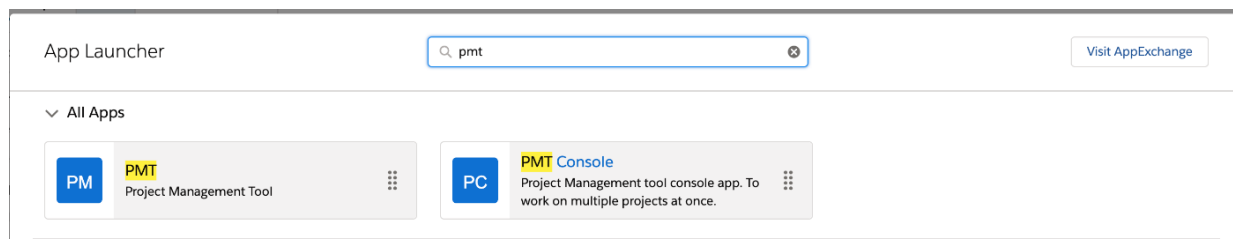


PMT Package - User Guide

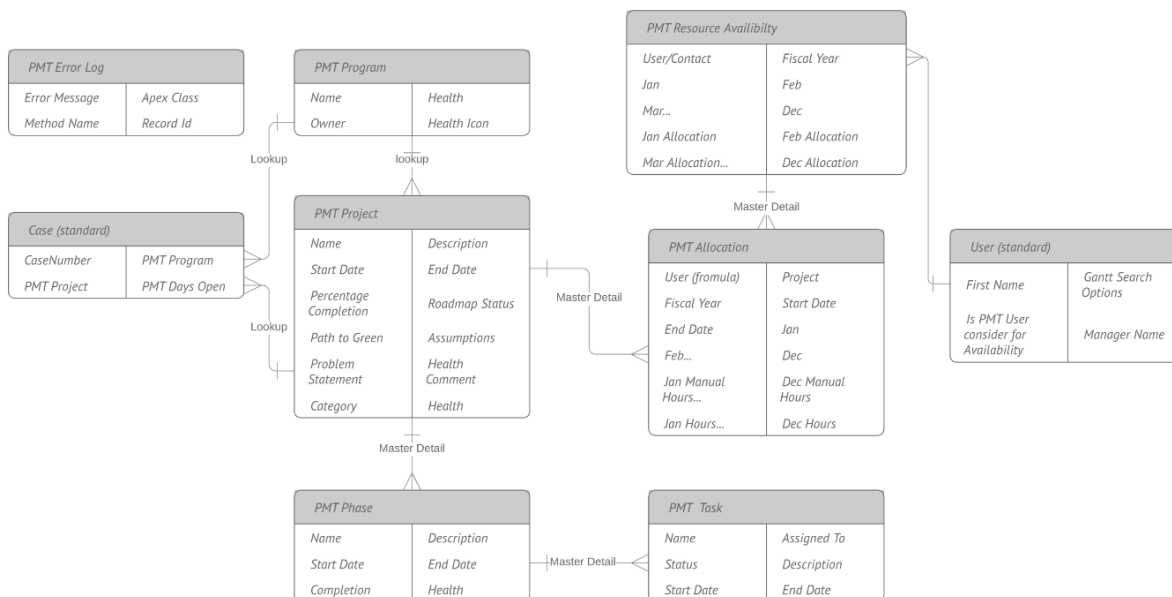
How to Access PMT App

From the App Launcher, you have two options to access PMT:

- PMT Console - RECOMMENDED
- PMT



PMT Architecture



PMT Automations

The following automations have been built to facilitate project updates

ON PROJECTS

- [Start and End Dates](#) are rolling from PMT Tasks
 - Initial Start and End Dates fields set during project creation remain unchanged
- [Project % of Completion](#) is rolling from PMT Tasks using a weighted average based on the task duration

ON PHASES

- [Start and End dates](#) are rolling from PMT Tasks
- [Phase % of completion](#) is rolling from PMT Tasks using a weighted average based on the task duration

ON PMT TASKS

- Setting a Task status to Completed will automatically set its % of completion to 100 and vice-versa.
 - To reopen a Task, both the Status and % of Completion must be updated.
-

PMT Objects

USERS - STANDARD OBJECT

- This is the Salesforce standard User object, used to define the PMT records ownership, PMT Tasks and Resource Availability assignments
 - Custom fields:
 - Is PMT User consider for Availability: check this checkbox for the users who should be available as resources for resource planning.
-

PROGRAMS - CUSTOM OBJECT

- Programs are used to group [Projects](#) under a common umbrella, allowing to track and report on [Programs](#) achievements and status.
- Recommendation: Even if linking a [Project](#) to a [Program](#) is not mandatory, to facilitate the reporting and enforce data coherence, we recommend to assign non-program related [Projects](#) to a default "Individual Projects" [Program](#).

Creating a Program

1. Option 1 - From Program object:
 - a. Open the [Program](#) object
 - b. From the List view, click [New](#)
 - c. Enter [Program Name](#) and update [Program Health](#) if needed
2. Option 2 - From Project details:
 - a. Edit the [Program](#) field
 - b. From the lookup search dropdown menu, click [New Program](#)
 - c. Enter [Program Name](#) and update [Program Health](#) if needed

Program Page

- Tab [Chatter](#): Program dedicated Chatter feed

- Tab **Details**: Default landing Page, presenting Program details and related Projects within a Lightning Enhanced datatable.

Chatter **Details** Dashboard

Program **T**

Program Health Icon Program Health On Track Owner **az**

Related List Quick Links

[Files \(0\)](#) [Projects \(10+\)](#) [Program History \(1\)](#)

Program Related Projects

Projects (16)

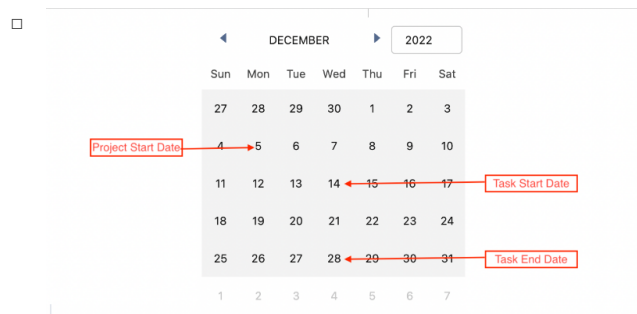
16 items - Sorted by Health Color - Updated a few seconds ago

	Project Name	Description	Health C...	Project Completion	Health Comment	Path to Green	Project Owner
1				91%			Deborah Farache
2				51%			Deborah Farache

PROJECTS - CUSTOM OBJECT

Creating a Project Template

- Open the [Project](#) object
- From the List view, click [New](#)
- Enter [Project Name](#) + mandatory fields and other necessary information.
- Check the checkbox field [IsTemplate](#) to mark the project as template.
- Create the phases and tasks which will then be used for project creation.
- **NOTE** : Avoid adding any resources to templates as resources will not be cloned.
- These projects are excluded from the reports provided in this package. Any further reports created should consider adding the filter as per the requirements.
- Task object contain some new fields to allow date calculations
 - Start Days Out - Used to calculate the start date from project start date.
 - Duration in Days - Adds the number of days to the task start date to calculate task end date.
 - These date calculations exclude weekends (Sat and Sun) by default, this setting can be changed by the admin.
 - Example for the date calculation:
 - Let's assume a task with start days out as 7 and duration in days 10.
 - The user selected 5th Dec 2022 as the start date for the project.



Creating a Project

- Option 1 : From Project object:
 - Open the [Project](#) object
 - From the List view, click [New](#)
 - Enter [Project Name](#) + mandatory fields and other necessary information.
- Option 2 : From Project Template:
 - Open the [Project](#) object
 - From the List view called '[All Templates](#)', select the template you want to use.
 - Click on the button '[Use This Template](#)'
 - Enter [Project Name](#) and Start Date > Click Next
 - Select Phases and Tasks to clone on the next screens.

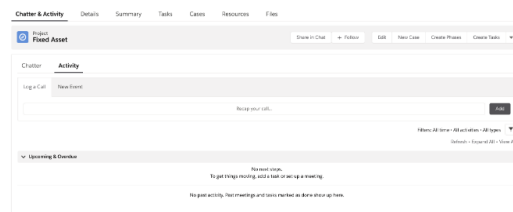
Project Page

- Tab [Project Summary](#), Default landing page presenting:
 - Project key informations
 - Health, Status and Path to Green
 - Phase Table displaying:
 - Phase status and completion
 - Tasks with an end date in Current and Next periods
 - Ongoing Tasks with an end date after Next period

PHASE	STATUS	CURRENT PERIOD (END: 01 - DEC 21)	NEXT PERIOD (END: 01 - JAN 22)	ONGOING DATE AFTER JAN 21
1. Initiate	On Track	0% View		
2. Execute	On Track	0% View		

- Tips:
 - All Icons are clickable and will open the related record in **Edit** mode for quick updates.
 - The **right corner buttons** allows to switch from a weekly to a monthly or quarterly view
 - The **Milestone List** button will display Key Milestones tasks in a popup.

- Tab [Chatter & Activity](#)
 - Project dedicated Chatter feed
 - Project Activity (emails + events) logged from Salesforce Gmail/Outlook application



- Tab [Project Details](#)
 - Project record details
 - Include all the project information and fields used to document or report on the project.

- Tab **Tasks**

- Sub-tab **Tasks**

- Display **PMT Tasks** in a table UI
- Use picklists at the top to filter
- **Inline editing** on Task Name, % compl., Start, End dates and Description
- Standard **mass change** on above fields by using the row checkboxes
- **Mass change** via flow on Status and Assigned To fields by using rows checkbox + Changed button at the top of the table.

- Subtab **Gantt Chart**

- Use **'Expand All'** button to see all phases and tasks.
- The colours representation for the gantt is mentioned on the right side of the filters.
- You can use the **'View By'** dropdown to change the timeframe
- Gantt will not show anything for the template type project.

Project Name	Project ID	Project Category	Project Department	Project Status
Fixed Asset	10000000000000000000	Discovery	Discovery	Discovery
Weekly test as comment placeholder	10000000000000000000	Discovery	Discovery	Discovery
Fixed Asset	10000000000000000000	Discovery	Discovery	Discovery

Phase	Task	Status	To Do	Start Date	End Date	Assigned To	Description
Phase 1	Task 1	Not Started	Not Started	Dec 16, 2022	Dec 16, 2022		
Phase 2	Task 2	Not Started	Not Started	Dec 16, 2022	Dec 16, 2022		

Project	Task	Start Date	End Date	Status
Phase 1	Task 1	16/12/2022	07/01/2023	Not Started
Phase 2	Task 2	16/12/2022	07/01/2023	Not Started

- Tab **Cases**

- Display the **Cases** in datatable UI
- Use picklists at the top to filter the table
- Click on **Case Number** to open the Case record
- Use the row **drop-down menu** to Open/Edit the case

Case Number	Type	Age	Case Title	Description	Status	Priority
100	Completed	100	Completed	Completed	In Progress	High
101	Completed	101	Completed	Completed	In Progress	High
102	Completed	102	Completed	Completed	In Progress	Medium
103	Completed	103	Completed	Completed	In Progress	Medium
104	Completed	104	Completed	Completed	In Progress	Medium
105	Completed	105	Completed	Completed	In Progress	Medium
106	Completed	106	Completed	Completed	In Progress	Medium
107	Completed	107	Completed	Completed	In Progress	Medium

- Tab **Resources**

- Display **Allocated Resources** in a table UI
- Click **Edit Allocations** to switch to Edit

Mode

- Once in Edit mode, Click **Save** to validate changes
- Click on the **Resources Green Icon** to update an assignment.

Chatter & Activity	Details	Summary	Tasks	Cases	Resources	Files
 Search						
Resource Allocation ▼ PPT5 (16) ▼ ▼ ▼						
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- Tab **Files**
 - Present the Files component, allowing to add documentation to the project from:
 - User computer
 - Google Drive (if setup by admin)
 - Quip (if setup by admin)

Owner	Activity	Details	Summary	Types	Cases	Resources	<u>Files</u>
Files (5)							Add File
File		Owner				Last Modified	Size
		Owner				2/13/2020 9:39 AM	
		Owner				6/1/2016 10:01 AM	
		Owner				8/8/2019 6:08 PM	
		Owner				8/8/2019 3:03 PM	
		Owner				8/8/2019 1:07 PM	
		Owner				8/8/2019 1:01 PM	

PHASES - CUSTOM OBJECT

The phase object is used to give Projects a structure and group related PMT Tasks.

Create Phases

- Option 1 : From the **Project Summary > Create Phases** Button:
 - Click on the **Create Phases** button
 - A popup will appear allowing **multiple** phases to be created at once
 - Click the **+Add Row** button to add multiple Phases
 - **Tips: Phases will be sorted based on the start date on the Summary Page.**
- Option 2 : From the **Project Summary > Clone Phases/Tasks** Button:
 - Click on the **Clone Phases/Tasks** button
 - Search for a project to clone from and click next.
 - Select the phases to clone and click next.
 - Select the tasks to clone and click next.

Activity

Details

Summary

Tasks

Resources

Files

Create Phases

+

Add Row

#	PHASE NAME	PHASE HEALTH	DESCRIPTION
1	Initiate	Not Started	
2	Design	Not Started	
3	Execution	Not Started	

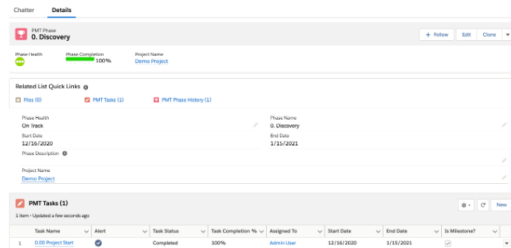
Save



Phase Page

- Tab [Details](#)
 - Default landing page providing the Phase record details

- Present an enhanced list of related PMT Tasks
- Tab **Chatter**
 - Phase dedicated Chatter feed.

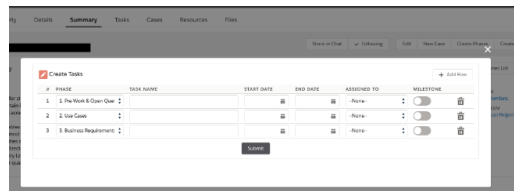


PMT TASKS - CUSTOM OBJECT

The PMT Tasks object represent the Project deliverables and work items and define the [project timeline](#).

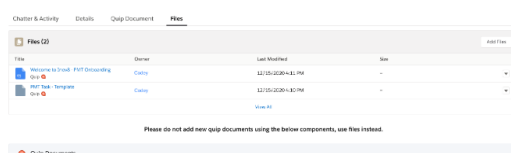
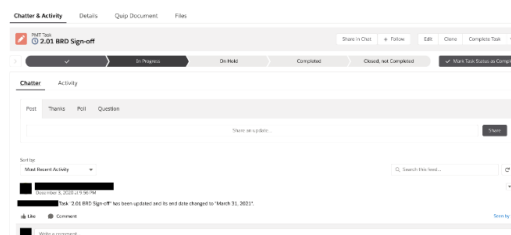
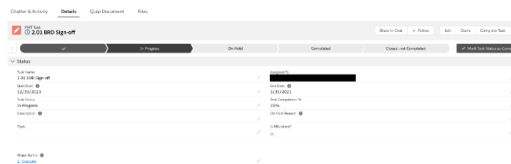
Create PMT Tasks

- From the [Project Summary](#) or Tasks Tabs:
 - Click on the [Create Tasks](#) button
 - A popup will appear allowing [multiple](#) PMT Tasks to be created at once
 - Click the [+Add Row](#) button to add multiple Tasks
 - [Tips: To better identify Tasks related Phase and order them in the list and table, a best practice is to number them, first with the Phase number and then as you wish \(1.01, 1.102...\)](#)



PMT Task Page

- Tab **Details**
 - Default PMT Tasks landing page
 - Present record details
- Tab **Chatter & Activity**
 - PMT Tasks related [Chatter Feed](#)
 - [Send email](#) from Activity
 - [Log emails and Event](#) with the Google Salesforce add-on
- Tab **Files**
 - [Document](#) your Tasks by adding documents from your computer, Google Drive or Quip based on the integrations



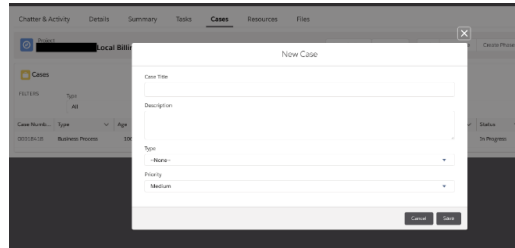
done using files connect.

CASES - STANDARD OBJECT

Cases in PMT represent the Project RAID Log: Risks, Actions, Issues, Decisions. Salesforce Case feature allows to collaborate, document, share and quickly solved Project open items.

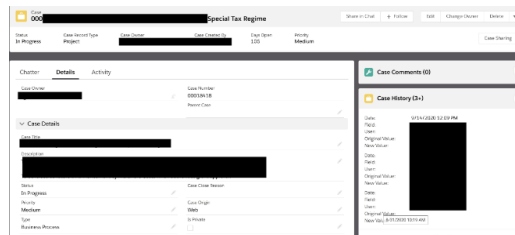
Create PMT Tasks

- From Project [Summary](#) or [Cases](#) Tabs
 - Click [New Case](#) button



Case Page

- [Right Panel](#)
 - [Case Comments](#)
 - [Status update](#) on the Case
 - Case History
 - Related Cases
 - Followers
 - Emails and Files attached
- Tab [Details](#): Case informations
- Tab [Chatter](#): Dedicated Chatter Feed
- Tab [Activity](#): Logged emails and Event



RESOURCES ALLOCATIONS - CUSTOM OBJECT

- The Resource Allocation object records people allocated on Projects with their monthly % of allocations.
- One record per person and Fiscal year is created on the project.
- To manage Project Allocations, see [🔗 Tab Resources](#)

RESOURCES AVAILABILITY - CUSTOM OBJECT

Optional object: Only to be used if you plan to track your team resource capacity.

Create Resource Availability

- Resource Availability records are automatically created based on the configuration done by the admin.
- Please get in touch with your admin for more details.

Resource Availability Page

- Tab **Details**
 - Default landing page
 - **Allocation summary**
 - Capacity
 - Allocated
 - Remaining Availability
 - **Assigned Projects**
 - Enhanced list presented assigned projects
 - Inline editing to quickly update project allocations.
- Tab **Chatter**
 - Dedicated Chatter feed

Capacity: total capacity of all resources for the year	Jan %	Feb %	Mar %	Apr %	May %	Jun %	Jul %	Aug %	Sep %	Oct %	Nov %	Dec %	Jan %
Allocated: allocated percentage throughout the year	90	90	90	90	90	90	90	90	90	90	90	90	90
Remaining: Remaining capacity after allocation	10	10	10	10	10	10	10	10	10	10	10	10	10

Assigned Projects	Project ID	Project Name	Role	Jan %	Feb %	Mar %	Apr %	May %	Jun %	Jul %	Aug %	Sep %	Oct %	Nov %	Dec %	Jan %
1	PMT Enhancement	Cloud	Project Dev	20	20	20	20	20	20	20	20	20	20	20	20	20
2	New completion form	Apps	Business Dev	5	5	5	5	5	5	5	5	5	5	5	5	5
3	P121 Roadmap	Admin	DEV	0	0	0	0	0	0	0	0	0	0	0	0	0

Global Custom Tabs

RESOURCE MANAGEMENT

- This view allows you to see the global resourcing at the org level.
- Filters are provided to filter on any specific resourcing needs.
- Inline editing is allowed 'Resource Capacity' and 'Project Allocations' tab

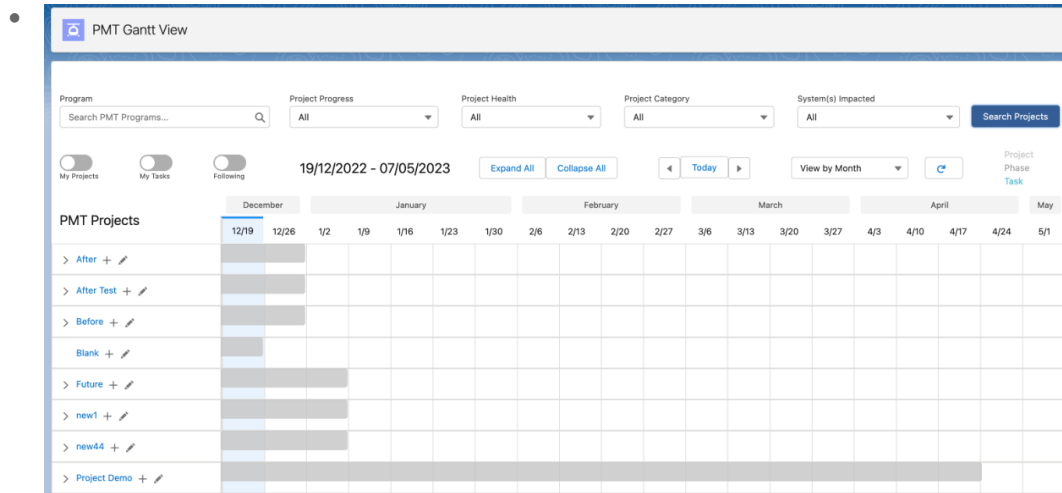
Summary (%)													
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	
Total Resources Availability	150	200	200	200	200	200	200	200	200	200	200	200	
Total Project Allocations	0	0	0	0	0	0	0	0	0	0	0	0	
Consolidated Remaining Capacity	150	200	200	200	200	200	200	200	200	200	200	200	
Remaining Capacity	150	200	200	200	200	200	200	200	200	200	200	200	

Resource Availability													
User	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	
1 Shekhar Gawli	100	100	100	100	100	100	100	100	100	100	100	100	
2 User User	50	100	100	100	100	100	100	100	100	100	100	100	

PMT GANTT VIEW

- This shows the gantt chart at the org level, allowing users to filter and see the gantt view for multiple projects.

- This view is limited to **30 projects** at a time to keep the performance better, filter further to see any specific projects.
- Templates are excluded from this view.



For any additional queries, please reach out to us at

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