

***Quick Guide***

*Functional Administration*

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| **Settings under Configuration**  |

Go to **Setup, Configuration**

* **Fortes Change Cloud:** Setup for e.g.:Limited Roles on projects, extra tabs on Single Sheets, Manager can select his own widgets, it is only possible for Functional Administration to delete Orders
* **Portfolio Management:** Setup for e.g:Activate Custom Dashboards, Activate Scenario Planning, Start Projects from Portfolio and/or Folders
* **Classic Project Migration:** Setup for migrating ‘classic projects’ to ‘generic projects’ (classic project is end of life per PTB 9.0)
* **Notifications:** Setup for email notification on deadlines
* **Conversions:** Help table for use in custom timeline fields
* **Hour Rates:** Setup for managing master table Hour Rates
* **Currencies:** Setup to define currencies and currency rates
* **Skill Categories:** Create categories for use in (timeline) reporting
* **Financial Categories:** Setup for managing the master table Financial Categories
* **Resources:** Manage Resources (both with or without a user account)
* **Skills:** Setup for managing the master table Skills
* **Time Entry:** Setup for Time Entry configuration
* **Entries:** Manage Entries
* **Non-project** **Activity Sets:** Managing master tableNon-project Activity Sets
* **Resource Allocation:** Set the resource allocation scale
* **Customize fields:** Create and manage Custom Fields
* **Approval Entries:** Manage approval entries
* **Advanced Configuration:** Manage widgets (for on premise customers only)

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| **Create, configure and move Organisational Unit**  |

Create an OU

Go to an OU in the tab **Navigation**, click  , a pop-up appears. Fill in the name, define OU roles and click **OK**.

Configure an OU

Navigate in the OU to the tab **Properties**, click **Configuration**, a pop-up appears. Select which modules should be active in this OU. Select the available currency (see: ‘set currency’) and click **OK.**

Move an OU

Navigate in an OU toward the tab **Navigation.** Select the line of the OU that you want to move, click **Move**, a pop-up appears. Select the target destination of the OU and click **OK.**

Merge OU’s

It is possible to merge OU’s. The functionality to perform this has to be activated first. Contact Fortes Support for this.

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| **Set currency** |

If you want to use different currencies you can define currencies and currency rates. Currencies can be applies to Organisational Units.

Set currencies

1. Go to **Setup, Configuration, Currencies**
2. Click **Define currencies**
3. Click  and fill in the data required for the currency

Set Currency Rates

1. Go to **Setup, Configuration, Currencies**
2. Click **Currency Rates**
3. Define the currency rate, you can also add a start date for the currency rate

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| **Set Currency per Organisational Unit** |

1. Go to the OU and go to **Properties**
2. Click **Configuration**
3. Select the Currency

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| **User administration**  |

You can create user accounts and user groups. Groups are used to apply a selection of users to an OU instantly.

Create a user account

1. Go to **Setup, User Administration, tab** **Users.**
2. Click  to add a user: enter the appropriate information in the pop up.
3. When you’re done, click **OK**.

Change a username

1. Go to **Setup, User Administration,** tab **Users.**
2. Select the line of the respective user and click **Edit account,** a pop-up appears.
3. Apply changes and click **OK.**

Create a User Group

Users groups can be given a role, just like you can adding roles to individual users.

1. Go to **Setup, User Administration,** tab **Groups.**
2. Click , a pop-up appears. Give the group a name and description, click **Create Group**
3. Click on the name of the group, a pop-up appears.
4. Click **Add/Remove**, a pop-up appears: add users, click **OK.**

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| **Edit roles** |

Roles first must be assigned on OU (e.g. reader or member) and functional module level. Users that have a role on that level, can be assigned roles in the functional modules (e.g. project manager).

Edit roles on OU

1. Go to an OU, **tab Properties** and click **Edit Roles**, a pop-up appears.
2. In the pop-up click  to assign roles on OU level and per functional module.
3. Click **OK** and then **Close**.

Note: use the user group **All Users** to make everyone a member of the OU.

Edit roles on portfolio’s, folders, projects, and so on …

You can find the button **Edit Roles** on the **tab** **Dashboard**

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| **Create a portfolio/folder** |

Create a portfolio

Navigate to an OU, **tab** **Portfolio Management**, click , a pop-up appears. Fill in the pop-up and click **OK**.

Create a folder

Navigate to an OU, **tab** **Project Management**, click , a pop-up appears. Fill in the pop-up and click **OK**.

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| **Set tolerances on folders**  |

You can set tolerances on a folder. Go to a folder, click on **Edit Tolerances** in right top corner of your screen. There are two types of tolerances that can be set:

1. You can set tolerances for stages or the total number of plan items. The tolerances apply for all projects in the folder, for individual projects tolerances can also deviate. Tolerances can be set as a relative or absolute figure. Also, you can decide to only look at plan items/costs in the current stage of the project.

For **Stage Planning Tolerance** the number of stages which surpass the their planned delivery date is compared to the total number of stages. The tolerances can be set as an absolute or relative figure.

**Product Planning Tolerance** looks at the number of overdue plan items compared to the total number of plan items of the project planning.

1. For **Cost Tolerances** the total actual costs are compared to the project budget.
2. The **Hour tolerances** are not in working order and will be removed in the next releases.

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| **Move a portfolio/folder/programme/project**  |

Navigate to the item you want to move and select the line of the item. When the line is selected, click **Move**, a pop-up appears. Select the correct OU and optionally the correct folder, click **OK**.

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| **Creating an idea/initiative/project** |

See QG Portfolio management for more information.

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| **Planning and managing a project**  |

See QG Project management for more information.

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| **Archiving, restoring and deleting items** |

You can archive a OU, portfolio, portfolio-item, folder, programme or a project. Doing this will make these items visible in the **tab** **Archive.** This tab exists in OU’s, portfolio’s and folders.

Archiving items

1. Navigate to the item you want to archive and the line of the item, click **Archive**, a pop-up appears. Click **Archive** again.

Note 1: Projects have to be archived in the modules Portfolio Management **and** Project Management. These are separate actions that must be performed manually in each module.

Note 2: When archiving items, all underlying items are archived as well. For example: when a folder is archived, all projects in the folder will be archived as well. The same goes for entire OU’s which can contain portfolio’s, folders and projects.

Restoring archived items

Navigate to the tab **Archive**, select a line and click **Restore**. A pop-up appears, click **Restore** again.

Removing archived items

Navigate to the tab **Archive**, select a line and click

***WARNING:***  *Removing archived items permanently deletes these items and all underlying items from Fortes Change Cloud. The data cannot be restored!*

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| **Creating a project model** |

A project model is a template for a project. You can create a project model by importing/exporting an existing model or by creating a model from an existing project.

Creating a model from an existing project

1. In the **Projects** section,go to the program.
2. Select the project on which you want to base the model.
3. Click **Model.**
4. Enter the data for the model.
5. Confirm by clicking **OK**.
6. The model is now displayed in the program, in the **Project models** section (under the **Projects** section).



1. Export and Import a Product model
	* Select the model in the **Project** **Models** section and click **Export;** Save the file.
	* Go to the Organisational Unit with **Project Management**, to the tab **Models**.
	* Click in the **Project Models** section **Import**, select your Project model and enter the data in the pop-up screen and click **OK**.

Configuring a project model

You can configure the following elements of a project model:

* Tab Property page layout 🡪 see ‘Editing page layout’
* A planning (stages/plan-items) 🡪 see QG Project management
* Page layout of plan-items🡪 see ‘Editing page layout’
* Automated reports 🡪 see ‘Creating templates for…’
* Widgets 🡪 on tab **Properties** and tab

**Reports**, click **Edit Widgets**

* Linked resource pools 🡪 on tab

**Resource management**, click **Edit Resources.**

* Plan-item approval 🡪 on detail page of

a plan item, click **Approval settings**

* Behavior of costs, hours and time entry 🡪 on tab Dashboard, click **Configuration 🡪 See QG Financial Configuration**

**Some caution** when adjusting a project model:

* These changes do affect existing projects: Property page, existing automated reports, plan-item approval, plan-item custom page layouts, widgets, cost and hour behavior
* These changes do not affect existing projects (with that model):
Planning, linked resource pools, new automated reports.
* These change do not affect existing or new projects (with that model):

Roles that have been selected in the Project model

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| **Availability of the Project model when starting a project** |

When you start a project you first have to select the OU and a Folder.



Based on the selected OU and folder the following project models will be available:

* All models in the selected folder (Model saved in this folder)
* All models in the folder above the selected folder in the same OU (Model saved in above folders in same OU)
* All models in this the selected OU (Model saved in this OU tab Models)
* All models in above OU’s (Model saved in OU tab Models)

The following Project models will not be available:

* Models saved in the folder next to the selected folder (model saved in that Folder)
* Models saved in a folder in a OU above the selected OU (model saved in a higher OU in Folder)

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| **Permissions**  |

It is possible to hide specific parts of projects for specific roles. Using the permissions provides the opportunity that users only see the parts what they need.

These parts can be tabs (Dashboard, Properties, History, Taskboard, Product decomposition, Documents, Portfolio reports, Automated reports), planning related elements (Backlog, Gantt, Costs, Resources) Resource management (Overview, Approve Hours, Resource Allocation) and Logs (Issues, Risks, Quality Reviews, Changes, Actions, Lessons Learned, Minutes of meeting, Orders)

Configuring permissions

You can configure permissions in two ways: in the **Project Model** or in the individual **Project**.

1. Go to the tab **Permissions** in a model or a project
2. Click on edit 
3. By ticking the boxes you can hide or show tabs and logs per project role. You can change settings per role or per group of roles.
4. Click **Save** to apply the changes.

Note: You can allow the role Project Manager to edit the permissions in the project itself. To do that, in a **Project Model** on the **tab Permissions**, check the box **Allow Project Managers to override this configuration on the project**. The tab Permissions will now also appear on the project.

Note: Permissions can be set for project roles only; as an administrator the permissions do not apply.

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| **Single sheet projects**  |

Single sheet projects are ‘one page‘ projects. There is no Gantt chart and there are no logs, but you can save documents. A single sheet project at first is empty. From a portfolio you can send a report request, which will become the ‘one page’. With a single sheet it is possible to:

* Manage projects on one page
* Perform resource allocation
* Perform time writing
* Report to the portfolio

Singe sheet projects are recognisable by the  icon and are started with a Single sheet project model.

Start a ‘regular’ project from a single sheet project

A single sheet project shows the button **Start Project** with which you can apply a regular project model. Note that when there is an open report request, that button is replaced by the button **Publish to portfolio**.

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| **Creating a portfolio model**  |

Fortes Change Cloud comes with a standard portfolio model. You can create extra portfolio models in the **tab** **Models**, in the section **Portfolio Models**.

For more information on configuring a portfolio model, see:

In the portfolio model the followings things can be configured:

* Page lay-out of portfolio items (see ‘Editing page layout’)
* Report models (see ‘Creating a report model’)
* Automated reports (See ‘Working with automated reports’)
* Field configuration (See QG Custom fields)
* Financial configuration (See QG Financial grid)

The configuration of a portfolio model applies to portfolio’s based on the model. However, in a portfolio it is possible to deviate from the model configuration.

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| **Creating a report model**  |

A report model can be used to have projects report to the portfolio. Report models are part of the portfolio model and are found in the **section** **Report Models.** In that section you can create, import/export and manage report models.

Click the name of a report model to open it. A report model has the following buttons:

Click on **Page Layout** to edit the contents of the report model (see Editing page layout). Click **Model Configuration** to select whether the report model should contain a properties section and/or a financial grid.

Note that the financial grid will follow the financial configuration of the portfolio (see QG Financial Configuration) .

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| **Editing page layout**  |

Within the Portfolio, Report and Project Models it’s possible to customize the layout of pages.

* Portfolio: Portfolio-item layout
* Report: Report Layout
* Project: Tab Properties, plan-item pages and logs

Editing page layouts

Example: the project **tab** **Properties**

1. Go to the project model, **tab Properties**, click on **Layout**, the **Edit Layout**, a pop up appears.
2. Use drag-and-drop to add page sections, then add grids and or fields. You can also add grids (tables) and labels.
3. To make a field mandatory, double click the field, a pop-up appears, select ticket box **Required** 

Note: mandatory fields are marked with a ‘\*’ . Pages can only be saved when all mandatory fields have been entered.
4. Double click on a page section (outside of the dotted lines) to edit the properties of that section. Here you can also change the color of the section.
5. When you’re finished, click **Save**.

Special: use rules for the page layout of plan-items

1. Go to the project model, click on

the **tab Plan item layout**

1. You can add and rank rules for page layouts. For each rule you can define a filter for which plan-items it applies and define the page layout.



Export/import existing layouts

You can export page layouts and import them somewhere else:

1. Click on **Export Layout** and save the file
2. Click on **Import Layout** and select the file

Note that layouts can only be imported on the same object type.

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| **Editing and saving views** |

On tabs, reports and logs you can edit and save views. Under the button **View** you will find the following possibilities:

*Set Filter:* Configure filters on the view

*Set Columns:* Select the columns in the view

*Set widths:* Adjust column widths in view

*Chart Options:* Show view as graph

*Advanced:* Advanced setting (for example totals)

*Make default* Make default

*Save view:* Save view for user(s)

*Manage views:* Manage the properties of views

Click **Set Columns**

1. You can add or delete columns by means of drag and drop. The order of the columns can be edited in the same way.
2. Add a sorting and confirm by clicking **OK**.



Click **Set** **Filter**

1. You can filter the data in a view by setting one or more filters.
2. Click **Add filter**, select the filter-field and set the filter and confirm with **OK**.

Click  to export the view to the clipboard, to Word or to Excel.

Click **Save** **View**

1. Every configured view can be saved for users. Warning: unsaved views are lost!
2. Select **--new view--** or select an existing view. Enter a new name for the view.
3. Choose the type **Personal** (for personal use), **Local** (for all users on this location in the Fortes Change Cloud), or **Global** (for all users system wide), and confirm with **OK**.

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| **Working with automated reports**  |

You can generate reports/documents with Fortes Change Cloud based on templates. The available reports can be found in the **Automated** **Reports** section on the **Dashboard** tab and on the **Reports** tab.

1. Click the name of the desired report.
2. **Warning**: Excel reports should always be saved before opening.
3. Allow macro’s (in order for the report to fill with data).

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| **Creating templates for automated reports** |

See the QG Reporting.

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| **Widgets** |

Widgets can be used to visualize data. Examples of widgets are pie charts or bubble charts. Different widgets exist on different levels in different modules throughout Fortes Change Cloud. To configure widgets, go to **Edit widgets**. Here, you can select the number and type of widget(s). Next, you can **Configure** the widget itself. This is different for each type of widget. You can use the filter to apply additional filter options.

Widgets can be configured by administrators. You can allow users with the role **Manager** and **Coordinator** to configure widgets (under **Setup** > **Configuration**).

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| **Custom fields** |

Custom fields can be used to register specific data that does not fit in the (regular) system fields. These fields can be used in dashboards, views and reports.

See the QG Custom fields for more information on:

* Creating custom fields
* Custom field properties
* Behaviour of custom fields
* Use of custom fields

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| **Last login date of users** |

To see the last ‘login date’ of a user:

1. Go to **Setup, User administration**
2. Go to **View** and click **Set columns**
3. Select the column **Last login date**

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| **Help** |

Under the help button you can find the user manual, an overview of shortcuts, and a link to the Fortes Support Portal. Note that you can only log in to the support portal from your production environment.



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