OPENPROJECT

Draft Setup notes for Openproject

Setup – Draft Notes

Contents

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

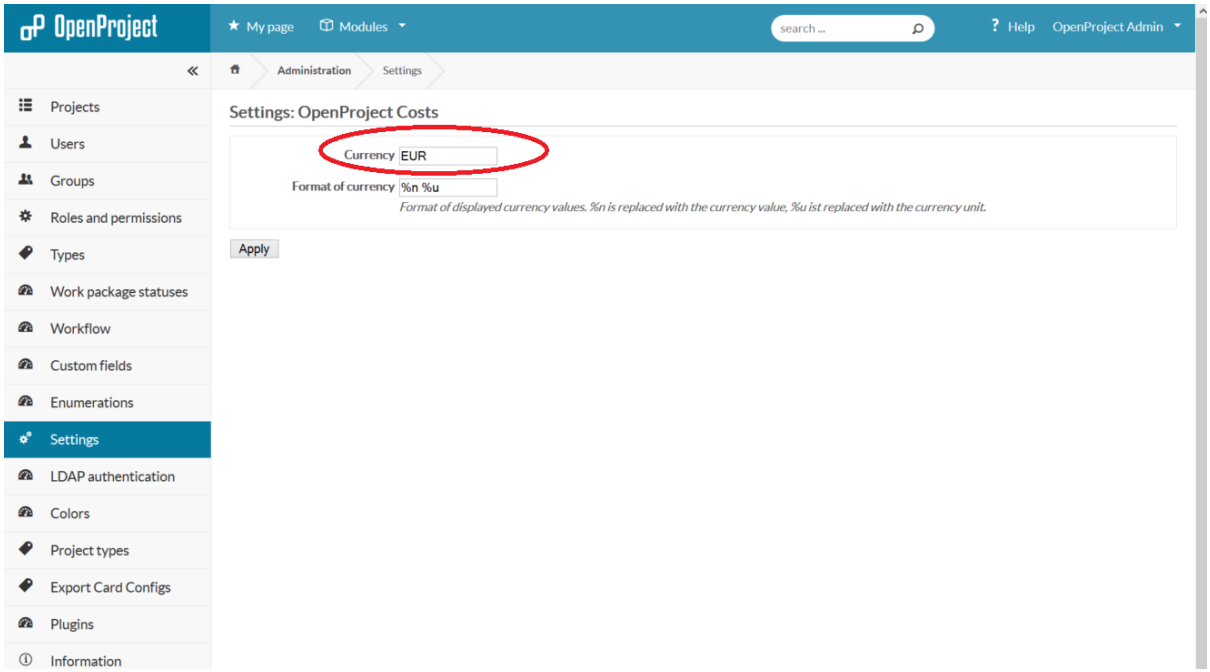
1. Using a web browser, open the project server on your local host or go the servers IP address if you are using Amazon or some other service provider
2. Login as admin pwd admin
3. Open the Administration Module
4. Go to the plugin page at the bottom of the menu.

Configure the Help link

Accept the default

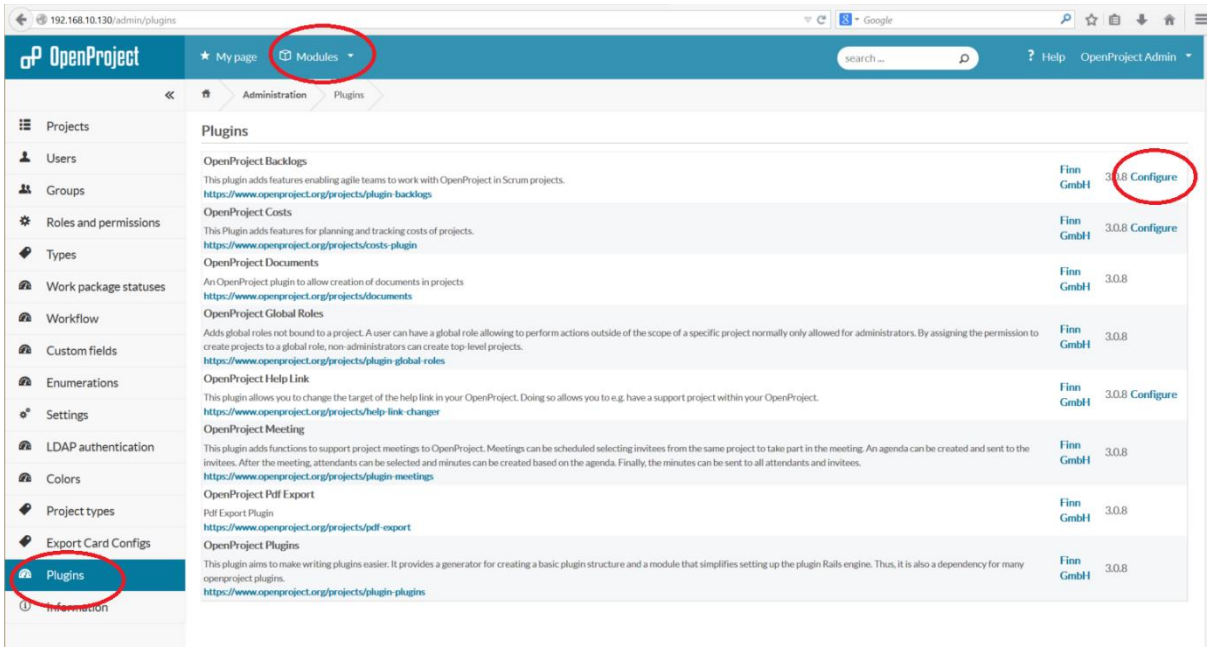
Configure the Costs Plugin

Can the currency symbol to the currency used by your company

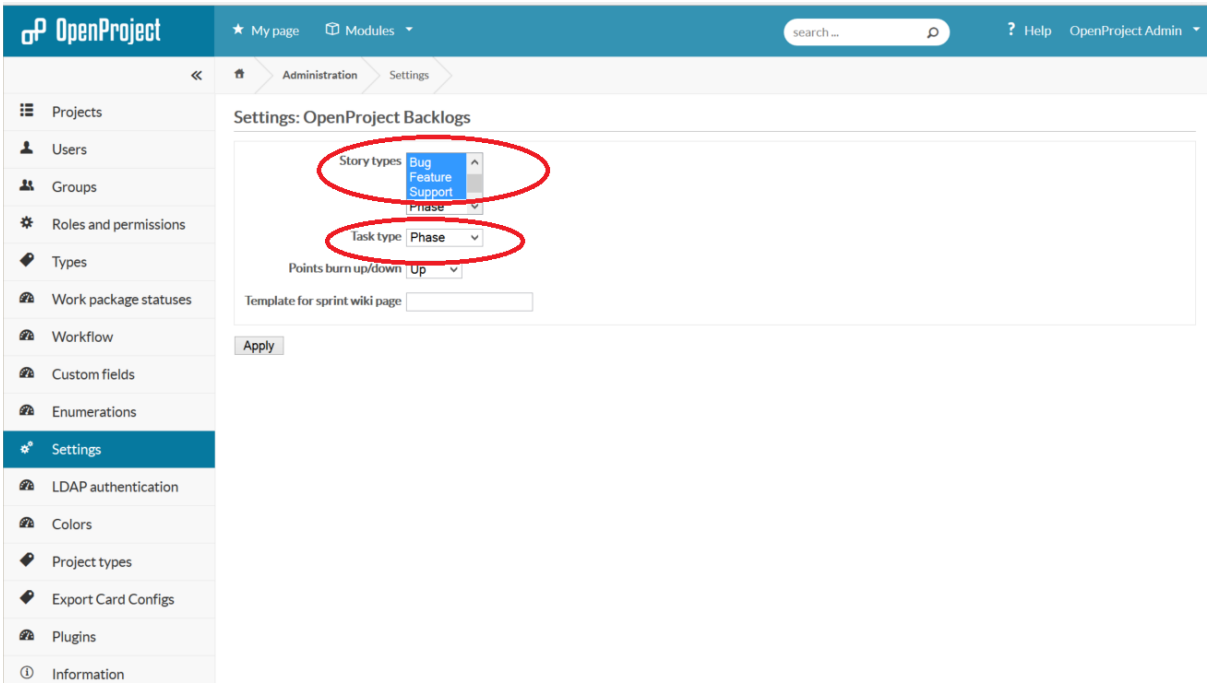


Configure the backlog Plugin

You access the configuration screen as below



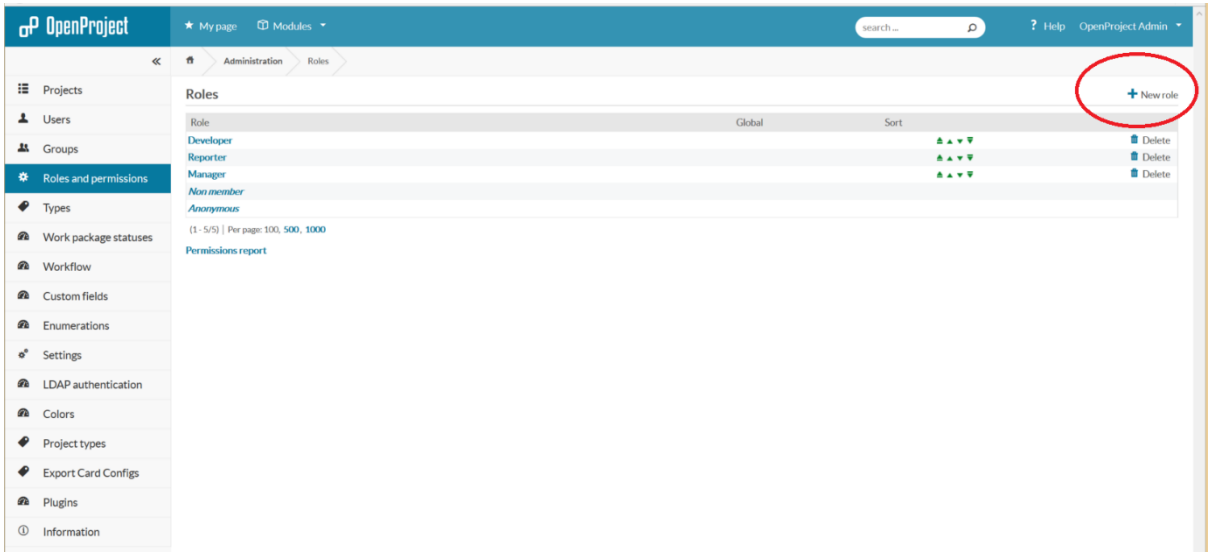
Use the shift button to select the group of project types that can be used in the initial story process. I use none, bug, feature and support. I used “phase” as the task type. I do not have sprint wiki template setup yet.



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

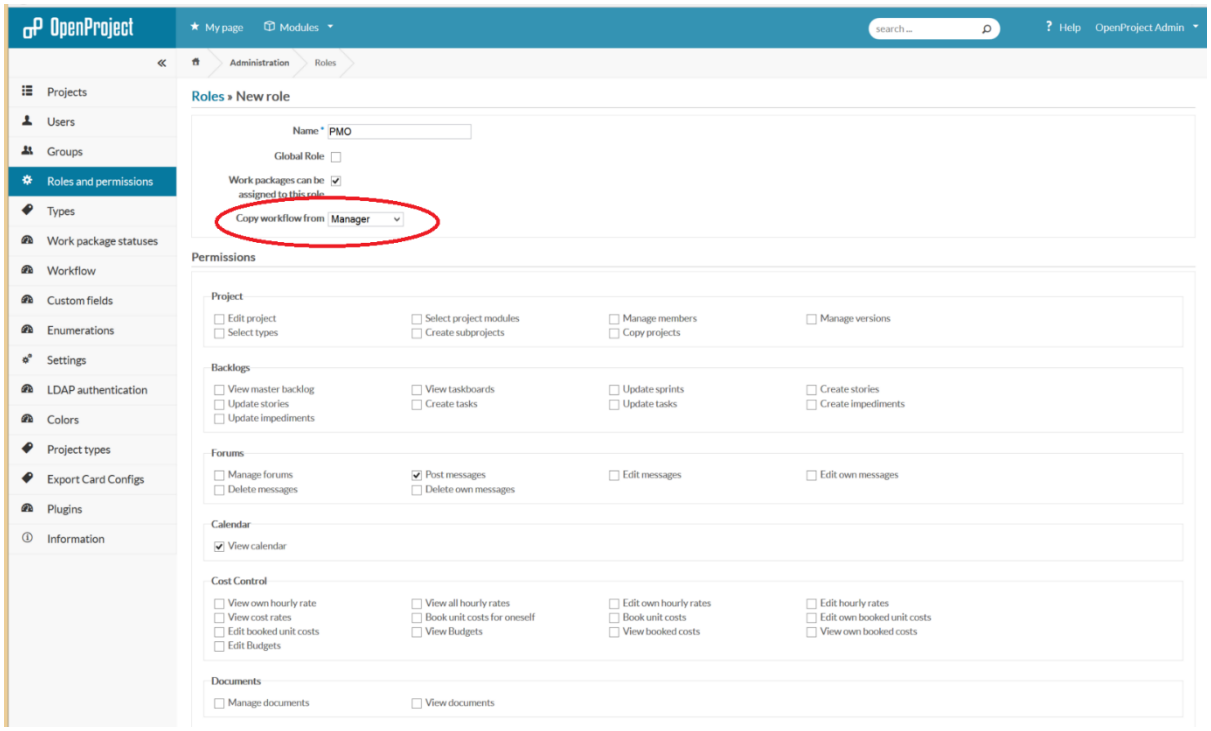
Updating Roles and Permissions

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

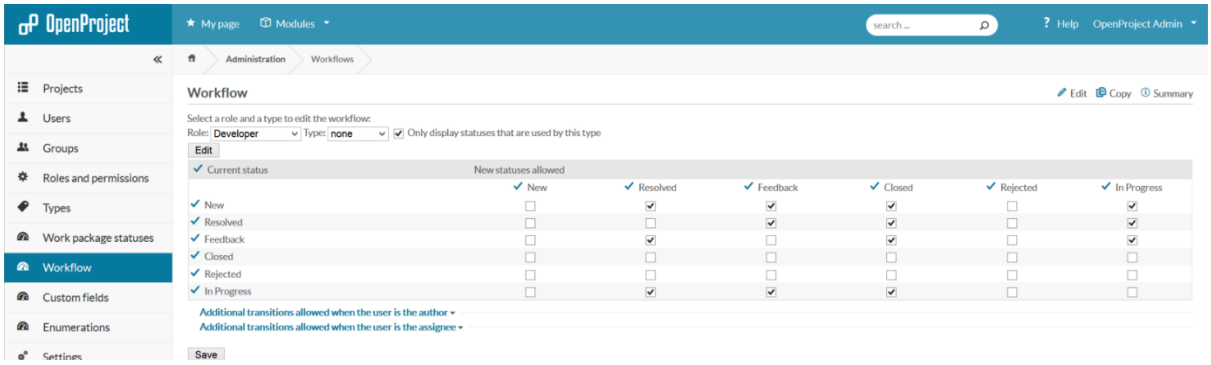
I am going to copy another roles workflow. It is important that you set up workflow as this will have a large effect on how OpenProject works. For example, you may have a testing role. You not allow the tester to create new tasks but you may allow them to change “in progress” to “feedback” or “rejected”. 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.



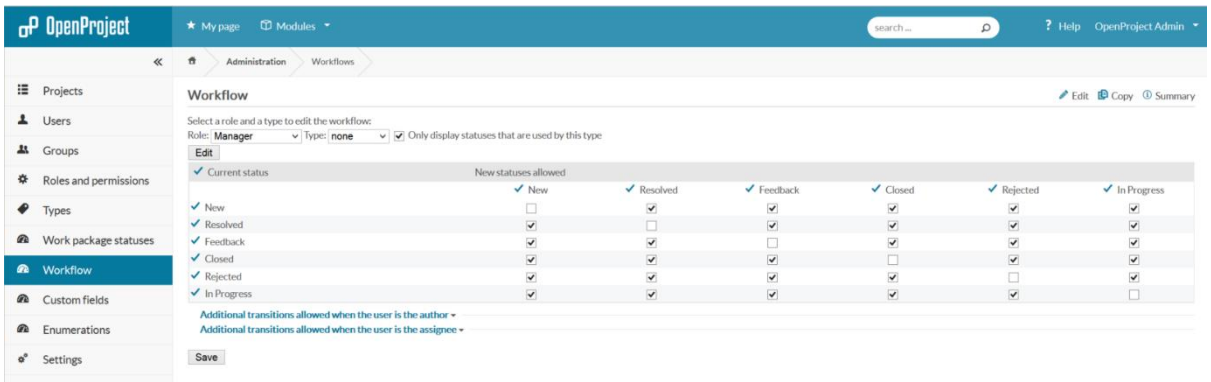
Workflow

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

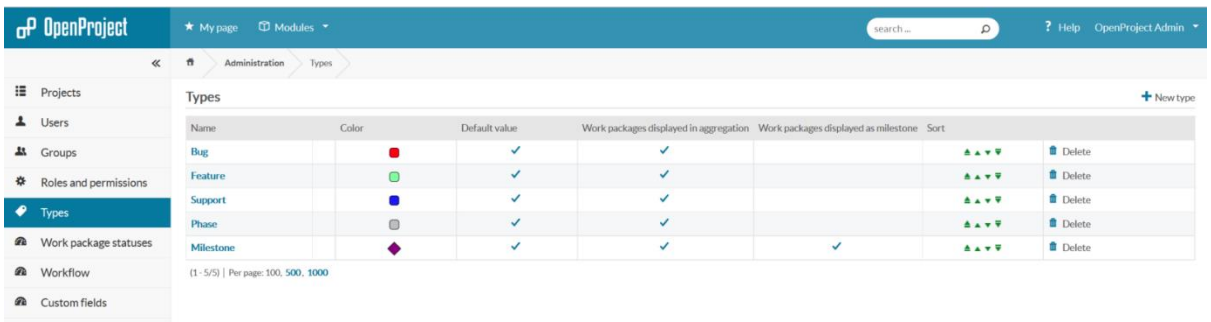


Whereas the manager can control all the work packages and their status.



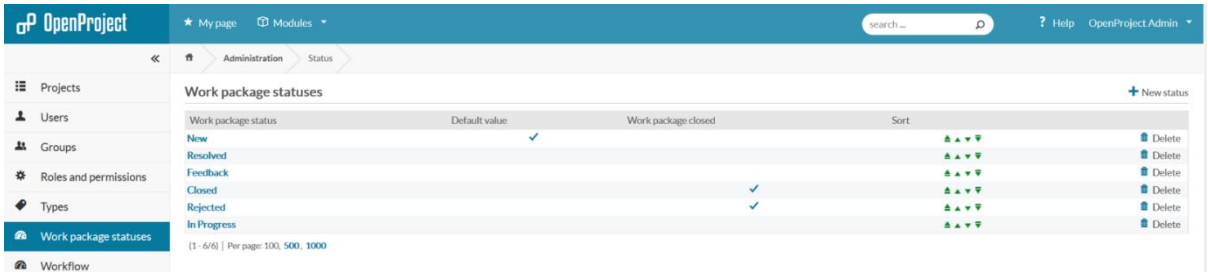
Types

No Change



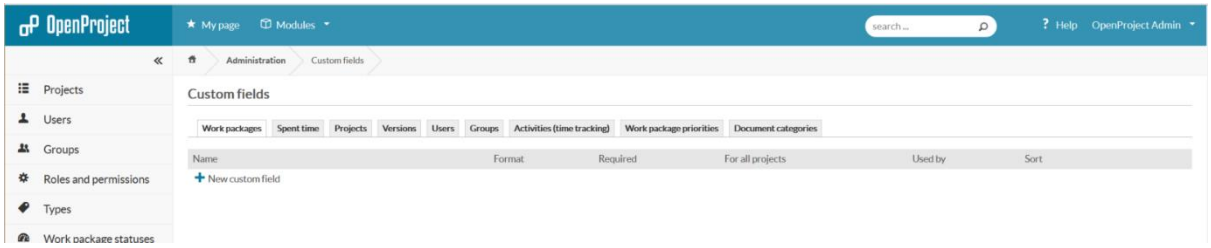
Work package statuses

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.



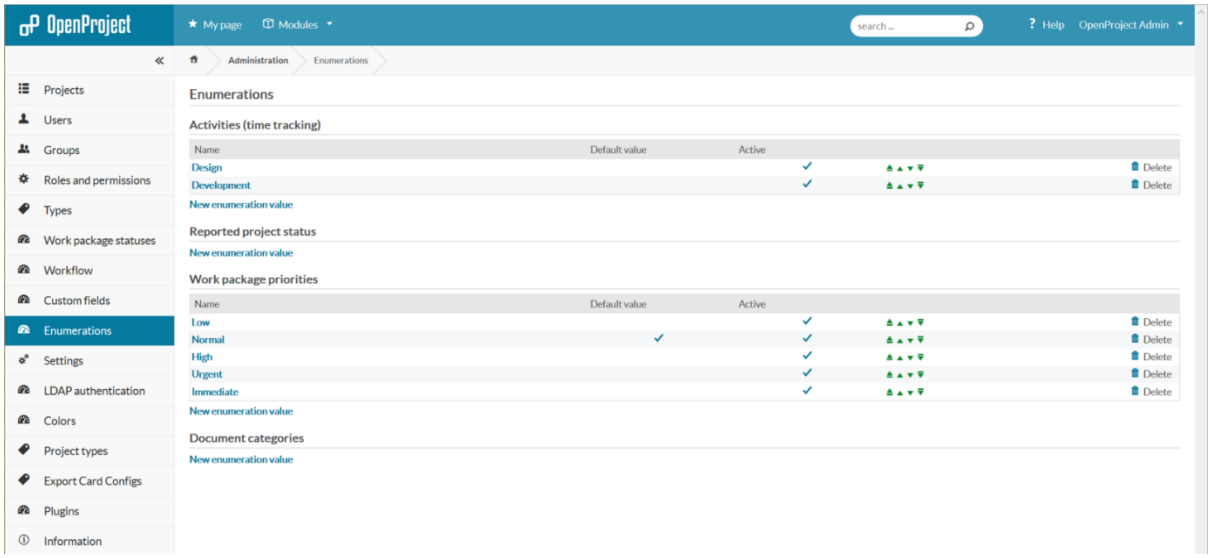
Custom Fields

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.



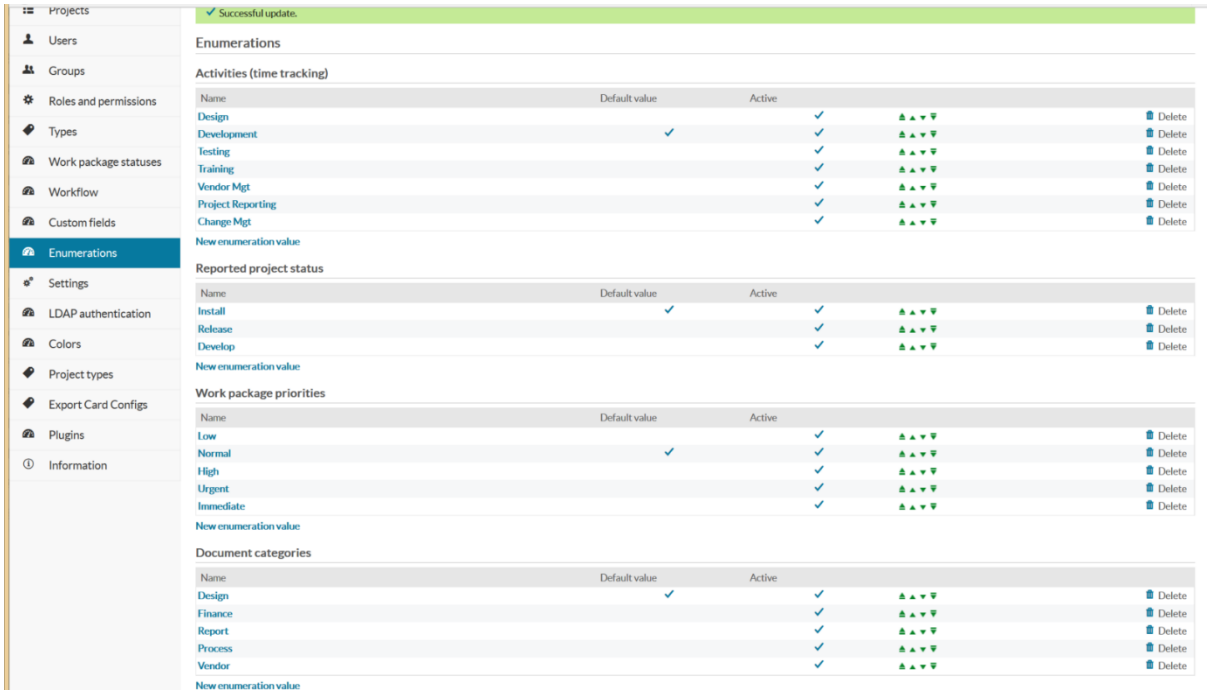
Enumerations

You will need to add information here.



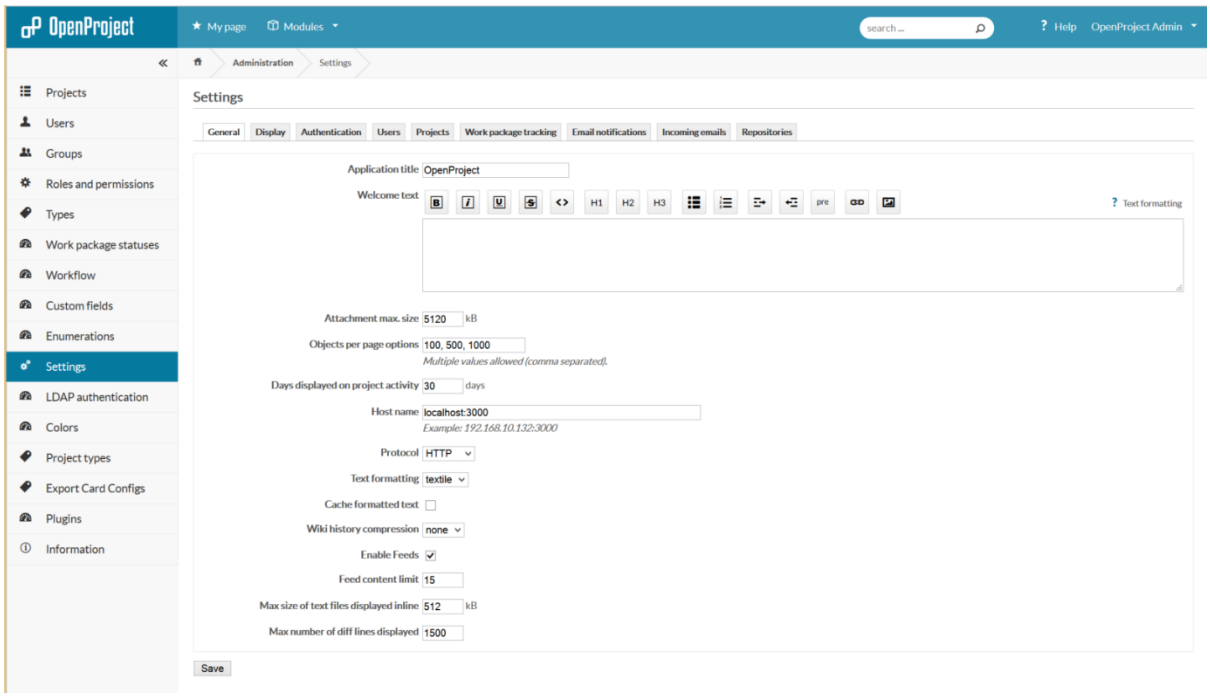
I will add more time tracking categories like Reporting, Change mgt, Training, Documenting, System mgt, Vendor mgt, Testing, Coding new features, Coding bug fixes as well as document categories

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



OpenProject Settings

Select the settings option on the left main menu



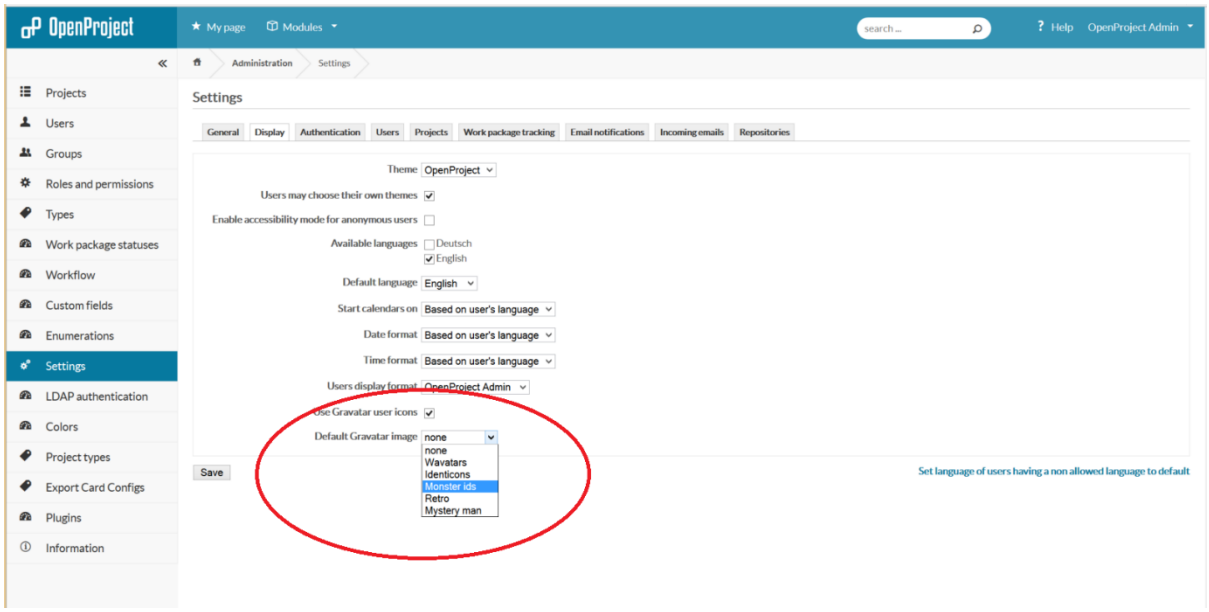
As you can see you have the option to update the general settings, Display, Authentication, Users, Projects, Work Package Tracking, Email Notification, Incoming Emails, Repositories.

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

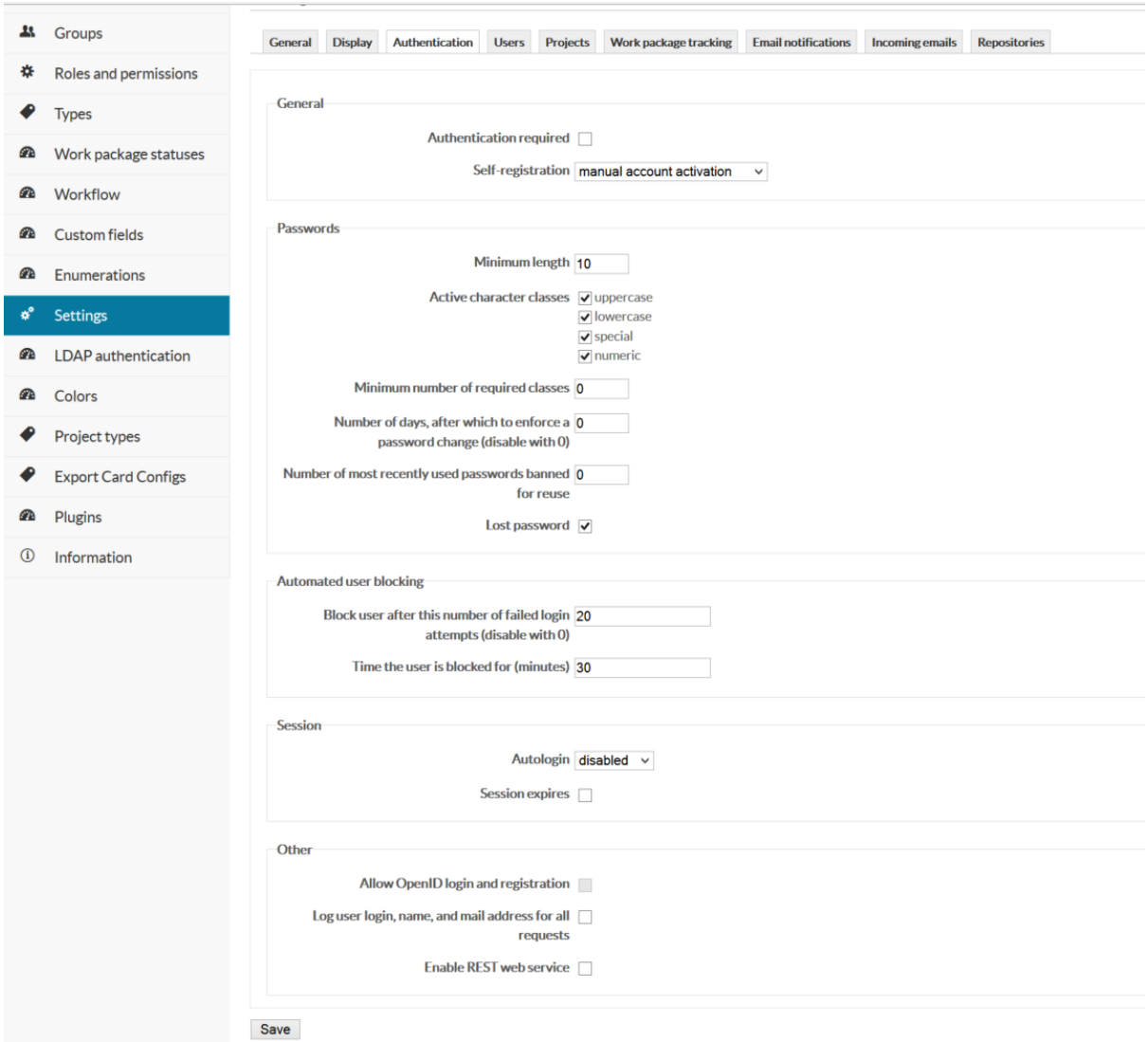
I allowed the use of icons to brighten up my site



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

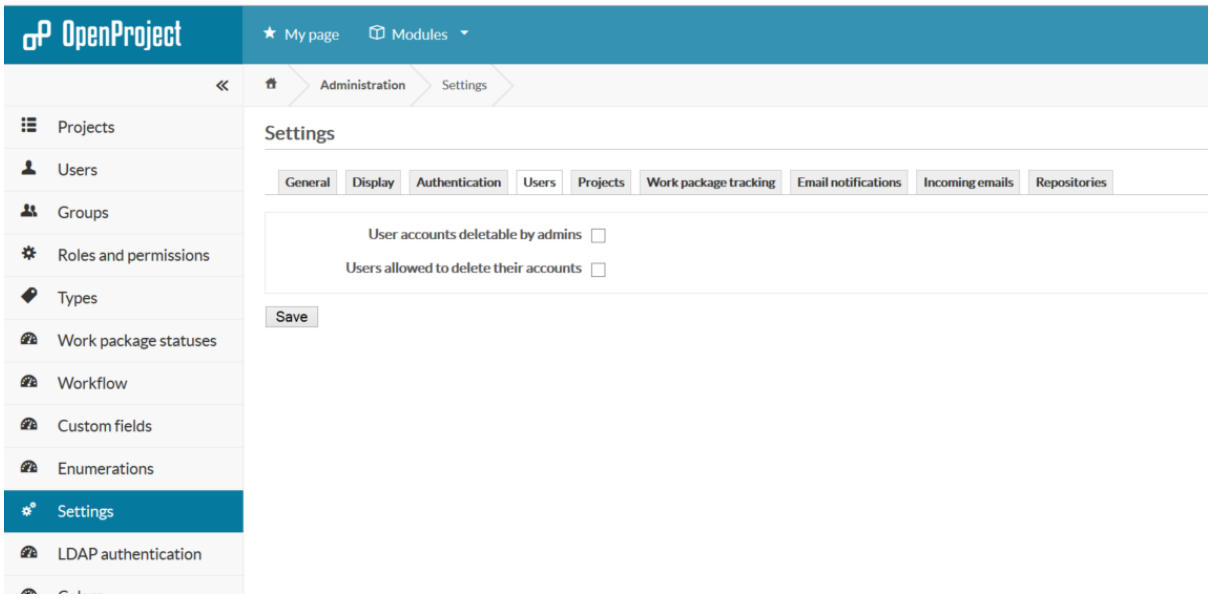
Updating Authentication

I have kept the defaults



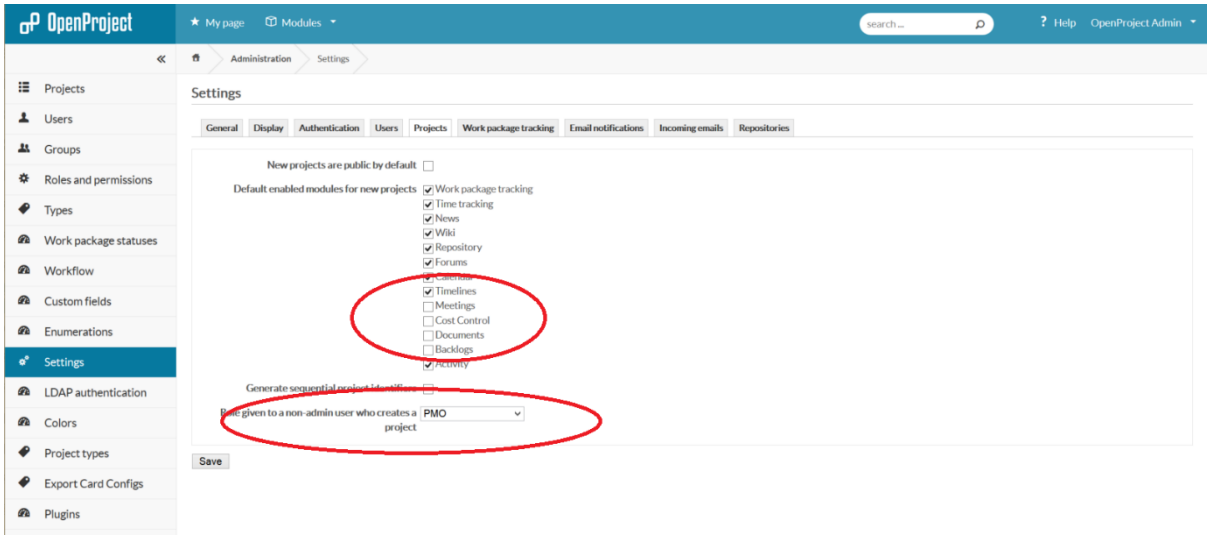
Updating User General Settings

I have kept the defaults



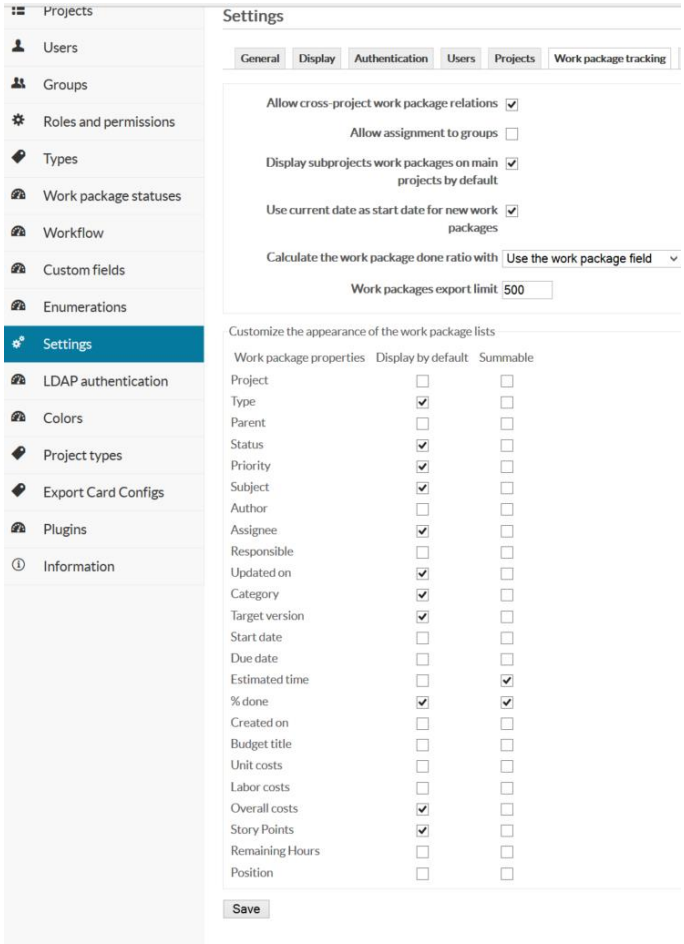
Project Settings

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



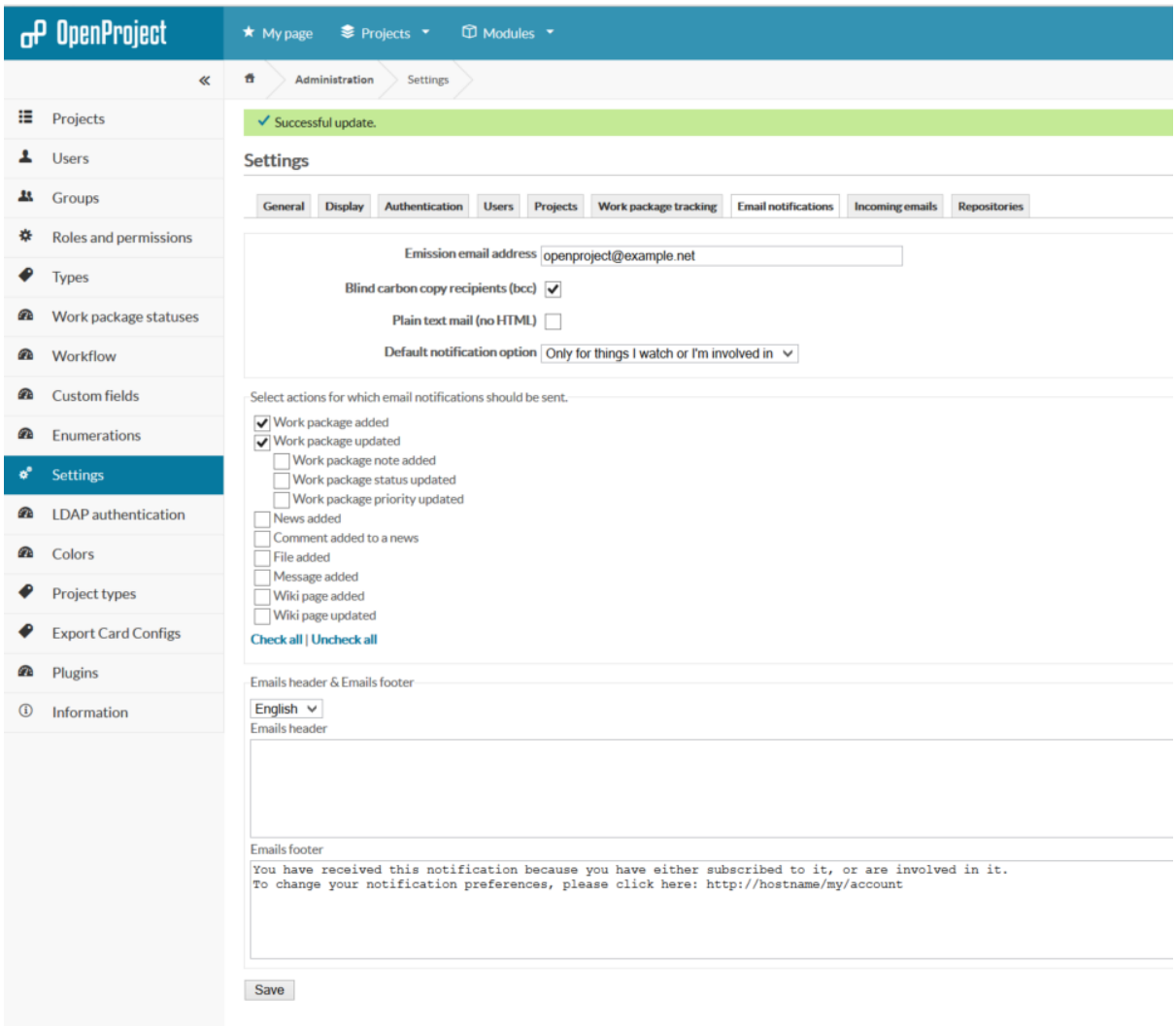
Work Package Tracking

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.



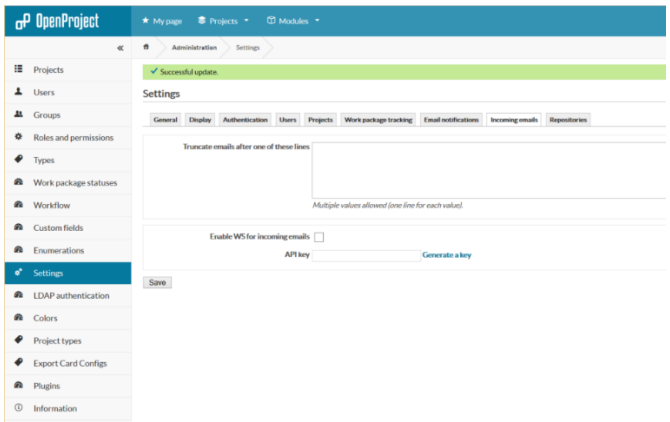
Email Notification Page

Keep the defaults for now



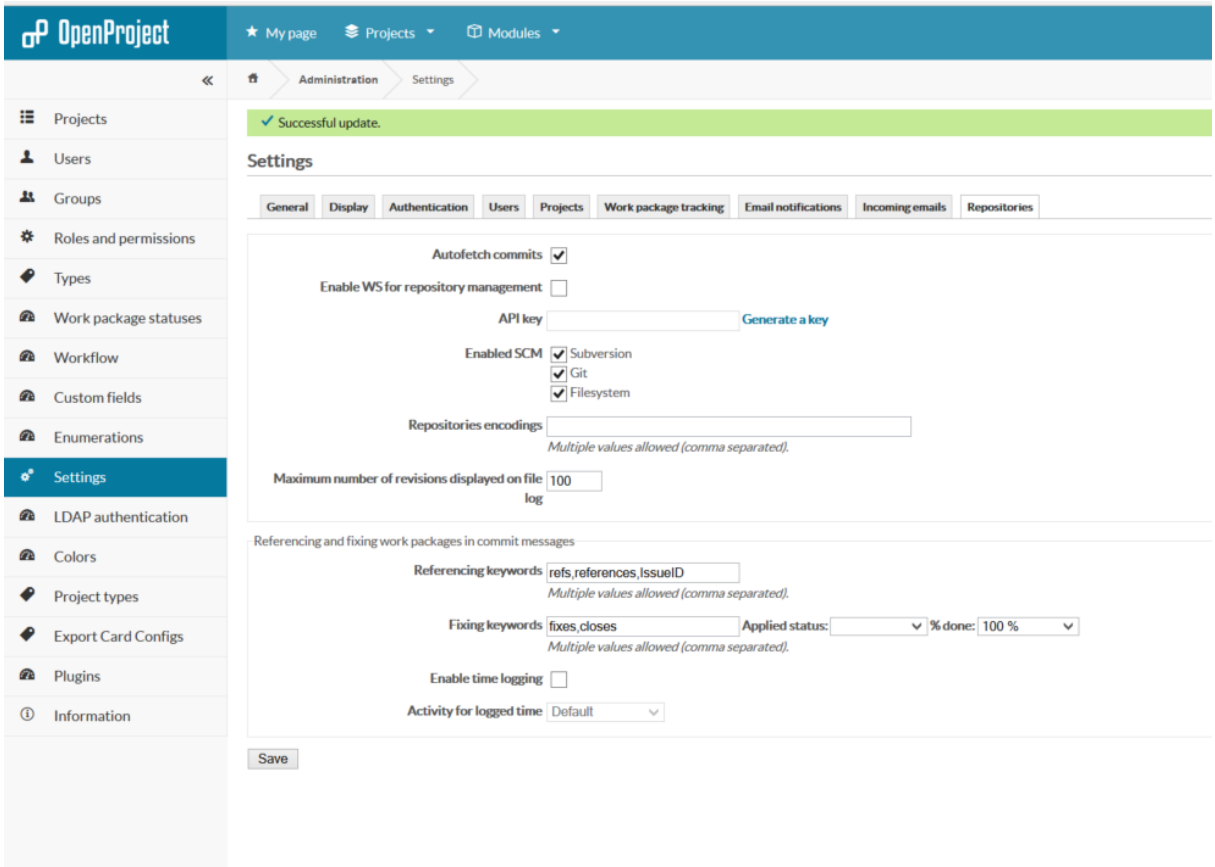
Incoming Email Page

Keep the defaults for now



Repositories

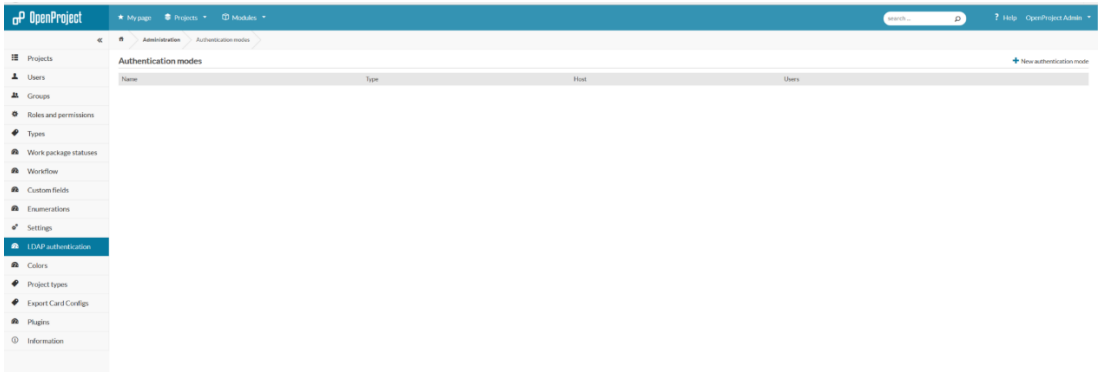
I enabled time logging and made the default category “Development”



LDAP Authentication

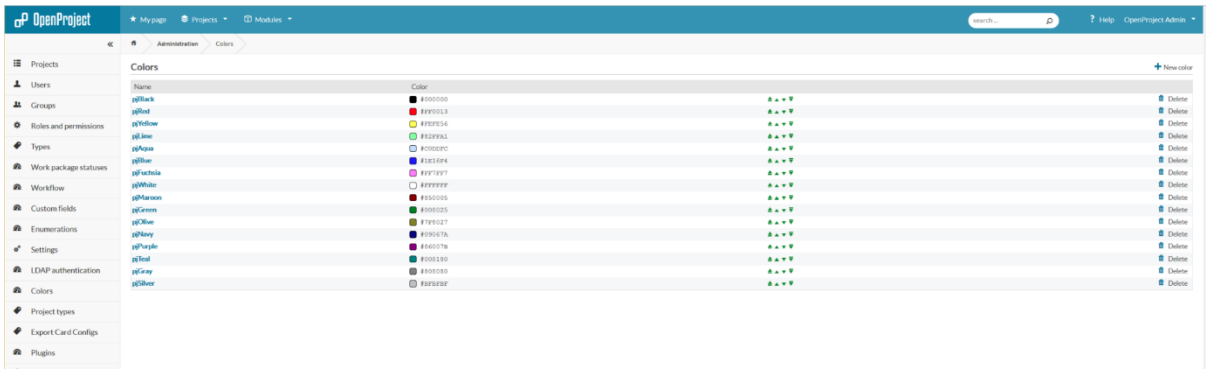
This is where you set up remote authentication using LDAP (connect to your Microsoft AD).

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



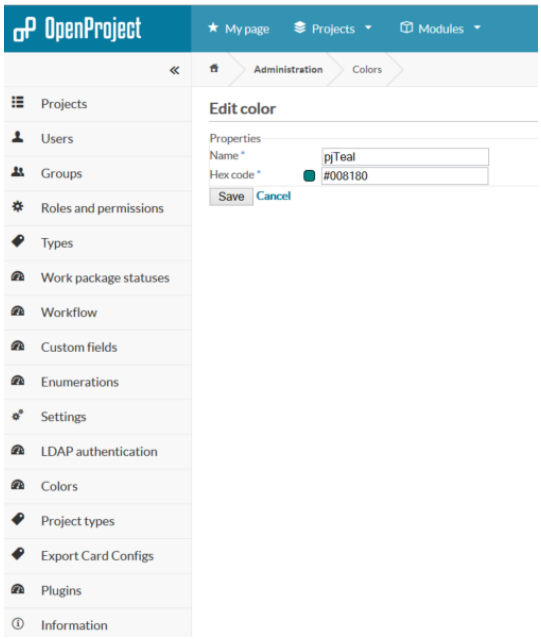
Colors Page

You can change the colour options on this page.



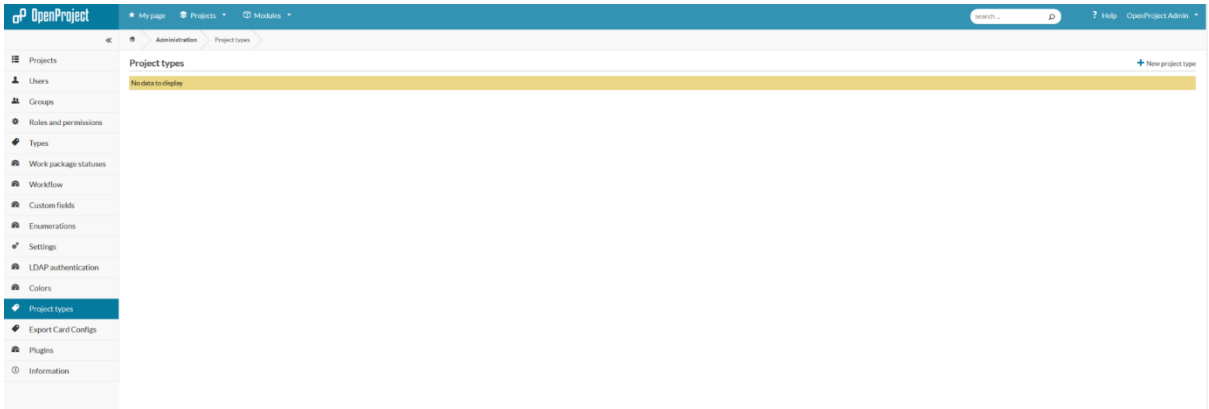
If you click on a colour you can edit its name and the colour. You might like to set up a new pastel set ☺

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.



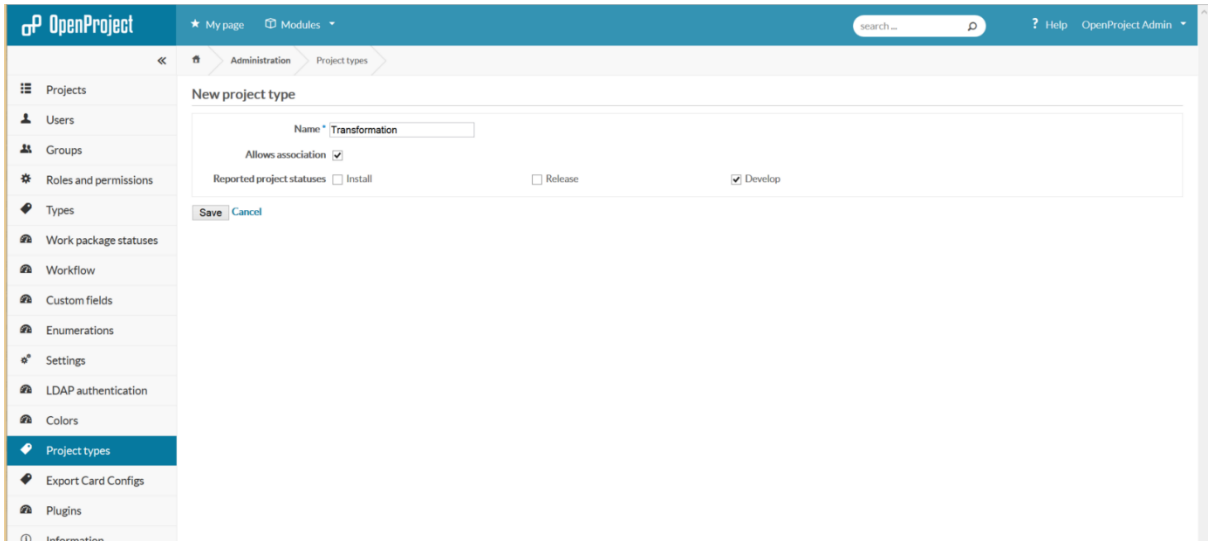
The Project Types Page

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.

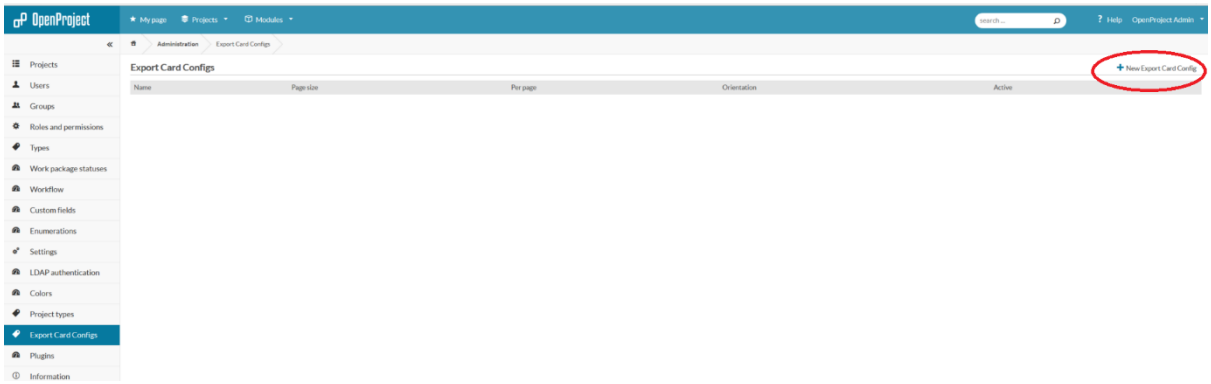


Export Card Configs

This item appears as I have loaded the PDF export plugin

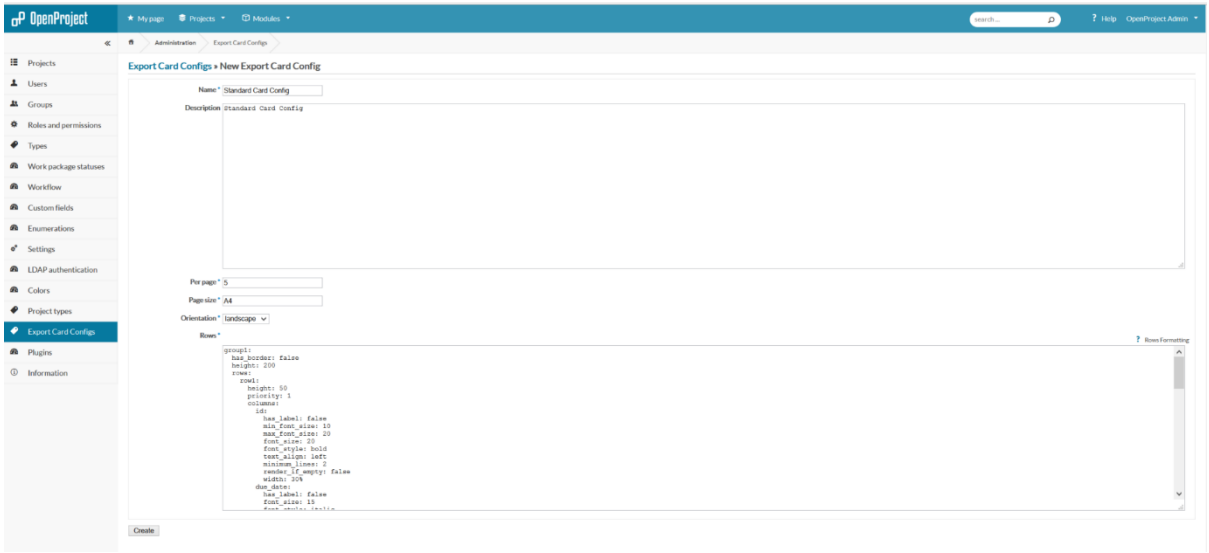
The plugin page has an example YAML format to use so I will install that.

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



Add a New Export Config

My setup

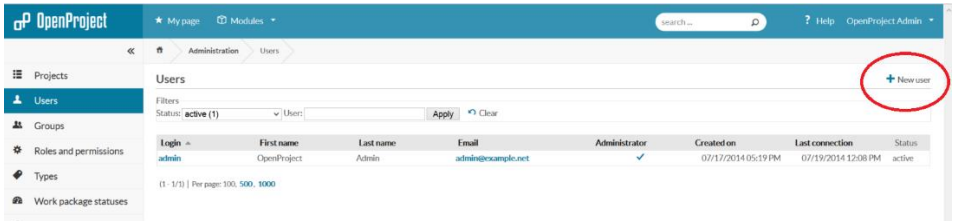


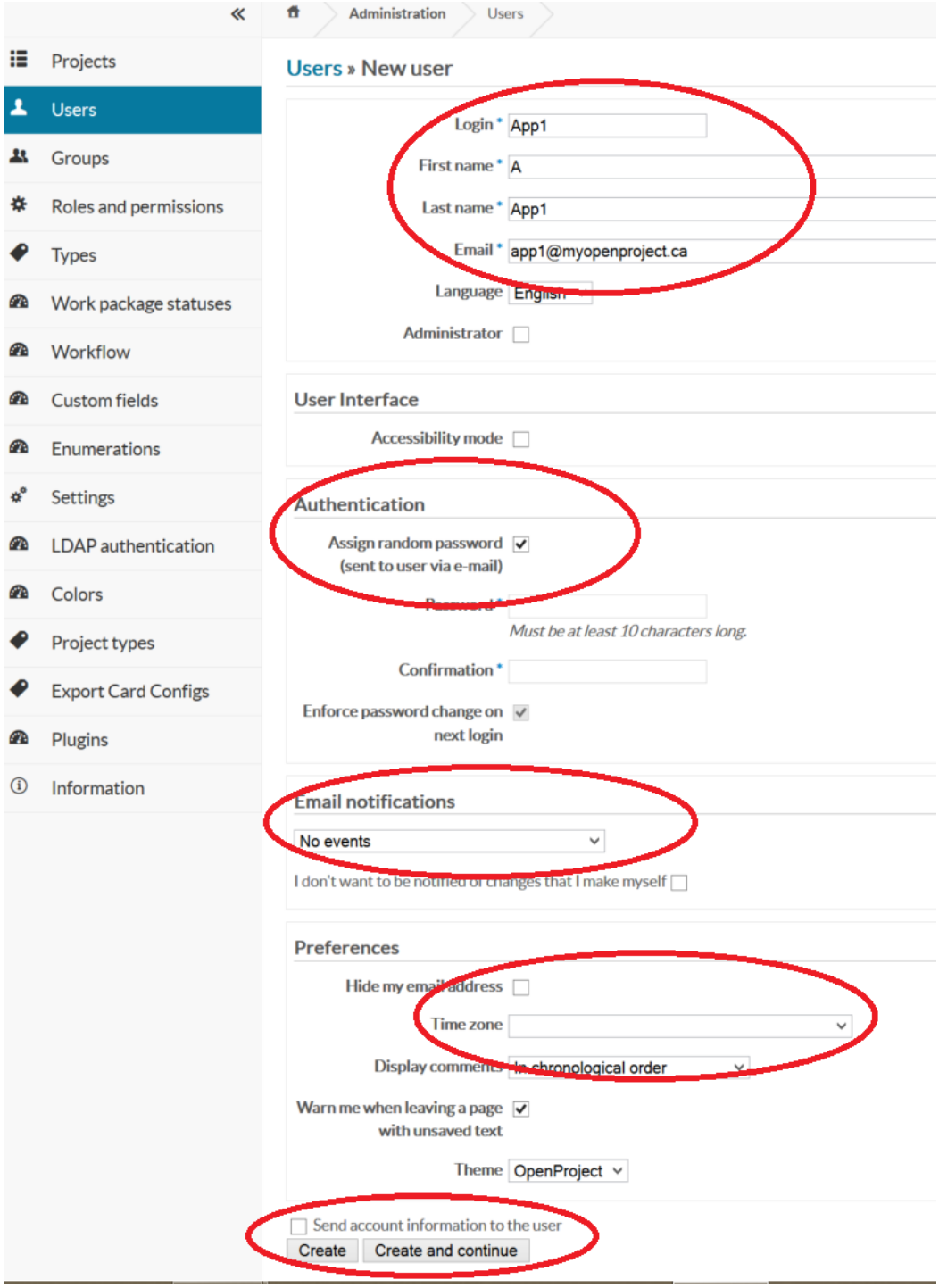
Users Setup

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

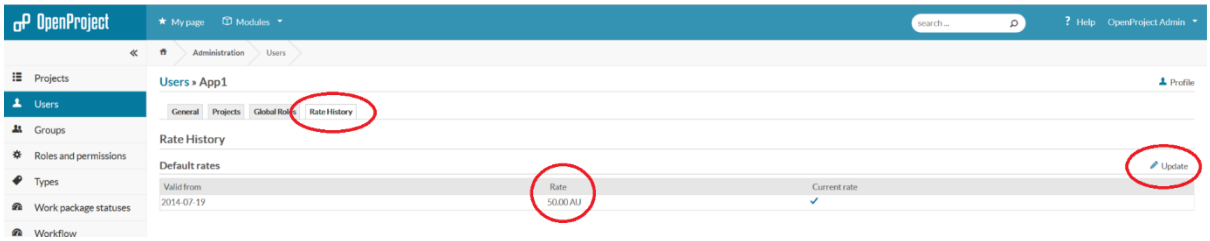




I turn off all the email notifications as this is a test installation, but you may choose differently when in production. You can also use LDAP, but I have not looked into this and it's effects on the user setup, so this is a local user at the moment.

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.

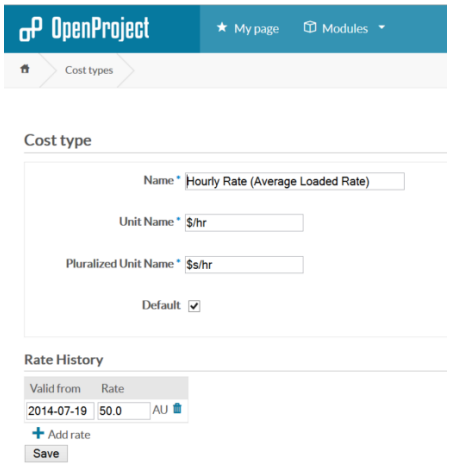


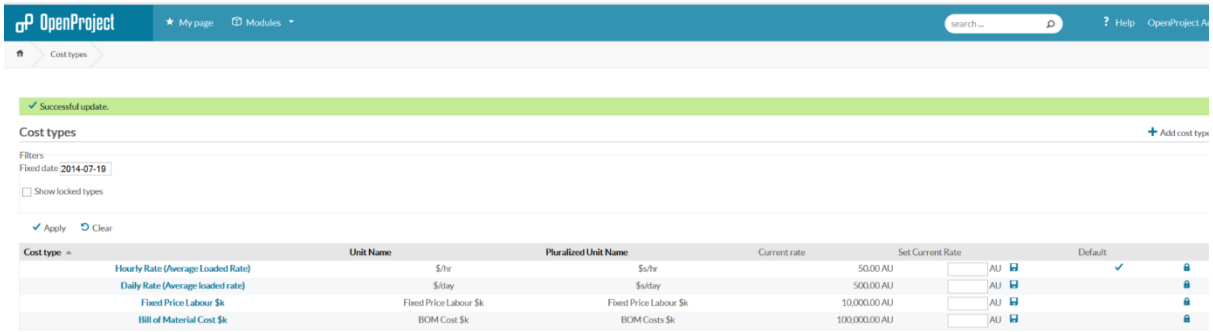
You can update the rate as you need to as costs change.

Costs Module Plugin

Add costs type in the costs module

Add hourly, and fixed cost types as suggestions.

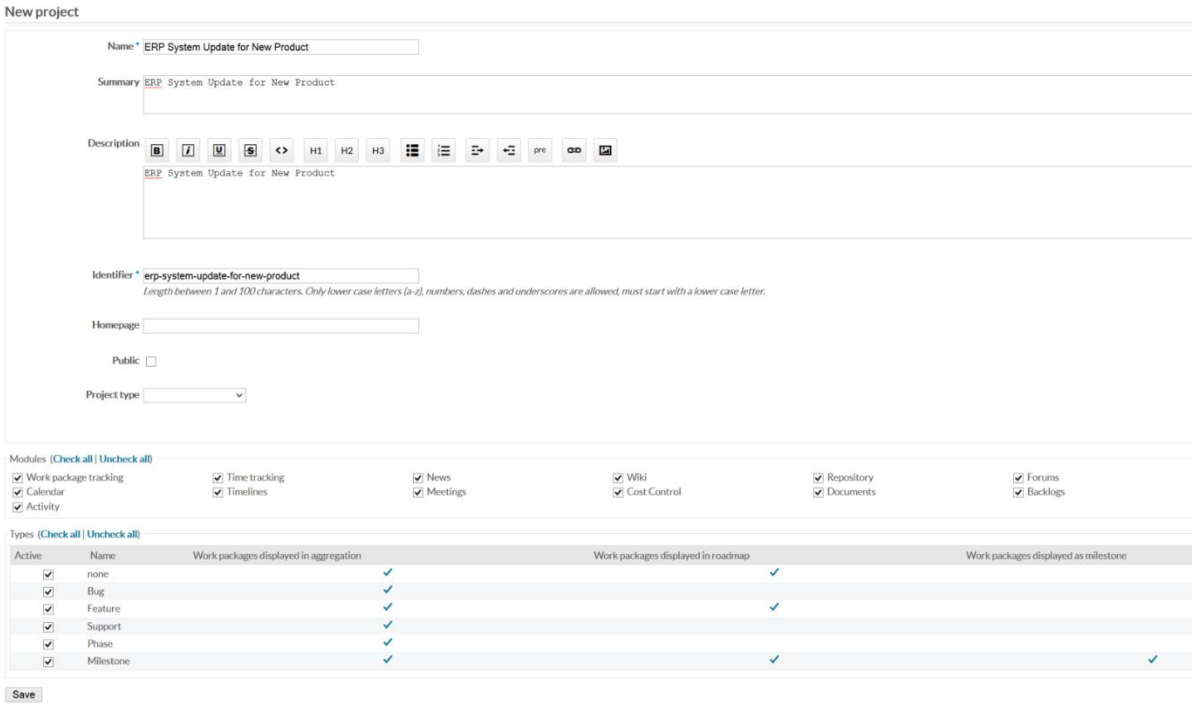




Creating a Project

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

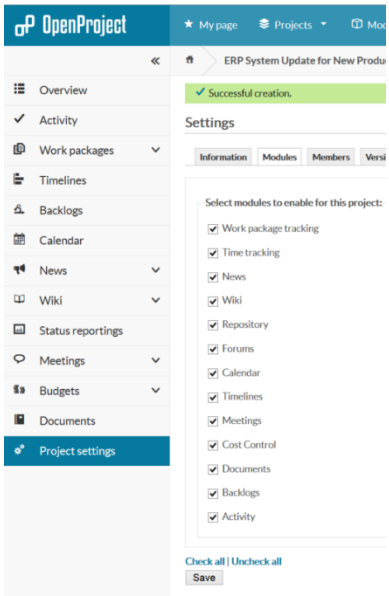
I have included all the plugins for testing purposes



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.

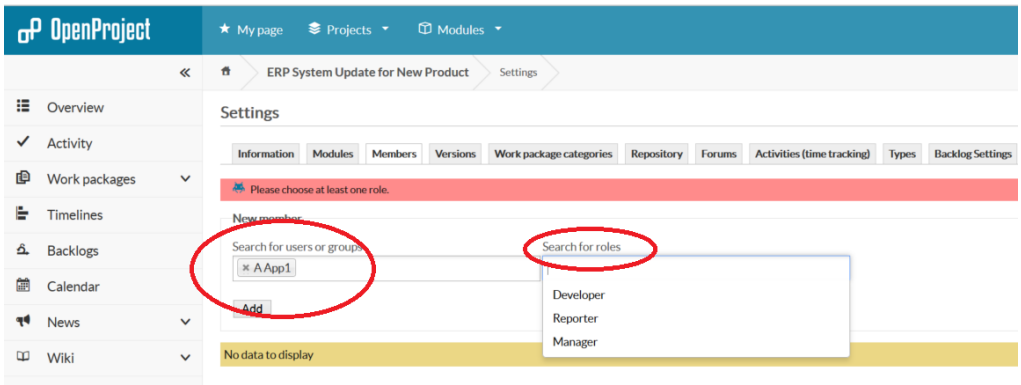
Project Modules



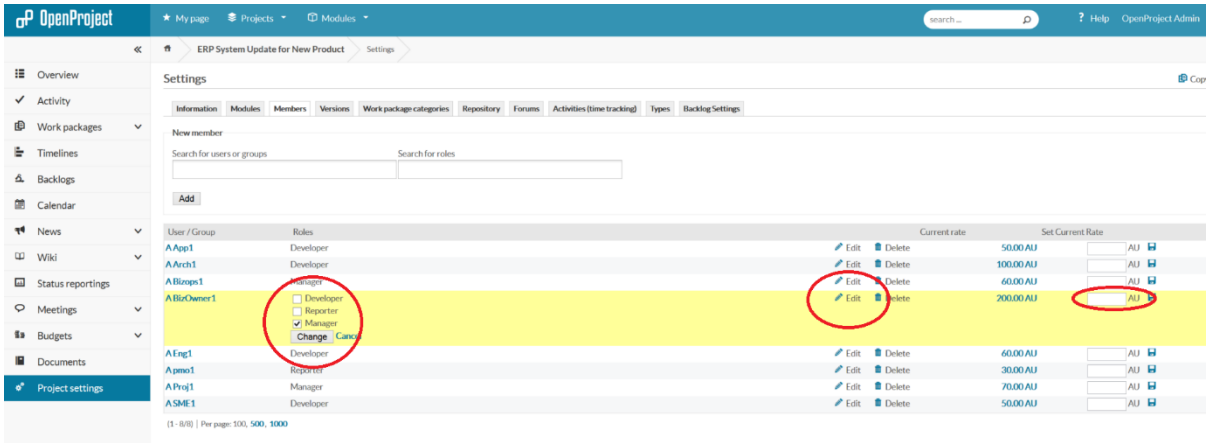
Project Members

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.

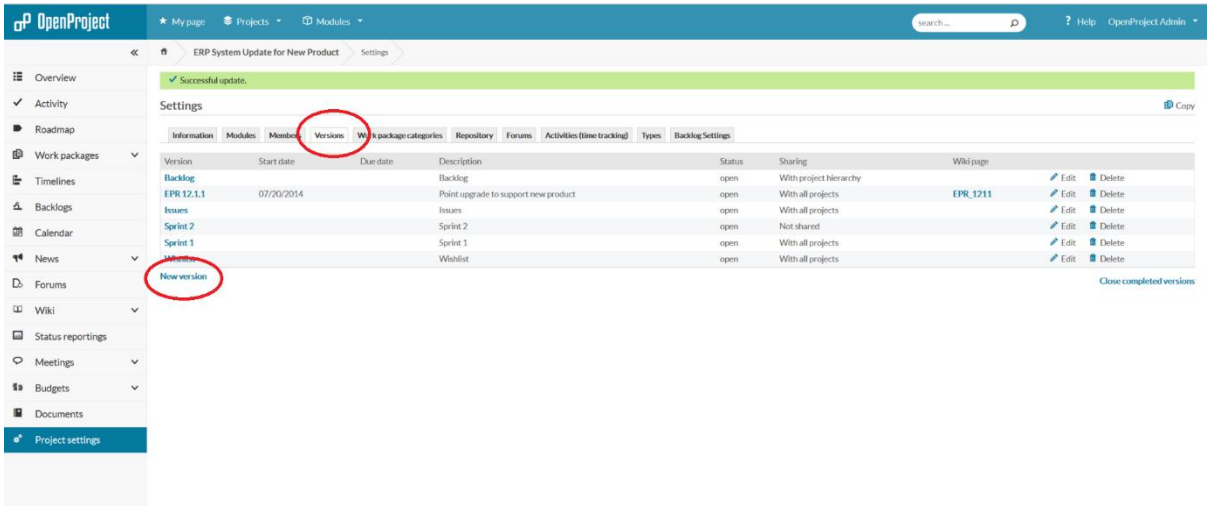


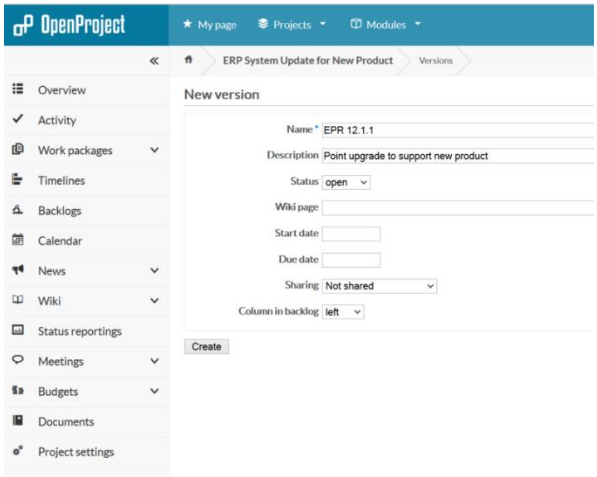
If you make a mistake, you can edit the settings. You can add specific rates as well at this point for the project team



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.



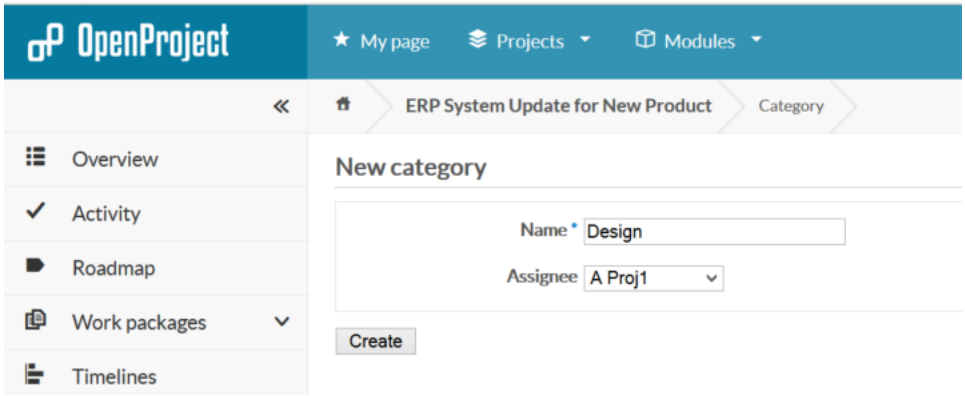


Project Work Packages

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

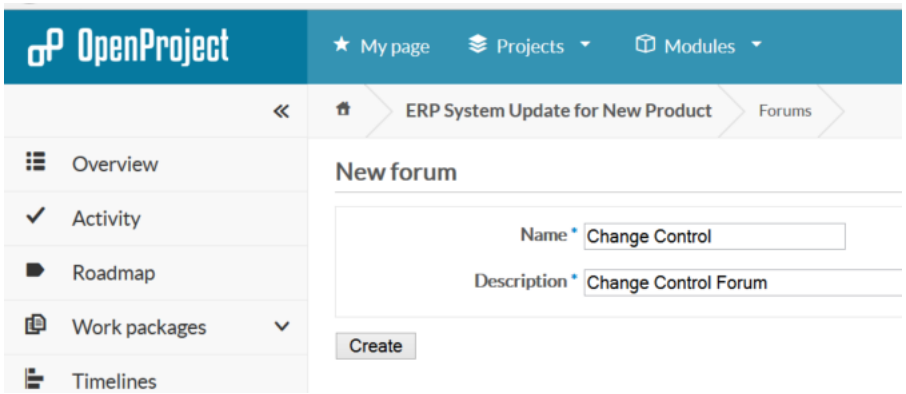


Project Repositiitories

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.



Project Activities

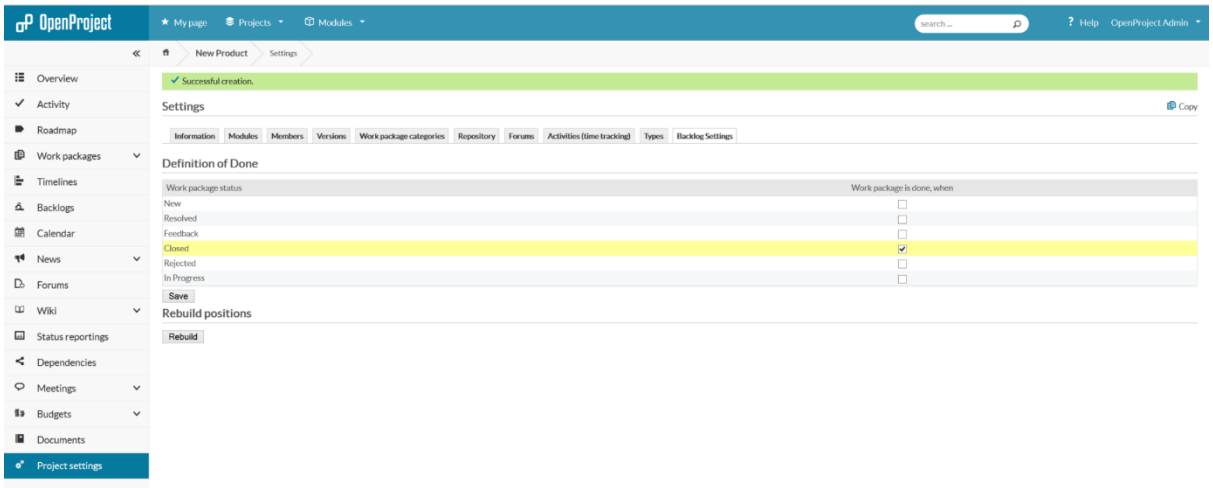
Activities – no change, am accepting the categories I set up earlier.

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.

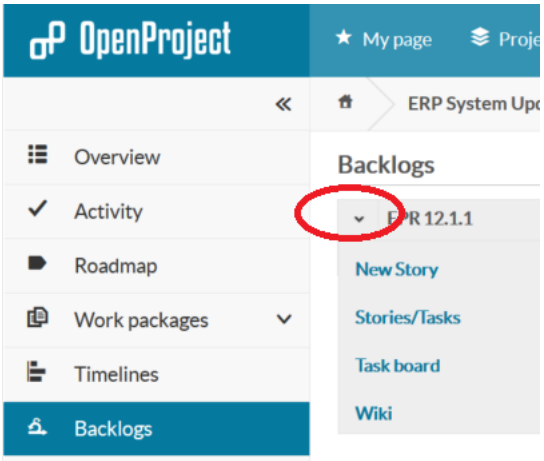


Project Kick Off

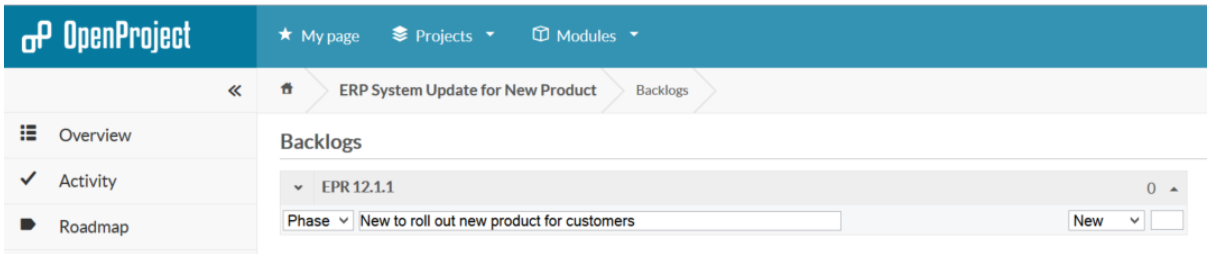
Lets Add some stories to the back log and see how we can then provide more detailed requirements and put these into a task board. You can add your stories to the backlog or issues versions then drag them to the working sprint/project when you want to kick off some work. This is how you can segment the 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

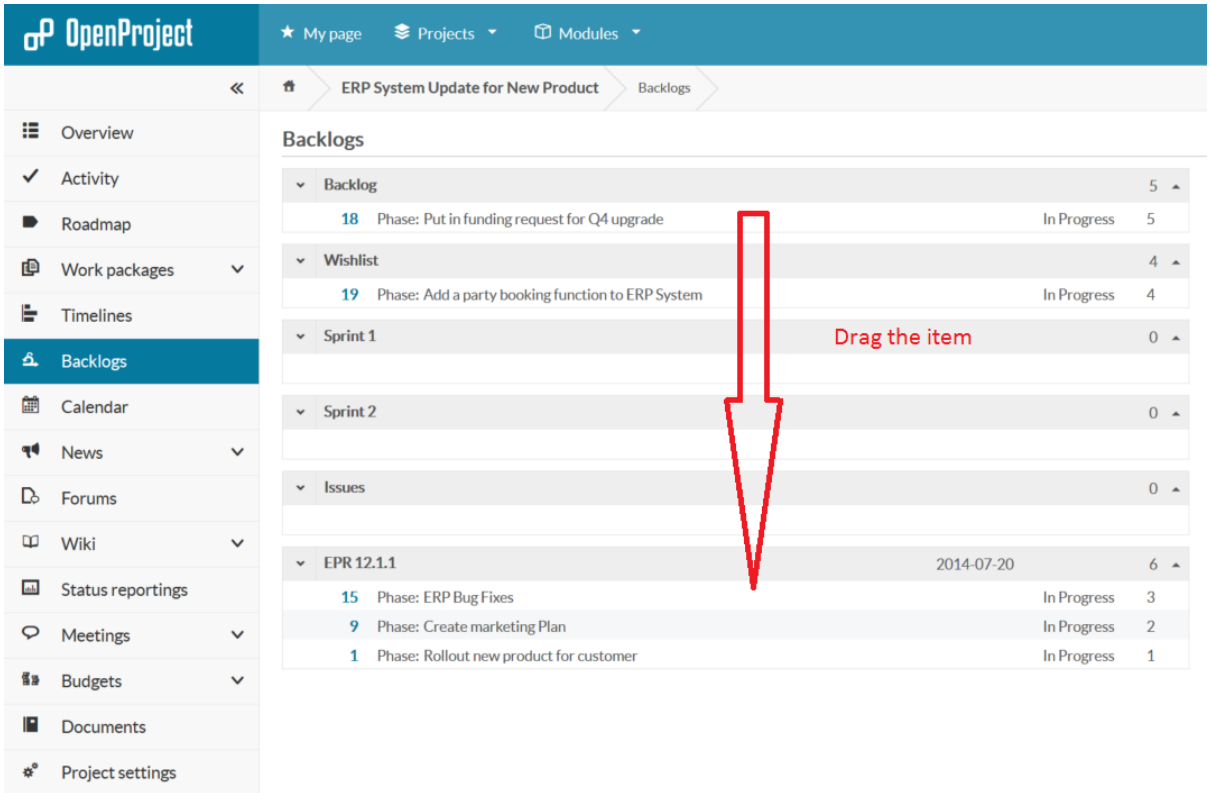


Select back log and click the down arrow and add a new story. The last right hand box is the priority of the backlog as set by the business owner.



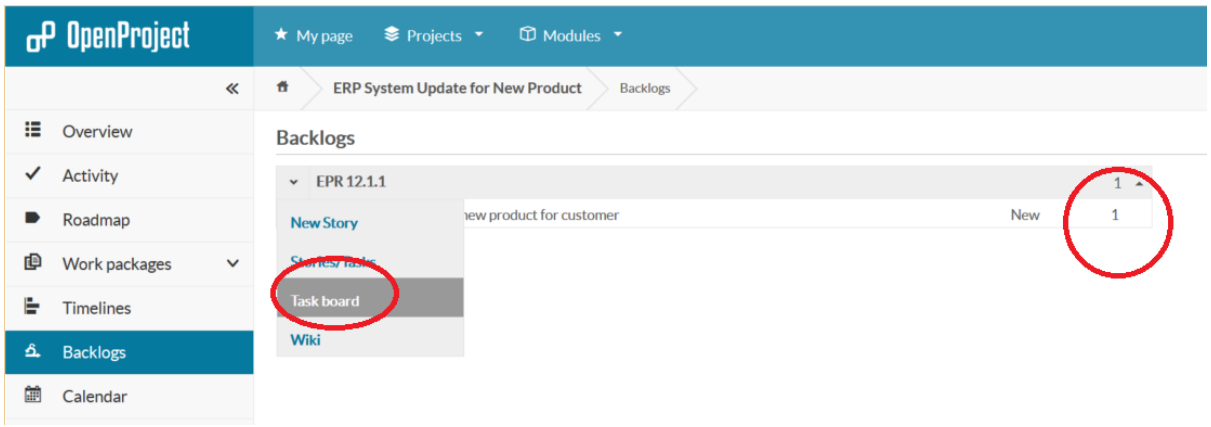
Project Backlog View

You can build a plan quickly by dragging the stories.



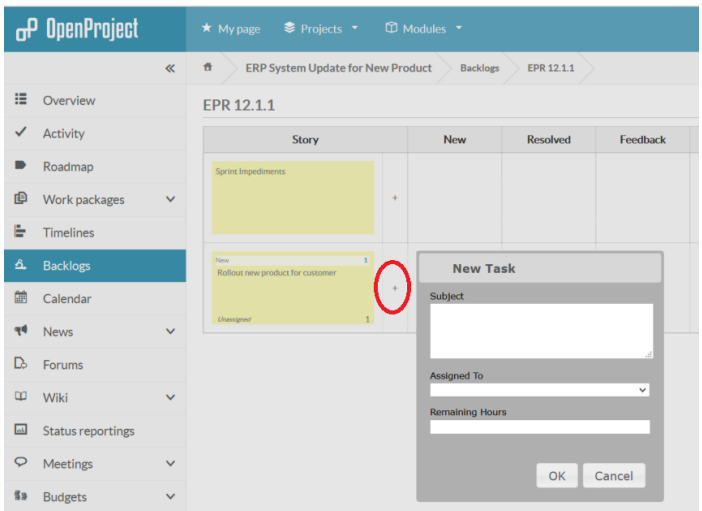
The Project Task Board

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

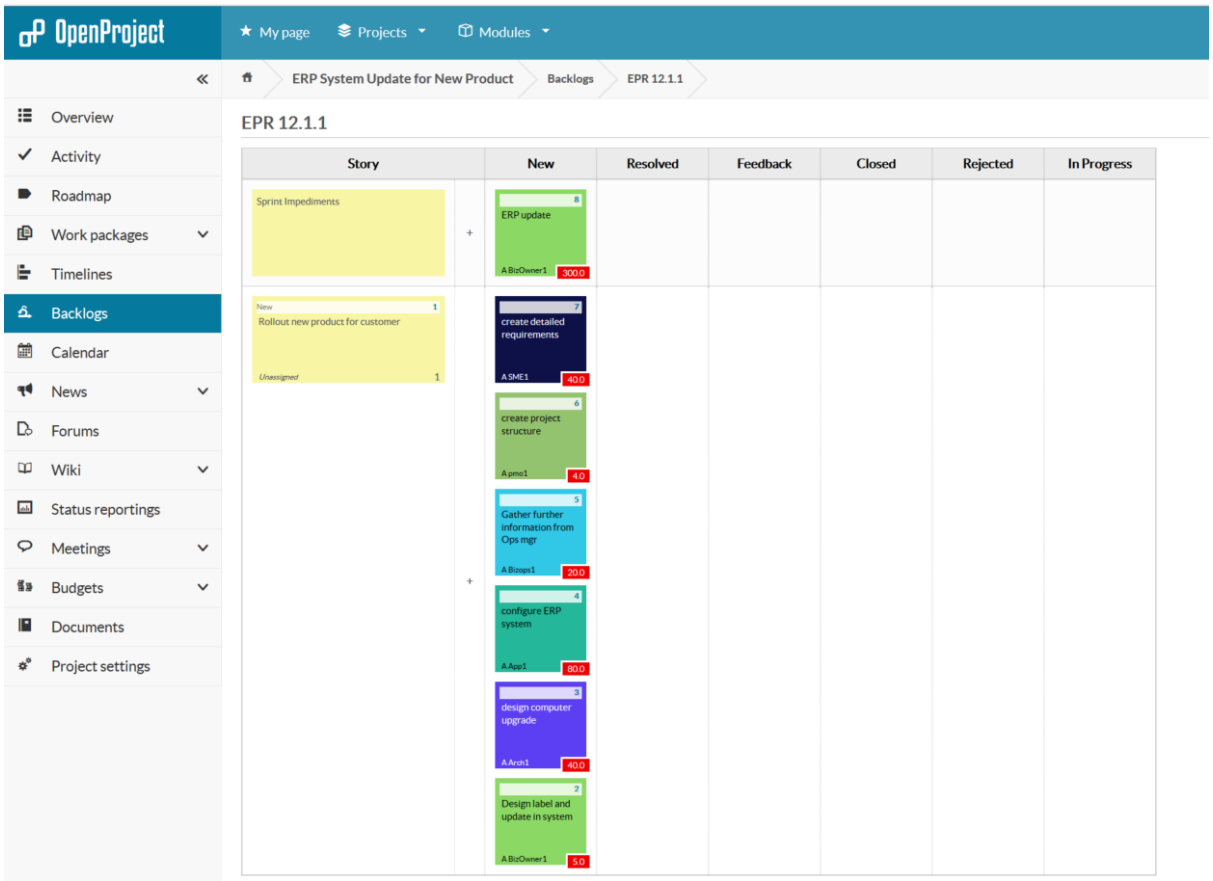


Add tasks by pressing the "+"

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.



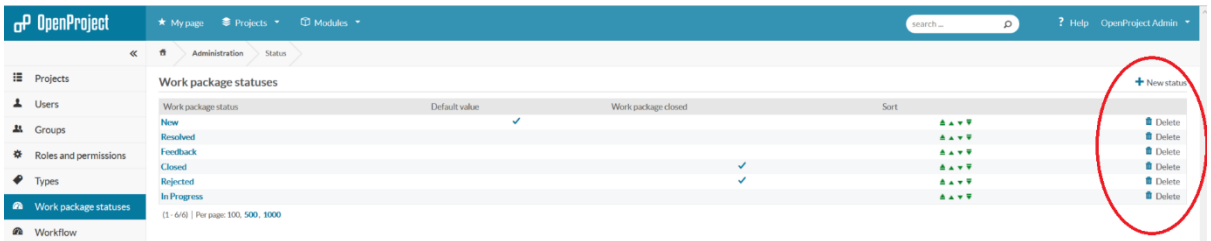
I will also nominally assign these task to people and estimate the hours



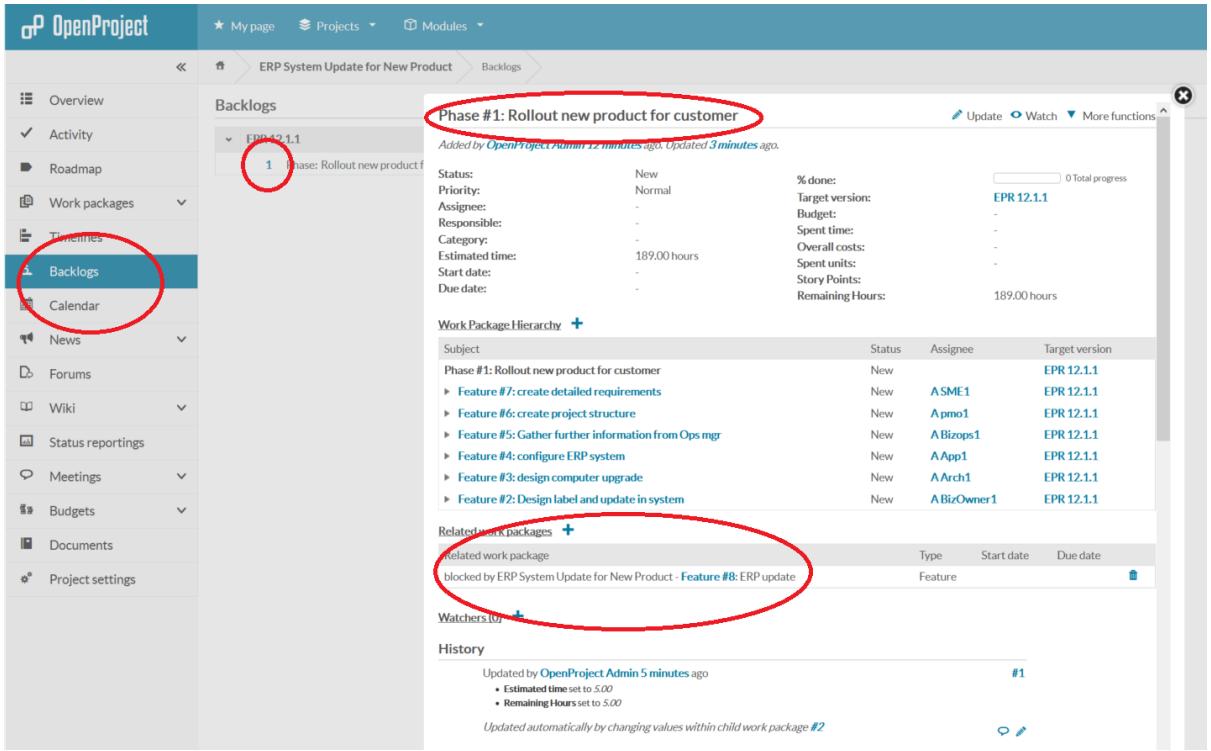
You may get a message about leaving the page but work may not be saved. You can ignore this.

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

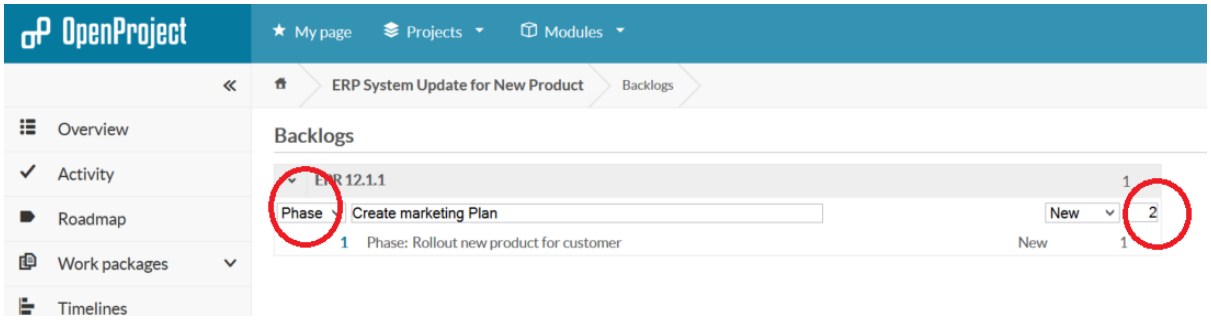
You can edit the Work Package Statuses in the administration module. Here you can add or delete statuses, but you must also reset the workflow or the system will break.



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

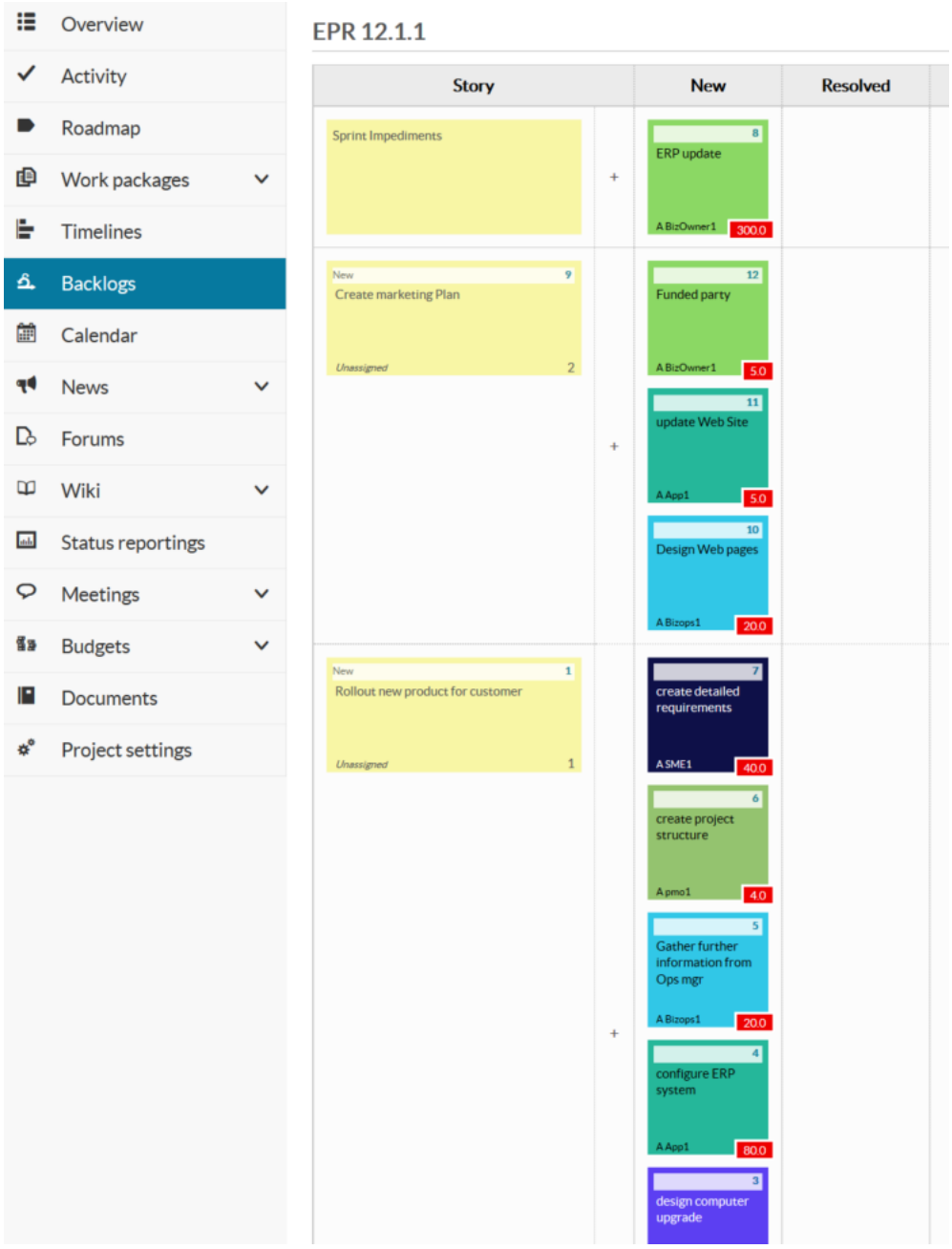


Notice that the sprint blocks this phase 1. Lets create a second phase just to show we can run multiple programs at the same time. Lets make the marketing a different stream, just for demonstration purposes.

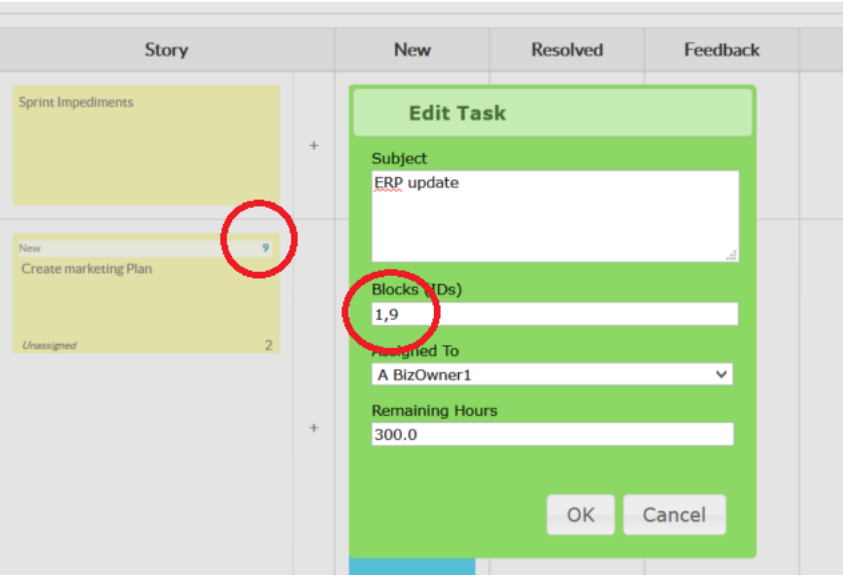


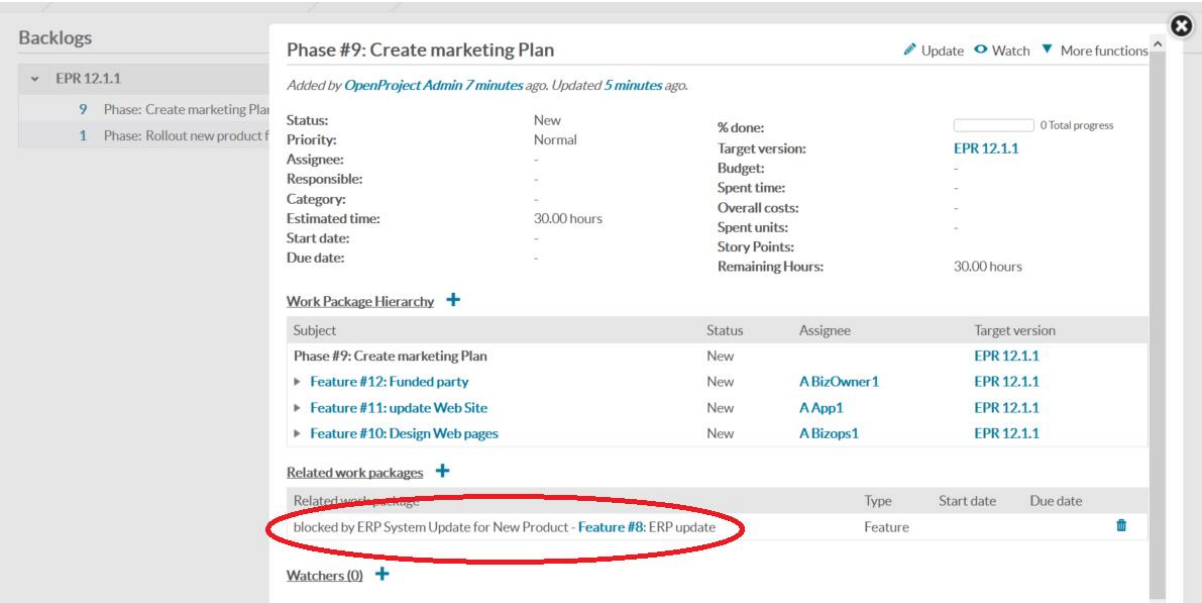
And you will see.

The task board example is below



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.

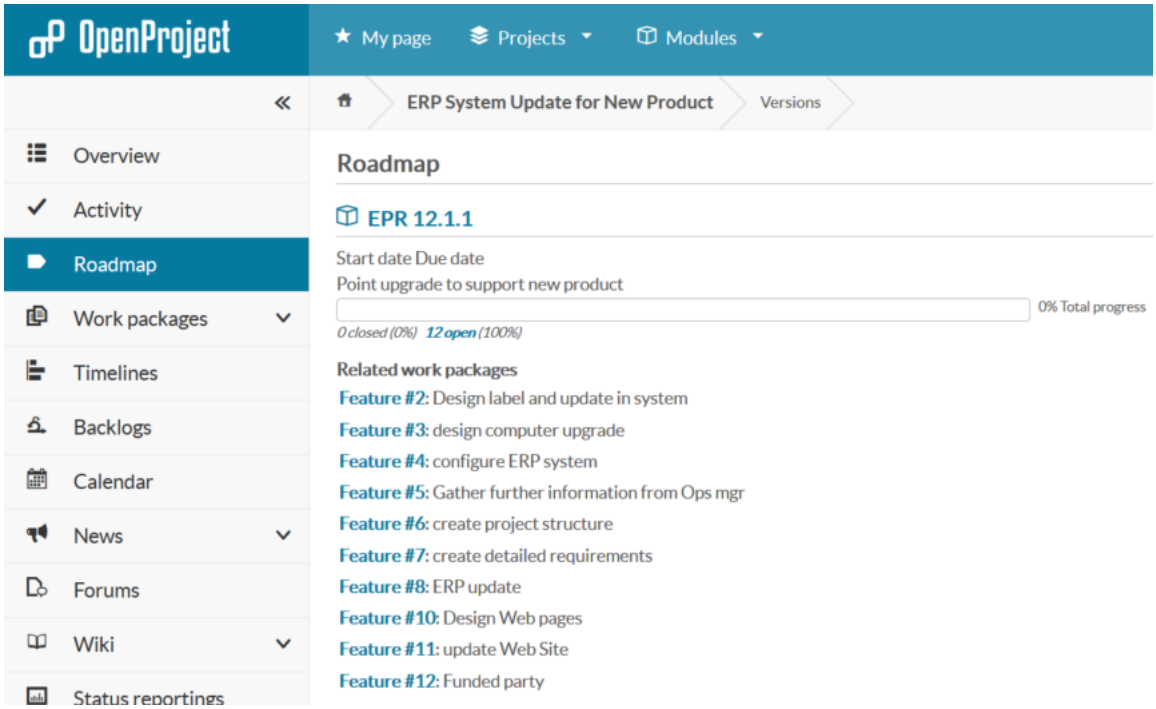




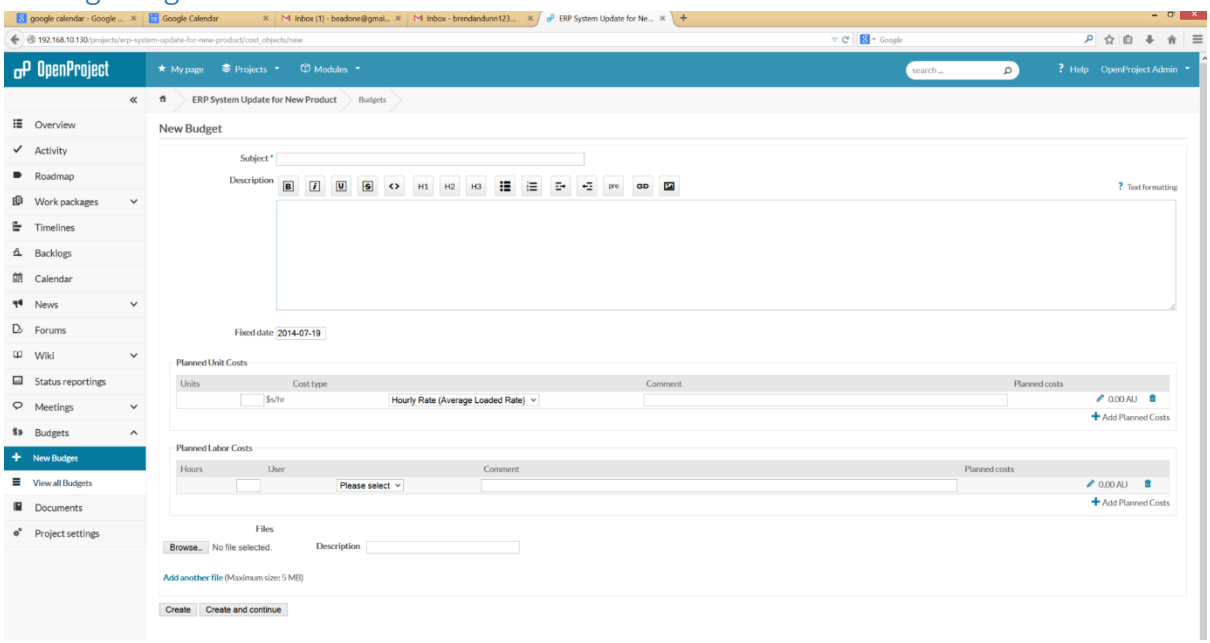
The groupings are flexible and you can experiment with them. This will affect how the timeline report looks and you may decide on changing the setup based on your approach to the projects within the business.

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.

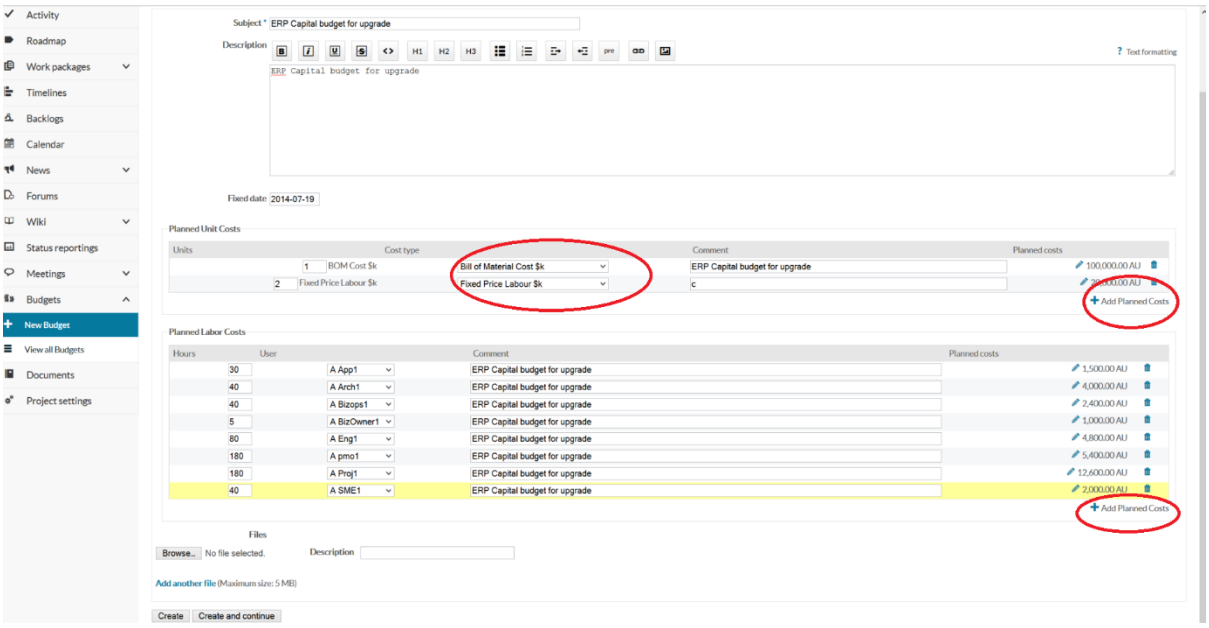


Adding Budgets

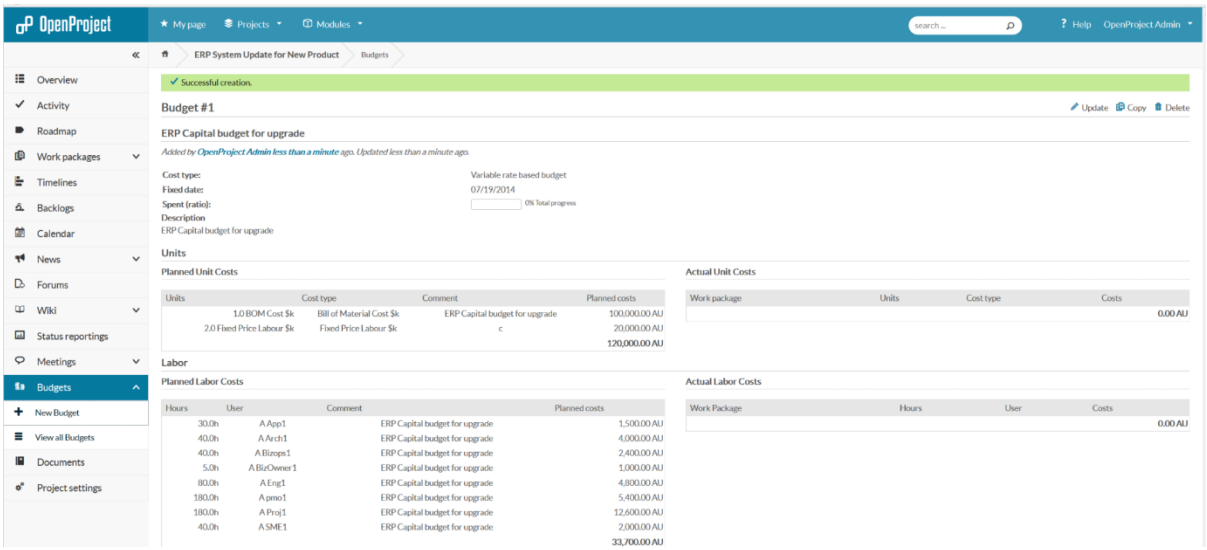


Add a capital budget and labour budget. Use the drop downs to select the capital rate you set up earlier in the unit costs section and add all the users to the labour budget.

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.

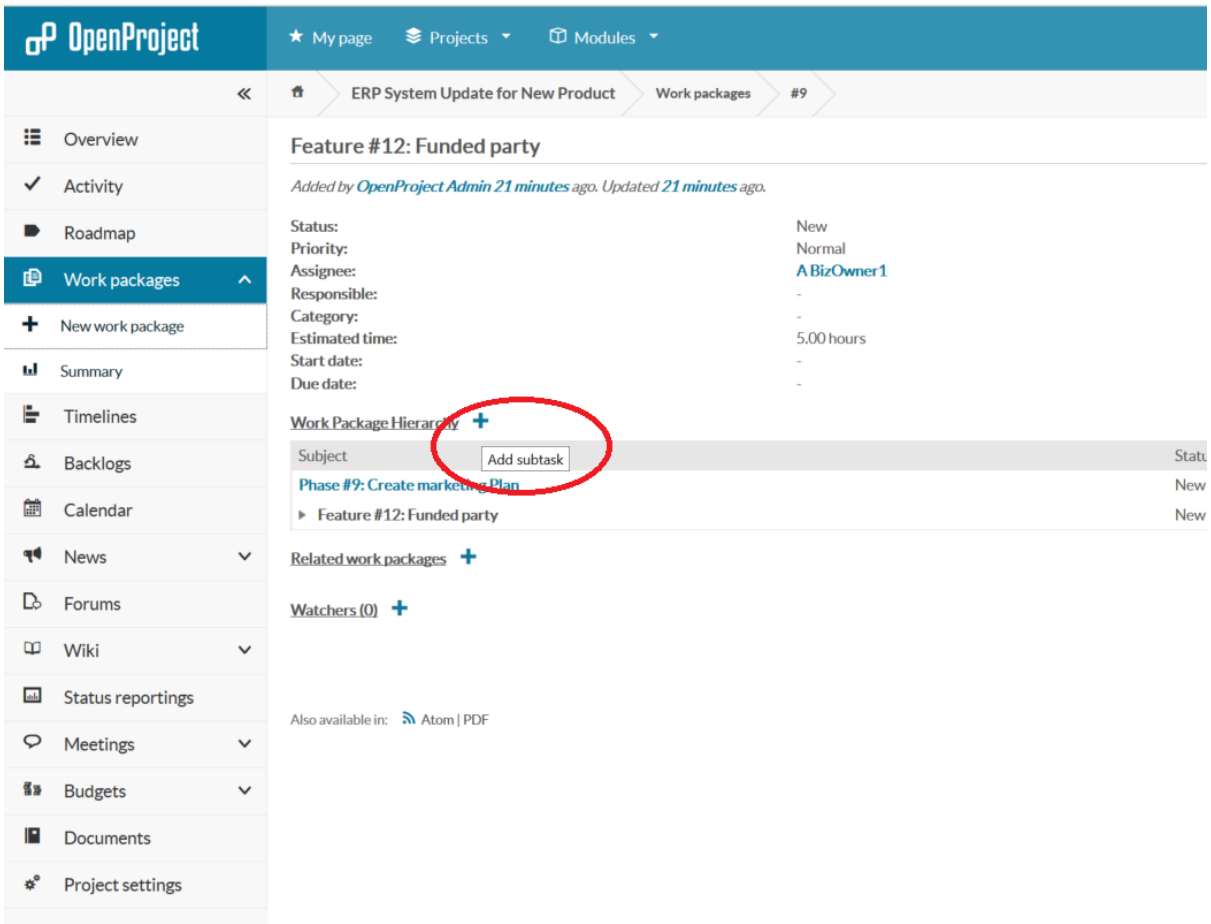


Once created you will see your budget screen that will track your project costs.



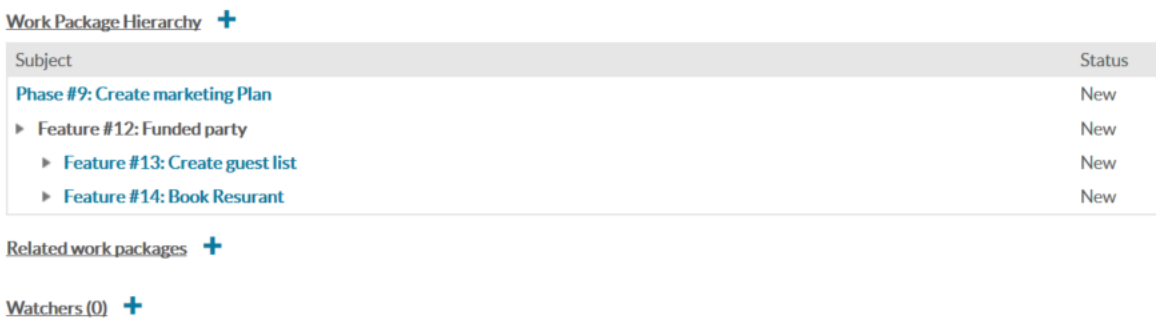
You can now start to assign dates or even add sub tasks to your plan using the “+” in the work packages screen

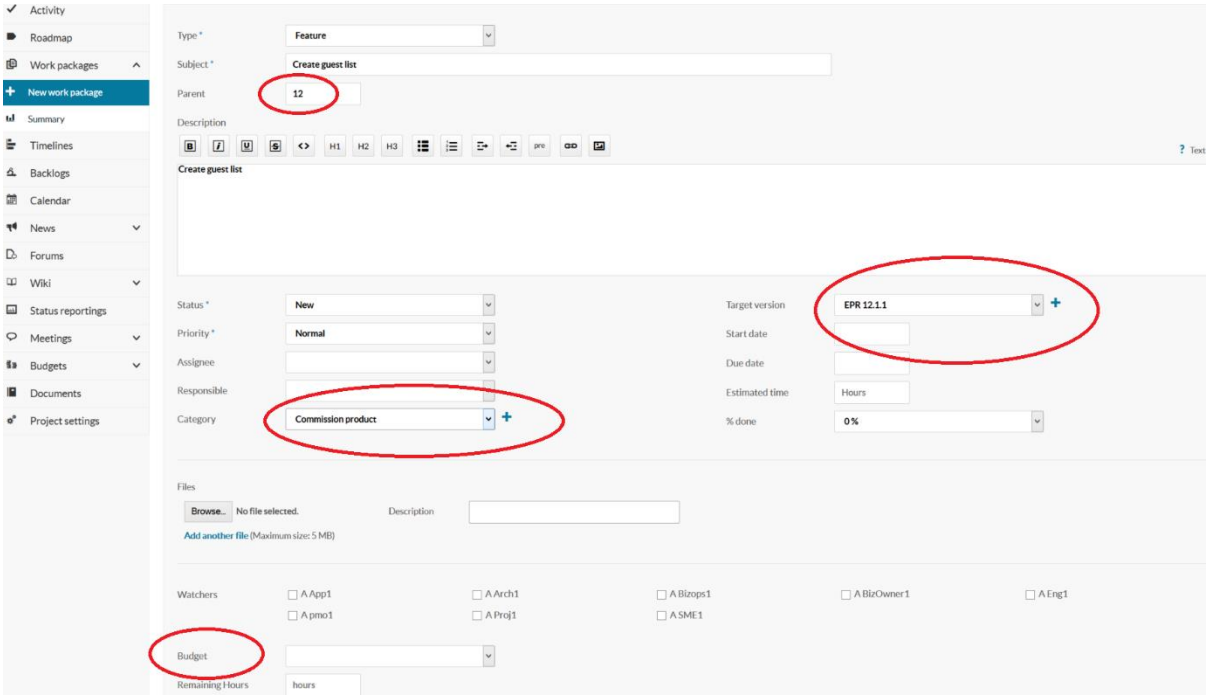
Drill into a task through the Work packages menu item.



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.



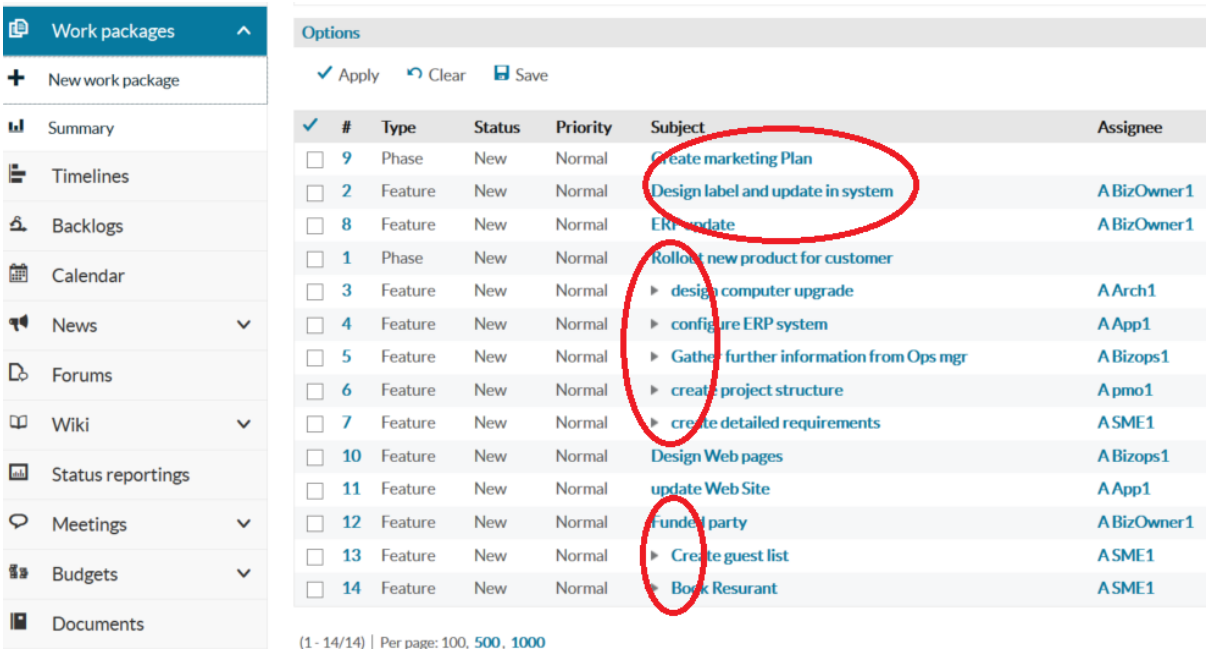


To update the tasks so they now have dates

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

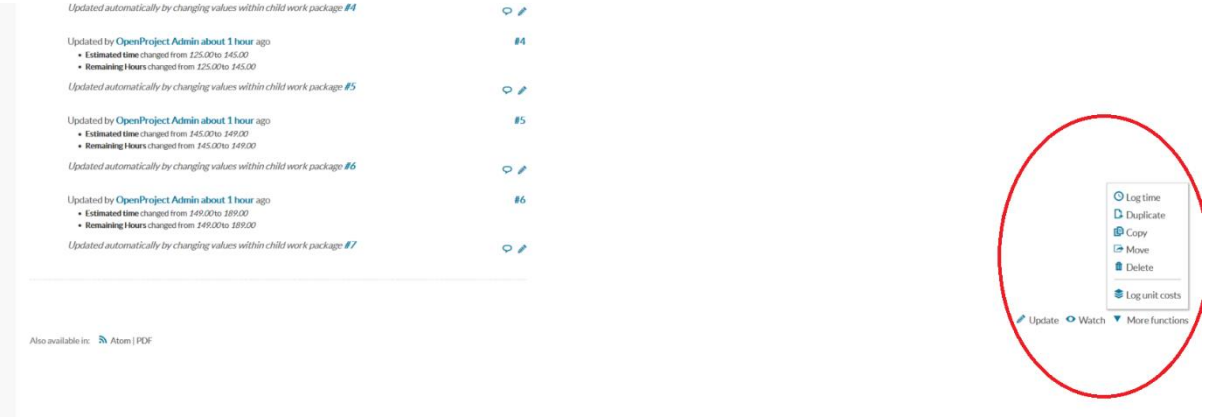


Click the “Rollout new product for customer”

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

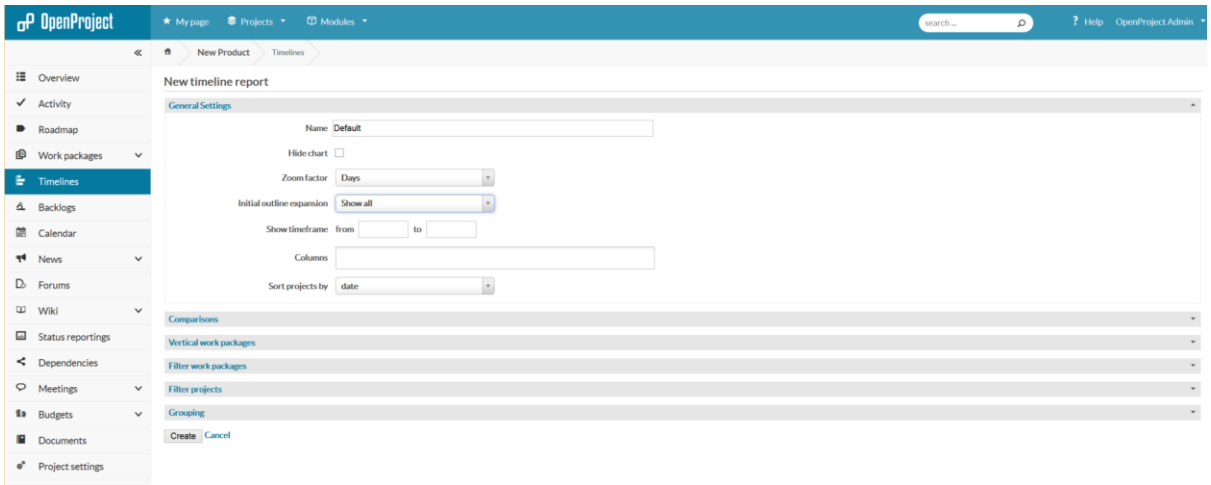
and add the dates and budget etc

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

The Timeline Report

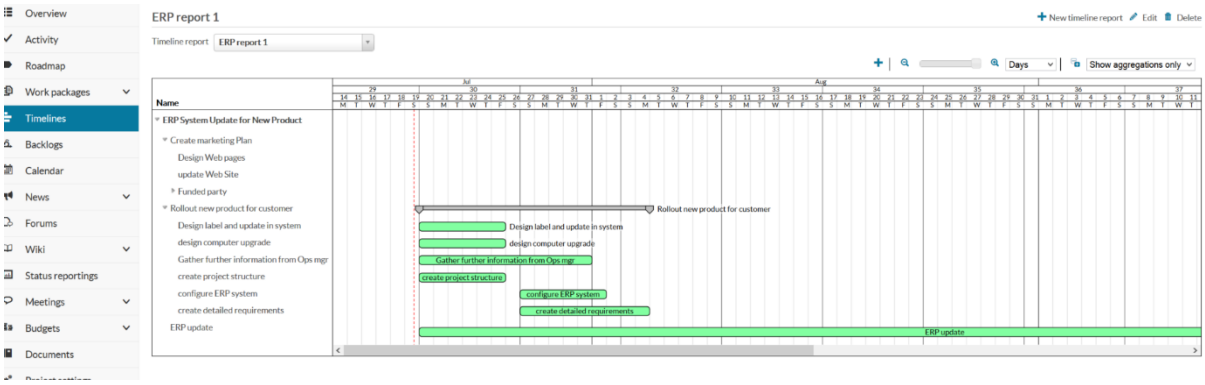
It is the traditional view of a project.

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.

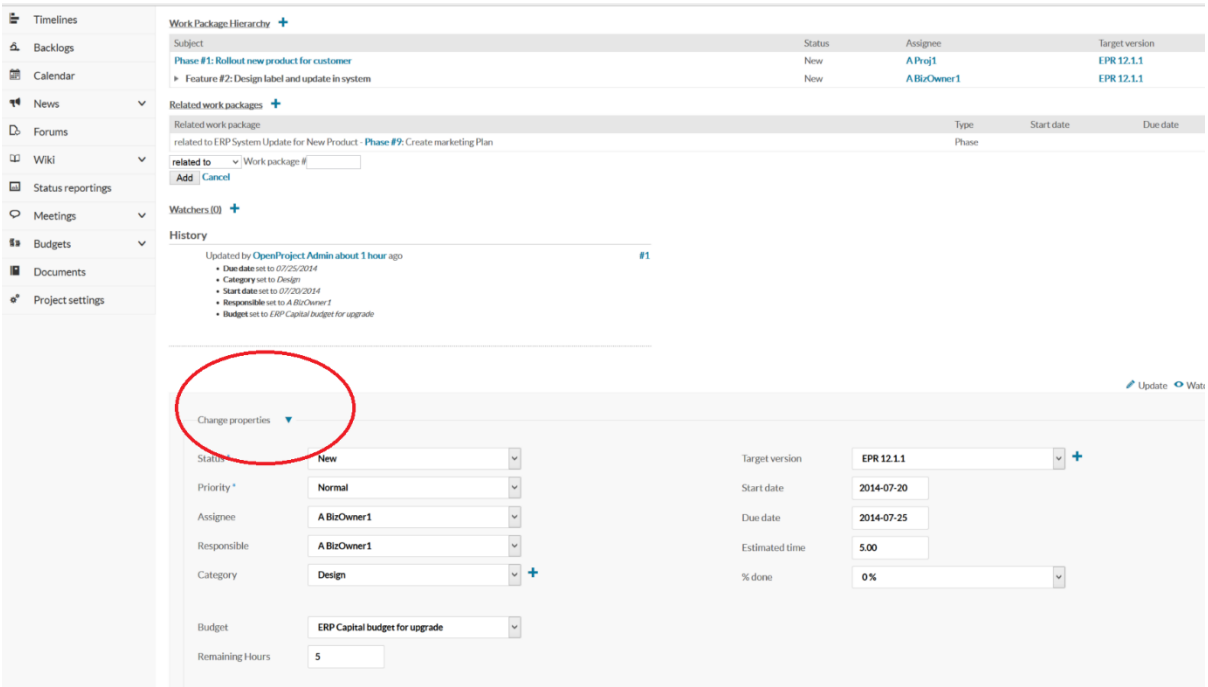
Below is how my time line report looks after completing the first set of tasks. You will have to create this report first but it is quite easy to do.



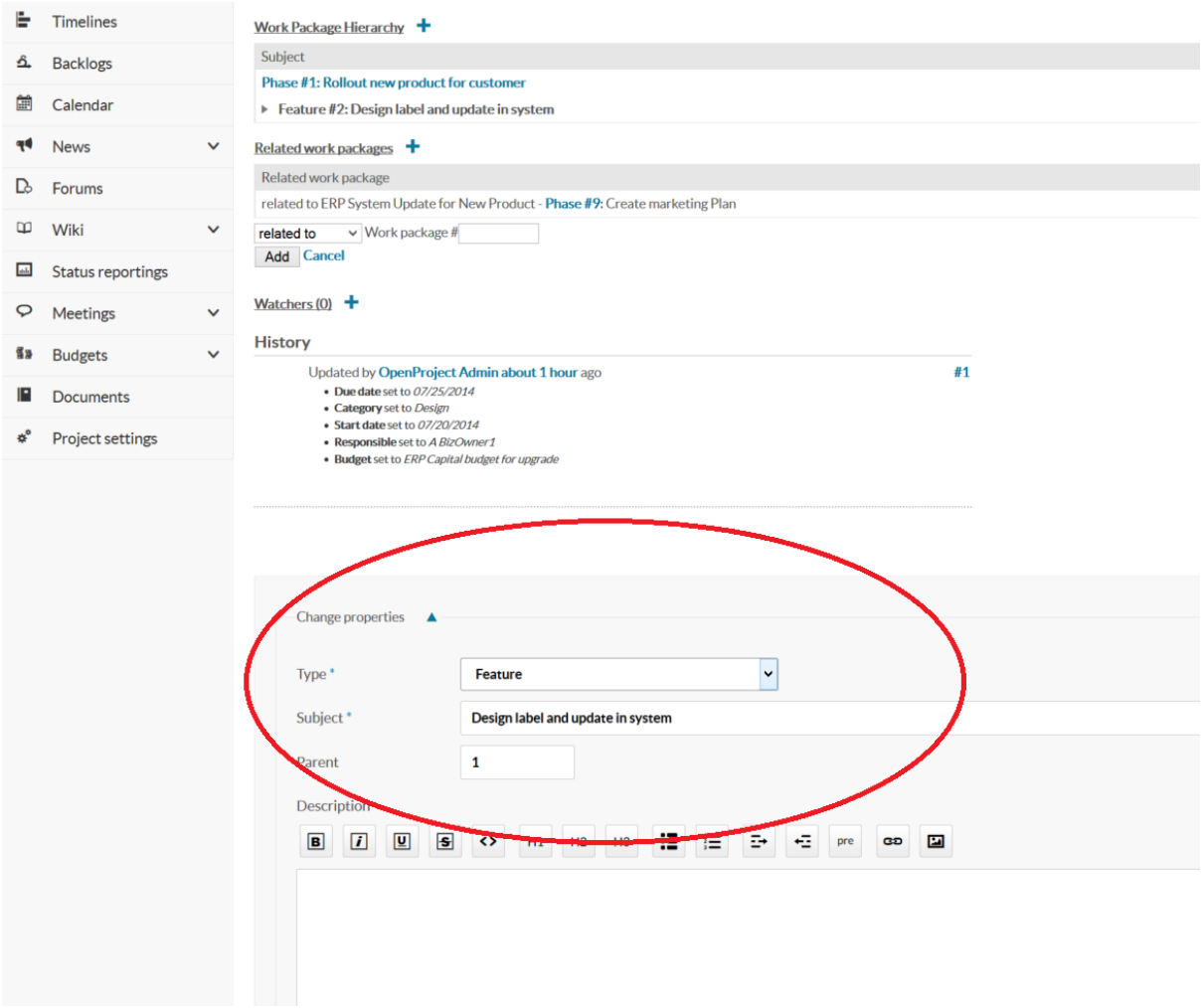
You can now update the dates for the other tasks and change their hierarchy. You can access the tasks from the timeline report by clicking the task

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.

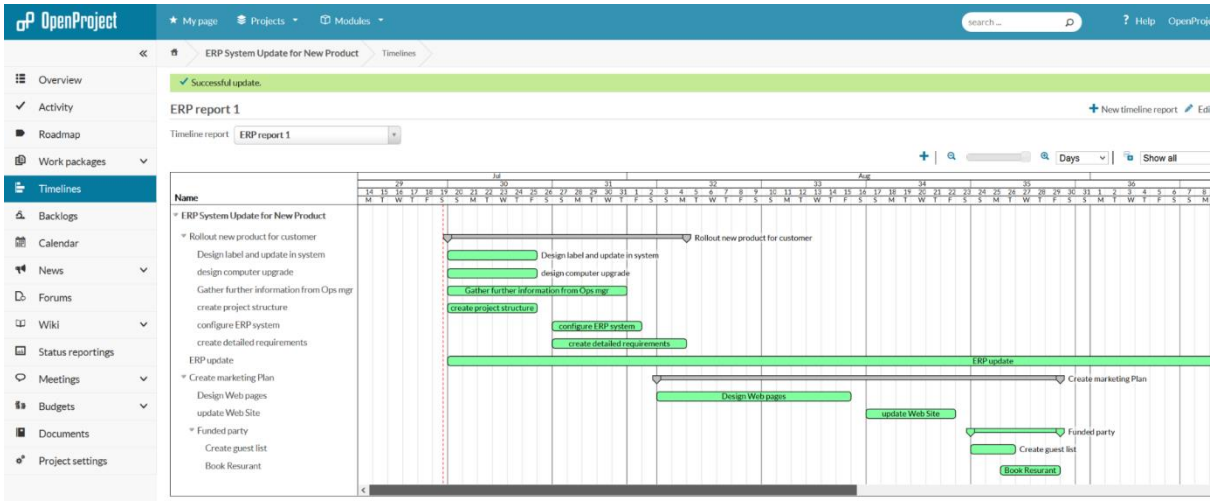
To fix any hierarchy issues you need to click the “Change properties” arrow found in the Work package screen.



You change the type and the parent here



My plan with dates

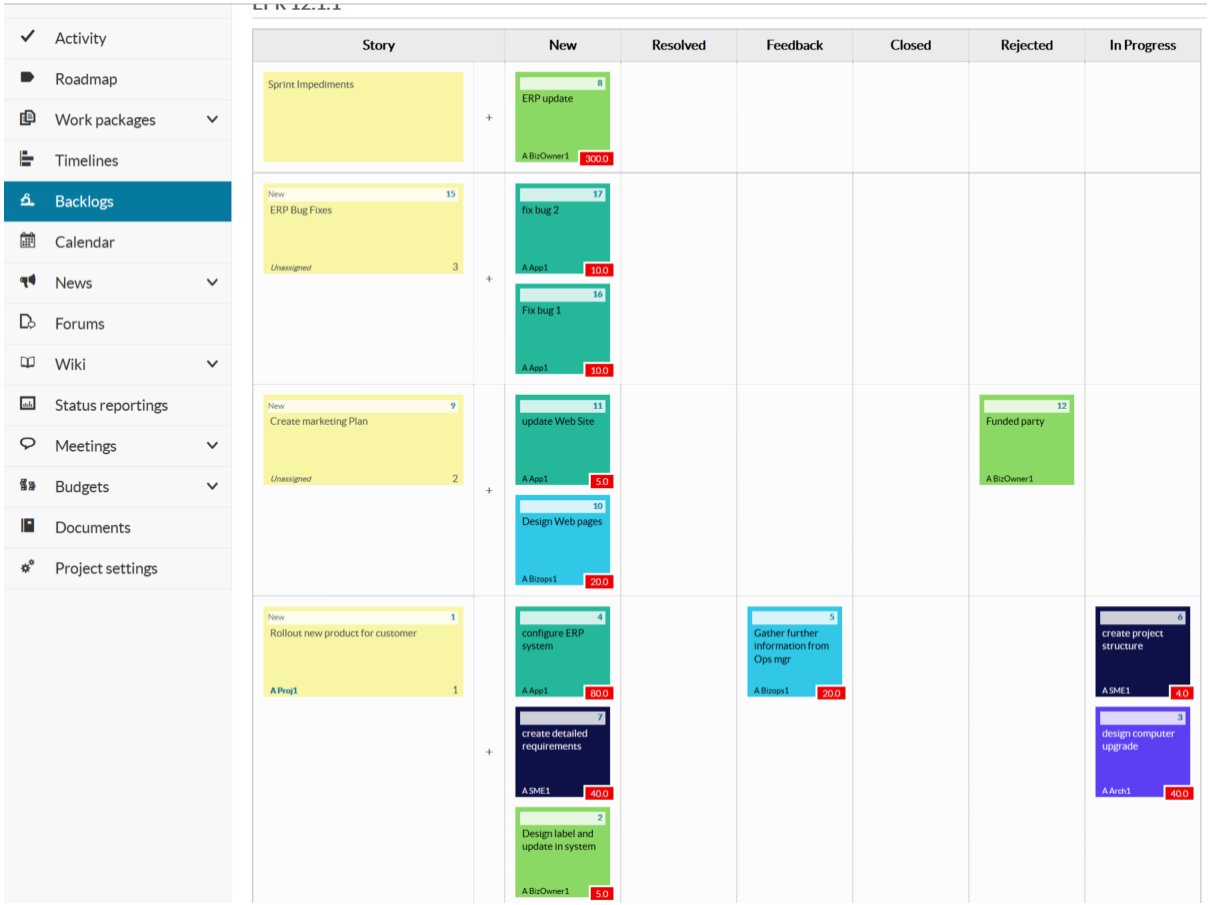


We can add milestones, we can add other tasks or streams of work. Lets add some bug fixes to the plan and move some of the tasks to “In Progress”

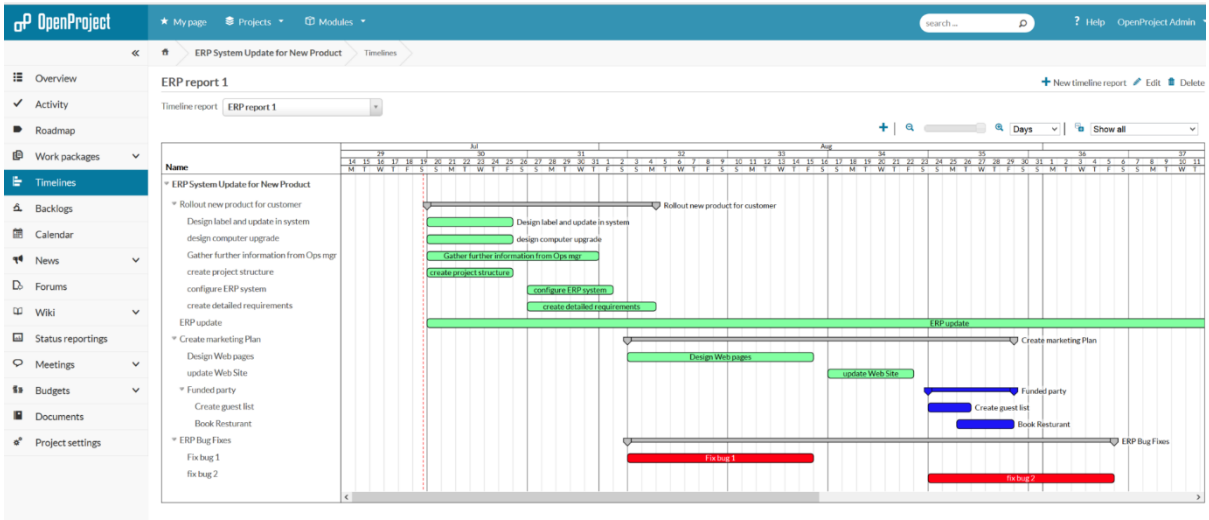
Below is our new Task Work Board. All you have to do is drag the boxes to the new status. This is a powerful approach to use with the executive. It visually demonstrates the effects of their decisions.

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.



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.