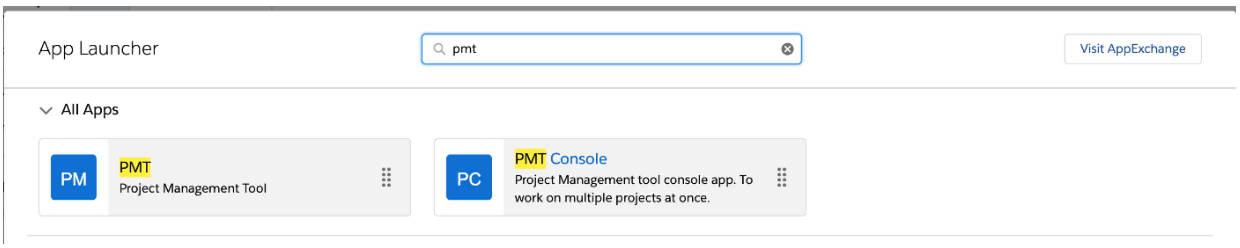
PMT Package - User Guide

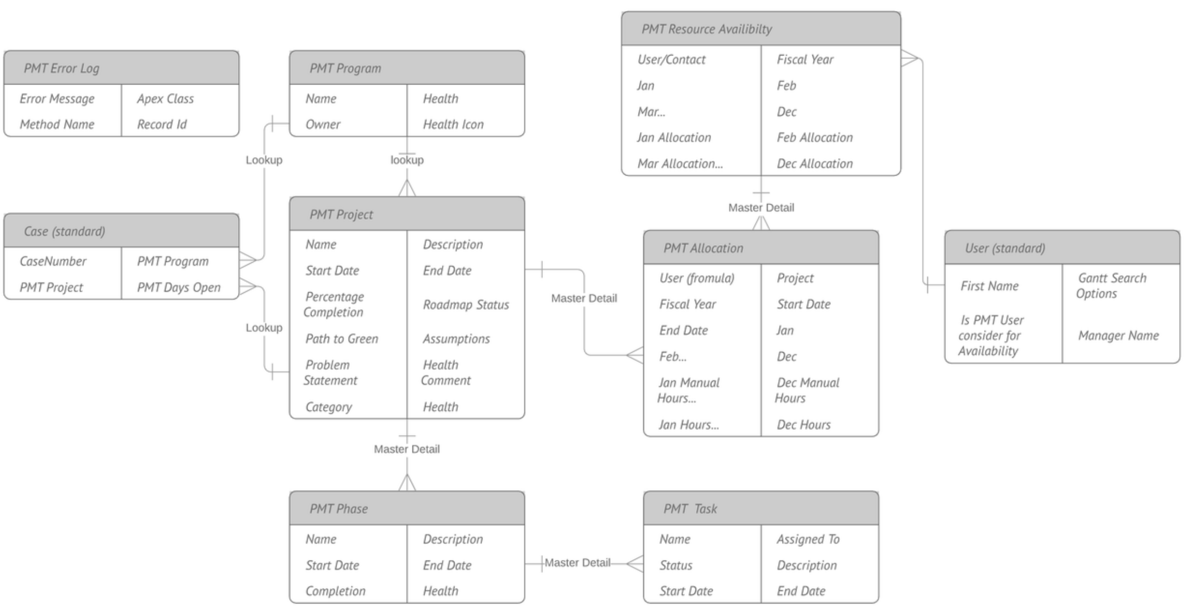
How to Access PMT App

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.
- When Tasks dates or Status are updated, the Project Owner is receiving an email notification

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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

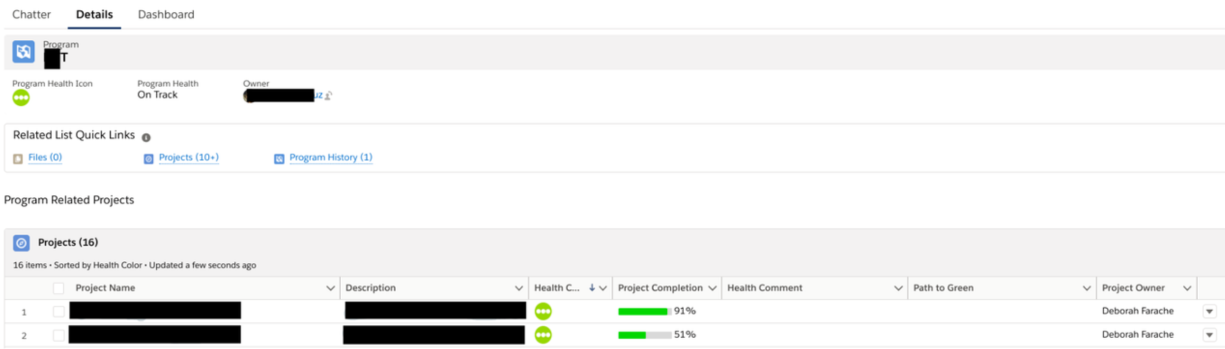
- Programs are used to group Projects under a common umbrella, allowing to track and report on Programs achievements and status.
- Recommendation: Even if linking a Project to a Program is not mandatory, to facilitate the reporting and enforce data coherence, we recommend to assign non-program related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



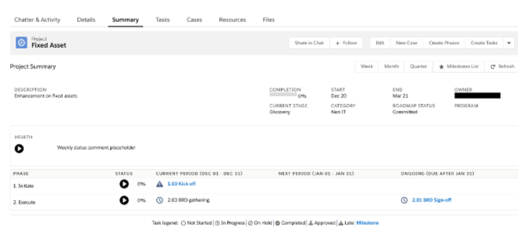
PROJECTS - CUSTOM OBJECT

Creating a Project

- From Project object:
  - Open the Project object
  - From the List view, click New
  - Enter Project Name + mandatory fields and other necessary information.

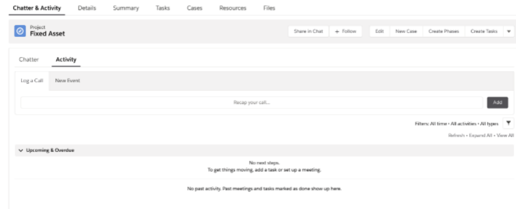
Project Page

- 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

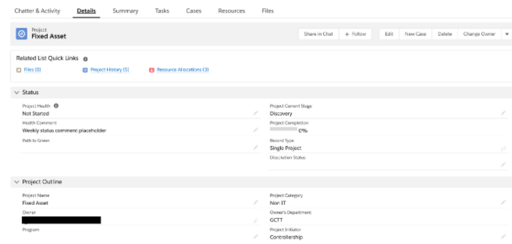


- Tips:
  - All Icons are clickable and will open the related record in **Edit** mode for quick updates.
  - The **right corner buttons** allows to switch from a weekly to a monthly or quarterly view
  - The **Milestone List** button will display Key Milestones tasks in a popup.

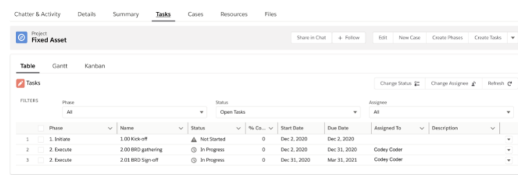
- Tab Chatter & Activity
  - Project dedicated Chatter feed
  - Project Activity (emails + events) logged from Salesforce Gmail/Outlook application



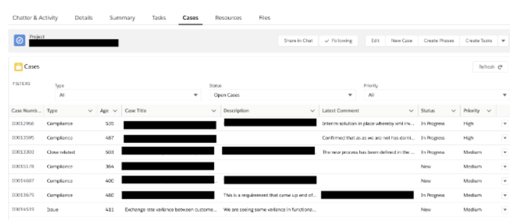
- Tab Project Details
  - Project record details
  - Include all the project information and fields used to document or report on the project.



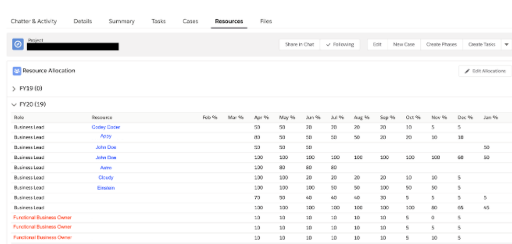
- Tab Tasks / sub-tab Table
  - Display PMT Tasks in a table UI
  - Use picklists at the top to filter
  - Inline editing on Task Name, % compl., Start, End dates and Description
  - Standard mass change on above fields by using the row checkboxes
  - Mass change via flow on Status and Assigned To fields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



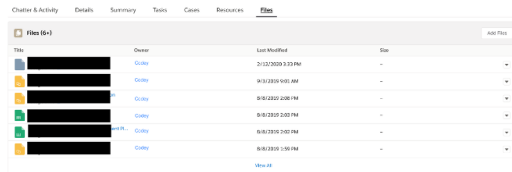
- Tab Cases
  - Display the RAID Log in datatable UI
  - Use picklists at the top to filter the table
  - Click on Case Number to open the Case record
  - Use the row drop-down menu to Open/Edit the case



- 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.



- Tab Files
    - Present the Files component, allowing to add documentation to the project from:
        - User computer
        - Google Drive
        - Quip

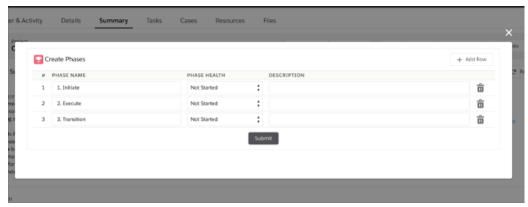


PHASES - CUSTOM OBJECT

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

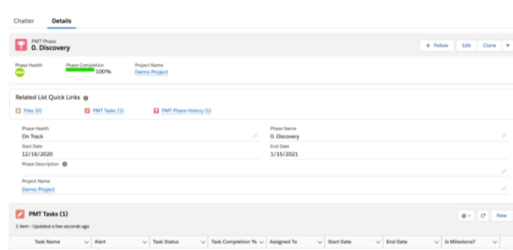
Create Phases

- From the Project Summary or Tasks Tabs:
    - 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 alphabetically on the Summary Page. Number the phases to order them as you wish.



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.



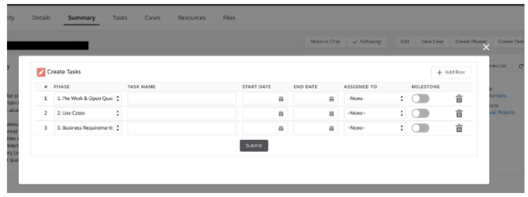
PMT TASKS - CUSTOM OBJECT

The PMT Tasks object represent the Project deliverables and work items and define the project timeline.

Create PMT Tasks

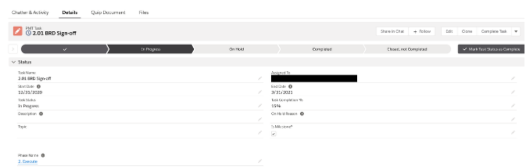
- From the Project Summary or Tasks Tabs:
    - Click on the Create Tasks button

- 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...)

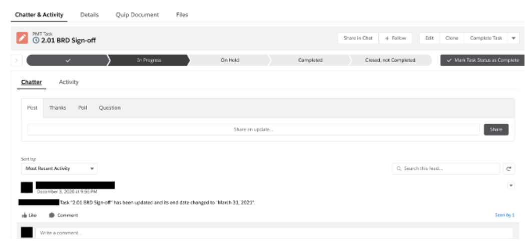


PMT Task Page

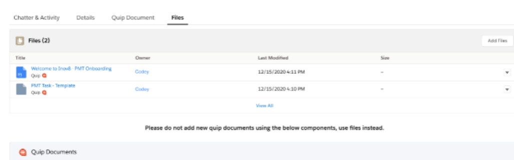
- Tab Details
  - Default PMT Tasks landing page
  - Present record details



- 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.

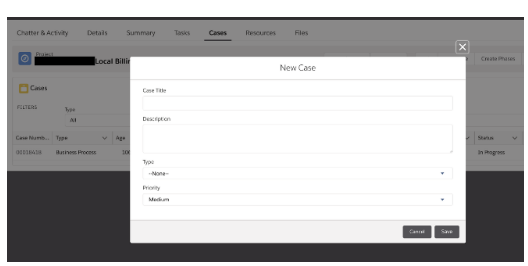


CASES - STANDARD OBJECT

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.

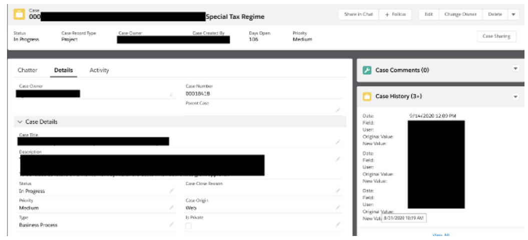
Create PMT Tasks

- 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

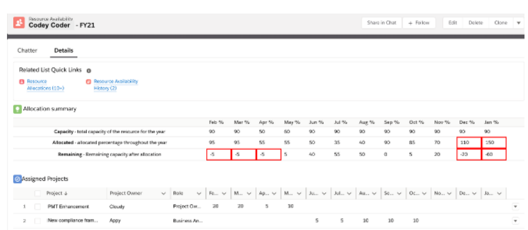
> *Optional object: Only to be used if you plan to track your team resource capacity.*

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

For any additional queries, please reach out to us at

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