PROJECT LIFECYLE PRO ADMINISTRATOR MANUAL

CONTENTS

INSTALLATION INSTRUCTIONS

INSTALLATION PASSWORD

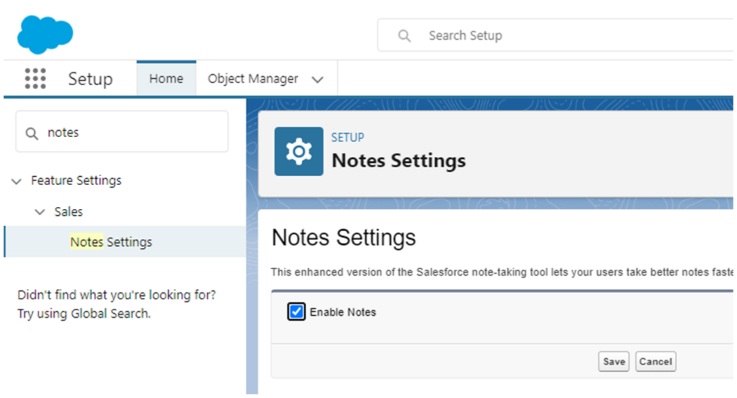
"SCLLCPLP2023" The 2023 package was built with a password. You will be prompted to enter this password when installing the package. The password will be removed from future packages.

CONSIDERATIONS

1. Project Lifecycle Pro (PLP) contains 70 active flows. These flows should not apply to your org's limit of active flows (2,000 for Enterprise edition).
2. The Project Lifecycle Pro flows will apply to the limitation of 1,000 flow interviews per hour. Average hourly volume of PLP flow interviews should be negligible since they are primarily triggered by project team member, cost and benefit changes.
3. PLP will not support more than 10,000 cost or 10,000 benefit records on a single project. The flow that updates access-rights to these records will exceed Salesforce limitations.
4. The namespace prefix for all custom components of the app is "scllc". Many of the custom components also have a prefix of "plp" but not all, so you'll usually see an API name starting with "scllc__plp" or "scllc__"

ENABLE NOTES

You won't be able to take notes on the project if you don't enable notes. To enable notes: Setup/Notes Settings check 'Enable Notes' and save.



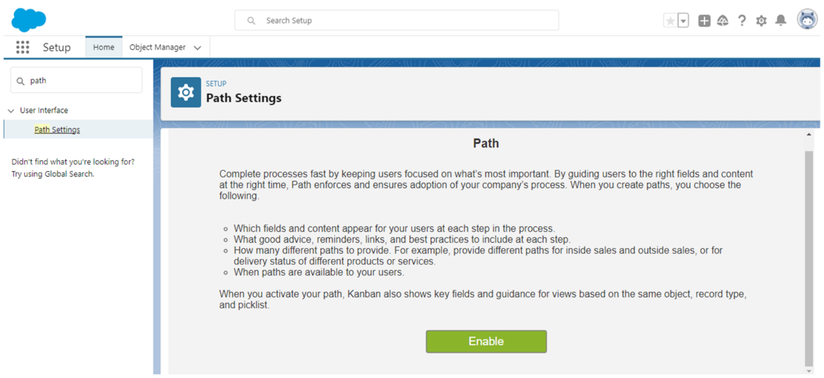
You will also need to add "Notes" to the related list portion of the page layouts for the objects which should capture notes.

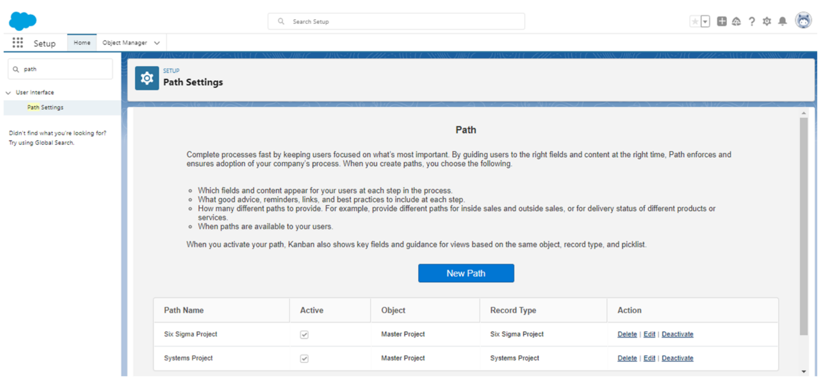
SALESFORCE REFERENCES

https://help.salesforce.com/s/articleView?id=sf.notes_setup_enable.htm&type=5

ENABLE PATHS

You must enable paths in the target org after installing the package for the systems projects and six sigma project paths to be deployed. Setup/Path Settings/Enable





SALESFORCE REFERENCES

https://help.salesforce.com/s/articleView?id=sf.path_create.htm&type=5

SHARE PLP REPORTS FOLDER

In order for reports and dashboards to be visible with users, the Project Lifecycle Pro report folder must be shared with the appropriate users. It is recommended you simply share the folder with all internal users but you can share in any way you wish. To share with all internal users a Sys Admin must: Reports/All Folders/Share <Project Lifecycle Pro>/ Share With <Public Groups>/Names <All Internal Users>, Access <View>/Share/Done

MANUALLY DEPLOY SOME METADATA

Have to manually deploy some components which can't be included in the AppExchange package. These are:

- Approval Process
- Sharing Rules
- Group

Download the package.xml and meta-data.xml files on Google Drive here:
https://drive.google.com/drive/folders/1RRSdEiW4TQrhtH5jSLVauJB7VvojlHAp?usp=sharing

1. If you do not know how to use SFDX/Salesforce CLI to deploy code than learn from these resources:
    a. https://developer.salesforce.com/docs/atlas.en-us.sfdx_cli_reference.meta/sfdx_cli_reference/cli_reference_deploy_commands_unified.htm
    b. https://trailhead.salesforce.com/content/learn/modules/sfdx_app_dev/sfdx_app_dev_setup_dx
    c. https://trailhead.salesforce.com/content/learn/projects/quick-start-lightning-web-components/set-up-salesforce-dx
2. Copy the supplied project to your local repository
3. Connect to the target organization where you installed the Project Lifecycle Pro package (not production).
4. Open a terminal session and navigate to the folder.
5. Run the following command in the terminal, placing the correct target org in the sfdx force:source:deploy -p "Project Lifecycle Pro/main/default" -u <Target Org> -w10

ASSIGN USER PERMISSIONS

User permissions cannot be included in managed packages since these are global settings. However, to use the full PLP functionality you will have to enable the following user permissions for all of the same users assigned to the **Project Lifecycle Pro Project Administration** and the **Project Lifecycle Pro Standard User** permission sets (see User Access). You can either add these user permissions to the user's profiles or create a custom permission set. Here are the user permissions (system permissions) to be granted:

1. **Access Activities** – Enables users to create/edit Tasks and Events.
2. **Edit Events** – Allows uses to edit events.
3. **Edit Tasks** – Allows users to edit tasks.
4. **Run Reports** – Allows users to run the PLP reports and standard dashboards.
5. **View Dashboards in Public Folders** – Allows users to view the PLP dashboards.

Only the owner of the project record may submit it for approval. Therefore, the project manager should be the owner of the project record. However, if the project was created by someone else, then the project manager may not be able to submit it for approval. Thus, the backlog managers need the ability to transfer ownership of a project to the assigned product owner or project manager. Therefore, you should grant the following user permission to the members of the **Project Lifecycle Pro Project Backlog Manager** permission set by either adding it to an existing profile or creating a new permission set.

1. **Transfer Record** – Allows the user to transfer ownership of the project and any other record they can access.

ADD BACKLOG MANAGERS TO GROUP

Access to projects with a status of "In Backlog" is controlled by a sharing rule based on the members of the Project Backlog Manager Group. Add the appropriate users to the group: Setup/Public Groups/Project Backlog Managers/Edit/<Select Users>

SETUP ISSUES

Issues were created by adding a custom checkbox field to the Task object, and are intended to simply be assigned tasks that answer a question. Unfortunately, the custom configurations must be managed through Profiles rather than permission sets, so some manual setup is required to get Issues to work.

1. Assign the PLP Task Layout to appropriate user profiles. The only change is that the 'Issue' checkbox has been added to designate issues. Make the change by: Setup/Object Manager/Task/Page Layouts/Page Layout Assignments.
2. Assing the Task with Issue compact layout to the appropriate user profiles. Setup/Object Manager/Task/Compact Layout/Compact Layout Assignment/ Set the primary compact layout = Task with Issue.

ROUTE FLOW ERRORS TO APEX ADMINISTRATOR

1. To ensure you receive any flow errors, change the **Process Automation Settings/Send Process or Flow Error Email To** to be "Apex Exception Email Recipients"
2. Add the desired email to the **Apex Exception/Apex Exception Email** setting in setup.

LOAD LABOR STANDARD RECORDS

1. An Excel and CSV file are provided which can be used to pre-load the labor standard records with a dummy value of one hour for each technical class/complexity combination (https://drive.google.com/drive/folders/1Aqh2l2O1mYUNOG8fXyJycUFNZeGy7vXC?usp=sharing). This makes it easy for the user to simply change the hours in the records for the combination of component type and complexity.
2. If the labor standard records are not pre-loaded, the user must manually create a record for every technical class/complexity combination.

ASSIGN LAYOUTS TO COMPONENT RECORD TYPES

Packages cannot set record type-specific page layouts, so this must be done manually for the project component page layouts.

1. Setup/Object Manager/Project Components/Page Layouts
2. Page Layout Assignments (button in upper right)
3. Click Edit Assignment
4. Click a Record Type
5. Select the corresponding page layout in the Page Layout To Use picklist
6. Repeat for all record types

DISABLE PICKLIST API NAME CHANGES (OPTIONAL)

If you change the picklist values of PLP-provided picklists, you should avoid changing the API names of the picklist values. Theoretically, existing flows and formulas should be updated with the new API name, but we've found cases where this is not always the case. So you should be careful making picklist API name changes or block them all together by disabling them: Administer/Data Management/Picklist Settings.

GLOBAL SETTINGS CHANGES (FYI)

The following settings changes are deployed with PLP which will have global impacts on your Salesforce instance:

- Tasks
  - Added a new checkbox “Issue” to designate project issues
  - Added a new field “Related Project”, which ties the task to the PLP project even if the task is tied to a child object
- Events
  - Added a new field “Related Project”, which ties the task to the PLP project even if the task is tied to a child object

COMPANY-SPECIFIC CONFIGURATIONS

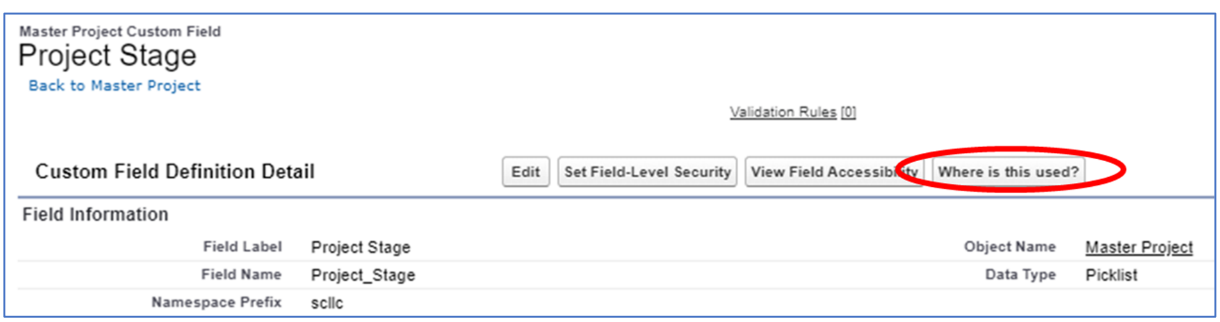
Project Lifecycle Pro was built with the intent that customers would configure it for their specific project management processes and organization structure. Therefore, it is highly configurable like all of Salesforce. The only areas to avoid modifying are those related to user access and rollups.

1. **User Access** – User access is driven by the permission sets, the project 'Confidential' field and the following key project team member fields (see User Access section for more details). Thus, customers should not edit these fields and the permission sets and flows are inaccessible.
    a. Active
    b. Read Only Access
    c. Financial Access
    d. Automation Roles
2. **Rollups** – Automated flows roll up the project/program financials, project end date (i.e. max milestone date) and component counts. Because customers may have their own financial metrics and component types the flows which roll up this data are overridable. This means they can be cloned and then modified to accommodate changes. Customers just need to be aware that making changes to fields that roll up will require making changes to these flows. We are happy to provide more detailed guidance on how to make these changes.

The following objects can be highly configured and it won't impact any automations but may impact reports and dashboards:

1. Project Risks
2. Project Scope
3. Systems Inventory
4. Software Licenses

The following sections provide guidance on the remaining objects and what can be configured and what should not be configured. Whenever making changes to an existing field it is highly recommend you use the 'Where Is It Used?' button.



PROJECT STAKEHOLDERS

The Project Stakeholder object is used for change management, by mapping the project changes to the groups which will be impacted. Therefore, the record values will be specific to the customer. The following picklist fields can be customized to match the customer's organization. Customers can also add additional custom categories.

1. Divisions (scllc__Divisons__c)
2. Functions (scllc__Functions__c)
3. Regions (scllc__Regions__c)

PROJECT PATHS/STAGES

Two project types are provided with PLP: Systems Project and Six Sigma Project. These represent two record types on the Master Project object. The Project Stage (scllc__Project_Stage__c) field's picklist values vary based upon the record type selected. Two paths are also defined based on the Project Stage values for the two record types.

Customers may change the existing Project Stage values with the only impact being to standard reports and dashboards provided with PLP. Customers may also add new record types with no impact on PLP automation.

PROJECT TEAM MEMBERS

The Project Roles (scllc__Project_Roles__c) is intended to be the descriptive field for the team member's role on the project and is entirely configurable by the customer. Some standard project roles have already been populated but change these as you wish.

Automation Roles (scllc__Automation Roles__c) cannot be modified without breaking considerable automation (i.e. flows, formulas, etc.). Therefore, customer should not modify the existing automation roles or add additional automation roles.

PROJECT CHANGE MANAGEMENT IMPACTS

The Mitigation Type (scllc__Mitigation_Type__c) field is not used in any automations so you may change this picklist as you see fit.

You may also want to add additional descriptive fields to this object. Just be aware that impacts are tied to Project Stakeholders using a junction object, so if you want any new fields to appear with stakeholders they will need to be included in the junction object and its report types.

PROJECT COMPONENTS

The technical classes associated with project components were based on project management standards but you may want to modify them. The technical classes are defined as record types on the Project Component object. Therefore, if you want to add a new technical class you'll need to add a new record type, and:

1. Create a custom page layout
2. Review potential impacts on roll up flows

PROJECT FINANCIALS

The Project Costs and Project Benefits records are rolled up to the Project Financials and Release Financials records. The Project Financial records are rolled up to the Program Financial record. Therefore, if you make changes to the standard financial metrics provided in PLP, you'll need to make clones of the financial roll up flows to incorporate the new metrics.

SYSTEM REQUIREMENTS

The Project Functionality Category object, allows the creation of custom requirement categories for an individual project and is a lookup field on the System Requirements object. These are records within an object, so you may create as many categories as needed.

The following picklist fields are not used in any automation and may be changed as desired:

1. Fit/Gap (scllc__Fit_Gap__c)
2. Gap Type (scllc__Gap_Type__c)
3. Priority (scllc__Priority__c)
4. Status (scllc__Status__c)

PROJECT LABOR STANDARDS

The Project Labor Standards are rolled up to the Project Components object. If you want to add new labor categories or additional estimate parameters you'll need to add the fields to the Project Labor Standards, Project Components objects and the related roll up flows. There is also a validation rule and supporting flow that ensures there is only one unique Project Labor Standard record for each Technical Class/Complexity combination.

PROJECT RELEASE

You many configure the following picklist fields as you wish, the only impact will be standard reports, dashboards and a lookup filter. You may add custom fields without any impact.

1. Release Status (scllc__Release_Status__c)
2. Stage (scllc__Stage__c)

PROJECT MILESTONE

Additional fields can be added to the Project Milestone object without impact to any automations. You can also configure the Status (scllc__Status__c) field picklist values. The Order (scllc__Order__c) field is used to sort milestones in chronological order before all end dates have been defined. The only field used by automations is the Forecasted Date (scllc__Forecasted_Date__c), the max forecasted date is rolled up to the project end date when the Rollup End Date field is checked.

USER ACCESS RIGHTS

Access to PLP records is controlled at several levels. For example, a user may be able to access a project but cannot access the project financial information (e.g. costs and benefits).

PERMISSION SETS

1. **Project Lifecycle Pro Standard User** – The majority of users will be added to this permission set which grants access to all the PLP basic functionality.
2. **Project Lifecycle Pro Administration** – Project owners, project managers and system admins should be added to this permission set. It includes all the Standard User permissions and additional rights related to management of the project, such as, managing team members and dependencies.
1. **Project Lifecycle Pro Backlog Manager** – Intended for a limited number of users to assign project suggestions submitted from employees. Backlog Manager access is controlled by both this permission set and a sharing rule. The permission set only grants access to the minimum number of fields to review the project and assign it to a produce owner or project manager. The sharing rule grants them access to all project records with a status of 'In Backlog' regardless if they are confidential or public. If a user is added to both the Backlog Manger and Standard User/Administration permission sets, they will have global access to all project records with a 'In Backlog' status. Users submitting projects can bypass the backlog managers by assigning the project a status other than 'In Backlog'.
1. **Project Lifecycle Pro Labor Standards** – Grants users the ability to add/edit labor standards for project estimating. The Labor Standards custom object is intended to be a global reference standard for estimating labor. Therefore, only a few users should have access to update the corporate labor standards. All PLP standard users can view labor standards.
3. **Project Lifecycle Pro Stakeholder Edit** – Grants users the ability to edit the corporate stakeholder list. Stakeholders are groups within the organization which will receive training or communication as part of project change management. This is intended to be a global reference source, so to avoid duplicate entries access to this object should be limited.
4. **Project Lifecycle Pro Systems Inventory Edit** – Grants users the ability to create and edit records on the Systems Inventory and Software License objects. It is intended that IT personnel are granted these rights. PLP standard and administration permission sets grant limited read-only access to these objects so they can be associated with project components and requirements.

SHARING RULES

PLP uses three sharing rules: two for granting enterprise read-only access to all public projects/programs and one for granting backlog managers broad access to projects.

1. **scllc__plp_Master_Project__c/Read_Access_for_Internal** – Grants all internal users read-only access to projects where Master Project/scllc__Confidential__c = FALSE (i.e. they are public projects).
2. **scllc__plp_Program__c/Read_Access_for_Internal** – Grants all internal users read-only access to projects where Program/scllc__Confidential__c = FALSE (i.e. they are public programs).
3. **scllc__plp_Master_Project__c /plp_Project_Backlog_Manager** – Grants all users in the Project Backlog Managers group access to projects where scllc__Project_Status__c = 'In Backlog'.

PROJECT TEAM MEMBER ACCESS

Access to projects is controlled at several levels, and is granted using Team Member record fields and automated flows which update object share records. A custom share reason called 'Project Team Member' is used so PLP will not interfere with standard Salesforce access functionality. In addition, record owners can also share records manually per standard Salesforce functionality.

Access rights to the scllc__plp_Master_Project__c object are duplicated to the child objects of Master Project. These objects are:

1. Project Change Management Impacts
2. Project Components
3. Project Functionality Category
4. Project Release
5. Project Risks
6. Project Scope
7. Project Team Members
8. System Requirements

The **scllc__plp_Master_Project__c/scllc_Confidential__c** field is used to designate whether a project is confidential or public. Confidential projects can only be accessed by users with a project Team Member record. All internal users have read-only access to public projects.

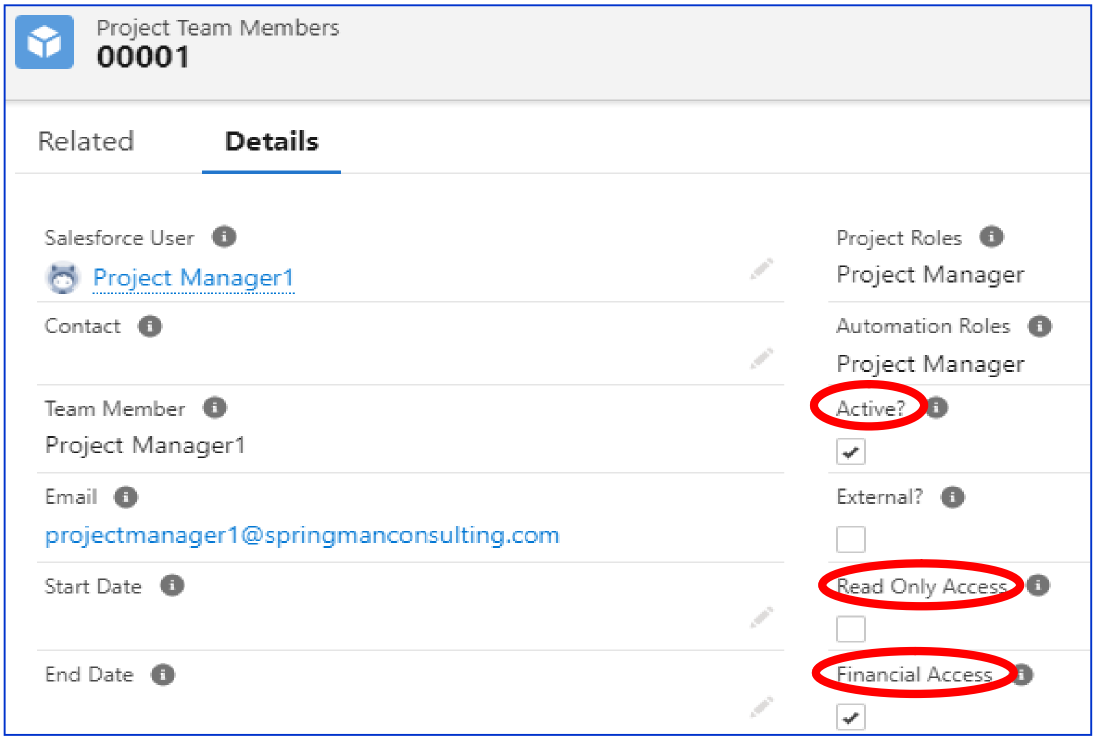
The **scllc__plp_Project_Team_Members__c/scllc__Active_cc** field is used to designate whether a project team member is currently active on the project and should have access to the project, project financial or dependency records. Only active team members have access rights to the project, project financial or dependency records. Access is revoked where **scllc__Active__c** = FALSE.

The **scllc__plp_Project_Team_Members__c/scllc_Read_Only_Access__cc** field controls whether users are granted read-only or read/write access to the project, project financial or dependency records.

Users assigned read-only access to a project can view all project information, but they cannot create or edit records. Some details:

- Read-only users will still be presented with 'New' and 'Edit' action buttons but they will be unable to save their changes. Unfortunately, the buttons cannot be hidden for read-only users, because visibility of these action buttons is controlled at the object level not the individual record level.
- Read-only users can still create notes and upload files. As record owner, read-only users can edit notes or files they created.
- Read-only users can create tasks or events associated with the project.

The **scllc__plp_Project_Team_Members__c/scllc_Financial_Access_cc** field controls whether users can access project financial or release financial records.



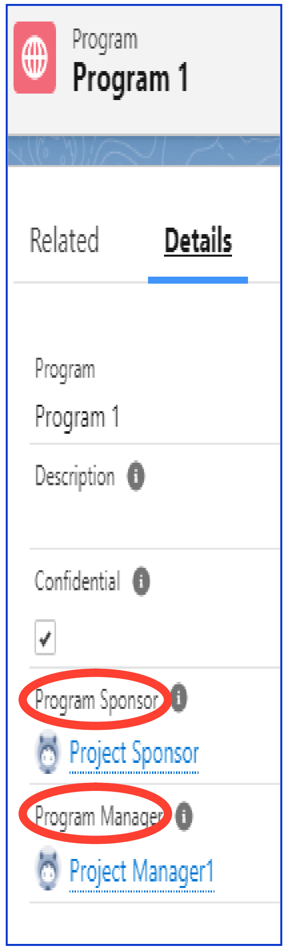
PROGRAM ACCESS

To gain access to a program, the owner of the program record must add the user to either the Program Sponsor or Program Manager field. Both the program sponsor and program manager are granted read/write access to the program and the related Program Financials record. Only users in the Project Lifecycle Pro Administration permission set can create a program.

Once a program is created, each child project must be opened and the program assigned to the program field. Users with access to the program must be granted separate access to the projects within the program. Otherwise, they will not see the projects listed on the ‘Related’ tab.

Project Financials are summed to the related program, regardless of the access rights of the user triggering the rollup. Therefore the Program Financials total will always be correct. A user with program financial access will see correct totals, even if they don’t have financial access to all the sub-projects.

The program record owner can grant additional users access using the Salesforce standard record sharing functionality. The same for the program financial record. The record owner has the option to grant access to the program without granting access to the program financial information.



PROJECT AND RELEASE FINANCIALS ACCESS

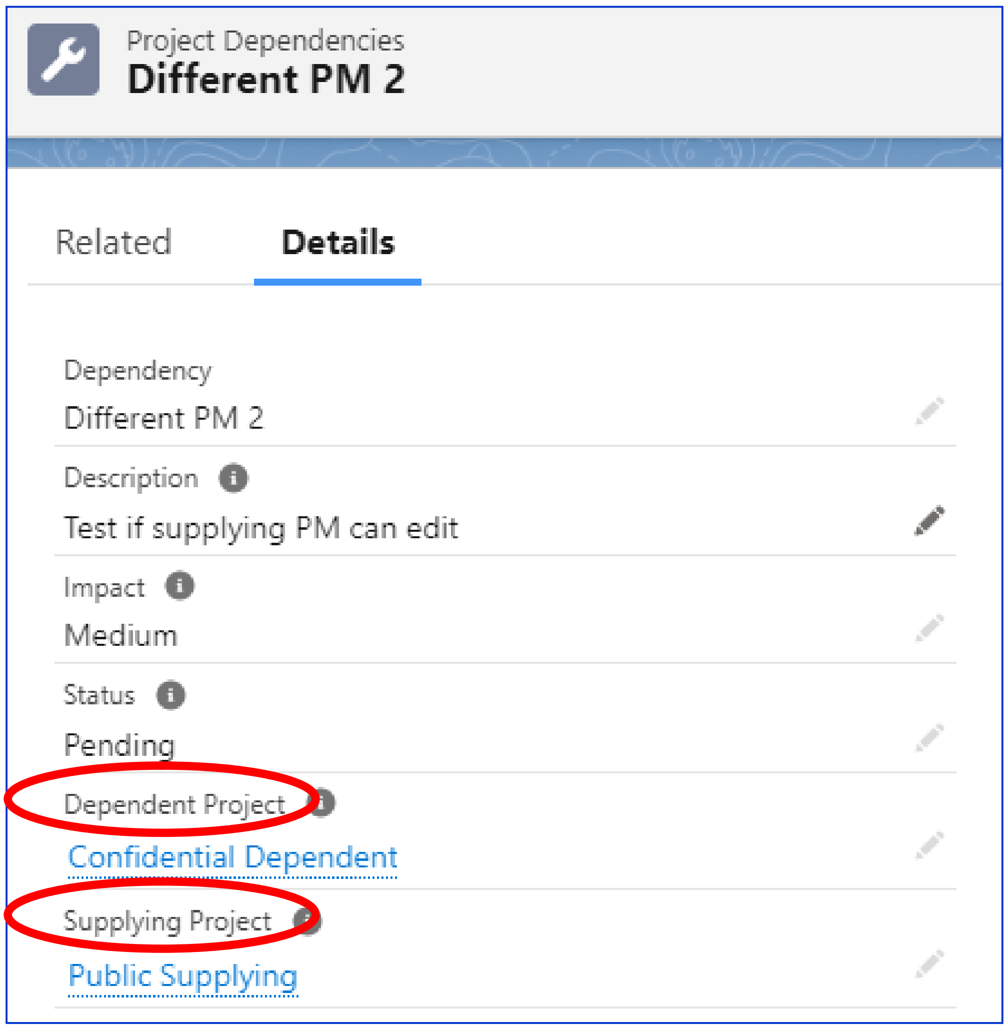
User access to the Project Financials is separate from the user access to the project. This allows users to have access to the project information without being able to view sensitive financial information. Project Financial access is controlled using the scllc__Financial_Access__c field on the Team Member object. Project Financial access also drives access to the Project Cost and Project Benefit child objects.

User access to the Release Financials is separate from the user access to the project and release. When scllc_Financial_Access__c = TRUE the user has access to both the Project Financial and Release Financial records. Access to the Project Cost and Project Benefit records are tied to the Project Financial record, but the cost/benefit records are tied to the Release Financials using a lookup field.

PROJECT DEPENDENCY ACCESS

Only users in the Project Lifecycle Pro Project Administration permission set can create project dependencies. Two projects are associated with each dependency: a dependent project which requires the dependency and a supplying project which supplies the dependency. All active team members on the dependent project are granted read-only access to the dependency. The active project managers on both projects are granted read/write access to the dependency.

The project manager on the supplying project should be granted read-only access to the dependent project by being added as a team member. Otherwise, they'll be able to view/edit the dependency but won't see the name of the dependent project.



POTENTIAL SUPPORT ISSUES

- **Project Manager Unable to Delete Record -** Though Project Managers have permission to delete project records, standard Salesforce functionality only allows record owners, their managers in role hierarchy or users with 'Modify All' permission to delete records. Therefore, if the record was created by another team member, the PM will be unable to delete it. They can delete the record by changing the owner to themselves and then delete the record.
- **Labor Standard Changes -** If a labor standard is changed it will not update existing labor estimates. The new standard will only be applied to future estimates. An existing estimate can be manually updated to the new standard by unchecking Use Standard Labor Estimates, saving the record, and then re-checking Use Standard Labor Estimates.
- **Project Approvals -** The person submitting the project for approval must be the owner of the project record. Otherwise, an error message will be displayed when the project is submitted for approval: "No applicable approval process was found."

VERSION HISTORY

- 5/9/2023 – First version
- 5/31/2023 – Added manual assignment of Project Component page layouts by record type