

PMT Package - FAQ for AppEx

Q - Many of the features are working well for us but I'm having an issue with resource allocation. When trying to add resources to a project I get the error "The resource availability are not setup for this year yet. Get in touch with your admin". I have created several available resources with the Fiscal Year FY22 but still get this error

A - This is because the placeholder availability is not created. Placeholder availability records are created where the user field is blank and is used to assign a role to project without actual resource. This can be done using the scheduler part mentioned in the PMT admin guide.

Here is the summary from the admin guide:

A scheduler to create the availability automatically needs to be configured. There is the sample code that you need to store. And then schedule this apex code to run at a specific frequency.

Once this scheduler runs the placeholder availability records will be created automatically based on

PMT_NumberOfYearsAvailabilityToBeCreated from Setup > Custom Code > Custom Metadata Type > PMT Settings > Manage > Default > Edit (by default 2)

Q - I am trying to deploy the PMT from Github repository as I need to make some changes to the objects which are not allowed directly.

My deployment fails with following errors:

Error PMT/ZJdwKeVNazdphKGOKgoOevLuGnjCVK Cannot find folder:PMT

Error PMT In field: sharedTo - no User named test-hvaqzbjtbpsi@example.com found

Error Admin Unknown user permission: FieldServiceAccess

Can you please help me out on where should I start debugging from?

A - Here are the fixes for these issues:

Error PMT/ZJdwKeVNazdphKGOKgoOevLuGnjCVK Cannot find folder:PMT

Error PMT In field: sharedTo - no User named test-hvaqzbjtbpsi@example.com found

Please remove the foldershares with the above username 'test-hvaqzbjtbpsi@example.com' from the file at : /force-app/main/default/dashboards/PMT.dashboardFolder-meta.xml

Error Admin Unknown user permission: FieldServiceAccess

Delete the profiles folder from the local repository as it only contains system admin profile

Q - Is there any option to enable Gantt chart with PMT?

A - Gantt chart has been released in the release 1.6. Please upgrade the package to 1.6 or above if you have older version.

Q - The description notes that you can "mass creation and updating of records" I don't see how to create a template that we can reuse for implementation projects. Am I missing something in the app or do I have to create a flow to create the project, Phases and tasks?

A - Templates feature has been released in the release 1.6. Please upgrade the package to 1.6 or above if you have older version.

In case if you have the older version, follow these steps:

- Please visit [AppExchange - PMT](#), upgrade to the latest version.
- Go to Setup > Object Manager > PMT Project > Page Layouts Tab > Update the assigned layout to include

- Field - isTemplate
 - Action 'Clone Phases/Tasks'
 - Action 'Use This Template'
 - Go to Setup > Custom Metadata Types > PMT Settings > Edit 'PMT Setting Layout' > Add 'Holidays' Field
 - Existing reports and dashboards should filter out templates to avoid reporting on template projects.
-

Q - The permissions on the manage packaged make it impossible to remove unneeded fields or objects. I can't even modify the new case action to use a different record type.

A - We have a dedicated record type of case in the package, so that it won't affect any of your existing case related features. We also have uploaded the unmanaged version to github in case if you would like to customize it beyond the current features of the package. The link to the repository is available in the customization section.

Q - I've tried 3 different orgs. All have failed to install the app. Two failed with messages like:

PMT_Phase__c-PMT Phase Layout FY20-Q1: feedLayout is not supported for this layout

PMT_Project__c-PMT Project Page Layout FY20-Q1: feedLayout is not supported for this layout

PMT_Task__c-PMT Task Page Layout %28FY20-Q1%29: feedLayout is not supported for this layout

A - The chatter needs to be enabled on the target orgs.

Path to enabled chatter : Setup→Customize→Chatter→Settings

Q - I recently installed and configured the PMT app in my org to help track projects for my team. I am running into an issue where non-admin users are not able to use the Change Status or Change Assignee actions on the Tasks tab for a project.

They have access to the Tasks and can click Edit and update them individually. Do you know if there is a different Permission they need to be able to use those actions? Currently the users have the PMT User permission set.

The error non-admin users get is: You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary.

The PMT Project sharing settings is set to Private, but the users in question have access to the Projects/Tasks they need to update.

A - Please verify that your users have the "Flow User" checkbox checked on their user profile. Alternatively you can enable the "Run Flows" permission at the profile or permset level for the user.

Q - Are there instructions how to uninstall the app? It does not appear there is a quick process to accomplish this?

A - Since it is a sandbox, it is recommended that you refresh the sandbox or remove access to the app if the sandbox is in use and to be refreshed later. As this uninstall process can be time consuming.

If you want to continue to uninstall the app, here are the steps to be followed based on the above screenshot:

Deactivate all process builders and flows from PMT

Assign the non-pmt layout for all the profiles for PMT case record type (Setup > Object Manager > Case > Case Page Layouts > Page Layout Assignment > Edit Assignments > Remove All assignments to PMT)

Once you complete these steps, note that step 2 will not work for some error messages as there are some hidden profiles and chatter profiles for which Salesforce automatically assigns the page layout.

For those profiles you can use the URL hack here : https://yourInstanceURL/_ui/common/config/layout2/LayoutMappingUI/e?

`type=Case&pid={00xxxxxxx}`

Replace {yourInstanceURL} with your sandbox instance URL

Replace {00xxxxxxx} with the id of a profile, these ids can be achieved by clicking on the profile name provided on the uninstall error screen.

Then edit assignment and choose one of the existing case page layout from your org to replace PMT page layout

Note that these profiles are not visible on the screen for selection, just choose a different page layout (anything except PMT) and click save

This needs to be repeated for all such hidden profiles.

Q - I am seeing the following error when trying to add a resource "Availability not found. The resource availability are not setup for this year yet"

A - You can follow the admin guide to setup or run a scheduler to have resources created. Alternatively, you can run below code immediately in anonymous window as a quick fix will not work on longer term.

```
inov8.PMT_ResourceAvailabilityScheduler sch = new  
inov8.PMT_ResourceAvailabilityScheduler();  
sch.execute(null);
```

Q - One thing I noticed is that the resources seem to be built on the Users within SF. In our company's case, none of the resources we assign to projects would have a Salesforce account. They are listed as contacts currently. I am wondering if the app has been customized in the past to track resources that are in the Contacts Object rather than User resources. Let me know if this is possible to customize.

A - The recommendation for this is to use the open source code link provided in the package and customize the objects and code provided to meet this requirements.

Q - The PMT Tool from the app exchange package comes with 2 processes that are created in Process Builder – I am not seeing an option to migrate these to a flow. Is there a way to get these as flows instead?

A - The latest package has the flows moved from processes. If this package is freshly installed, there shouldn't be any processes. For the upgraded package, the process should be present and active. The admin should deactivate the processes.
