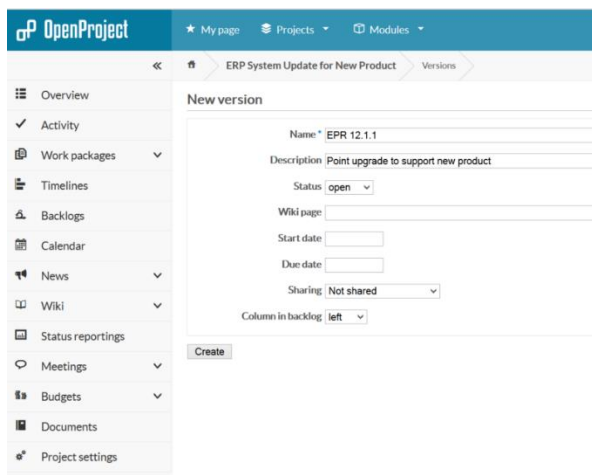
Add your project versions here. This will affect your story boards later as the stories get pinned to versions as you create your program/project/sprint and it sets up your backlog lists. Do not add a start date yet. Add a backlog version, and a wishlist version as well the current version you are working on and a future version. This will help you as you go thru your initial discovery stage with the executive using the Kanban board and the story features of OpenProject. This does not mean you have to use a SCRUM approach to running the project but the Story and task board will work extremely well in executive sessions in my experience.



The screenshot shows the 'Versions' tab in the 'Settings' section of OpenProject. A green banner at the top indicates a 'Successful update.' The 'Versions' tab is selected, and a 'New version' button is highlighted with a red circle. The table below lists existing versions:

Version	Start date	Due date	Description	Status	Sharing	Wiki page	
Backlog			Backlog	open	With project hierarchy		Edit Delete
EPR 12.1.1	07/20/2014		Point upgrade to support new product	open	With all projects	EPR_1211	Edit Delete
Issues			Issues	open	With all projects		Edit Delete
Sprint 2			Sprint 2	open	Not shared		Edit Delete
Sprint 1			Sprint 1	open	With all projects		Edit Delete
Wishlist			Wishlist	open	With all projects		Edit Delete

A 'Close completed versions' link is visible at the bottom right of the table.



The screenshot shows the 'New version' form in OpenProject. The form fields are as follows:

- Name: EPR 12.1.1
- Description: Point upgrade to support new product
- Status: open (dropdown)
- Wiki page: (empty text field)
- Start date: (empty text field)
- Due date: (empty text field)
- Sharing: Not shared (dropdown)
- Column in backlog: left (dropdown)

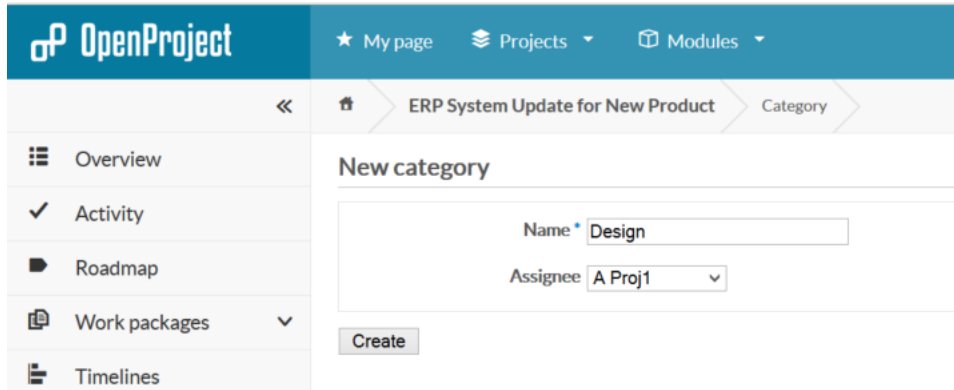
A 'Create' button is located at the bottom of the form.

Project Work Packages

You can get granular here but there may not be much pay off for getting detailed other than coding the work for efficiency reviews. Certainly there will be a set of tasks based on startup or discovery

and some based on Finance and executive management as well as a training stream and maybe a change mgt stream.

I assigned all the categories to the project manager for the moment



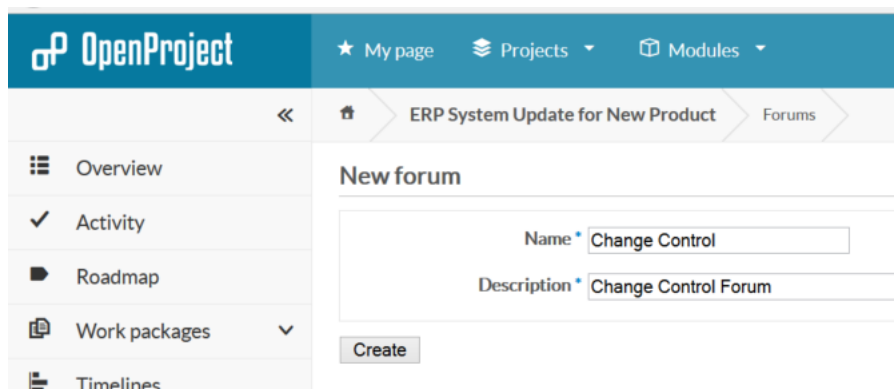
The screenshot shows the OpenProject interface. The top navigation bar includes the OpenProject logo, a star icon for 'My page', a stack icon for 'Projects', and a folder icon for 'Modules'. The breadcrumb trail shows 'ERP System Update for New Product' and 'Category'. The left sidebar contains links for Overview, Activity, Roadmap, Work packages, and Timelines. The main content area is titled 'New category' and features a form with a 'Name' field containing 'Design' and an 'Assignee' dropdown menu set to 'A Proj1'. A 'Create' button is located at the bottom of the form.

Project Repositories

Repositories. I have not set this up but you can add you release mgt tracking here. Looks like a worth while thing to do if you have a lot of changes going into production and this is a software project. You also have the option of using the local file system and you can use this to manage your document repository. I think my approach would be to use the Wiki for my documents and this functionality purely for software and release management as part of an overall change management process.

Project Forums

Add Forums. This is how you would communicate in larger teams and notify official changes to the project as an example.



The screenshot shows the OpenProject interface. The top navigation bar includes the OpenProject logo, a star icon for 'My page', a stack icon for 'Projects', and a folder icon for 'Modules'. The breadcrumb trail shows 'ERP System Update for New Product' and 'Forums'. The left sidebar contains links for Overview, Activity, Roadmap, Work packages, and Timelines. The main content area is titled 'New forum' and features a form with a 'Name' field containing 'Change Control' and a 'Description' field containing 'Change Control Forum'. A 'Create' button is located at the bottom of the form.

Project Activities

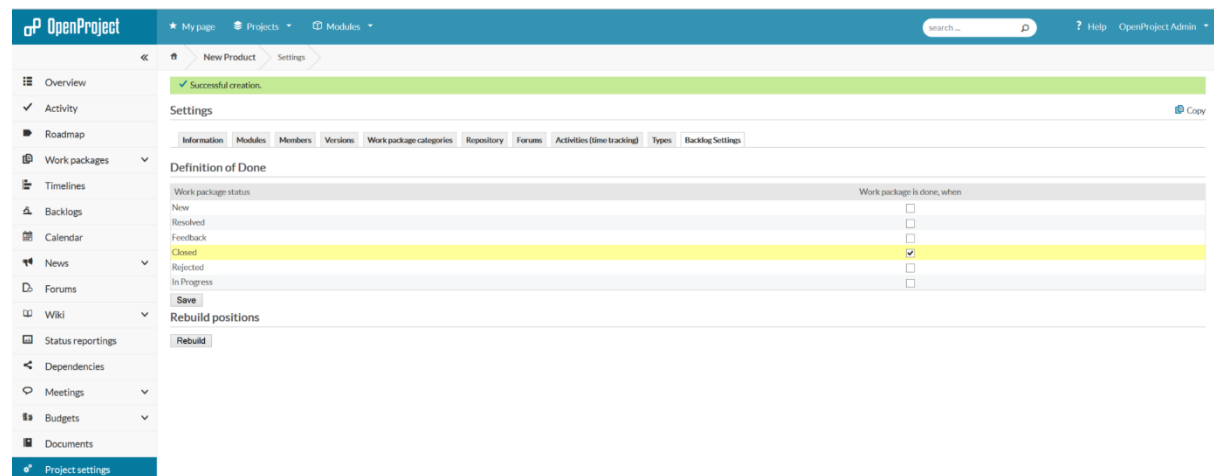
Activities – no change, am accepting the categories I set up earlier.

Project Types

No change, am accepting the categories I set up earlier.

Project Backlog Settings

I selected Closed and Rejected as status to indicate that a work package is done.

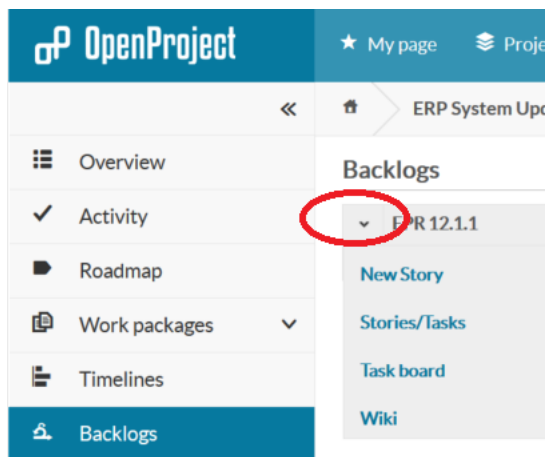


Project Kick Off

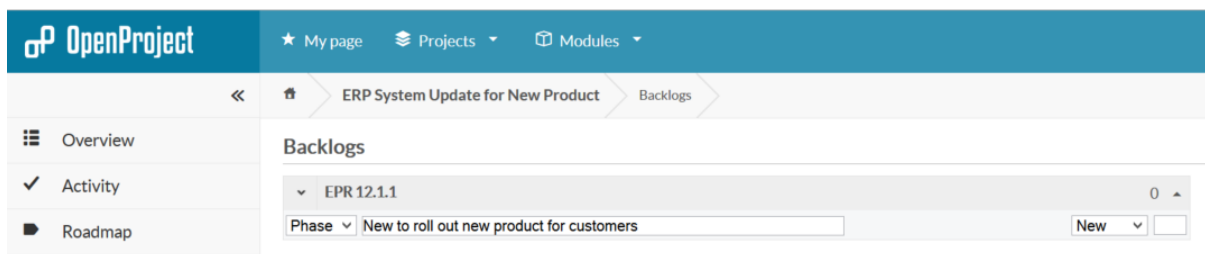
Lets Add some stories to the back log and see how we can then provide more detailed requirements and put these into a task board. You can add your stories to the backlog or issues versions then drag them to the working sprint/project when you want to kick off some work. This is how you can segment the work as it comes into the department at the highest level. This should be owned by the business owner as this is where the items get a priority. You can drag the stories from the holding lists to the sprints/projects on this page.

Below is an example of a back log page once you have started adding stories and setting up your sprint/project.

Creating the backlog Story

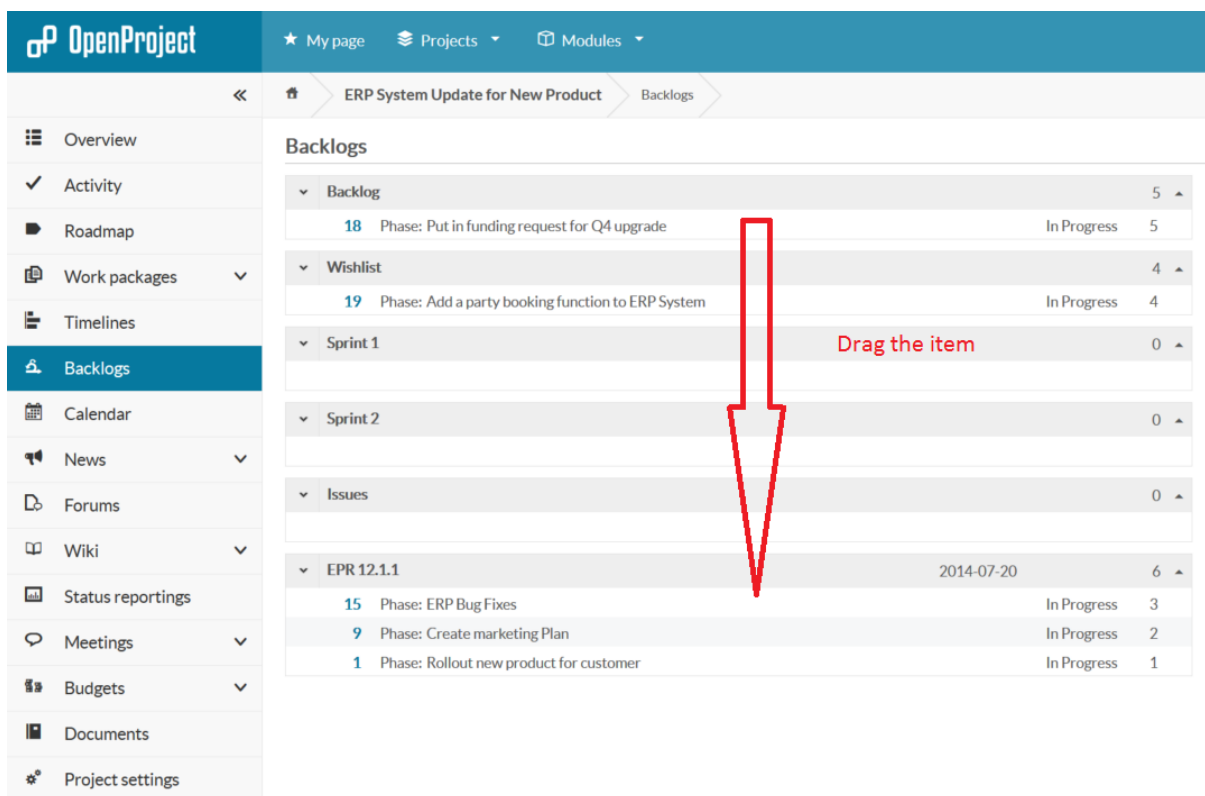


Select back log and click the down arrow and add a new story. The last right hand box is the priority of the backlog as set by the business owner.



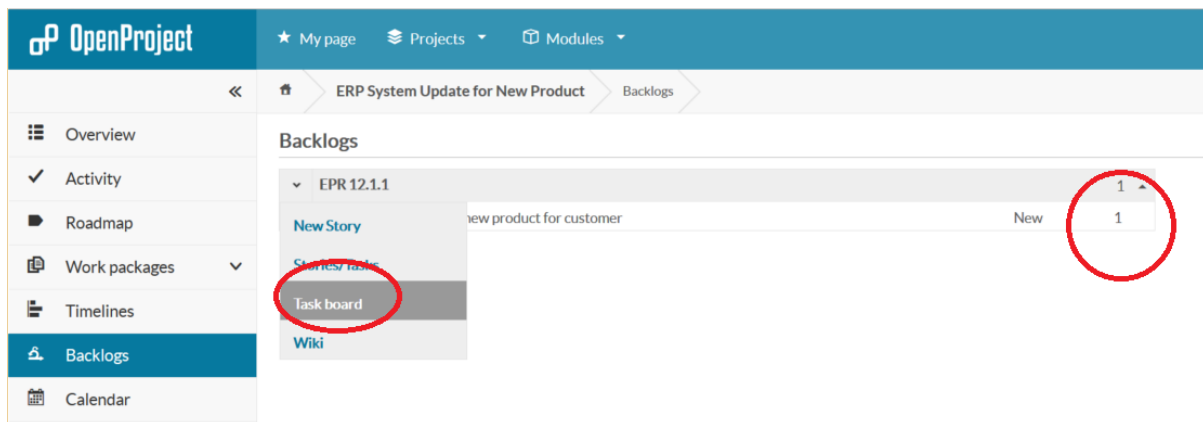
Project Backlog View

You can build a plan quickly by dragging the stories.



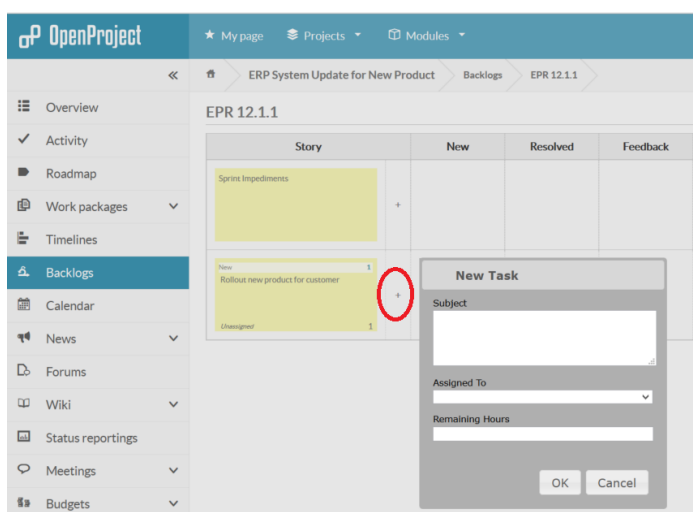
The Project Task Board

You can now use the task board with your business to set up the framework of the plan.



Add tasks by pressing the “+”

I will also add 1 sprint to hold all the work under and it denotes the scrum master or project manager’s stream of work. This is not mandatory but an approach I use, it should be used to send issues to the project manager (the sprint impediments) but you can do this as well.



I will also nominally assign these task to people and estimate the hours

The screenshot shows the OpenProject interface with a sidebar on the left containing navigation links like Overview, Activity, Roadmap, Work packages, Timelines, Backlogs, Calendar, News, Forums, Wiki, Status reportings, Meetings, Budgets, Documents, and Project settings. The main area displays a Kanban board for the project 'ERP System Update for New Product' under the 'EPR 12.1.1' backlog. The board columns are Story, New, Resolved, Feedback, Closed, Rejected, and In Progress. The 'New' column contains several tasks, each with a title, assignee, and estimate. For example, 'ERP update' is assigned to 'A.BioOwner1' with an estimate of 300.0. Other tasks include 'create detailed requirements', 'create project structure', 'gather further information from Ops mgr', 'configure ERP system', 'design computer upgrade', and 'Design label and update in system'.

You may get a message about leaving the page but work may not be saved. You can ignore this.

If you want a simpler task board like <http://kanboard.net/>

You can edit the Work Package Statuses in the administration module. Here you can add or delete statuses, but you must also reset the workflow or the system will break.

The screenshot shows the OpenProject Administration module with the 'Work package statuses' table. The table has columns for Work package status, Default value, Work package closed, and Sort. The statuses listed are New, Resolved, Feedback, Closed, Rejected, and InProgress. The 'New' status is the default value. The 'Resolved' status has a checkmark in the 'Work package closed' column. The 'Feedback' status has a checkmark in the 'Work package closed' column. The 'Closed' status has a checkmark in the 'Work package closed' column. The 'Rejected' status has a checkmark in the 'Work package closed' column. The 'InProgress' status has a checkmark in the 'Work package closed' column. A red circle highlights the '+ New status' button and the 'Delete' buttons for each status.

If you go back into the backlog, and click on your first phase, you will see the summary.

The screenshot shows the OpenProject interface. On the left sidebar, the 'Backlogs' menu item is circled in red. The main content area displays the 'Backlogs' for the project 'ERP System Update for New Product'. A backlog item is selected, showing details for 'Phase #1: Rollout new product for customer'. This title is circled in red. Below the title, there is a table for 'Work Package Hierarchy' and a section for 'Related work packages'. The 'Related work packages' section shows a package blocked by 'ERP System Update for New Product - Feature #8: ERP update', which is also circled in red. The 'History' section at the bottom shows updates to the item.

Notice that the sprint blocks this phase 1. Lets create a second phase just to show we can run multiple programs at the same time. Lets make the marketing a different stream, just for demonstration purposes.

The screenshot shows the OpenProject interface. On the left sidebar, the 'Backlogs' menu item is circled in red. The main content area displays the 'Backlogs' for the project 'ERP System Update for New Product'. A backlog item is selected, showing details for 'Phase #1: Rollout new product for customer'. This title is circled in red. Below the title, there is a table for 'Work Package Hierarchy' and a section for 'Related packages'. The 'Related packages' section shows a package blocked by 'ERP System Update for New Product - Feature #8: ERP update', which is also circled in red. The 'History' section at the bottom shows updates to the item.

And you will see.

The task board example is below

Overview	EPR 12.1.1			
Activity				
Roadmap				
Work packages				
Timelines				
Backlogs				
Calendar				
News				
Forums				
Wiki				
Status reportings				
Meetings				
Budgets				
Documents				
Project settings				
	Story	New	Resolved	
	Sprint Impediments	ERP update A BizOwner1 300.0		
	New Create marketing Plan Unassigned 2	Funded party A BizOwner1 5.0 update Web Site A App1 5.0 Design Web pages A Bizops1 20.0		
	New Rollout new product for customer Unassigned 1	create detailed requirements A SME1 40.0 create project structure A pmo1 4.0 Gather further information from Ops mgr A Bizops1 20.0 configure ERP system A App1 80.0 design computer upgrade		

You will need to update the sprint item to include the new task so it is also “blocked” in the same sprint/project/program if you want to use my less dogmatic approach to getting the project manager into a timeline report. This also how you would set up an impediment/issue that the project manager/scrum master would deal with.

Edit Task

Subject
ERP update

Blocks (IDs)
1,9

Assigned To
A BizOwner1

Remaining Hours
300.0

OK Cancel

Backlogs

Phase #9: Create marketing Plan

Added by OpenProject Admin 7 minutes ago. Updated 5 minutes ago.

Status: New
Priority: Normal
Assignee: -
Responsible: -
Category: -
Estimated time: 30.00 hours
Start date: -
Due date: -

% done: 0 Total progress
Target version: EPR 12.1.1
Budget: -
Spent time: -
Overall costs: -
Spent units: -
Story Points: -
Remaining Hours: 30.00 hours

Work Package Hierarchy

Subject	Status	Assignee	Target version
Phase #9: Create marketing Plan	New		EPR 12.1.1
▶ Feature #12: Funded party	New	A BizOwner1	EPR 12.1.1
▶ Feature #11: update Web Site	New	A App1	EPR 12.1.1
▶ Feature #10: Design Web pages	New	A Bizops1	EPR 12.1.1

Related work packages

Related work package	Type	Start date	Due date
blocked by ERP System Update for New Product - Feature #8: ERP update	Feature		

Watchers (0)

The groupings are flexible and you can experiment with them. This will affect how the timeline report looks and you may decide on changing the setup based on your approach to the projects within the business.

The Roadmap Summary

We now have the start of the project. You can see in the roadmap, what the plan is. We now have to schedule the work packages and assign resources correctly. You can now also set up the budgets so you can track cost. If you want to see more than just the features in the roadmap, will have to use the Administrators module to change the project settings.

OpenProject ★ My page Projects Modules

ERP System Update for New Product Versions

Overview
Activity
Roadmap
Work packages
Timelines
Backlogs
Calendar
News
Forums
Wiki
Status reportings

Roadmap

EPR 12.1.1

Start date Due date
Point upgrade to support new product

0 closed (0%) 12 open (100%) 0% Total progress

Related work packages

- Feature #2:** Design label and update in system
- Feature #3:** design computer upgrade
- Feature #4:** configure ERP system
- Feature #5:** Gather further information from Ops mgr
- Feature #6:** create project structure
- Feature #7:** create detailed requirements
- Feature #8:** ERP update
- Feature #10:** Design Web pages
- Feature #11:** update Web Site
- Feature #12:** Funded party

Adding Budgets

google calendar - Google... Google Calendar Inbox (1) - beadone@gmail... Inbox - brendandun123... ERP System Update for Ne... +

192.168.10.130/projects/erp-system-update-for-new-product/cost_objects/new

OpenProject ★ My page Projects Modules search... ? Help OpenProject Admin

ERP System Update for New Product Budgets

Overview
Activity
Roadmap
Work packages
Timelines
Backlogs
Calendar
News
Forums
Wiki
Status reportings
Meetings
Budgets
New Budget
View all Budgets
Documents
Project settings

New Budget

Subject *

Description

Fixed date: 2014-07-19

Planned Unit Costs

Units	Cost type	Comment	Planned costs
	\$/hr	Hourly Rate (Average Loaded Rate)	0.00 AU

+ Add Planned Costs

Planned Labor Costs

Hours	User	Comment	Planned costs
	Please select		0.00 AU

+ Add Planned Costs

Files

Browse... No file selected. Description

Add another file (Maximum size: 5 MB)

Create Create and continue

Add a capital budget and labour budget. Use the drop downs to select the capital rate you set up earlier in the unit costs section and add all the users to the labour budget.

You will have needed to record the hours you estimated when you created the tasks in the task board. I have not done that to see what type of warnings I get when I exceed the budgets.

Subject: ERP Capital budget for upgrade

Description: ERP Capital budget for upgrade

Fixed date: 2014-07-19

Planned Unit Costs

Units	Cost type	Comment	Planned costs
1	BOM Cost \$k	ERP Capital budget for upgrade	100,000.00 AU
2	Fixed Price Labour \$k	c	120,000.00 AU

Planned Labor Costs

Hours	User	Comment	Planned costs
30	A App1	ERP Capital budget for upgrade	1,500.00 AU
40	A Arch1	ERP Capital budget for upgrade	4,000.00 AU
40	A Bizops1	ERP Capital budget for upgrade	2,400.00 AU
5	A BizOwner1	ERP Capital budget for upgrade	1,000.00 AU
80	A Eng1	ERP Capital budget for upgrade	4,800.00 AU
180	A pmo1	ERP Capital budget for upgrade	5,400.00 AU
180	A Proj1	ERP Capital budget for upgrade	12,600.00 AU
40	A SME1	ERP Capital budget for upgrade	2,000.00 AU

Files

Browse... No file selected. Description:

Add another file (Maximum size: 5 MB)

Create Create and continue

Once created you will see your budget screen that will track your project costs.

OpenProject

My page Projects Modules

ERP System Update for New Product Budgets

Successful creation

Budget #1

ERP Capital budget for upgrade

Added by OpenProject Admin less than a minute ago. Updated less than a minute ago

Cost type: Variable rate-based budget

Fixed date: 07/19/2014

Spent (ratio): 0% total progress

Description: ERP Capital budget for upgrade

Units

Planned Unit Costs

Units	Cost type	Comment	Planned costs
1.0 BOM Cost \$k	Bill of Material Cost \$k	ERP Capital budget for upgrade	100,000.00 AU
2.0 Fixed Price Labour \$k	Fixed Price Labour \$k	c	120,000.00 AU

Actual Unit Costs

Work package	Units	Cost type	Costs
			0.00 AU

Labor

Planned Labor Costs

Hours	User	Comment	Planned costs
30.0h	A App1	ERP Capital budget for upgrade	1,500.00 AU
40.0h	A Arch1	ERP Capital budget for upgrade	4,000.00 AU
40.0h	A Bizops1	ERP Capital budget for upgrade	2,400.00 AU
5.0h	A BizOwner1	ERP Capital budget for upgrade	1,000.00 AU
80.0h	A Eng1	ERP Capital budget for upgrade	4,800.00 AU
180.0h	A pmo1	ERP Capital budget for upgrade	5,400.00 AU
180.0h	A Proj1	ERP Capital budget for upgrade	12,600.00 AU
40.0h	A SME1	ERP Capital budget for upgrade	2,000.00 AU
			33,700.00 AU

Actual Labor Costs

Work Package	Hours	User	Costs
			0.00 AU

You can now start to assign dates or even add sub tasks to your plan using the "+" in the work packages screen

Drill into a task through the Work packages menu item.

My page

Projects

Modules

ERP System Update for New Product

Work packages

#9

Overview

Activity

Roadmap

Work packages

New work package

Summary

Timelines

Backlogs

Calendar

News

Forums

Wiki

Status reportings

Meetings

Budgets

Documents

Project settings

Feature #12: Funded party

Added by OpenProject Admin 21 minutes ago. Updated 21 minutes ago.

Status:

Priority:

Assignee:

Responsible:

Category:

Estimated time:

Start date:

Due date:

New

Normal

A BizOwner1

-

5.00 hours

-

-

Work Package Hierarchy

Subject	Status
Phase #9: Create marketing Plan	New
Feature #12: Funded party	New

Related work packages

Watchers (0)

Also available in: Atom | PDF

You will be presented with the “Add a task” screen. Note the key items.

The parent is important as this is how you set up groups of tasks under a summary task. This also will print properly in the timeline screen.

Work Package Hierarchy

Subject	Status
Phase #9: Create marketing Plan	New
Feature #12: Funded party	New
Feature #13: Create guest list	New
Feature #14: Book Resurant	New

Related work packages

Watchers (0)

The screenshot shows the 'New work package' form. Red circles highlight the following fields:

- Parent:** 12
- Category:** Commission product
- Target version:** EPR 12.1.1
- Budget:** (Empty field)

Other visible fields include Type (Feature), Subject (Create guest list), Status (New), Priority (Normal), Assignee, Responsible, Files, Watchers, and Remaining hours.

To update the tasks so they now have dates

Go the Work packages screen

Select the phase that needs updating.

I will start with phase 1 "Rollout new product for customer" This is the over arching phase, you do not set dates for this item, you set dates for the sub tasks and this task will reflect the earliest start date and the latest finish date. The indents indicate sub tasks

Work packages		Options					
+ New work package		✓ Apply ↺ Clear 💾 Save					
✓ #	Type	Status	Priority	Subject	Assignee		
<input type="checkbox"/> 9	Phase	New	Normal	Create marketing Plan			
<input type="checkbox"/> 2	Feature	New	Normal	Design label and update in system	A BizOwner1		
<input type="checkbox"/> 8	Feature	New	Normal	ERP update	A BizOwner1		
<input type="checkbox"/> 1	Phase	New	Normal	Rollout new product for customer			
<input type="checkbox"/> 3	Feature	New	Normal	▶ design computer upgrade	A Arch1		
<input type="checkbox"/> 4	Feature	New	Normal	▶ configure ERP system	A App1		
<input type="checkbox"/> 5	Feature	New	Normal	▶ Gather further information from Ops mgr	A Bizops1		
<input type="checkbox"/> 6	Feature	New	Normal	▶ create project structure	A pmo1		
<input type="checkbox"/> 7	Feature	New	Normal	▶ create detailed requirements	A SME1		
<input type="checkbox"/> 10	Feature	New	Normal	Design Web pages	A Bizops1		
<input type="checkbox"/> 11	Feature	New	Normal	update Web Site	A App1		
<input type="checkbox"/> 12	Feature	New	Normal	fundel party	A BizOwner1		
<input type="checkbox"/> 13	Feature	New	Normal	▶ Create guest list	A SME1		
<input type="checkbox"/> 14	Feature	New	Normal	▶ Book Resurant	A SME1		

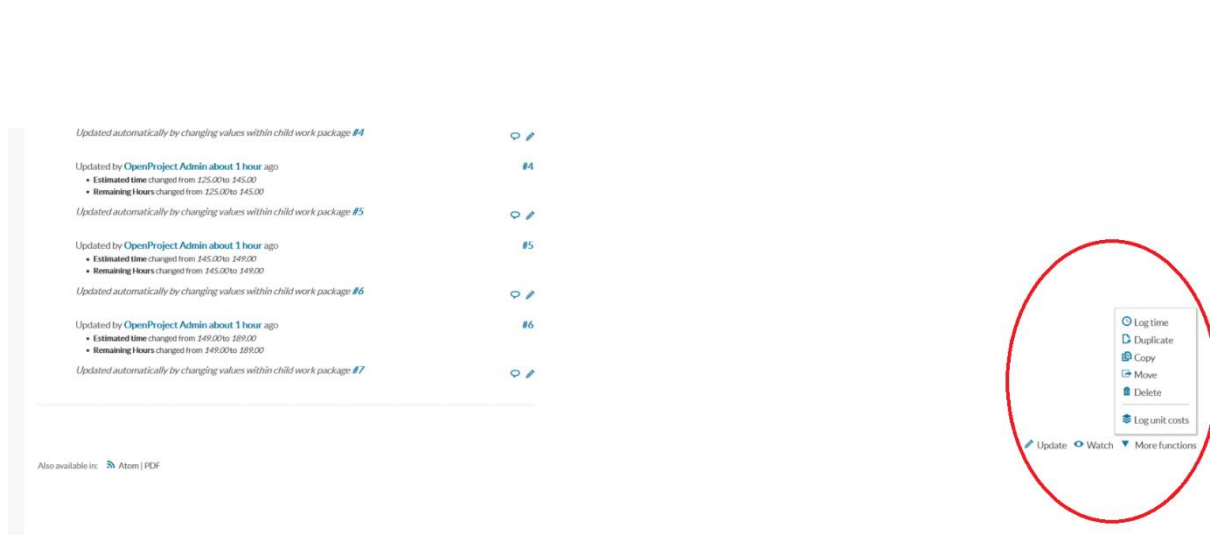
(1 - 14/14) | Per page: 100, 500, 1000

Click the “Rollout new product for customer”

Select each sub feature and click that feature

And scroll to the bottom of the screen. There you will find the “Update” button.

You will also find other handy functions



Click update

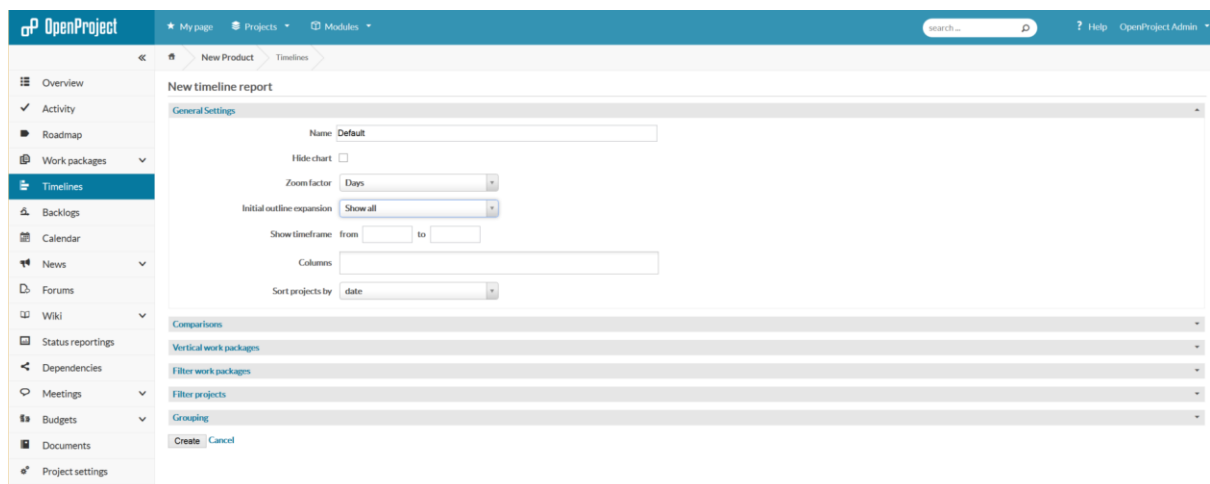
and add the dates and budget etc

Do this for all your tasks until you have a coherent plan.

The Timeline Report

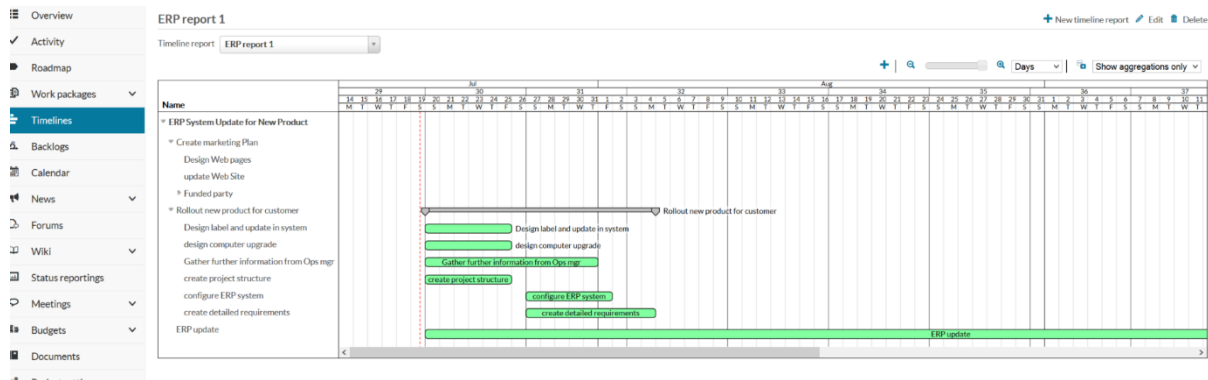
It is the traditional view of a project.

You will have to create a report at first. Change the Zoom and expansion so you all the detail.



Later you can create a report that has a view that you like.

Below is how my time line report looks after completing the first set of tasks. You will have to create this report first but it is quite easy to do.



You can now update the dates for the other tasks and change their hierarchy. You can access the tasks from the timeline report by clicking the task

The green means we are adding just features, but you could also start to add bug tasks and other tasks as well which have different colours.

To fix any hierarchy issues you need to click the “Change properties” arrow found in the Work package screen.

The screenshot shows the 'Work Package Hierarchy' screen. It includes a table of work packages with columns for Subject, Status, Assignee, and Target version. Below the table, there is a 'Related work packages' section and a 'History' section. The 'Change properties' form is highlighted with a red circle. The form contains fields for Status, Priority, Assignee, Responsible, Category, Budget, and Remaining Hours. The 'Status' field is set to 'New', 'Priority' to 'Normal', 'Assignee' to 'A BizOwner1', 'Responsible' to 'A BizOwner1', 'Category' to 'Design', 'Budget' to 'ERP Capital budget for upgrade', and 'Remaining Hours' to '5'. The 'Target version' field is set to 'EPR 12.1.1', 'Start date' to '2014-07-20', 'Due date' to '2014-07-25', 'Estimated time' to '5.00', and '% done' to '0%'.

You change the type and the parent here

For example, as a task is moved to “In Progress” you can see that it has a workload effect (red numbers on the task are the effort, the colour is the person) so a resource discussion can be had. You also have the priority of the Story against the other stories displayed, so the executive can level set their update against the business’s goals.

As you get more adept with OP, you can use sub projects and associations to provide an executive view and a drill down so that real progress can be made against the companies goals.

Activity

Roadmap

Work packages

Timelines

Backlogs

Calendar

News

Forums

Wiki

Status reportings

Meetings

Budgets

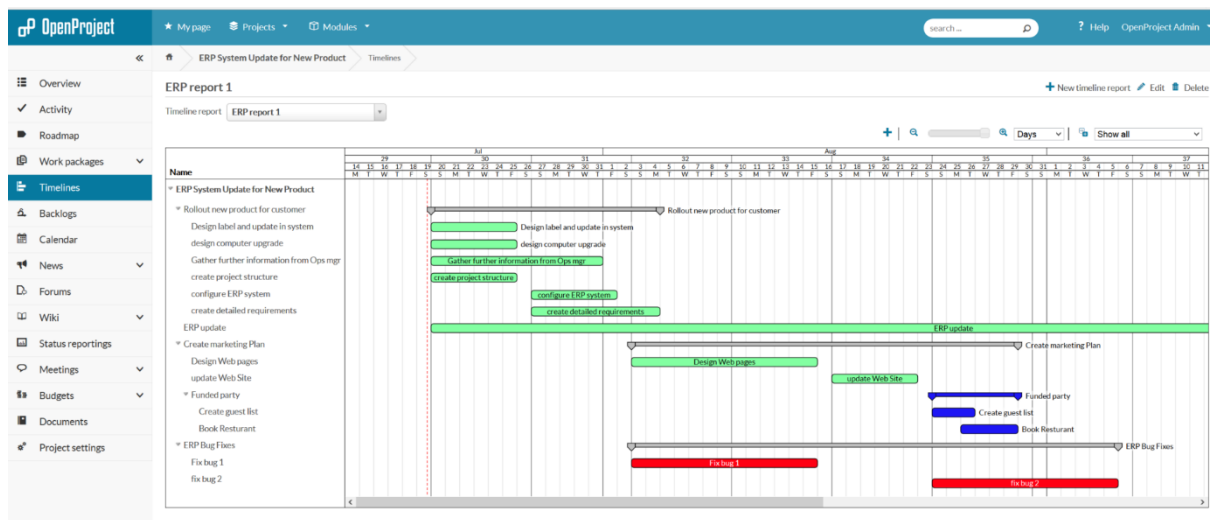
Documents

Project settings

ERP 2.2.1.1

Story	New	Resolved	Feedback	Closed	Rejected	In Progress
<div><div>New</div><div>Sprint Impediments</div><div>Unassigned</div><div>15</div><div>3</div></div>	<div><div>ERP update</div><div>A BioOwner1</div><div>300.0</div></div> <div><div>fix bug 2</div><div>A Asst1</div><div>100.0</div></div> <div><div>Fix bug 1</div><div>A Asst1</div><div>100.0</div></div>					
<div><div>New</div><div>ERP Bug Fixes</div><div>Unassigned</div><div>15</div><div>3</div></div>	<div><div>update Web Site</div><div>A Asst1</div><div>50.0</div></div> <div><div>Design Web pages</div><div>A Bizops1</div><div>20.0</div></div>				<div><div>Funded party</div><div>A BioOwner1</div></div>	
<div><div>New</div><div>Create marketing Plan</div><div>Unassigned</div><div>9</div><div>2</div></div>	<div><div>configure ERP system</div><div>A Asst1</div><div>80.0</div></div> <div><div>create detailed requirements</div><div>A SME1</div><div>40.0</div></div> <div><div>Design label and update in system</div><div>A BioOwner1</div><div>50.0</div></div>		<div><div>Gather further information from Ops mgr</div><div>A Bizops1</div><div>20.0</div></div>			<div><div>create project structure</div><div>A SME1</div><div>40.0</div></div> <div><div>design computer upgrade</div><div>A Asst1</div><div>40.0</div></div>
<div><div>New</div><div>Rollout new product for customer</div><div>A Proj1</div><div>1</div><div>1</div></div>						

My new Timeline looks like. You see the effect of setting up an end to end sprint impediment here, it shows the whole project time line, of course, you could use a task summary to achieve the same reporting effect (maybe better approach.. ??)



Next is to start booking time to the tasks and see how the tracking goes. Time to manage your project.