



# **Getting Started with Projectory Version 1.0**

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This document serves as an introduction to Projectory, walking you through the initial configuration and use of the software.

One word of caution: you can never delete entities from Projectory, you can only make them inactive. Before you start using Projectory in your development organization, it is recommended that you either set the project, team, and users you will create in this tutorial to Inactive status, or better yet, recreate the Projectory database as described in the installation documents.

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## 1. Logging In to Projectory

Point your browser to the server on which you installed Projectory, and log in with these credentials:

- User name: Projectory Admin
- Password: reptiles

Click on "Log In". You should see a customized task pad, showing all options that are available to you as an administrator.

The first thing you should do is change the administrator password. Click on "Update Your Account" under the "User Management" header. Enter your new password twice, then click "Save". You will be taken to a confirmation page that provides additional information about the administrator account. Click "OK" to return to the task pad.

## 2. User Groups

Each user account is associated with one or more user groups, with access to functionality that's appropriate for that group. You define the groups and the associated functionality through the Projectory web interface. This gives you the ability to mirror your organizational structure and roles within Projectory itself. If your development team consists of developers, team leads, and project managers, you can define each of these as a group and decide exactly what functionality you want each group to have access to.

By default, there are several different types of users in Projectory. These are:

- Administrators
- Developers
- Leads
- Managers

If these user types don't match your particular environment, don't worry. You will learn how to customize them later.

### 3. Create Sample Users

Next we will create an account for a team lead. Click on "Create a User Account" under "User Management." Enter a first and last name and set a password for the account. Click "Save" when you're done.

On the confirmation page, you will see all of the account details for the new user. Note that the User Groups and Teams fields are both blank for now. By default, new users do not belong to any user groups or teams. Click "OK" to return to the task pad.

To give the new user team lead privileges, we need to add him to the Leads user group. Click on "Edit a User Group" under "User Management" and select "Leads" from the drop-down list. Click "Continue" to move to the next page.

You can see the Leads group's name, description, status, and owner. Below this metadata are two selection panes. The one on the left (Members) is empty, and on the right are the names of all Projectory users.

To make our new user a Lead, select his name from the right-hand pane and click the "<" button to move him into the member list. Click "Save" and you'll see the User Group Details page, which confirms any changes to the user group metadata, user group members, and group privileges. Click "OK" to return to the task pad.

Now create two more users, and repeat the steps above. Add one of the users to the Developers user group, and the other to the Managers user group.

### 4. Go to the Head of the Team

To give you an understanding of how a user with Lead responsibilities will use the system, log in using the name and password of the Team Lead user that you created earlier. Click on "Log Out" under the Projectory logo, then select "Log In" on the task pad. Enter the full name and password and click "Log In."

The taskpad has a lot fewer options now. This is because a Lead has fewer privileges than an Administrator in Projectory, and users only see options that are available to them.

Click on "Create a Team" under team management. All developers and leads should be assigned to one or more teams. Teams can be permanent or ad-hoc, and can be set to active or inactive. Membership in a team determines which projects users have access to.

Use the form to create a sample team. Call it Intranet Applications and give it a short description. Notice that by default, the name of the user creating the team is assigned to Team Lead. Add the Developer user you created earlier to the team, then click "Save". On the confirmation page, click "OK."

## 5. Create a Project

Now we need to add a project. Projects are the containers for all of the work that is tracked in Projectory. Projects have one or more associated activities (e.g. Analysis, Documentation, or Development) and are associated with one or more teams. Members of teams have access to all projects associated with teams that they belong to.

On the task pad, select "Create a Project" under the "Project Mangement" header. Add a name and description to the project.

Under the standard metadata, you can see activities that can be associated with the project. Activities are high-level categories that define the sort of work that is associated with projects. Since activities are defined outside of projects, and should be applicable across multiple projects, these are not necessarily the line items that you would find on a project plan. Activities are best understood as descriptions of general classes of work.

Select a few activities that seem appropriate for the project, and then scroll down to add the Intranet Applications team to the project. Click "Save" to move to the confirmation page, then "OK" to return to the task pad.

## 6. The Developer View

Log out again, and this time log in as the Developer user that you created earlier. Once again, the task pad looks different, as it is customized to only display those functions that Developers have access to.

Developers use Projectory to track the development effort that they apply to their projects. This information is created using a Work Entry. Click on "Create a Work Entry" under the "Work Entries" heading.

The Work Entry page defaults to the current day, and lists all projects and associated tasks that the particular developer has access to. Enter some hours and, optionally, comments next to the activities listed under the project you created earlier. Click "Done" to continue, and "OK" on the confirmation page to return to the task pad.

## 7. The Manager View

Now that there is some actual project data stored, log in to the Manager account you created earlier. Managers can view a variety of reports on the projects and associated effort tracked in Projectory. Select any of the reports under the "Reporting" heading to explore what's available.

## 8. Customizing User Groups

If the standard Developer, Lead, Manager, and Administrator user groups don't accurately reflect the make up of your development organization, you can easily create your own user groups. Log in as Projectory Admin, and select "Create a User Group" under "User Management."

Give the new user group a name and a description, and add whatever users you want to its member list. Click "Save", review the confirmation page, and click "OK."

This new user group has no privileges set, so next we need to modify Projectory functions. On the task pad, click on "Edit a Function" under "Function Management." From the drop-down list, select a function that you would like to appear on the task pad for all members of the new user group, then click "Continue."

Don't edit any of the metadata for the function, but take a look at the Permissions section. Select a user group from the list to see the privileges the group has (Allow Access, Forbid Access, or Unspecified). Select the user group that you just created and click on the Allow Access radio button. Click "Save" to move to the confirmation page, and check the table to make sure that the permissions are the way you intended them to be. If not, click "Edit Function" to return to the edit view.

Repeat this process for each function that you want the new user group to be able to perform. If you're ever in doubt about which user groups can access which functions, just use "Audit Permissions" under the "Other Tasks" header when logged in as Projectory Admin.

## 9. That's It!

You should now know enough to get started using Projectory. For tips on configuring users, groups, teams, and projects, please see "Tips on Using Projectory".