

PMT Managed - Admin Guide

1. Initial Setup

- Assign PMT Global Admin permission set to the system admin user who is setting up the app.
- Update all picklist fields on following objects as per the business requirements:
 - PMT Project
 - PMT Program
 - PMT Phase
 - PMT Task
 - Resource Allocation
- Update configuration in custom metadata type
Go to Setup > Custom Code > Custom Metadata Type > PMT Settings > Manage > Default > Edit

Label	Default	Description
PMT_ActivateResourceAllocationTrigger	TRUE	This activates/deactivates the trigger which automates the project sharing. Keep this false, if your sharing model is public read/write for project
PMT_Default_Resource_Availability	100	The default availability percentage assigned to the users while creating the availabilities
PMT_FiscalYearStartMonth	2	This indicates the start of the fiscal year. The default value is 2 which means it starts from Feb. This setting should only be updated at the beginning only, subsequent changes can lead into inconsistencies.
PMT_NumberOfYearsAvailabilityToBeCreated	2	The rolling number of years for which the availability is created by the scheduler
Holidays	Sat;Sun	Defines the days to be considered as non-working days for week for calculations of the due date. Only considered for templates feature. Semicolon separated values are accepted and accepted values in the format Mon, Tue, Wed, Thu, Fri, Sat, Sun

- Add the field “Is PMT User consider for Availability” to the user page layout.
- Check the checkbox called “Is PMT User consider for Availability” on the user profiles for the users who should be available as resources for resource planning.
- Automate the availability creation on user creation/update
 - Create a new flow on User object if no existing auto-launched flow with start criteria based on the requirements
 - Add new criteria based on when you would like to create new availability
 - Create a Record Collection Variable.
 - Add the triggering user to the collection variable.
 - Add action > Type > Apex and select action > Create PMT Resource Availability on User creation
 - Pass the Record Collection Variable to the Apex Action parameter called `lstUser..`
 - Save and activate the flow
 - Update the user records with “Is PMT User consider for Availability” as checked
- A scheduler to create the availability automatically needs to be configured. Here is the sample code that you need to configure. And then schedule this apex code to run at a specific frequency

```
global class PMT_AvailabilityResourceCreation implements Schedulable{
    global void execute(SchedulableContext SC) {
```

```
inov8.PMT_ResourceAvailabilityScheduler sch = new
inov8.PMT_ResourceAvailabilityScheduler();
sch.execute(SC);
    }
}
```

2. Additional Configuration (Optional)

- Setup approval process on the task
- Setup email notifications using process builder as per the business requirements
- Install and configure [home/child kanban](#) appexchange package for kanban view on project
- Enable Path, if not enabled already, from Setup > User Interface > Path Settings > Enable Path to use path on the PMT task.

3. Security Setup

These are just guidelines for how to setup the sharing and visibility of the record based on our experience of PMT. But you can always potentially implement your own version of this. Here are couple of guidelines:

OPTION 1 : KEEP THE SECURITY PUBLIC

- Description:
 - This option opens up all records to all the users and there is no show/hide for based on criteria.
 - In this case only security applicable will be validation rules.
- Steps
 - Go to Setup > Sharing Settings
 - Open PMT Program, PMT Project and Resource Availability and change the sharing to public read/write.
- Pros
 - Easy setup and visibility
 - This model can be used by a small team where almost of all people are involved in all projects.
- Cons
 - Lacks security to hide the data based on project memberships

OPTION 2: SETUP SHARING AND VISIBILITY FOR THE RECORDS USING TRIGGER

- Description:
 - A trigger on the resource allocation object has been included in the package to automate the sharing of the project with the members.
 - As soon as the member is added to the project, the project is shared with the member.
- Steps:
 - Go to Setup > Sharing Settings
 - Open PMT Project and change the sharing to private or private read/write based on the requirements.
 - Keep the PMT Program as public read only and Resource Availability as public read/write.

- Pros
 - Handles the security of the data at a granular level
 - Cons
 - Complex to setup and maintain over the time
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4. Assumptions

- Completion can only be marked at task level which then rolls up automatically to the phase and project.
 - PMT is not completely supported in salesforce classic, some of the functionality will not work.
 - Kanban view is not provided as a part of the package but this [home/child kanban](#) appexchange package is recommended for the same.
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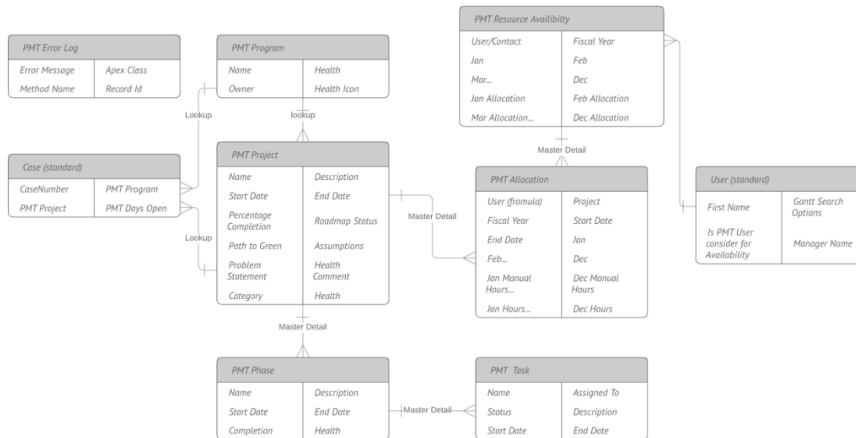
5. Technical Documentation

OBJECT DESCRIPTION

	Label	Master Object	Description
1	PMT Program		Use in Project Management Tool to record Programs and related projects.
2	PMT Project		
3	PMT Phase	PMT Project	
4	PMT Task	PMT Phase	
5	PMT Resource Availability		Stores availability of a resource, which is used for allocation to project
6	PMT Resource Allocation	Resource Availability, PMT Project	Stores the allocation of the resource for a requirement
7	PMT Error Logs		Used to capture errors occurred operations.

DATA MODEL

Here is the ER diagram with some of the important fields highlighted



PERMISSION SETS AND PERMISSION ASSIGNMENTS

There are 3 permission sets included in the package:

- PMT Resource Planner : User with project access and allocation to the projects
- PMT App User : User with project and task access
- PMT Global Admin : Admin access to the PMT app

	Object	PMT Resource Planner	PMT App User	PMT Global Admin
1	PMT Program	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete, View All, Modify All
2	PMT Project	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete, View All, Modify All
3	PMT Phase	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete, View All, Modify All
4	PMT Task	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete, View All, Modify All
5	PMT Resource availability	Read, Create, Edit	Read, Edit	Read, Create, Edit, Delete, View All, Modify All
6	PMT Resource Allocation	Read, Create, Edit, Delete	Read	Read, Create, Edit, Delete, View All, Modify All
7	PMT Error Logs	Read, Create	Read, Create	Read, Create, Edit, Delete, View All, Modify All

- Please note that “Flow User” checkbox must be checked on user in order to use some functionality on the Project > Task Tab.

VALIDATIONS RULES

	Object	Rule Name	Description
1	PMT Project	InitialStartDate_should_be_less	Initial End date must be after Initial Start date.
2		Path_to_Green_should_be_blank	Path to Green field should be used only for Late, At Risk or On Hold projects. Please use Health Comment for On Track projects
3		SOX_Comment_Blank_SOX_Impact_unchecked	SOX Comment should be blank if SOX Impact is not checked
4		SOX_comment_not_null_when_SOX_checked	SOX Comment should not be blank if SOX Impact is checked
5	PMT Phase	Kickoff_before_deadline	Phase End Date must be after Phase Start date.
6	PMT Task	Task_On_hold_Reason_not_null_if_On_Hold	On Hold Reason should not be Blank if Status is 'On Hold'.
7		Task_start_date_less_than_end_date	End Date must be after Start Date.
8	PMT Resource availability	Availability_cannot_be_more_than_100	Availability must be in between 0 and 100
9		Fiscal_Year_format_as_FYXX	Fiscal Year must be in the format of FYXX
10	PMT Resource Allocation	Hours_Cant_be_negative	Actual hours worked cannot be negative numbers
11		Self_update_hours	Hours can only be self updated

VERSIONS

- **Version 1:** PMT

- PMT with resource management
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- **Version 1.8.1:** Major release with Gantt

- Added Gantt Chart
 - Added Templates Feature
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- **Version 1.9.0:** Templates, Gantt, Bug fixes.

- Gantt Chart Enhancements/Bug fixes
 - Added task sorting option.
 - Added chart legends with icon and name.
 - Added status icon.
 - Added separation line across all views.
 - Clipped task names to show action buttons (add, edit, and delete).
 - Added project name filter on PMT Gantt View (Global Gantt chart).
 - Added a static message on PMT Gantt View (Global Gantt chart) when there are more than 30 projects.
 - Bug fix: tasks were not showing in the correct time slots.
 - Other Enhancements/Bug fixes
 - Updated the quarter formula on the project object to consider the quarter settings.
 - Made Apex action "PMT - Create Resource Availability on User Activation" available for flow.
 - Optimized the performance of the change status action.
 - Considered the initial start date while creating a project from a template.
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- **Version 1.11.0:** Bug fixes

- Resolved a bug affecting the sorting option in the Gantt Chart.
- Updated the PMT Gantt to display the PMT view expanded by default.
- Addressed an issue with the template feature where cloning selected tasks resulted in all tasks under a phase being cloned instead of just the selected ones.
- Corrected the fiscal quarter formula on projects.
- The migration of Process Builder to Flow:
 - Process: "PMT - Create Resource Availability on User Activation." Users can now utilize the updated version of the "Create PMT Resource Availability on User Creation" Apex action within the flow.
 - Orgs with the PMT Tool already installed should deactivate or delete the old process after creating a new flow.
 - Process: "PMT - Update Task Status and Percentage Completion." This process has been migrated to a flow named "PMT Task: Before Automation."
 - Orgs with the PMT Tool already installed should deactivate or delete the old process after upgrading the package.
 - Note: The old process has been replaced with a placeholder process containing an action that will never execute.
- Resolved the issue with project sharing that occurred when allocating a new user to a project.



For any additional queries, please reach out to us at

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