PMPeople™

People Collaborating on Project Management

2.1. USE CASES FOR PEOPLE

2.1.4. FEEDBACK

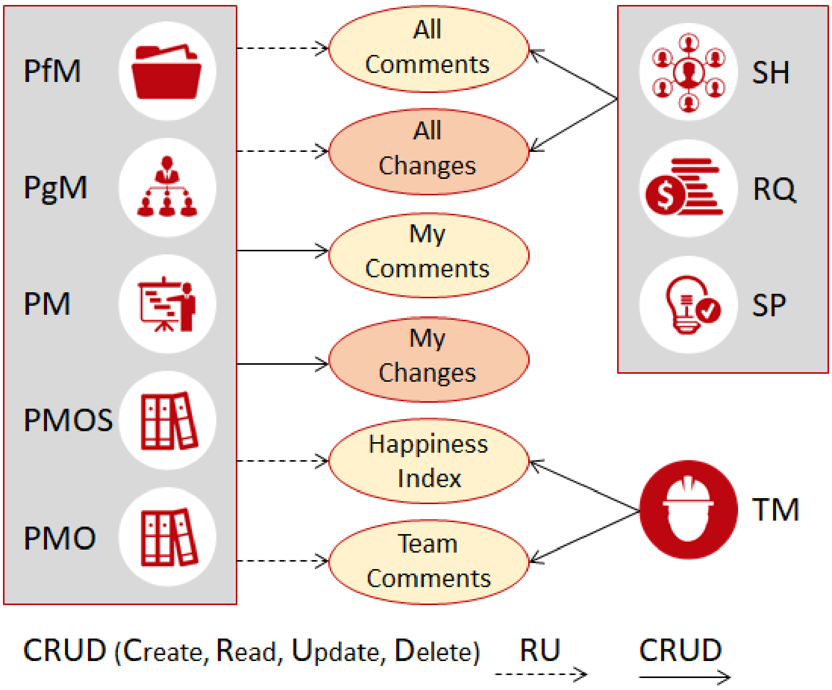
2.1. USE CASES FOR PEOPLE

2.1.4. FEEDBACK WITH PMPEOPLE

Project success depends more and more on the **effective communications of people** collaborating on them. Long time ago, the Sponsor directed Project Manager on what to do. PM produced documents, commanded, and controlled Team Members' daily tasks, and reported timely to Sponsor in the periodic project review. Today's projects are not managed that way anymore.

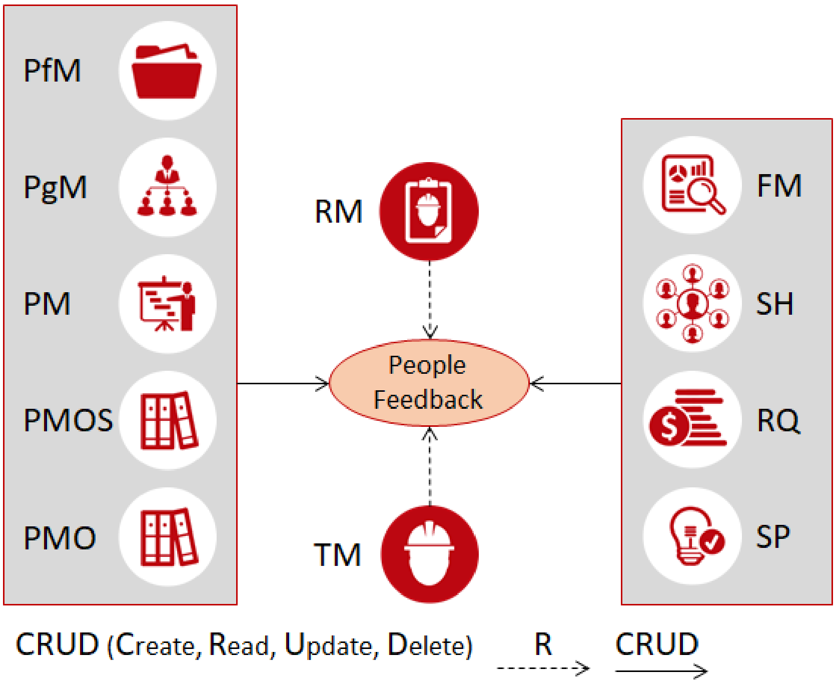
In this hyper connected society, we live on, with the project economy on the rise, many **Stakeholders** need to be engaged beyond review meetings. **Team members**, many of them working in virtual teams, are expected to comment proactively on problems, alternatives, workarounds, conflicts, needs, etc. **Project Managers** are not good professionals if they just follow orders. They need to be proactive to manage risks, model requirements, be on time, on cost, maximize value, etc. Project Managers are not alone in management. We need **project management teams**, instead. Communication technology enhances distribute collaboration and **continuous feedback on people, projects, programs, and portfolios**.

PMPeople implements feedback on different ways. First, people can provide **comments and change requests**:

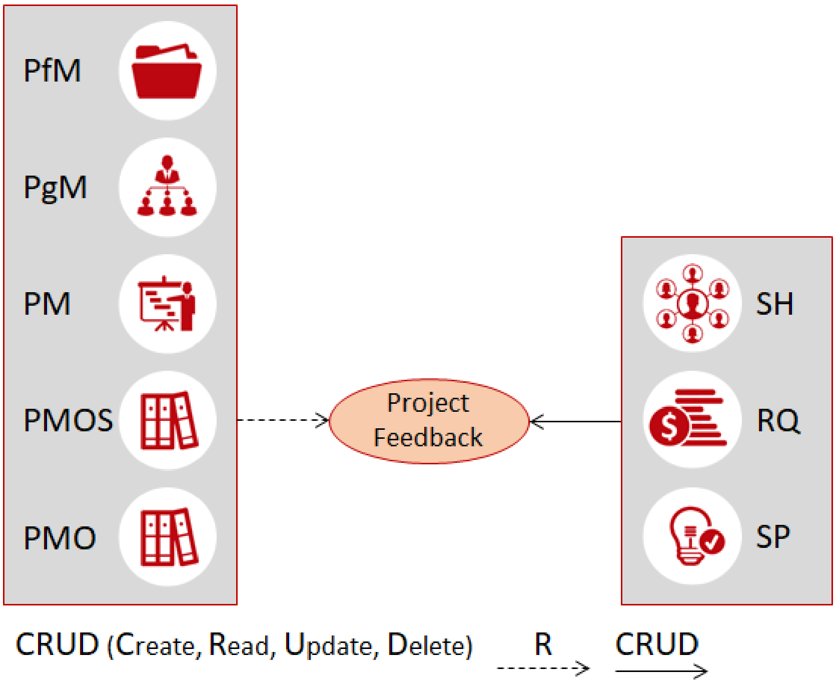


- **Changes**: Stakeholders, Requesters and Sponsors can request changes and get informed. Project Managers or equivalent managers can manage these change requests and create new ones.
- **Comments**: Stakeholders, Requesters, Sponsors, and Team Members can pass a comment, anonymously if they prefer so, and get informed if some manager has read it. Managers can mark comments as read, and also, they can create new ones.
- One special kind of comment: Team members can record anonymously their **happiness index** to facilitate agile retrospectives.

PMPeople enhances feedback on **people and project performance**:



Feedback on Team Members can be provided by any user with access to the project. Feedback data includes a section aimed to the Team Member. Other section, with confidential information, is only accessible to Resource Managers.



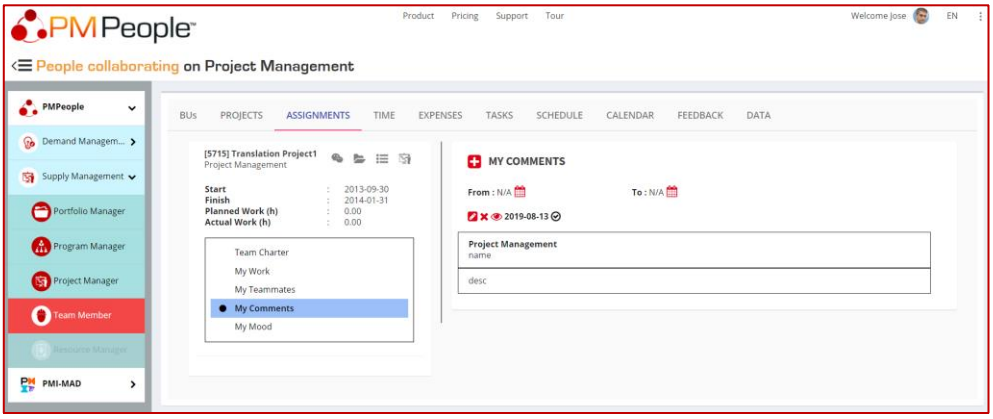
Project Stakeholders, Requesters and Sponsors can provide **feedback on projects**.

Following a third feedback loop, PMPeople can send **email notifications** automatically when some project management events are triggered, when the PM wants to notify changes on assignments, and also when tasks are due.

PMPeople does not replace direct feedback between people, but it can help project management with the use cases explained below.

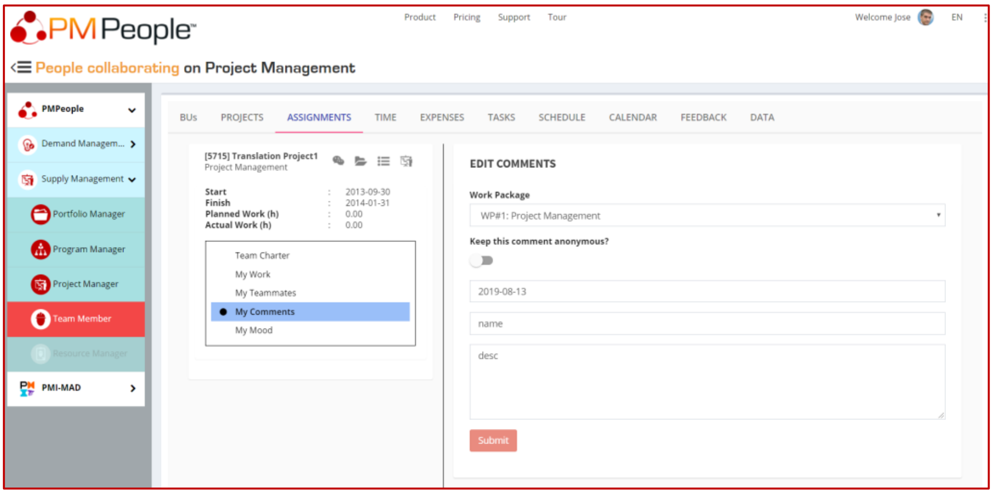
2.1.4.1. AS A TM, I CAN PASS ON PROJECT COMMENTS

Project Team Members (TM) can pass on comments to the Project Manager (PM). They can add, edit, and review comments on project work packages, or the project itself, at **ASSIGNMENTS > My Comments**:



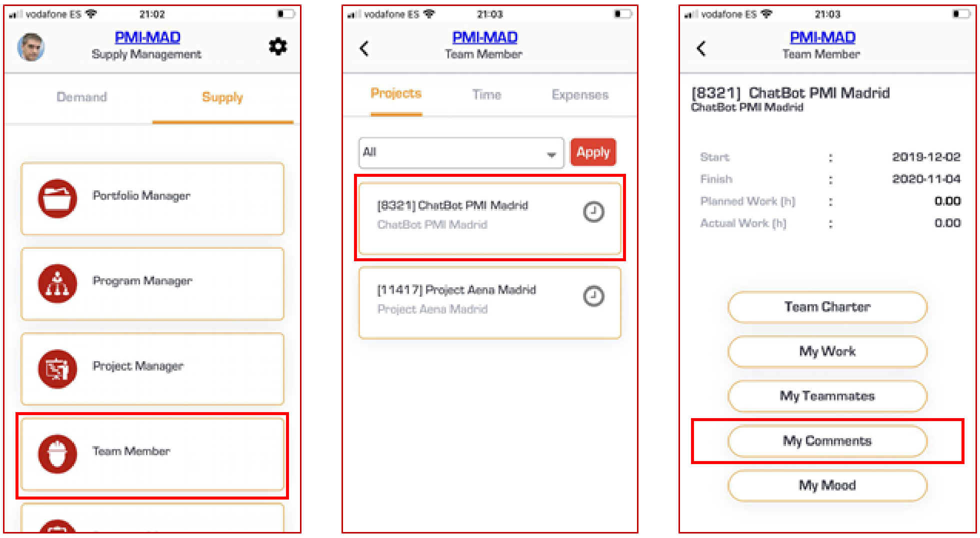
- New comments can be added by clicking "plus" icon [ ]. Existing comments can be filtered by dates.
- Comments are displayed with a "checked green" icon [ ] when Project Manager, or PMOS, PMO, PfM, PgM, marks the comment as read. Otherwise, comments are displayed with a "checked black" icon [ ]
- Each comment is shown with a title, a description, and a comment date as entered by author.
- Comments can be submitted anonymously, which is indicated with a "closed eye" icon [ ] or displaying the author name, which is indicated with a "open eye" icon [ ].
- Comments can be deleted with the "cross" icon [X] and edited with the "pencil" icon [ ].

Team members can move a comment from one work package to another of theirs:

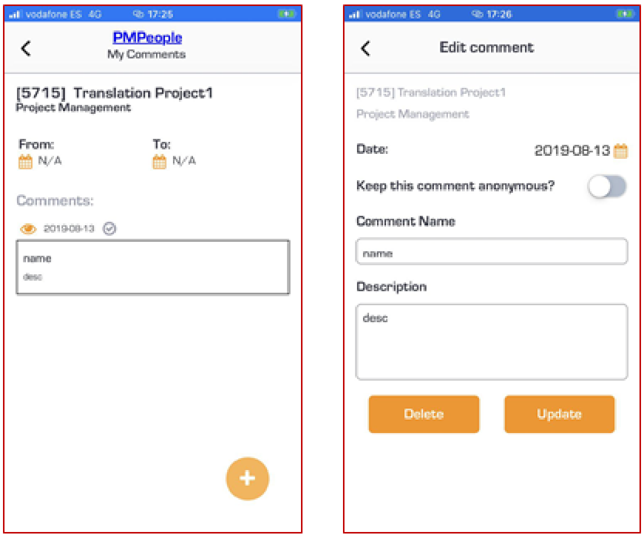


Once the Project Manager has read the comment, it cannot be edited.

Team Members (TM) can also pass on comments to the PM with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Team Member**, then the project and concrete work package (filter assignments if the list is too long) and finally, hit the menu option **My Comments**:

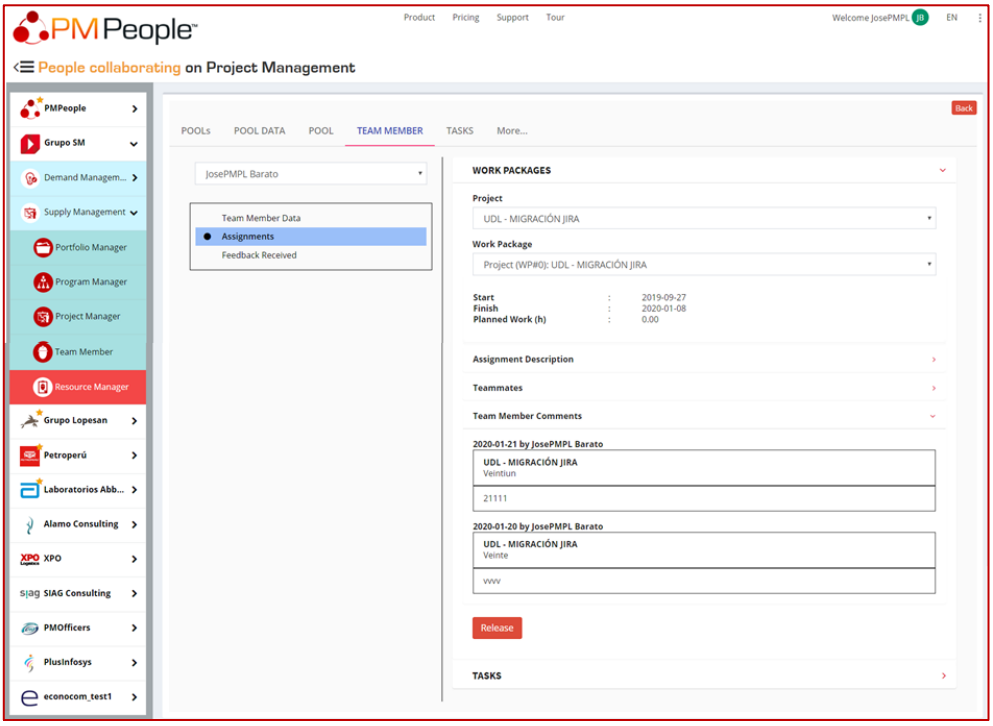


Team members can see and edit their comments on project assignments:



2.1.4.2. AS A RM, I CAN REVIEW COMMENTS FROM TMS

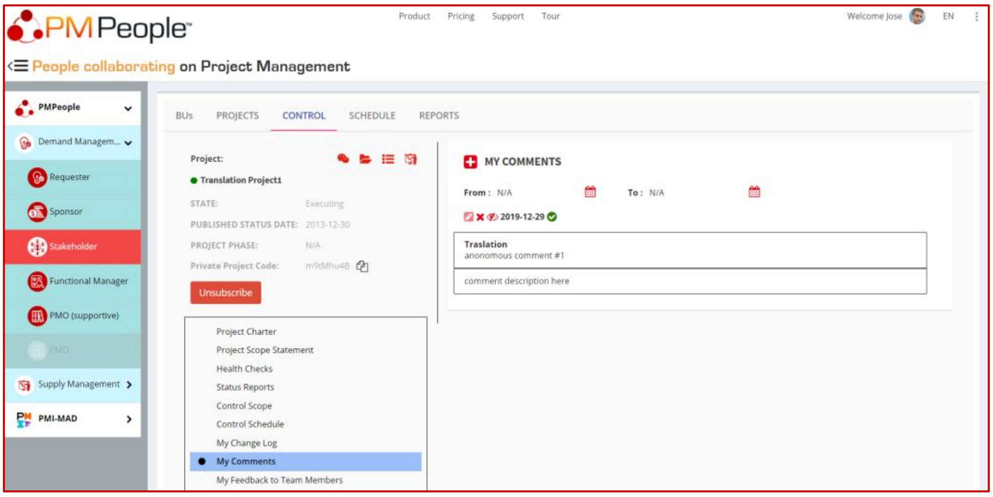
Resource Manager (RM) can review comments of Team Members (TM) belonging to their resource pools, provided that they are not anonymous, at **TEAM MEMBER > Assignments > Team Member Comments**:



To read comments, they need to select the resource pool, the concrete person, his or her assignment (project/package).

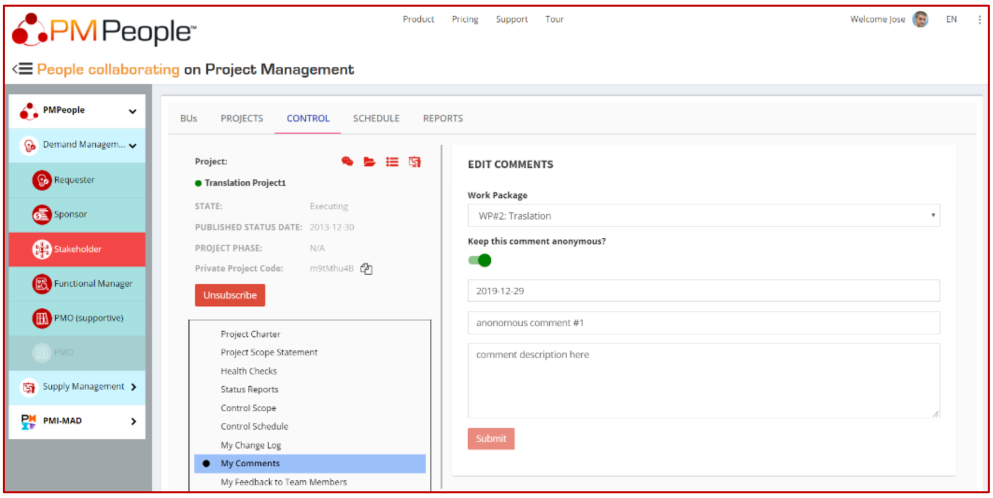
2.1.4.3. AS A SH, I CAN PASS ON PROJECT COMMENTS

Project Stakeholders (SH) can pass on comments to the Project Manager (PM) at **CONTROL > My Comments**:



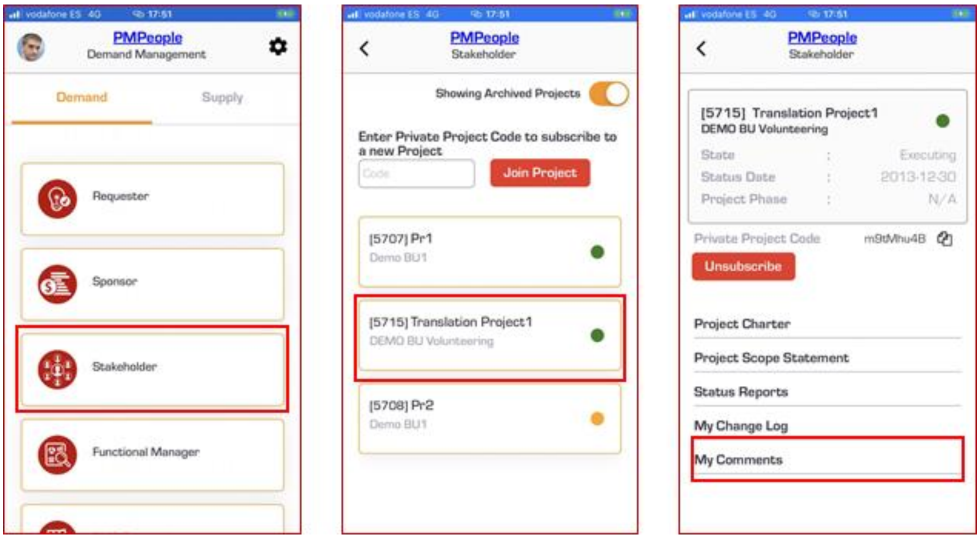
- New comments can be added by clicking “plus” icon [+]. Existing comments can be filtered by dates.
- Comments are displayed with a “checked green” icon [ ] when Project Manager, or PMOS, PMO, PfM, PgM, marks the comment as read. Otherwise, comments are displayed with a “checked black” icon [ ]
- Each comment is shown with a title, a description, and a comment date as entered by author.
- Comments can be submitted anonymously, which is indicated with a “closed eye” icon [ ] or displaying the author name, which is indicated with a “open eye” icon [ ].
- Comments can be deleted with the “cross” icon [X] and edited with the “pencil” icon [ ].

Stakeholders can move a comment from one work package to another:

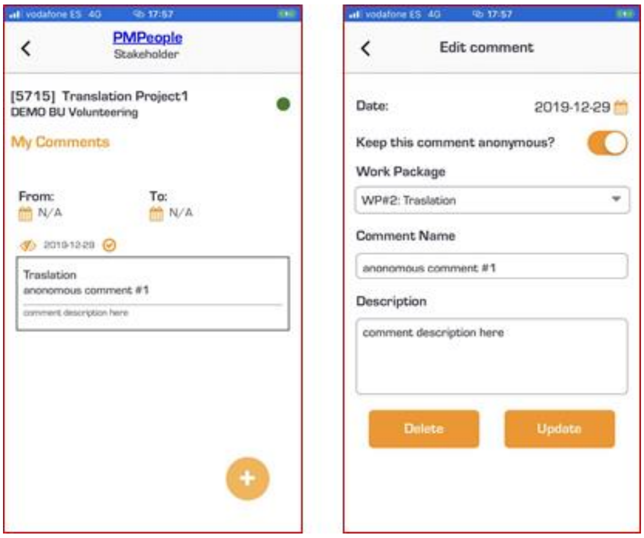


Once the PM has read the comment, it cannot be edited.

Stakeholders (SH) can also pass on comments to the PM with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Stakeholder**, then the concrete project and finally, hit the menu option **My Comments**:

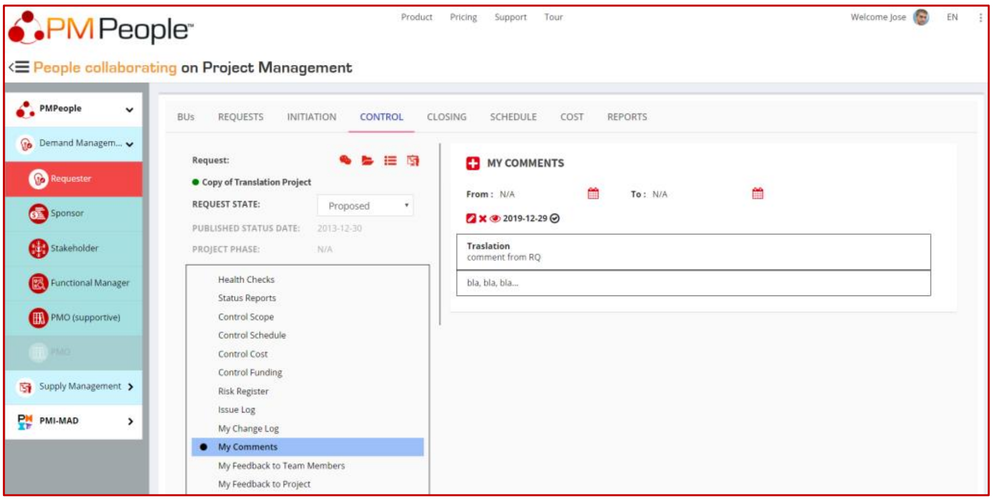


Project Stakeholders can see and edit their comments on projects:



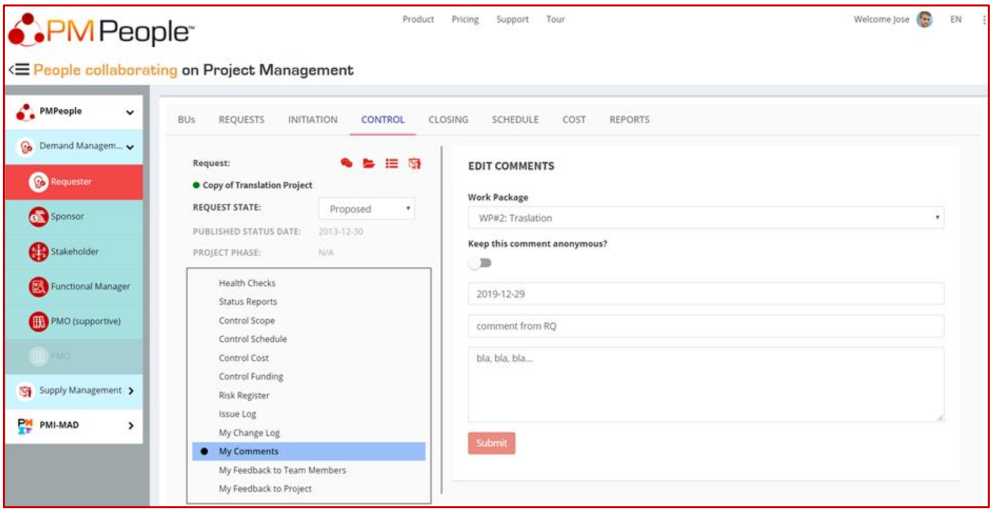
2.1.4.4. AS A RQ, I CAN PASS ON PROJECT COMMENTS

Project Requesters (RQ) can pass on comments to the PM at **CONTROL > My Comments**:



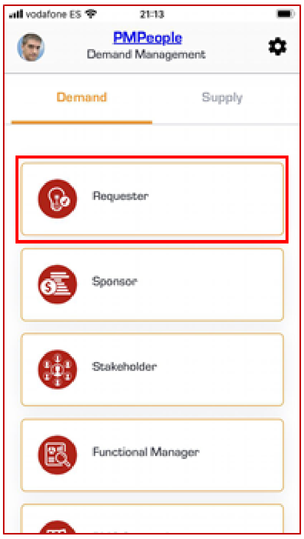
- New comments can be added by clicking “plus” icon [+]. Existing comments can be filtered by dates.
- Comments are displayed with a “checked green” icon [ ] when Project Manager, or PMOS, PMO, PfM, PgM, marks the comment as read. Otherwise, comments are displayed with a “checked black” icon [ ]
- Each comment is shown with a title, a description, and a comment date as entered by author.
- Comments can be submitted anonymously, which is indicated with a “closed eye” icon [ ] or displaying the author name, which is indicated with a “open eye” icon [ ].
- Comments can be deleted with the “cross” icon [X] and edited with the “pencil” icon [ ].

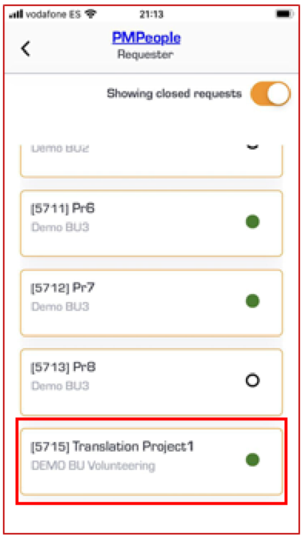
Requesters can move a comment from one work package to another:

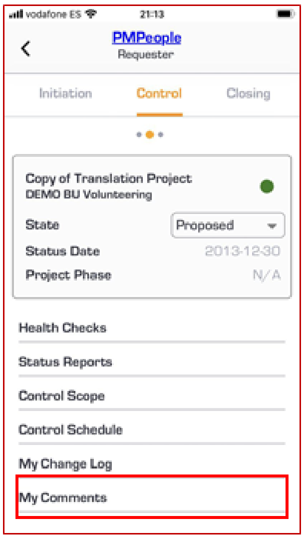


Once the Project Manager has read the comment, it cannot be edited.

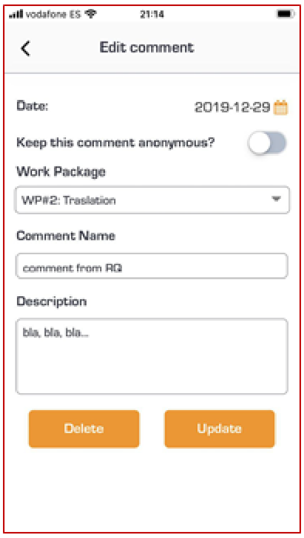
Requesters (RQ) can also pass on comments to the PM with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Requester**, then the concrete project and finally, hit the menu option **My Comments**:





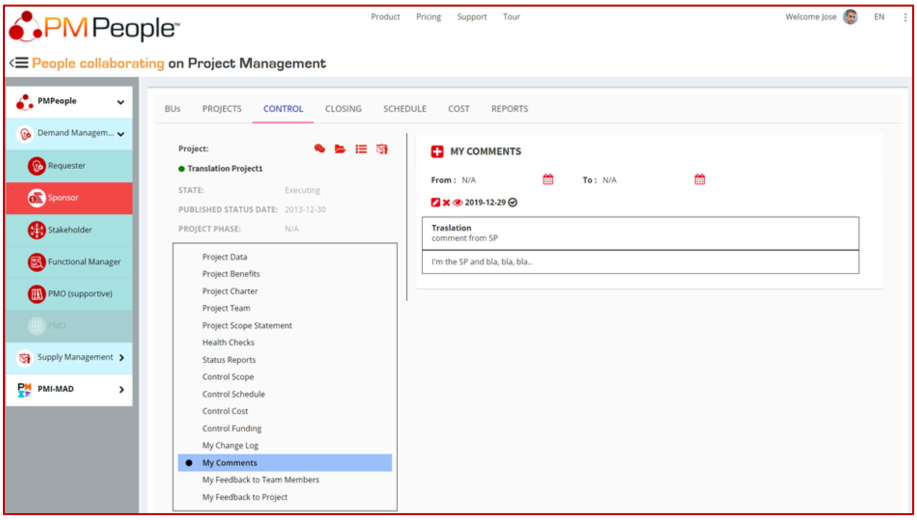


Project Requesters can see and edit their comments on projects:



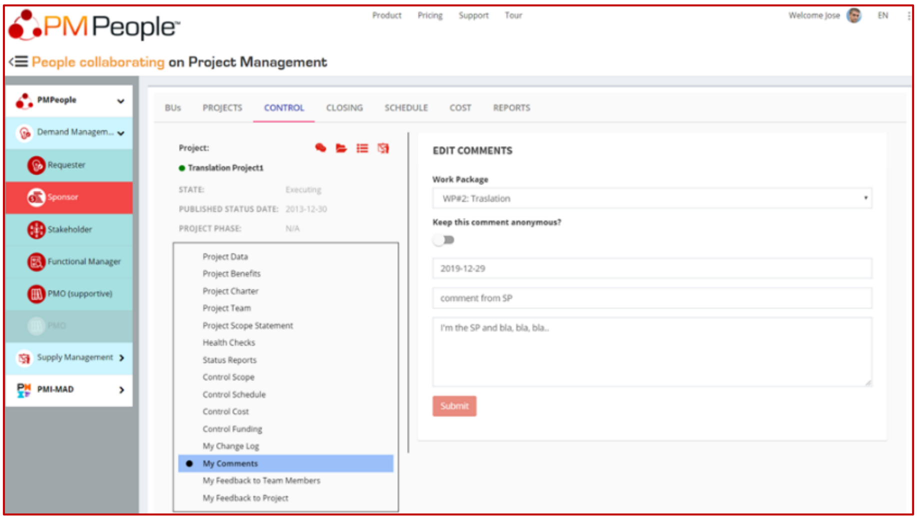
2.1.4.5. AS A SP, I CAN PASS ON PROJECT COMMENTS

Project Sponsors (SP) can pass on comments to the PM at **CONTROL > My Comments**:



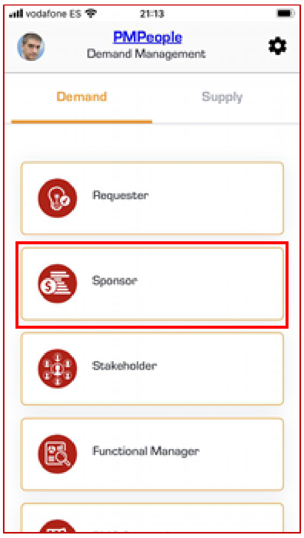
- New comments can be added by clicking “plus” icon [ ]. Existing comments can be filtered by dates.
- Comments are displayed with a “checked green” icon [ ] when Project Manager, or PMOS, PMO, PfM, PgM, marks the comment as read. Otherwise, comments are displayed with a “checked black” icon [ ]
- Each comment is shown with a title, a description, and a comment date as entered by author.
- Comments can be submitted anonymously, which is indicated with a “closed eye” icon [ ] or displaying the author name, which is indicated with a “open eye” icon [ ].
- Comments can be deleted with the “cross” icon [X] and edited with the “pencil” icon [ ].

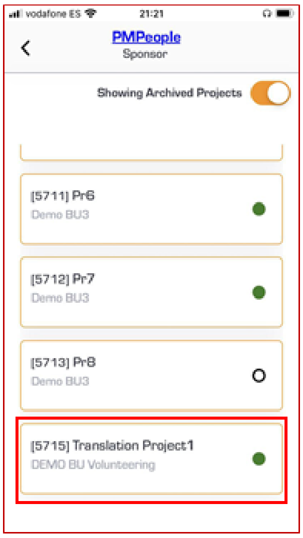
Sponsors can move a comment from one work package to another:

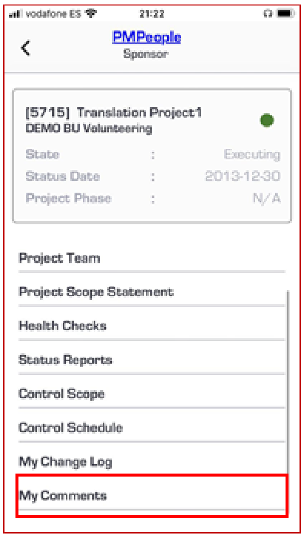


Once the Project Manager has read the comment, it cannot be edited.

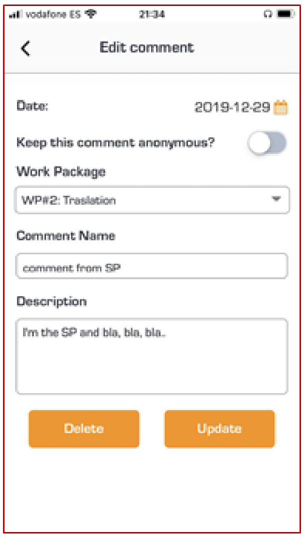
Sponsors (SP) can also pass on comments to the PM with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Sponsor**, then the concrete project and finally, hit the menu option **My Comments**:





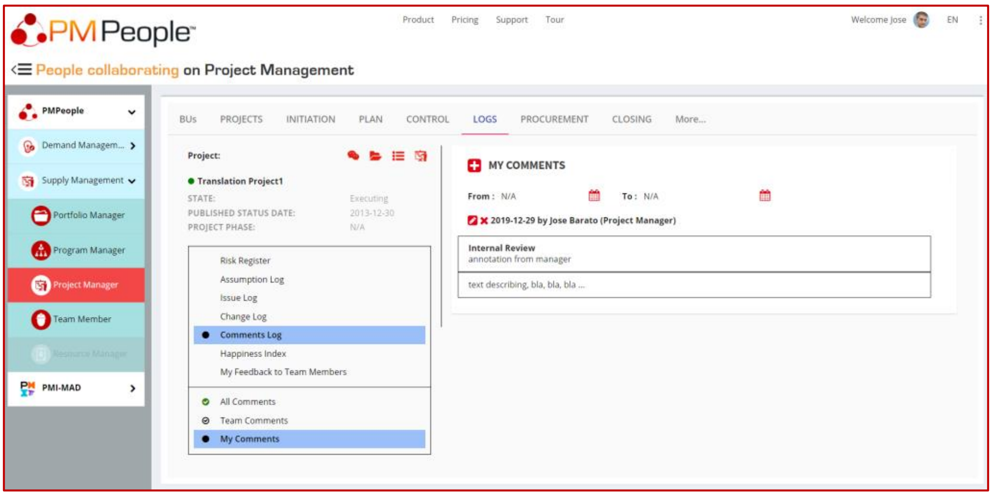


Sponsors can see and edit their comments on projects:



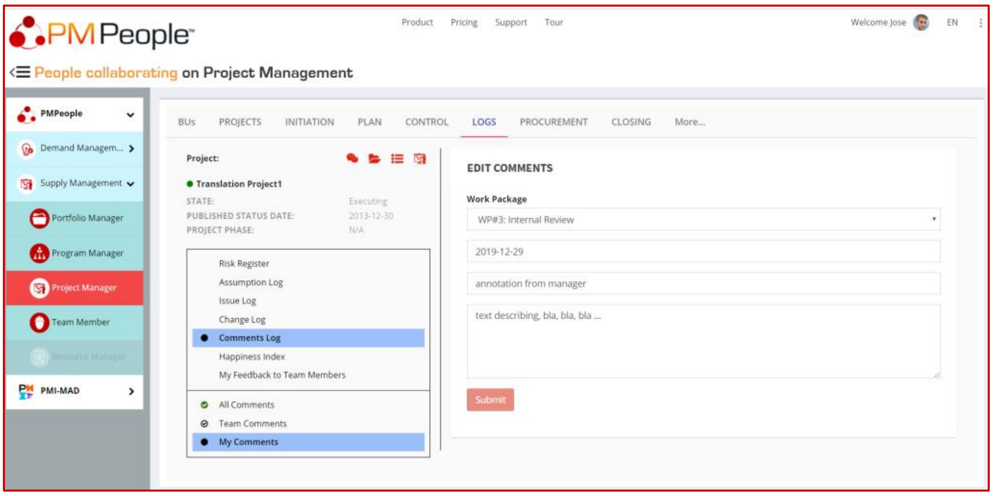
2.1.4.6. AS A PM, I CAN REGISTER PROJECT COMMENTS

Project Managers (PM), or other managers PMOS, PMO, PfM, PgM, can register their own comments, at **LOGS > Comments Log > My Comments**:



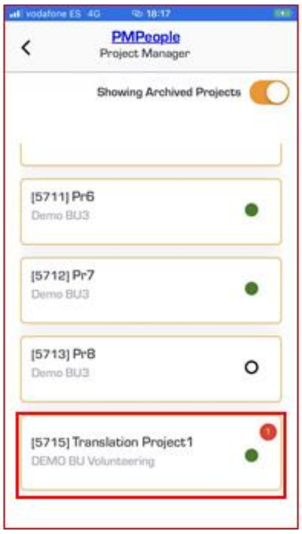
- New comments can be added by clicking "plus" icon [+]. Existing comments can be filtered by dates.
- Each comment is shown with a title, a description, and a comment date as entered by author.
- Comments can be deleted with the "cross" icon [X] and edited with the "pencil" icon [].

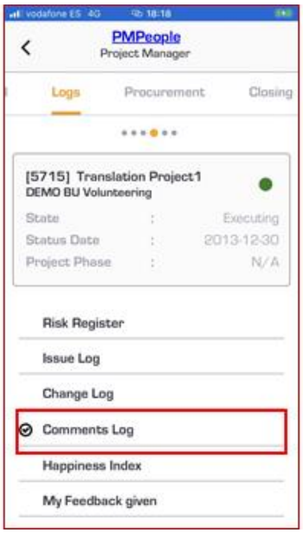
PMs can move a comment from one work package to another:

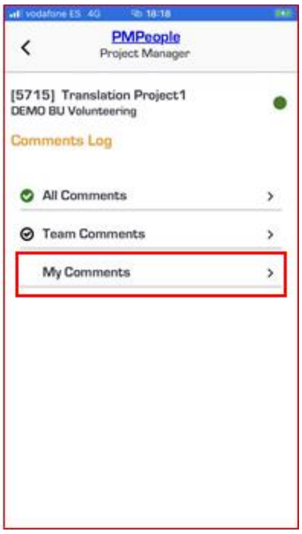


Once the Project Manager has marker the comment as "read", it cannot be edited.

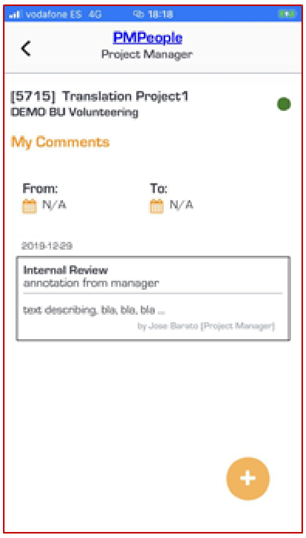
Managers can also register their comments to the with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Project Manager**, then the concrete project and finally, hit the menu option **Logs > Comments Log > My Comments**:

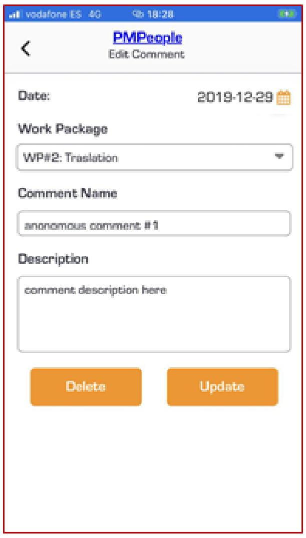






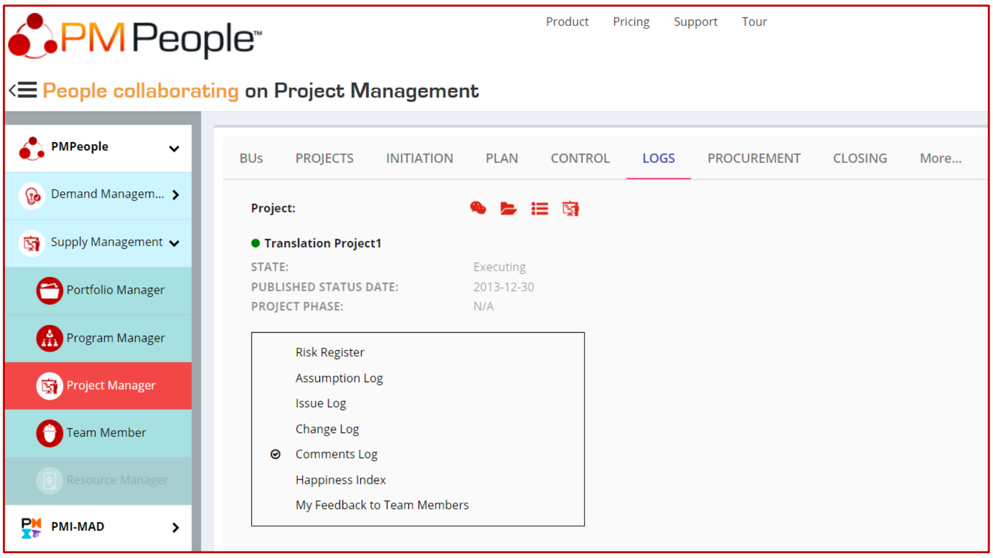
Managers can see and edit their comments on projects:



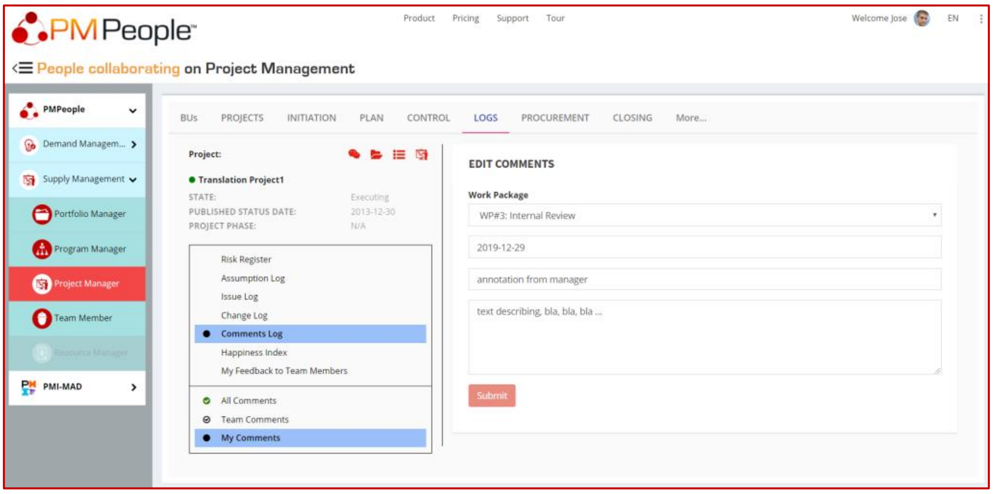


2.1.4.7. AS A PM, I CAN MANAGE PROJECT COMMENTS

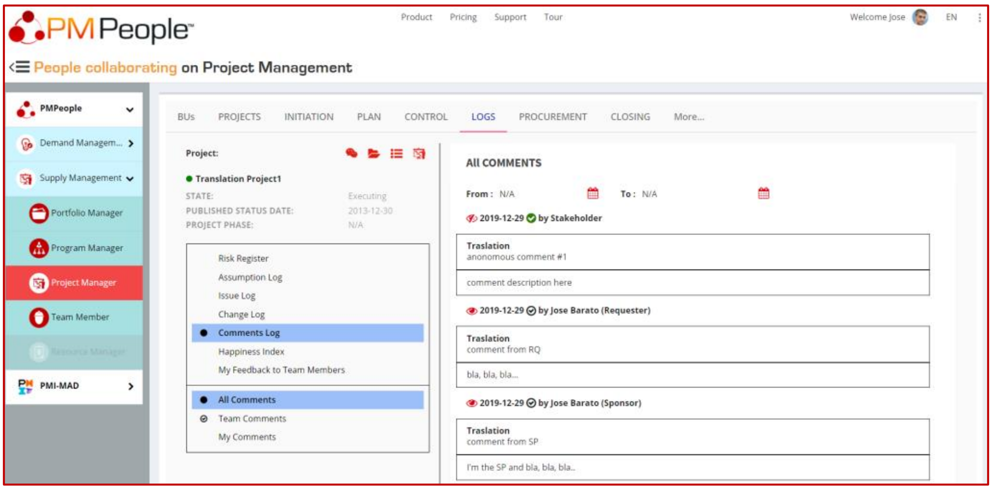
Project Managers (PM), or other managers PMOS, PMO, PfM, PgM, can manage project comments, at **LOGS > Comments Log**:



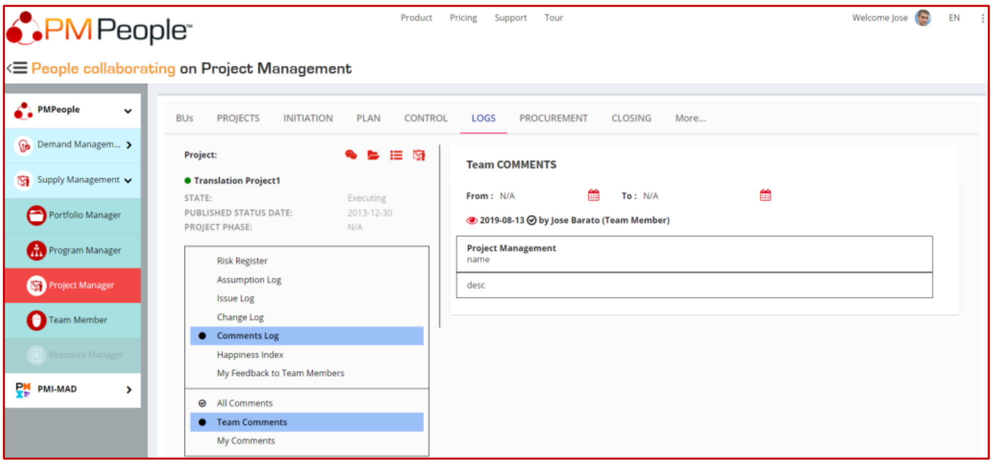
- If a "checked black" icon [⊘] is displayed, that means that some comment is pending to read. If all comments are marked as read, then a "checked green" icon [⊘] is displayed.
- Entering option [**Comments Log]**, Stakeholders, Requester and Sponsor comments can be managed at option (**All Comments**); Team Member comments can be managed at option (**Team Comments**).



Entering option [**All Comments**], the manager can read comments from Stakeholders, Requester, and Sponsor:



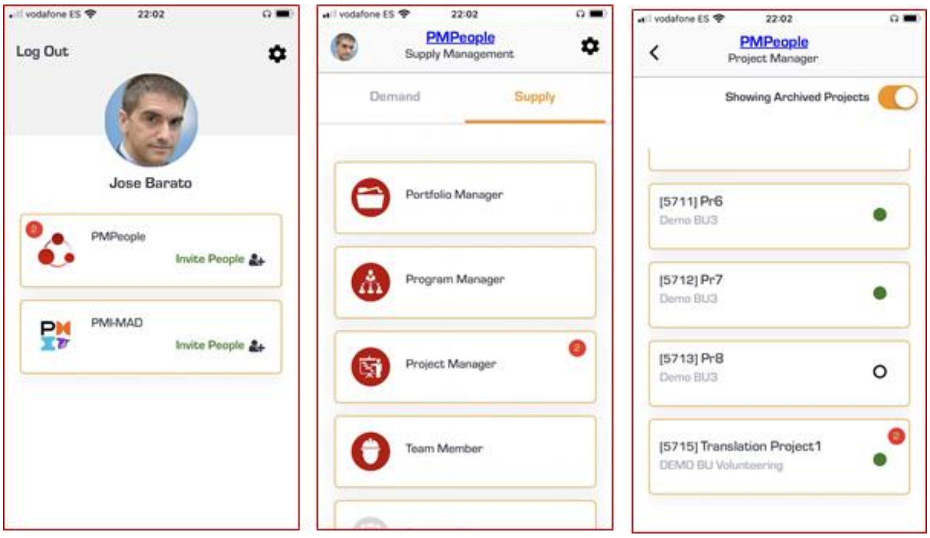
Entering option [**Team Comments**], the manager can read comments from the project team:



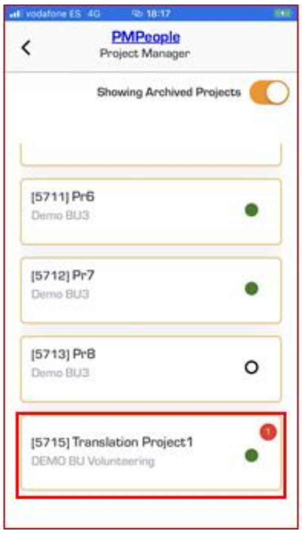
In both cases, the manager can process comments, marking them as read or not. Clicking a “checked black” icon [ ] turn it to green [ ], and vice versa.

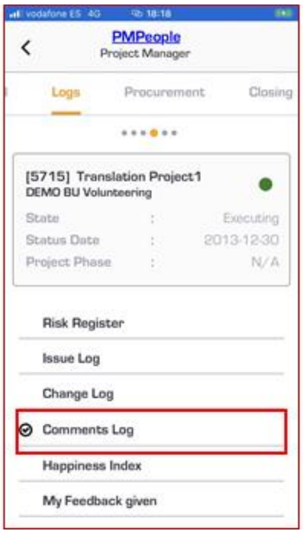
Mobile application can notify the number of comments pending to read:

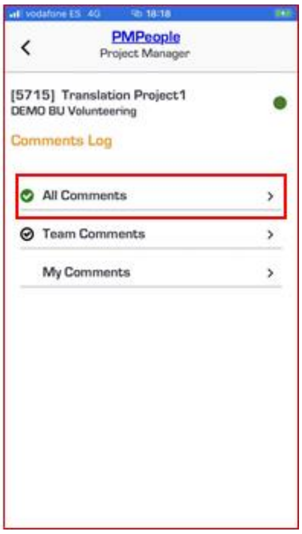
Inside the application, a number is displayed with the pending comments at each organization and each project:



Managers can process comments with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Project Manager**, then the concrete project and finally, hit the menu option **Logs > Comments Log > My Comments > All Comments or Team Comments**:





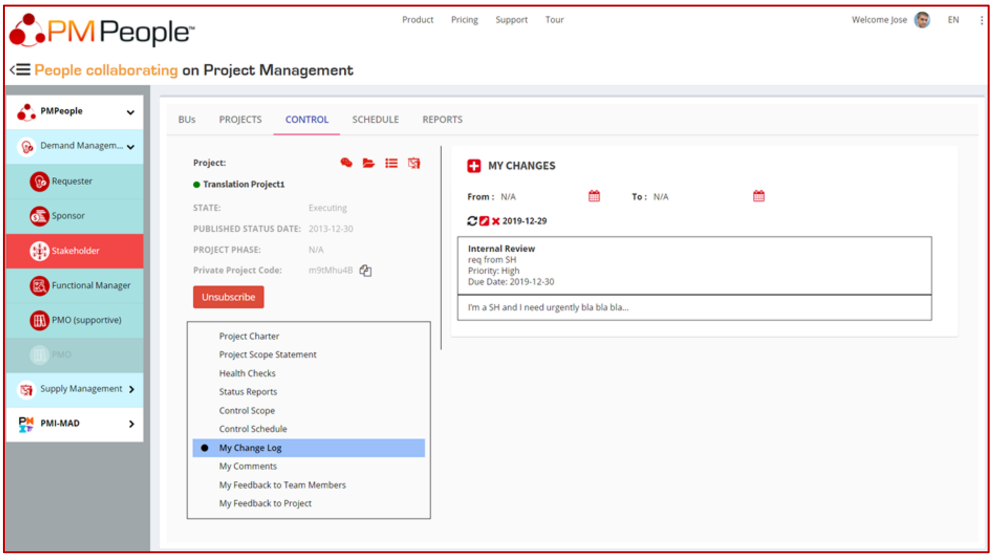


Managers can process comments on projects:

Manager can process comments, marking them as read or not. Clicking a “checked black” icon [ ] turn it to “checked green” [ ], and vice versa.

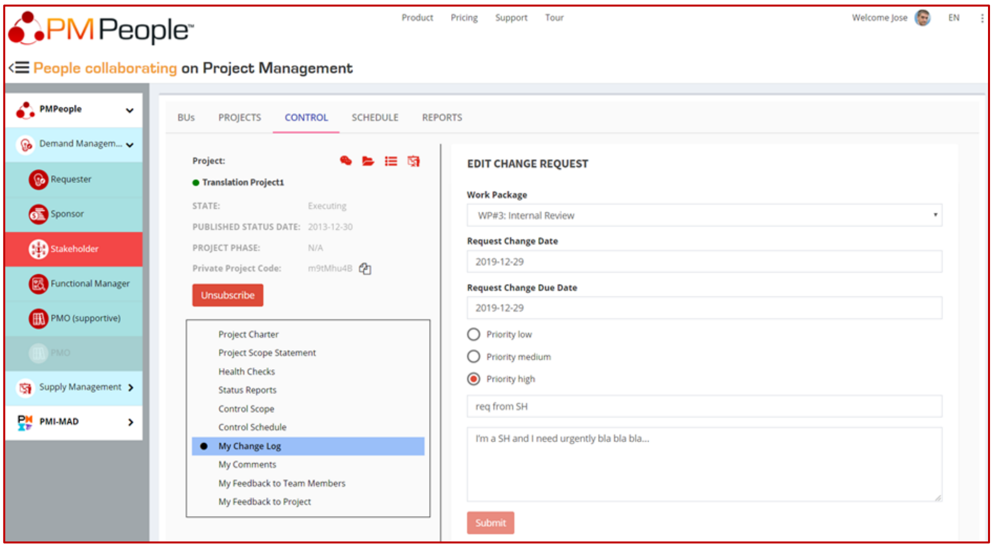
2.1.4.8. AS A SH, I CAN REQUEST PROJECT CHANGES

Project Stakeholders (SH) can request changes at **CONTROL > My Change Log**:



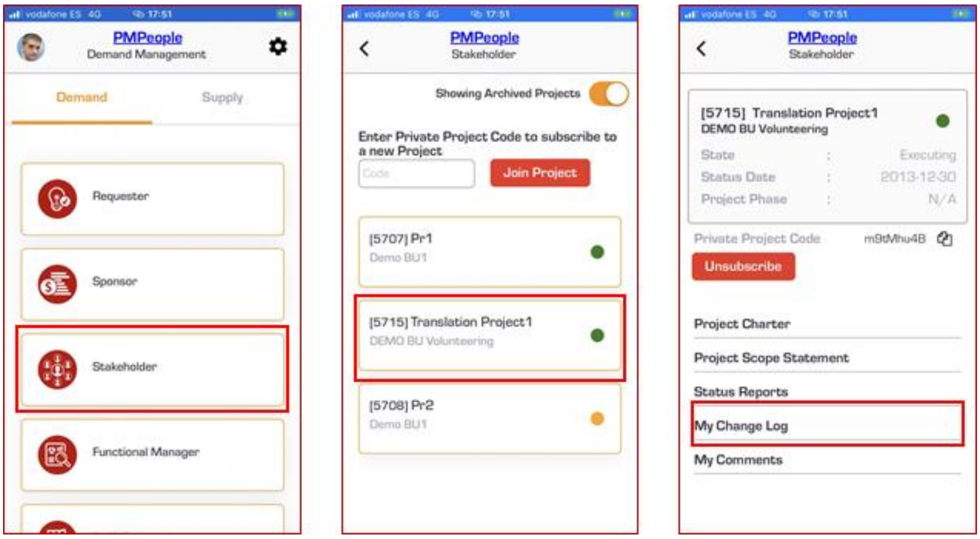
- New change requests can be added by clicking "plus" icon [+]. Existing change requests can be filtered by dates.
- Change requests are displayed with the "in progress" icon [ ] when Project Manager, or PMOS, PMO, PfM, PgM, has not processed it yet. Approved change requests are marked with the checked icon [✔]. Rejected change requests are marked with the "cross" icon [✖].
- Each change request is shown with a title, a description, a priority, and a request date as entered by author. Due date can also be annotated, if necessary.
- Change request can be deleted with the "cross" icon [X] and edited with the "pencil" icon [ ].

Stakeholders can move a change request from one work package to another:

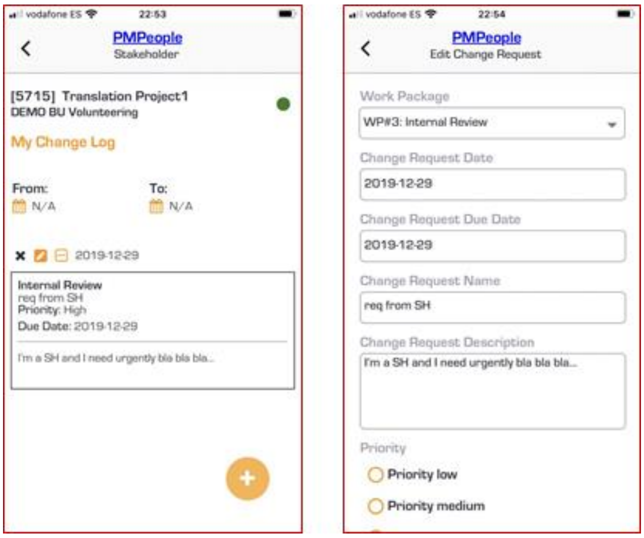


Once the Project Manager has approved the change request, it cannot be edited.

Stakeholders (SH) can also request changes with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Stakeholder**, then the concrete project and finally, hit the menu option **My Change Log**:

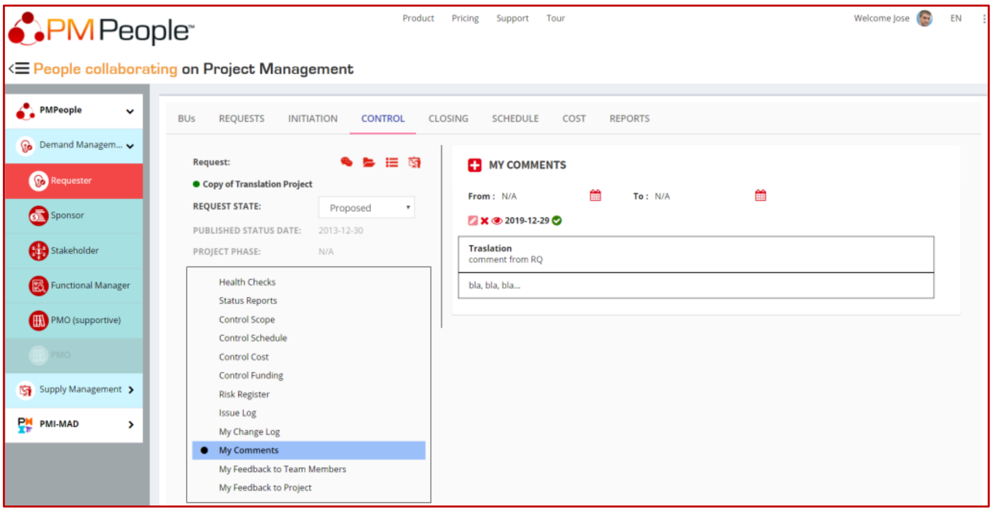


Project Stakeholders can see and edit their change requests on projects:



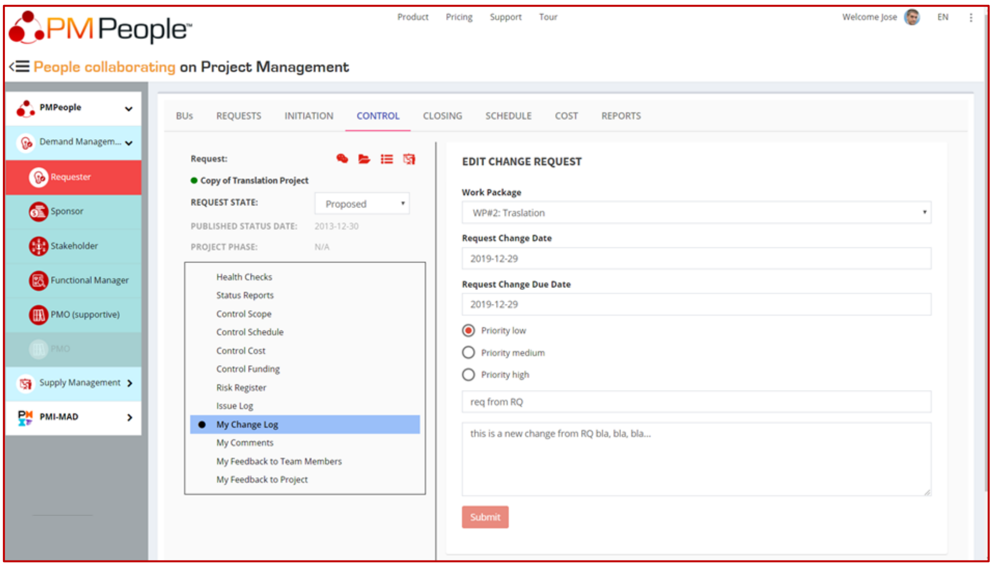
2.1.4.9. AS A RQ, I CAN REQUEST PROJECT CHANGES

Requesters (RQ) can request changes at **CONTROL > My Change Log**:



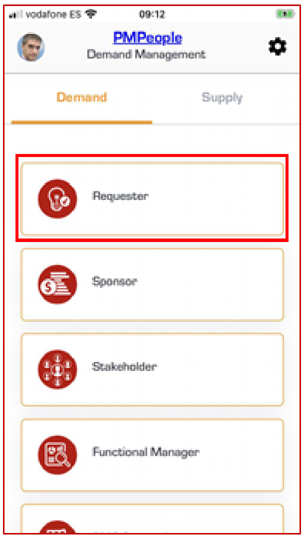
- New change requests can be added by clicking "plus" icon [ ]. Existing change requests can be filtered by dates.
- Change requests are displayed with the "in progress" icon [ ] when Project Manager, or PMOS, PMO, PfM, PgM, has not processed it yet. Approved change requests are marked with the checked icon [ ]. Rejected change requests are marked with the "cross" icon [ ].
- Each change request is shown with a title, a description, a priority, and a request date as entered by author. Due date can also be annotated, if necessary.
- Change request can be deleted with the "cross" icon [X] and edited with the "pencil" icon [ ].

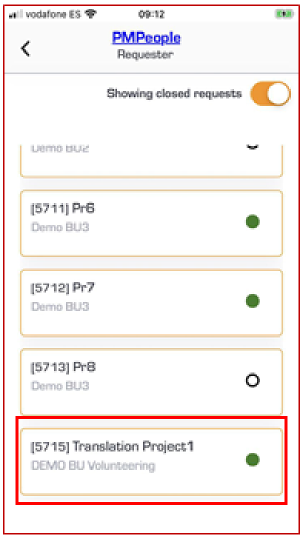
Requesters can move a change request from one work package to another:

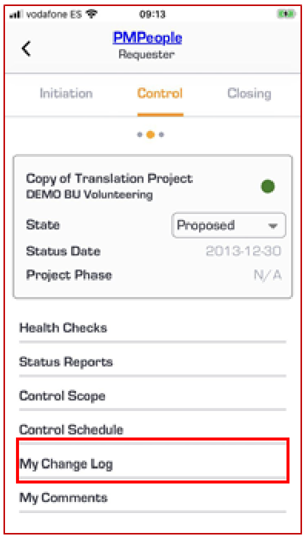


Once the Project Manager has approved the change request, it cannot be edited.

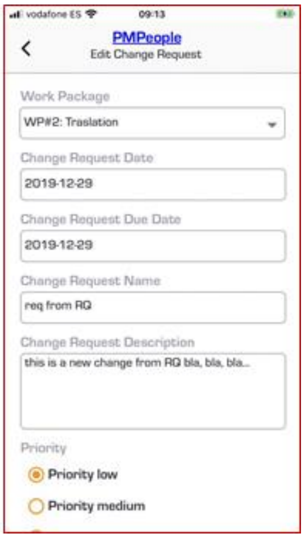
Requesters (RQ) can also request changes with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Requester**, then the concrete project and finally, hit the menu option **My Change Log**:





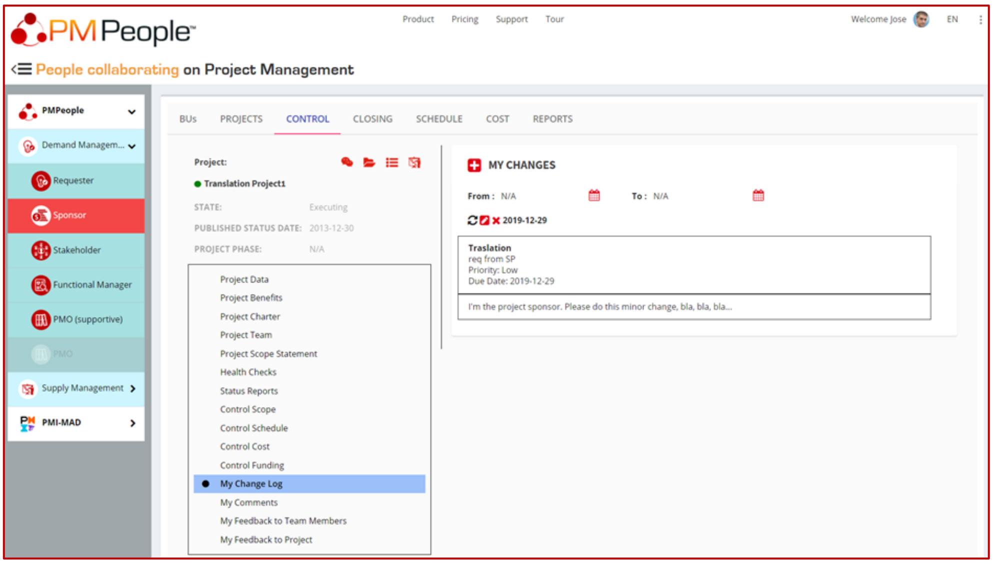


Requester can see and edit their change requests on projects:



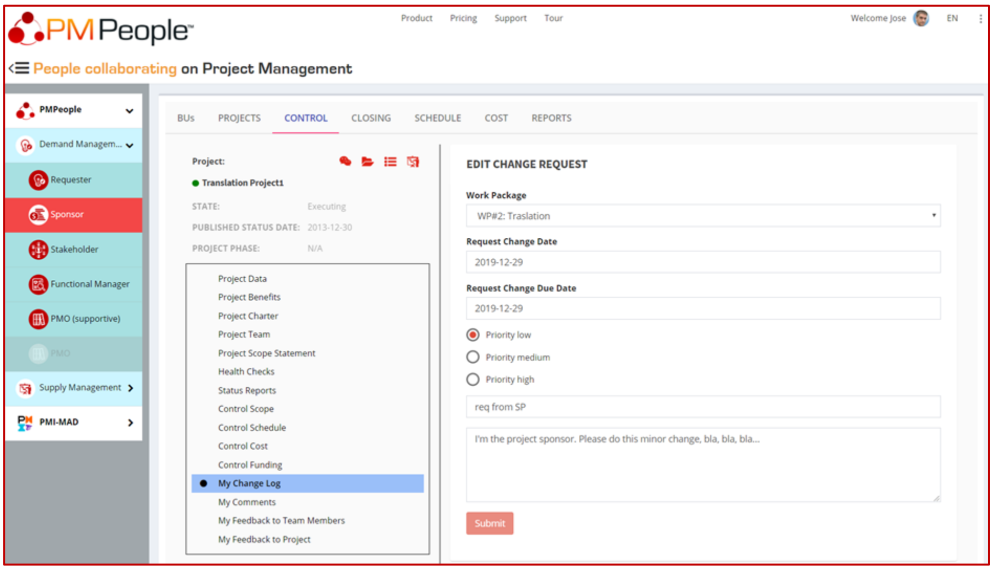
2.1.4.10. AS A SP, I CAN REQUEST PROJECT CHANGES

Sponsors (SP) can request changes at **CONTROL > My Change Log**:



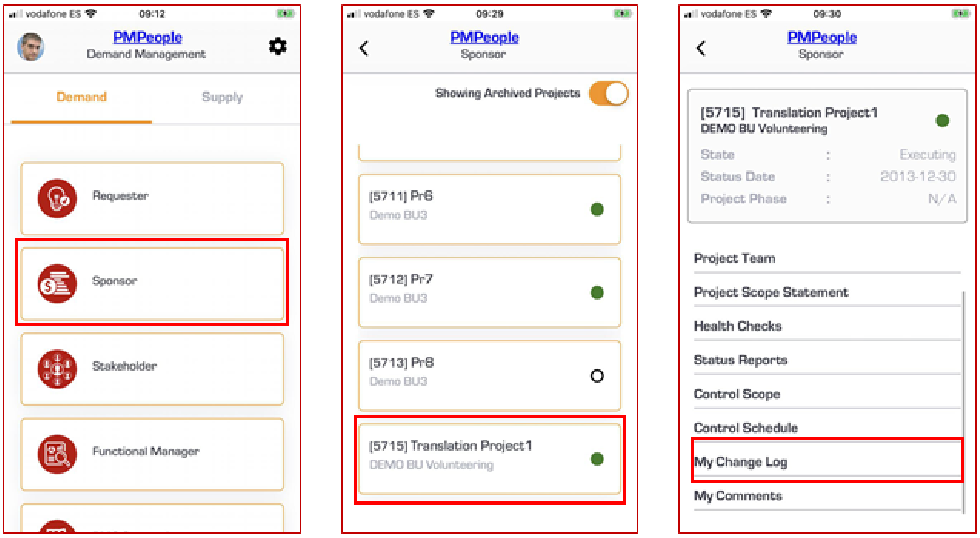
- New change requests can be added by clicking "plus" icon [ ]. Existing change requests can be filtered by dates.
- Change requests are displayed with the "in progress" icon [ ] when Project Manager, or PMOS, PMO, PfM, PgM, has not processed it yet. Approved change requests are marked with the checked icon [ ]. Rejected change requests are marked with the "cross" icon [ ].
- Each change request is shown with a title, a description, a priority, and a request date as entered by author. Due date can also be annotated, if necessary.
- Change request can be deleted with the "cross" icon [X] and edited with the "pencil" icon [ ].

Sponsors can move a change request from one work package to another:

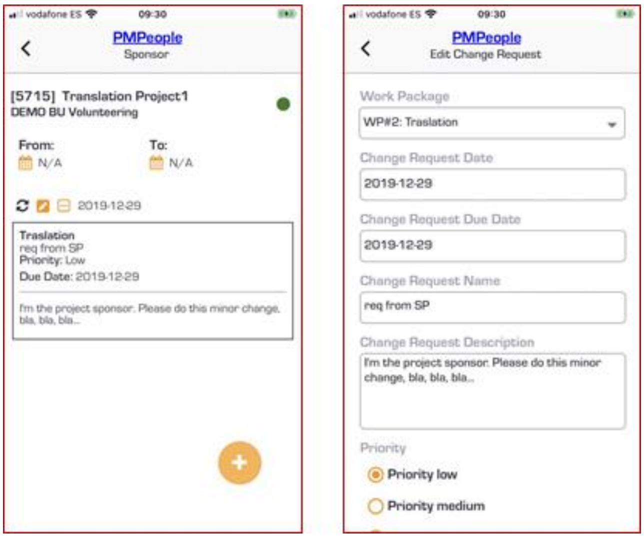


Once the Project Manager has approved the change request, it cannot be edited.

Sponsors (SP) can also request changes with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Sponsor**, then the concrete project and finally, hit the menu option **My Change Log**:

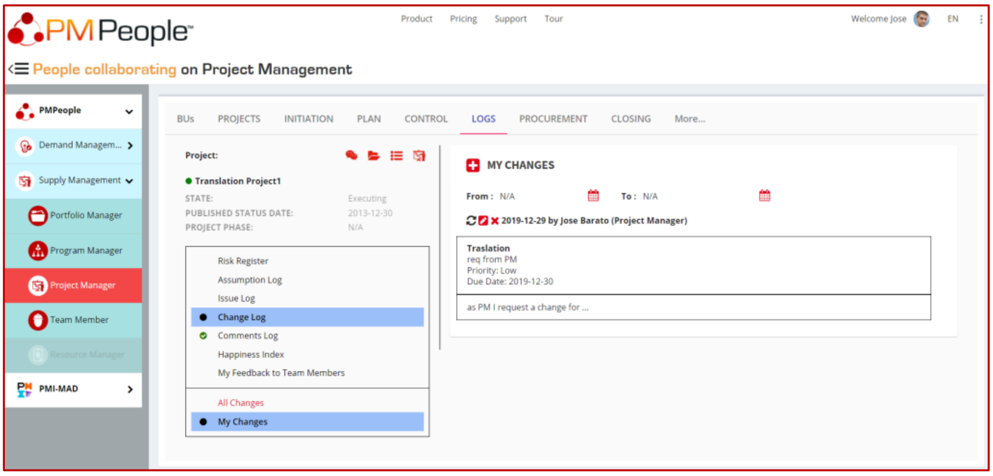


Sponsors can see and edit their change requests on projects:



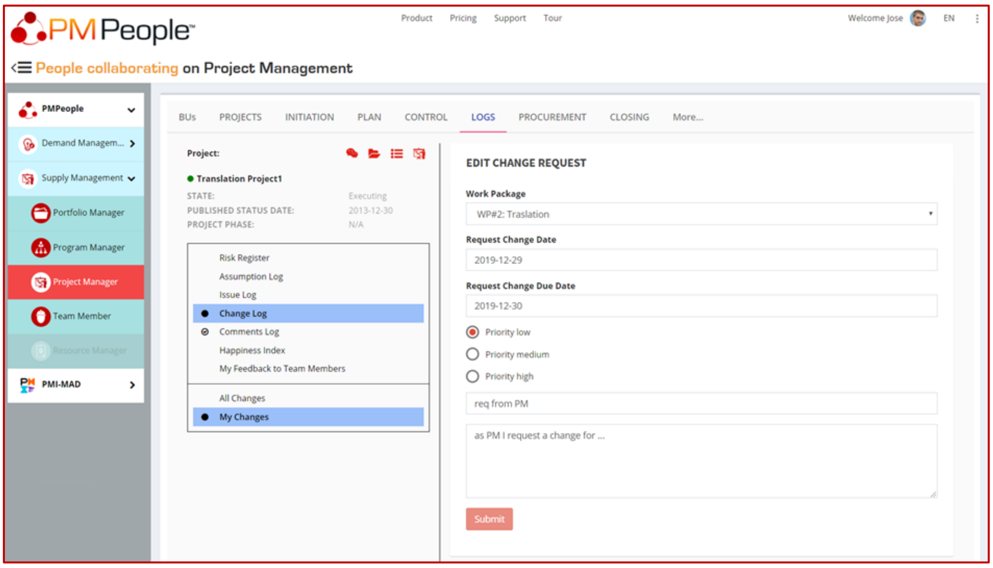
2.1.4.11. AS A PM, I CAN REQUEST PROJECT CHANGES

Project Managers (PM), or other managers PMOS, PMO, PfM, PgM, can request changes, at **LOGS > Change Log > My Changes**:



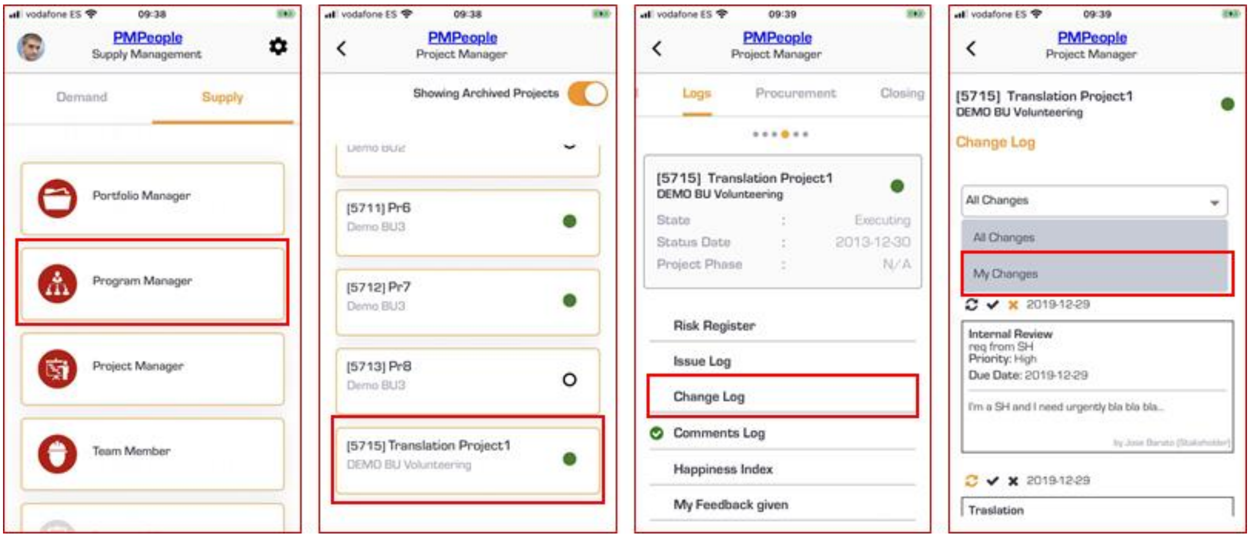
- New change requests can be added by clicking "plus" icon [ ]. Existing change requests can be filtered by dates.
- Change requests are displayed with the "in progress" icon [ ] when Project Manager, or PMOS, PMO, PfM, PgM, has not processed it yet. Approved change requests are marked with the checked icon [ ]. Rejected change requests are marked with the "cross" icon [ ].
- Each change request is shown with a title, a description, a priority, and a request date as entered by author. Due date can also be annotated, if necessary.
- Change request can be deleted with the "cross" icon [X] and edited with the "pencil" icon [ ].

Managers can move a change request from one work package to another:

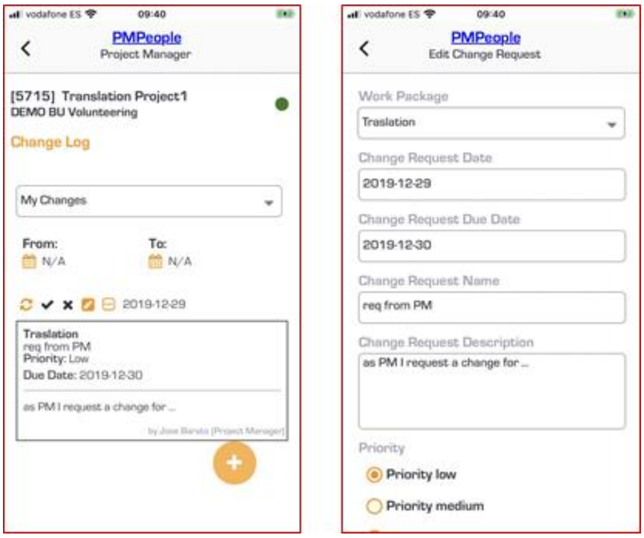


Once the Project Manager has approved the change request, it cannot be edited.

Project Managers (PM) can also request changes with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Project Manager**, then the concrete project and finally, hit the menu option **Logs > Change Log > My Changes**:

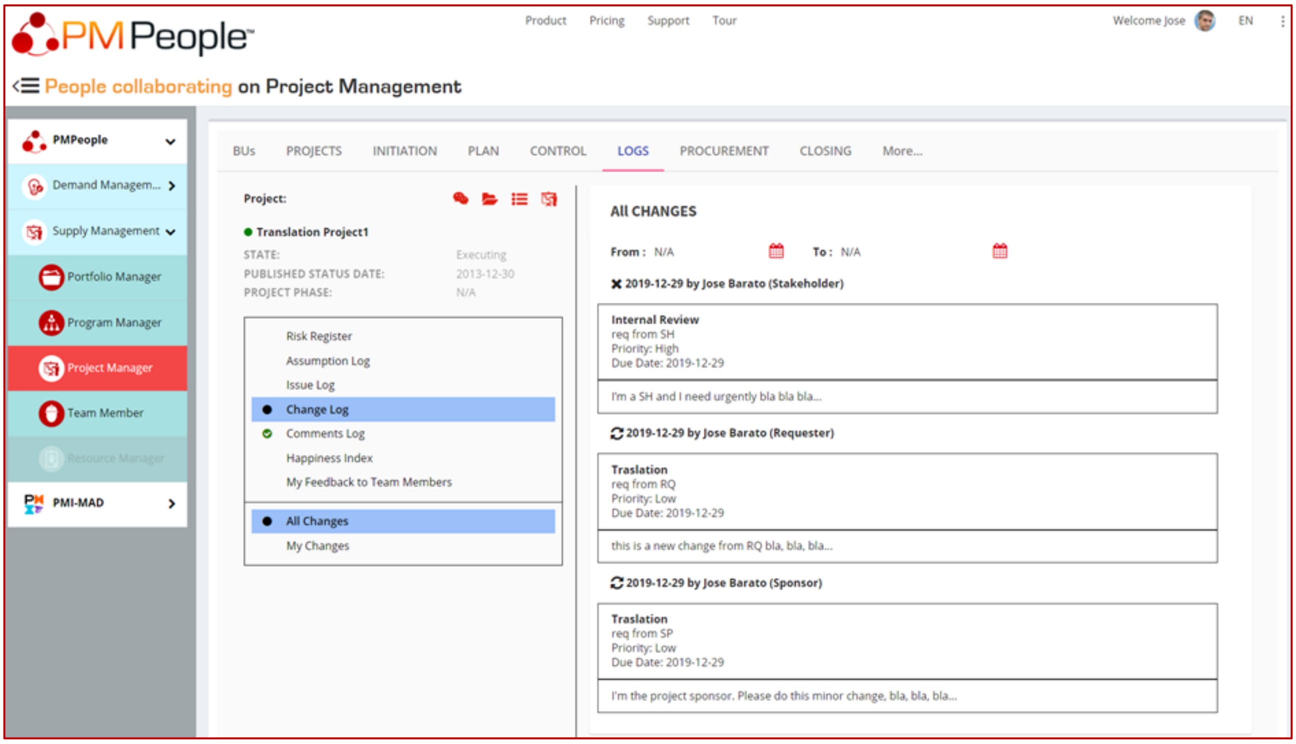


Managers can see and edit their change requests on projects:



2.1.4.12. AS A PM, I CAN MANAGE PROJECT CHANGES

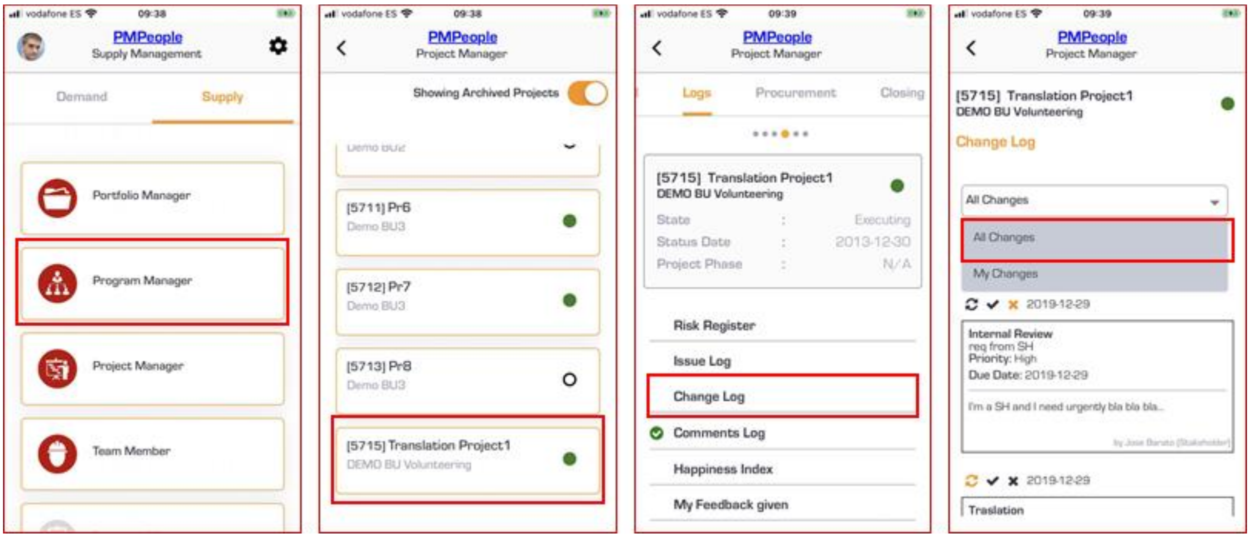
Project Managers (PM), or other managers PMOS, PMO, PfM, PgM, can manage project changes, at **LOGS > Change Log**:



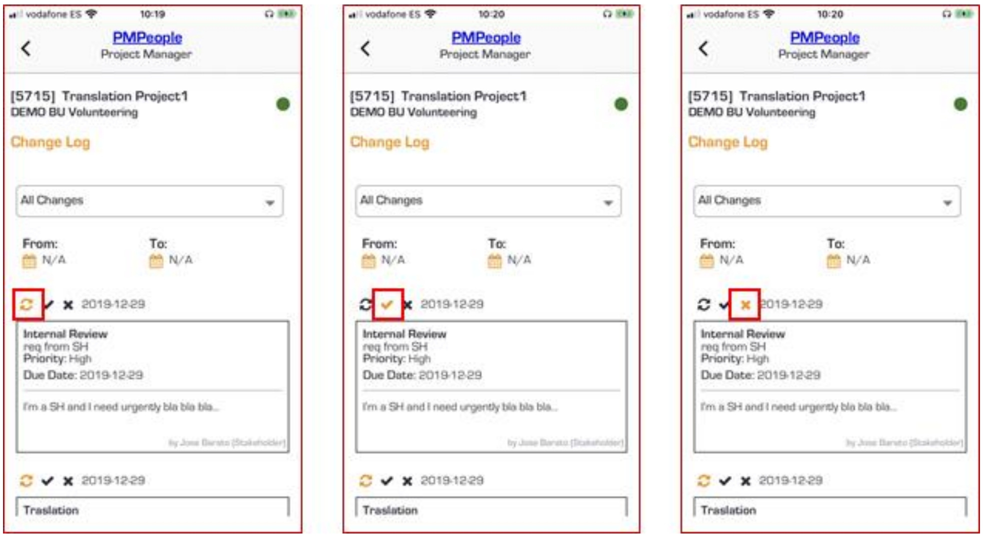
- Change requests from Stakeholders, Requester, or Sponsor, are grouped at option [**All Changes**]. Change requests from managers (PMO, PMOS, PfM, PgM, PM), are grouped at option [**My Changes**]. Change requests can be filtered by dates.
- Each change request is shown with a title, a description, a priority, and a request date as entered by author. Due date can also be annotated, if necessary.
- Managers can change request state. Requests still in progress are displayed with the "in progress" icon [↻]. Approved change requests are marked with the "checked" icon [✔]. Rejected change requests are marked with the "cross" icon [✖].

If a change request is approved, it cannot be edited. Managers can change status to "in progress" or "rejected" to edit it again.

Managers can also manage changes with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Project Manager**, then the concrete project and finally, hit the menu option **Logs > Change Log > All Changes or My Changes**:



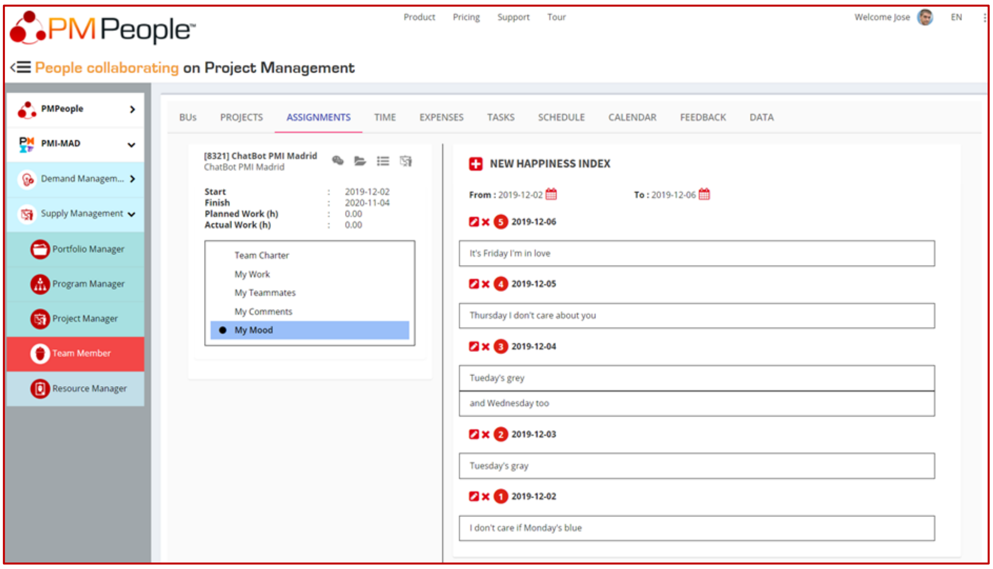
Managers can process change requests on projects:



- Click icon [↻] to mark change request as "in process".
- Click icon [✔] to mark change request as "approved".
- Click icon [✖] to mark change request as "rejected".

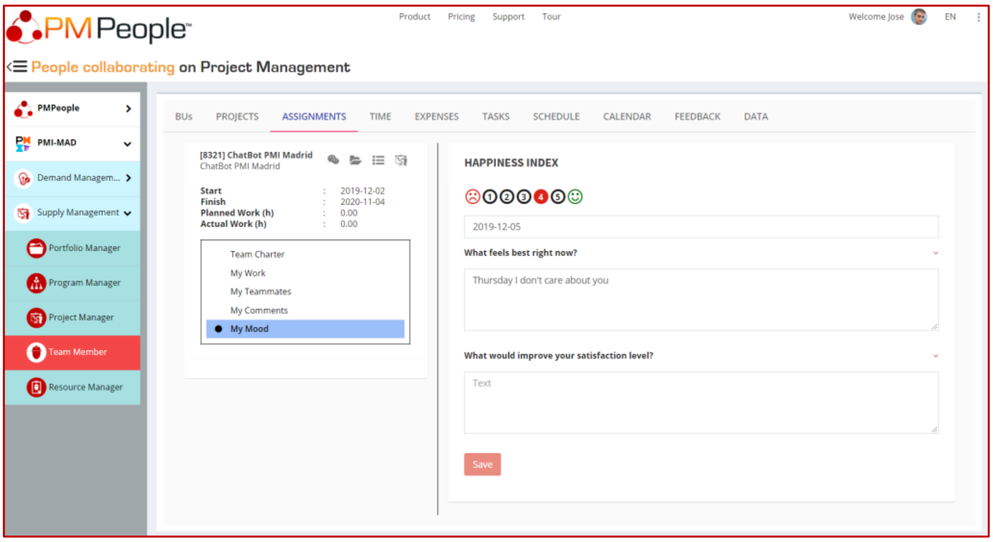
2.1.4.13. AS A TM, I CAN REGISTER MY HAPPINESS INDEX

Team members (TM) can register their happiness index, quite useful for agile retrospectives, at **ASSIGNMENTS > My Mood**:

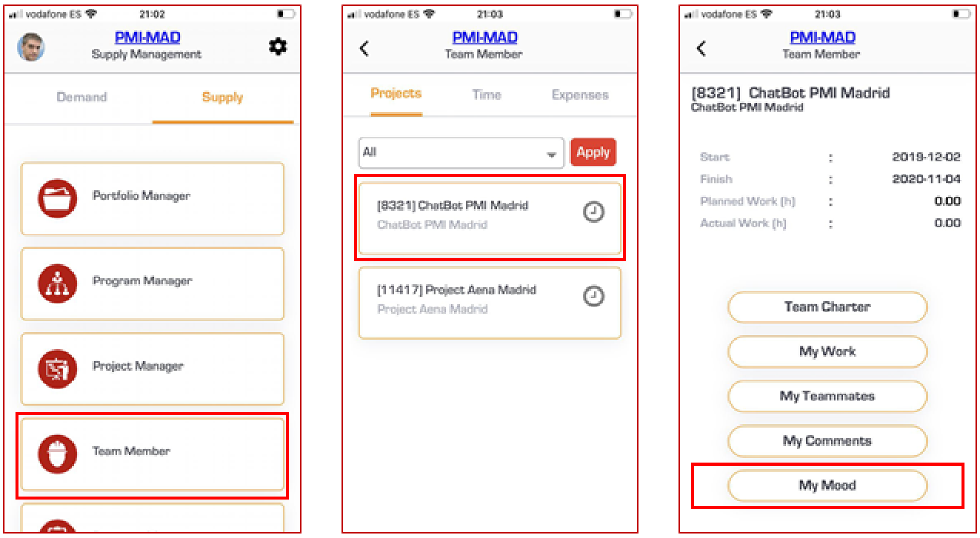


- New records can be added by clicking "plus" icon [+]. Existing records can be filtered by dates.
- Each record includes a date, a scoring from 1 (poor) to 5 (awesome), and some optional positive and/or negative comments. Authors will not be shown to managers.
- Records can be deleted with the "cross" icon [X] and edited with the "pencil" icon [].

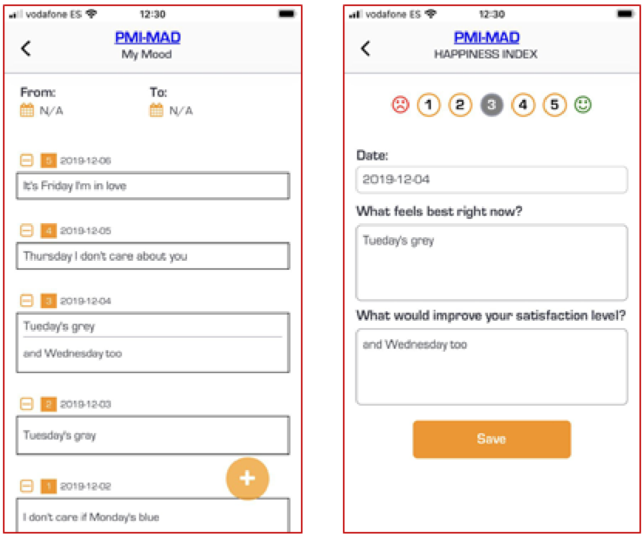
Edit record details a date choosing a score from 1 (poor) to 5 (awesome):



Team Members (TM) can also register happiness index with the **mobile application**. Once they have entered any organization (for instance, PMI Madrid), they need to select the role **Team Member**, then the project and concrete work package (user can filter assignments if the list is too long) and finally, hit the menu option **My Mood**:

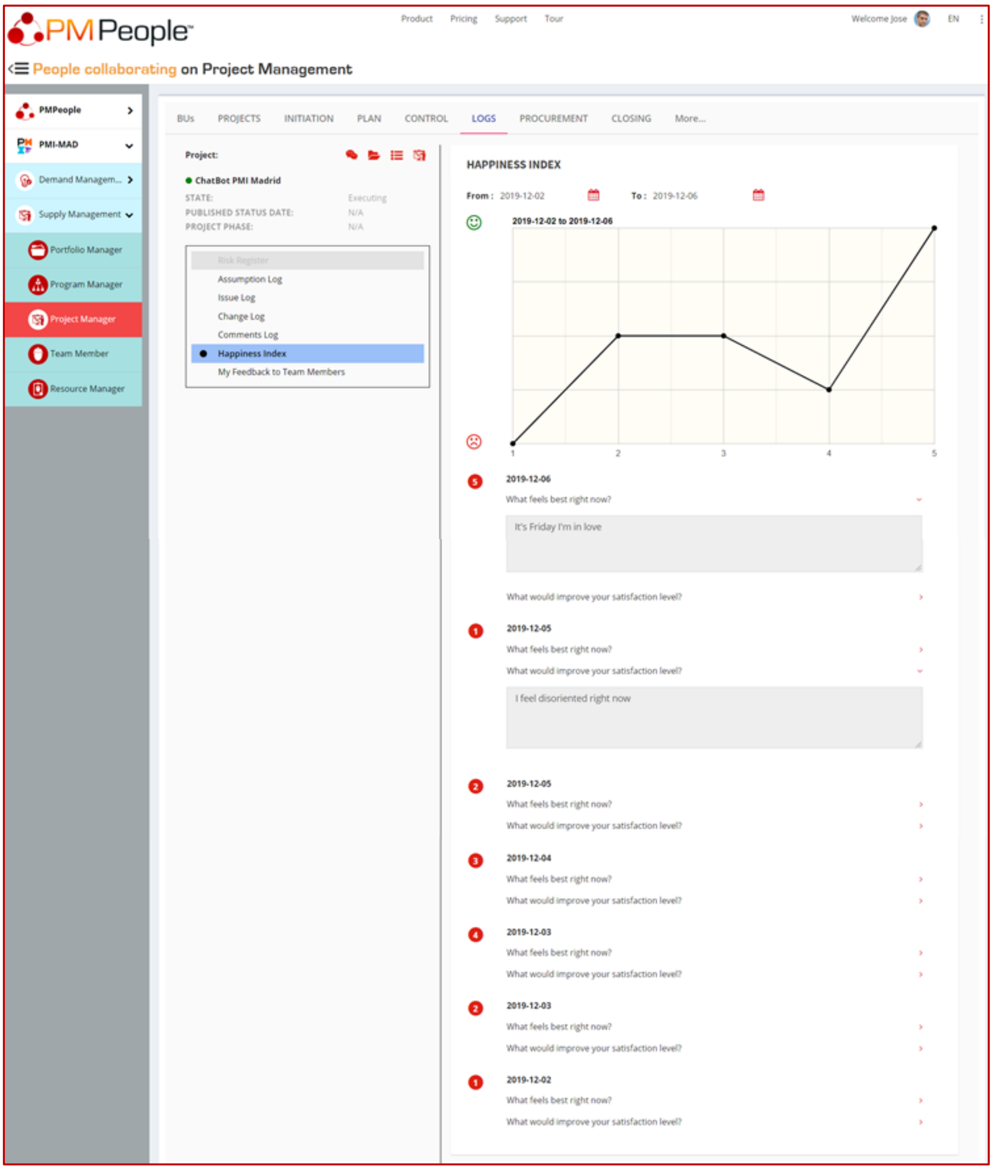


Team members can see and edit their happiness indexes on project assignments:



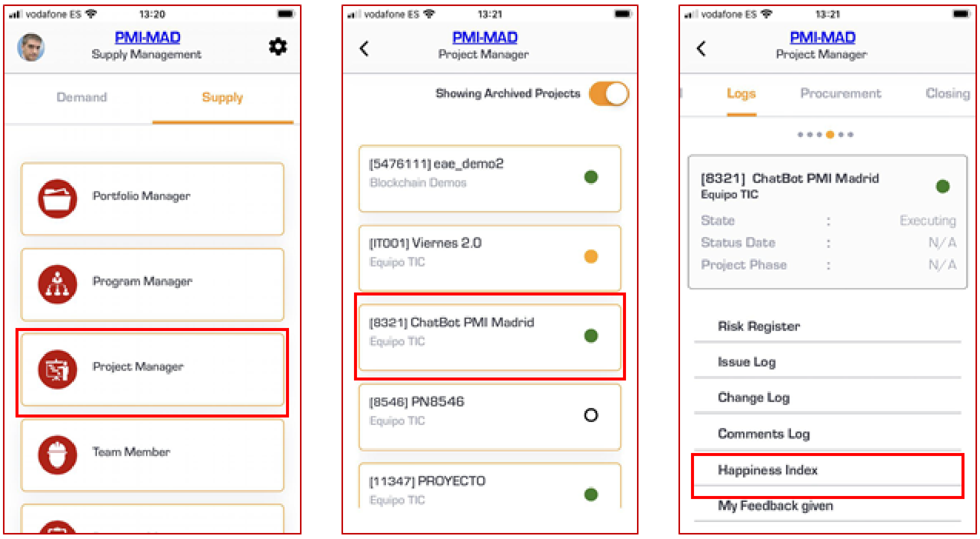
2.1.4.14. AS A PM, I CAN REVIEW PROJECT HAPPINESS INDEX

Project Managers (PM), or other managers PMOS, PMO, PfM, PgM, can review project happiness index, at **LOGS > Happiness Index**:

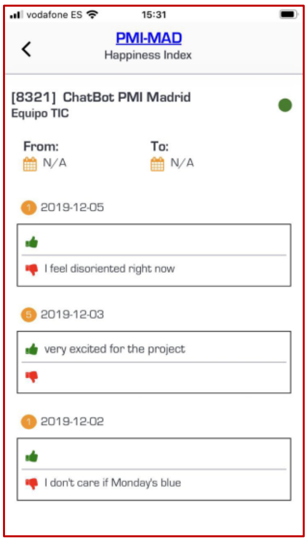


- Trend chart above represents average team happiness index on time. X axis measures actual days from the project start.
- Each record header shows the index score and the date as entered by author. Author names are not shown here.
- Click comments section to show/hide each positive or negative comment on each record.

Managers can also review happiness index with the **mobile application**. Once they have entered any organization (for instance, PMI-Madrid), they need to select the role **Project Manager**, then the concrete project and finally, hit the menu option **Logs > Change Log > Happiness Index**:

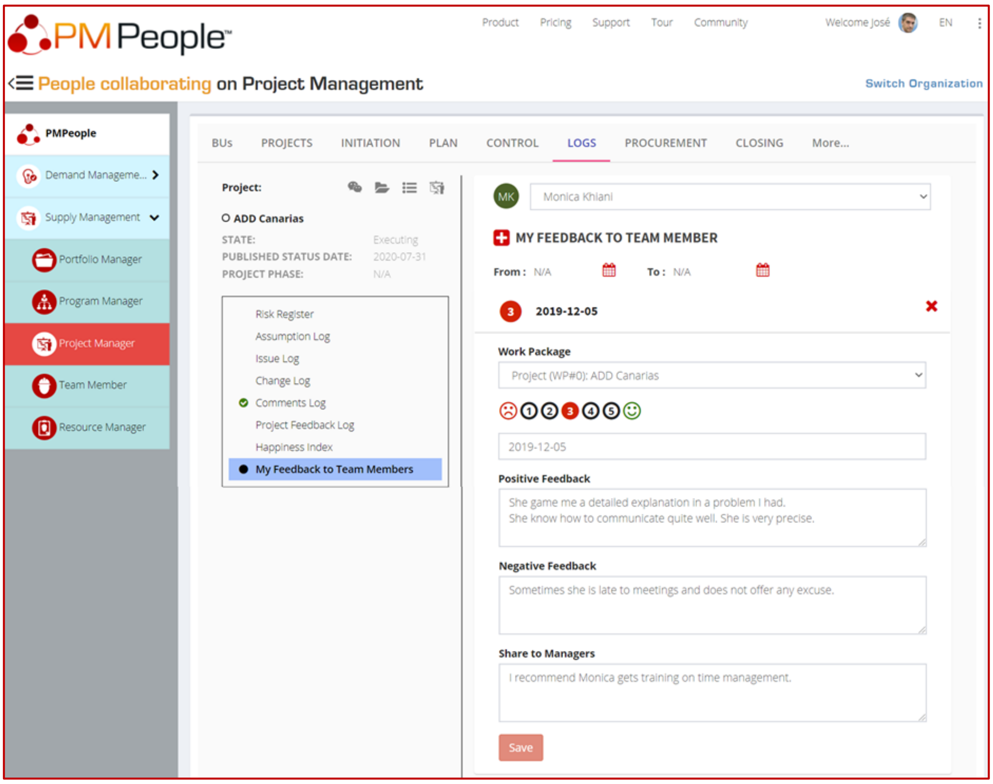


Managers can review happiness index of projects, filtering a period of time:



2.1.4.15. AS A PM, I CAN PROVIDE FEEDBACK ON TM PERFORMANCE

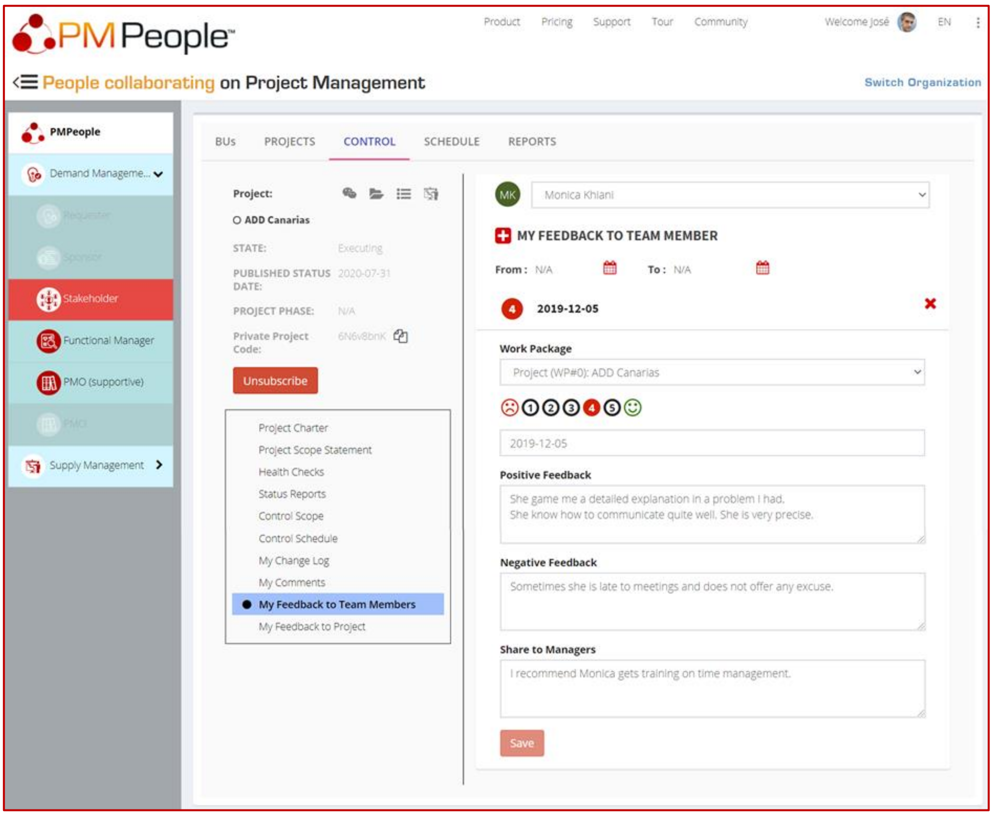
Project Managers (PM), or other managers PMOS, PMO, PfM, PgM, can provide feedback on TM's performance at **LOGS > My Feedback to Team Members**:



- New feedbacks can be added by clicking "plus" icon [+]. Existing feedbacks can be filtered by dates.
- Each feedback includes a date, a scoring from 1 (poor) to 5 (awesome), and some optional positive and/or negative comments, in the corresponding box, to be shown to Team Member, not mentioning author.
- Text box entitled **[Share to Managers]** will be displayed to the Resource Manager, showing who is the author and the project role. This comment is aimed to register confidential information not to be shown to the Team Member.
- While the project is not closed (that is, not int state "closing" or "archived") author is able to edit data anytime. Records can also be deleted by clicking "cross" icon [**X**].

2.1.4.16. AS A FM, SH, SP, RQ, I CAN PROVIDE FEEDBACK ON TM PERFORMANCE

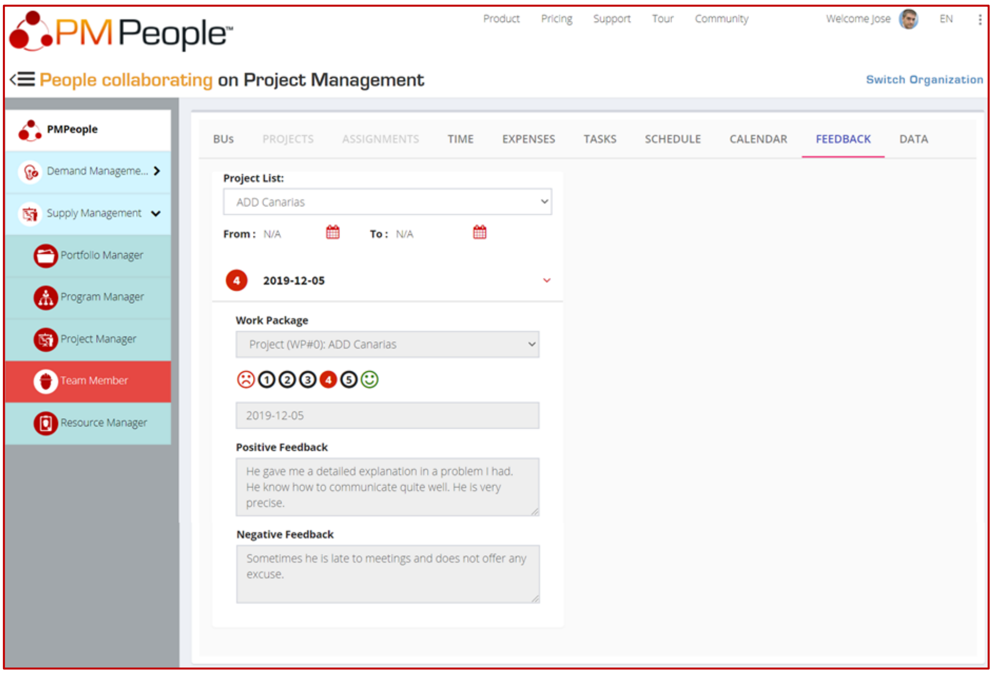
Roles of Functional Manager (FM), Stakeholder (SH), Sponsor (SP), and Requester (RQ) can provide feedback on a Team Member (TM) assigned to the project at **CONTROL > My Feedback to Team Members**:



- New feedbacks can be added by clicking "plus" icon [+]. Existing feedbacks can be filtered by dates.
- Each feedback includes a date, a scoring from 1 (poor) to 5 (awesome), and some optional positive and/or negative comments, in the corresponding box, to be shown to Team Member, not mentioning author.
- Text box entitled **[Share to Managers]** will be displayed to the Resource Manager, showing who is the author and the project role. This comment is aimed to register confidential information not to be shown to the Team Member.
- While the project is not closed (that is, not int state "closing" or "archived") author is able to edit data anytime. Records can also be deleted by clicking "cross" icon [**X**].

2.1.4.17. AS A TM, I CAN REVIEW THE FEEDBACK ON ME

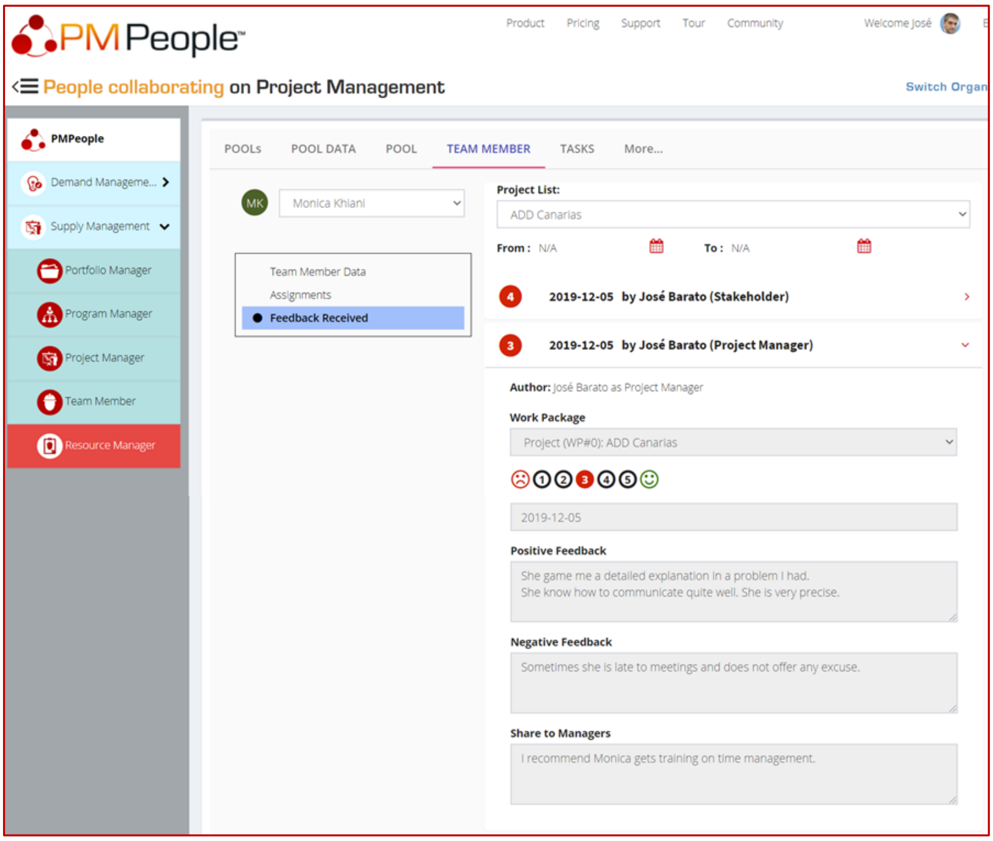
Team Members (TM) can review their feedback from functional managers (FM), Stakeholders (SH), Sponsors (SP), Requesters (RQ), Project Managers (PM) or any other manager (PMOS, PMO, PfM, PgM), not knowing who the author is, at **FEEDBACK**:



- First, they must choose a project from the list of assignments. Existing feedbacks can be filtered by dates.
- TMs are not displayed feedback authors names.
- Each feedback includes a scoring from 1 (poor) to 5 (awesome), and some optional positive and/or negative comments.

2.1.4.18. AS A RM, I CAN REVIEW TM'S FEEDBACK

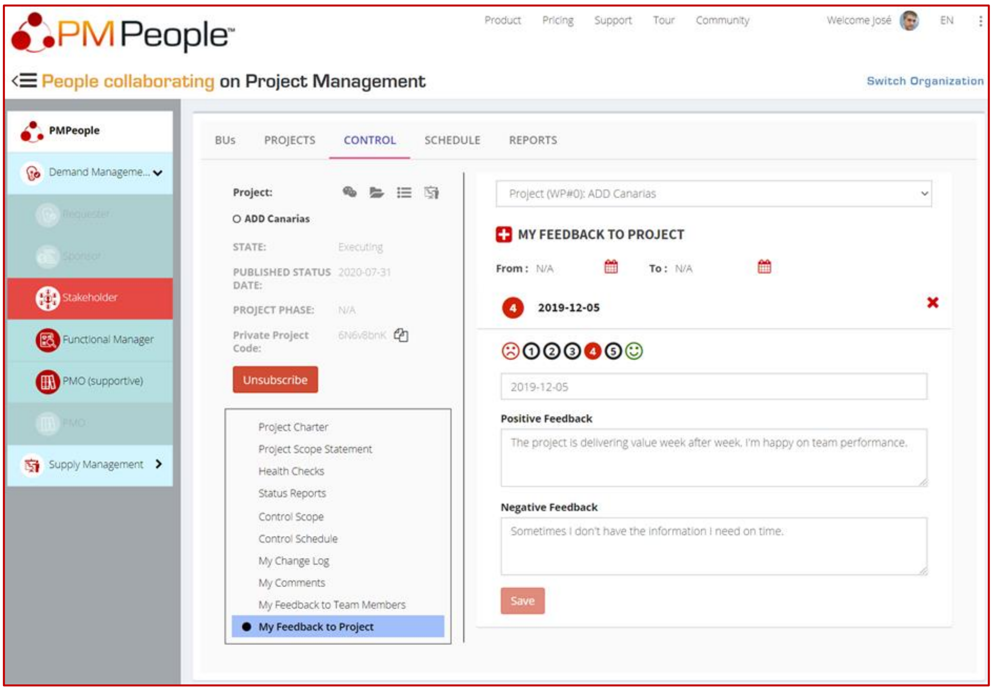
Resource Managers (RM) can review Team Members performance if they belong to one of their resource pools. For a certain project, RM can read feedback from the functional (FM), Stakeholders (SH), the Sponsor (SP), the Requester (RQ), the Project Manager (PM) or any other manager (PMOS, PMO, PfM, PgM), clicking the menu option **TEAM MEMBER > Feedback Received**:



- First, they must choose a project from the list of assignments for that TM. Existing feedbacks can be filtered by dates.
- RM can read feedback authors names and roles.
- Each feedback includes a date, a scoring from 1 (poor) to 5 (awesome), and some optional positive and/or negative comments.
- Text box **[Share to Managers]** contain the confidential feedback not to be displayed to the Team Member.

2.1.4.19. AS A SH, SP, RQ, I CAN PROVIDE FEEDBACK ON PROJECT PERFORMANCE

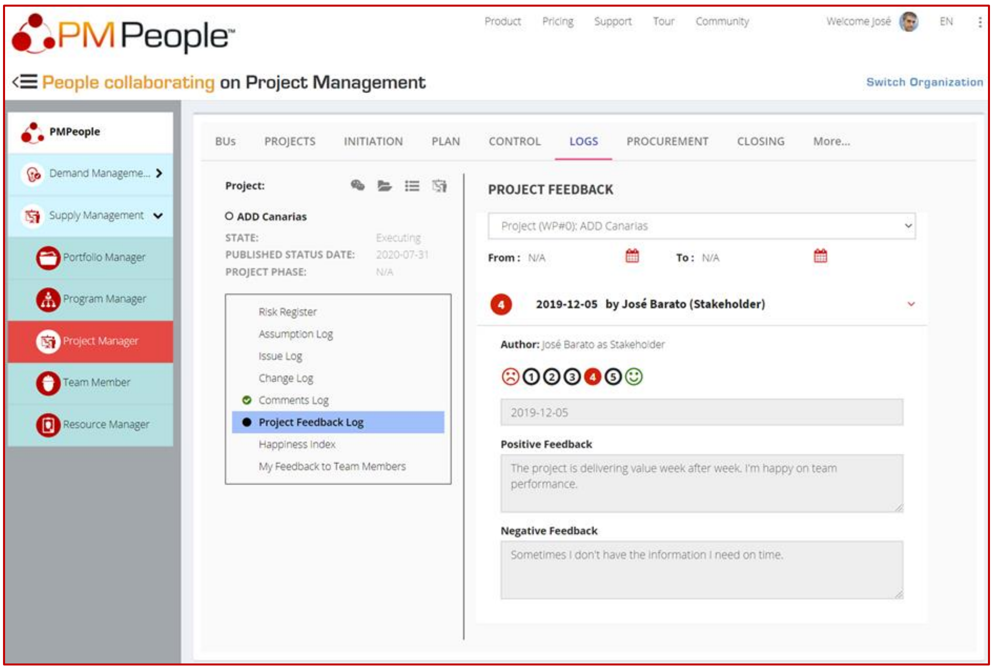
Roles of Stakeholder (SH), Sponsor (SP), and Requester (RQ) can provide feedback on a project at **CONTROL > My Feedback to Project**:



- New feedbacks can be added by clicking "plus" icon [+]. Existing feedbacks can be filtered by dates.
- Each feedback includes a date, a scoring from 1 (poor) to 5 (awesome), and some optional positive and/or negative comments, in the corresponding box, to be shown to the Project Manager, along with the author.
- While the project is not closed (that is, not int state "closing" or "archived") author is able to edit data anytime. Records can also be deleted by clicking "cross" icon [**X**].

2.1.4.20. AS A PM, I CAN REVIEW PROJECT FEEDBACK

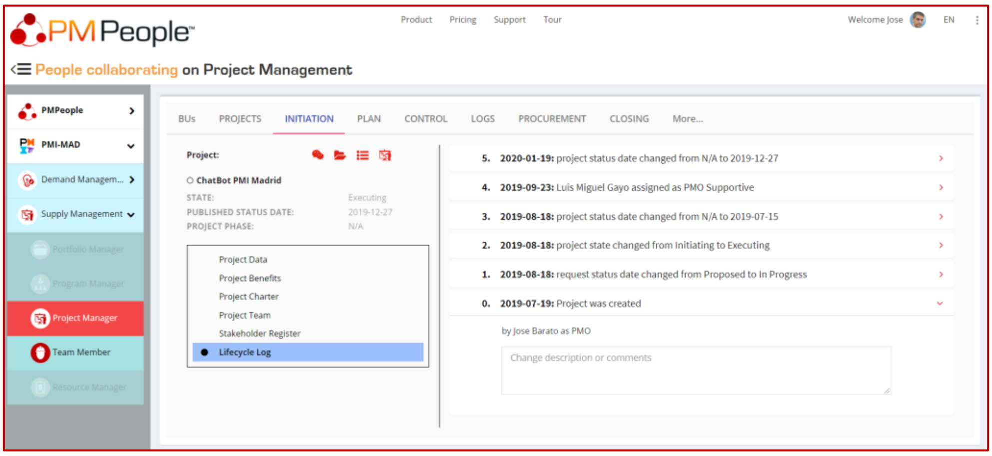
Project Managers (PM), or any other manager (PMOS, PMO, PfM, PgM), can review all project feedback from Stakeholders (SH), Sponsor (SP) and Requester (RQ), at **LOGS > Project Feedback Log**:



- Existing feedbacks can be filtered by dates.
- PM can read feedback authors names and roles.
- Each feedback includes a scoring from 1 (poor) to 5 (awesome), and some optional positive and/or negative comments.

2.1.4.21. AS A PM, RQ, I CAN REVIEW PROJECT LIFE CYCLE CHANGES

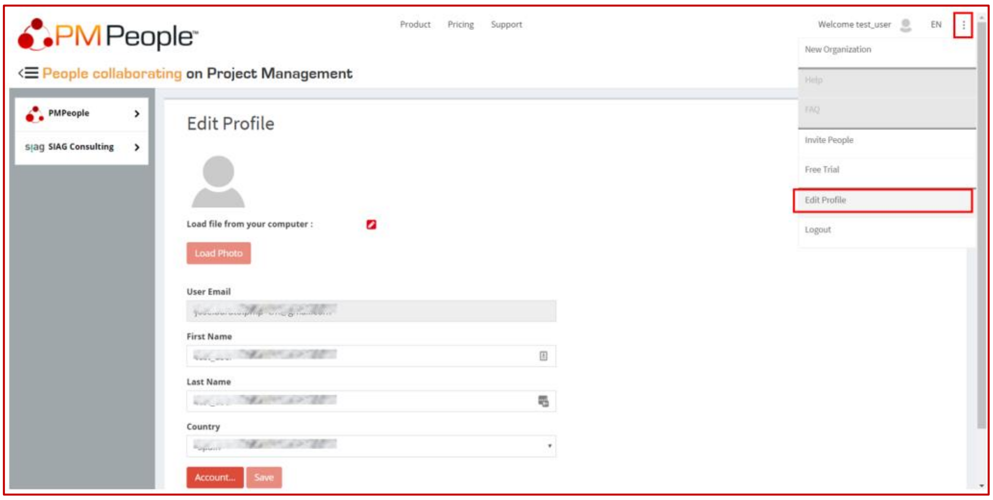
Project Managers (PM), other managers (PMOS, PMO, PfM, PgM), Requesters (RQ) and Functional Managers (FM), can review the basic state changes of the project at **INITIATION > Lifecycle Log**:



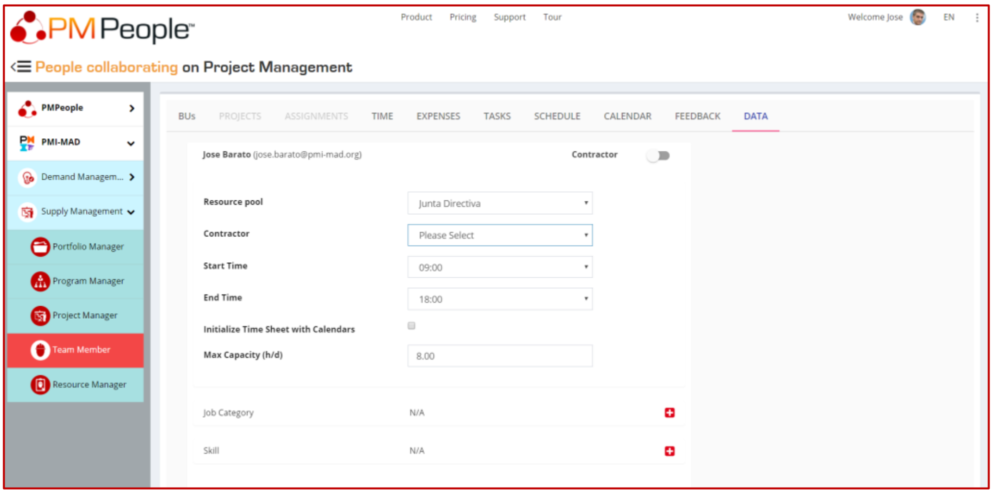
- Log items are shown in reverse chronological order.
- Log items are automatically added on certain trigger events: project creation, state change—initiation, planning, execution, closing and archived, status report creation, business unit/program/portfolio unit inclusion, new manager appointed.
- Users causing the change can edit an explaining comment.
- PMO can delete records.

2.1.4.22. AS A TM, I CAN REVIEW MY DATA

Personal data can be changed at the **upper right menu > Edit Profile**:



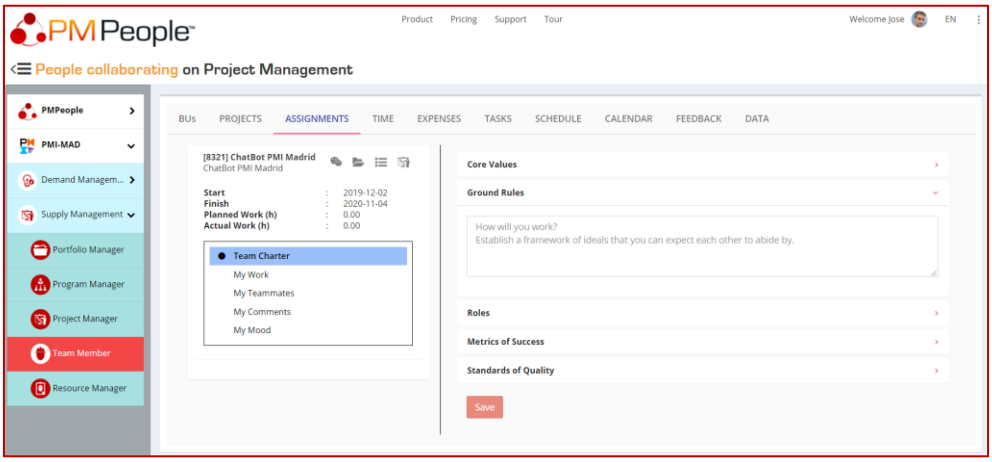
Team members (TM) can edit other data at menu option **DATA**:



Team members need to belong to one resource pool to be assigned to a project. They also need to be using the role Team Member to be assigned to a project. Team members can change resource pool or let this field empty indicating they do not belong to any resource pool. Team members cannot belong to more than one resource pools at the same time. Roles Resource Manager (RM) and PMO can also edit DATA > resource pool field.

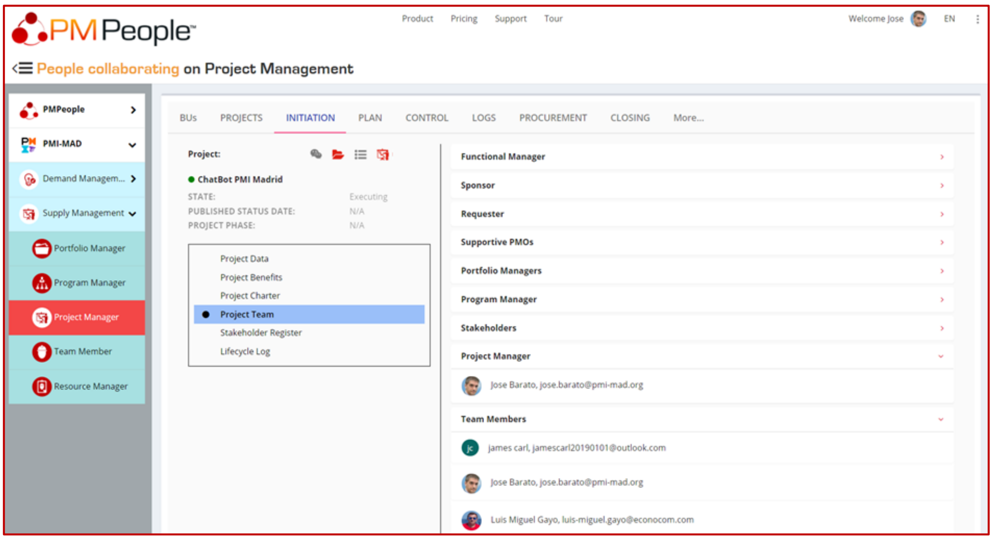
2.1.4.23. AS A TM, I CAN REVIEW THE TEAM CHARTER

Team Charter records the team values, agreements, and operating guidelines, as well as establishing clear expectations regarding acceptable behavior by project Team Members. Team members (TM) can review and update the team charter at **ASSIGNMENTS > Team Charter**:



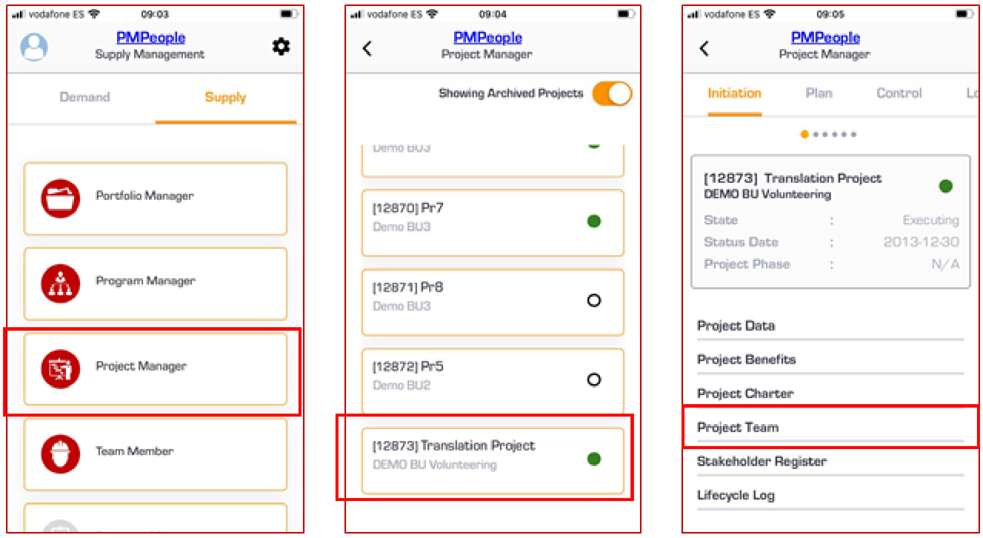
2.1.4.24. AS A PM, FM, RQ, SP, I CAN MEET THE PROJECT TEAM

Project Manager (PM), also PMO, PMOS, PfM and PgM, Functional Manager (FM), Requester (RQ) and Sponsor (SP) can read names and emails of the components of the extended project team at **INITIATION > Project Team**:

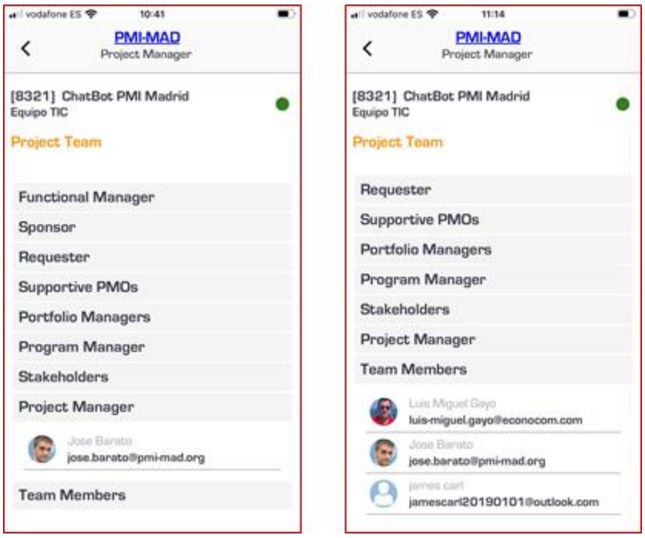


People are shown in sections according to their project role.

Project Manager (also PMO, PMOS, PfM and PgM), functional manager, Requester and Sponsor can read extended project team data with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Requester**, **Sponsor** or **Project Manager**, then the concrete project and finally, hit the menu option **Initiation > Project Team**:



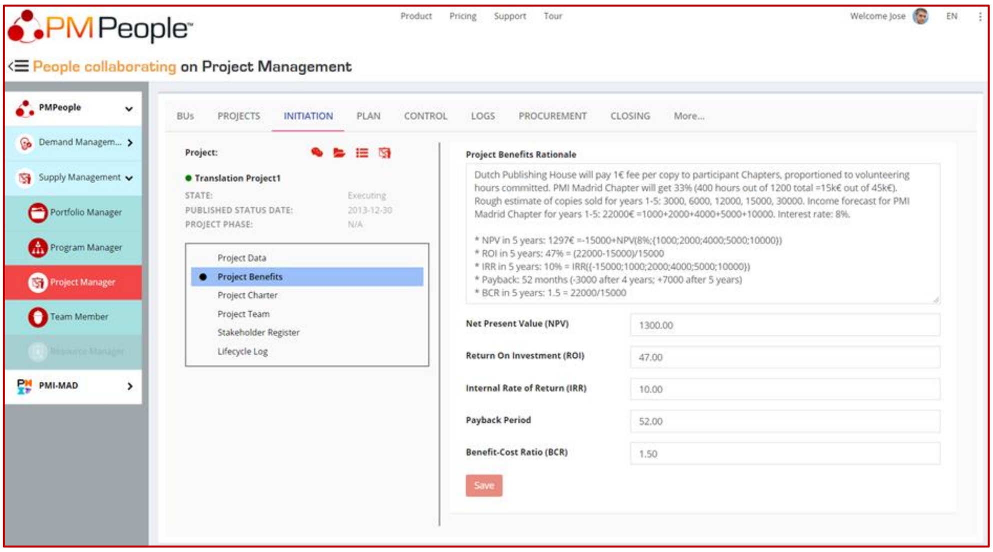
Extended project team data are shown in this screen:



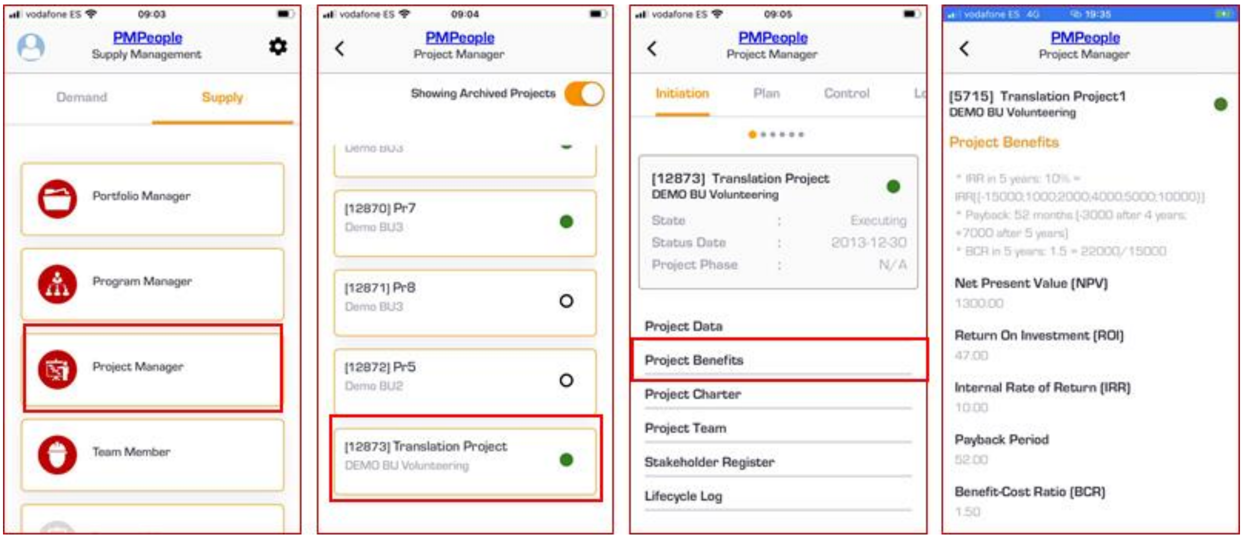
People are shown in sections according to their project role.

2.1.4.25. AS A PM, FM, RQ, SP, I CAN REVIEW THE PROJECT BENEFITS

Project Manager (PM), also PMO, PMOS, PfM and PgM, Functional Manager (FM), Requester (RQ) and Sponsor (SP) can update a project business case summary at **INITIATION > Project Benefits**:



Project Managers (PM) can review the businsess case rationale with the **mobile application**. Once they have entered any organization (for instance, PMPeople), they need to select the role **Project Manager**, then the concrete project and finally, hit the menu option **Initiation > Project Benefits**:

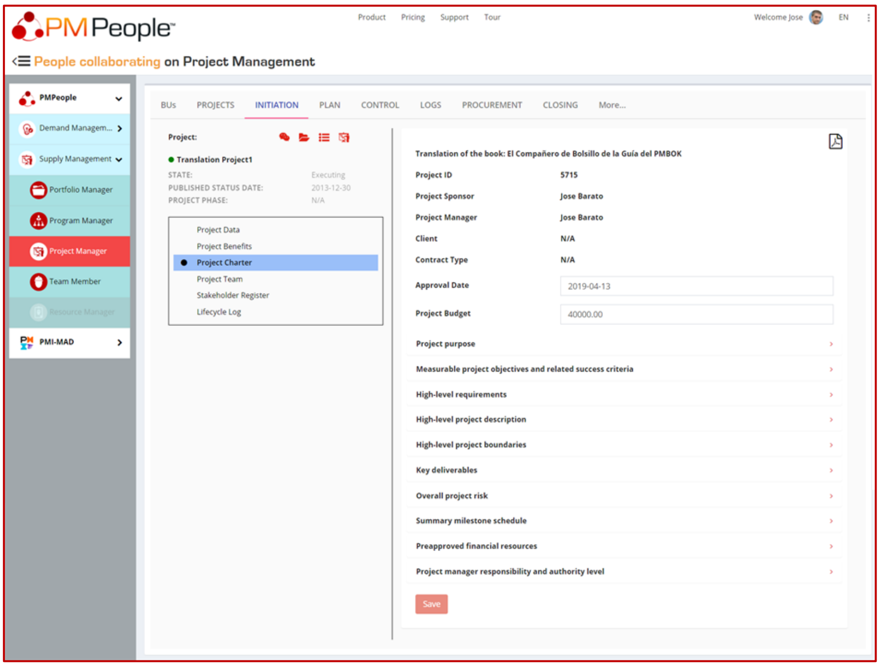


In the mobile application, Requesters (RQ) can read these data, while Sponsor (SP) can also edit data.

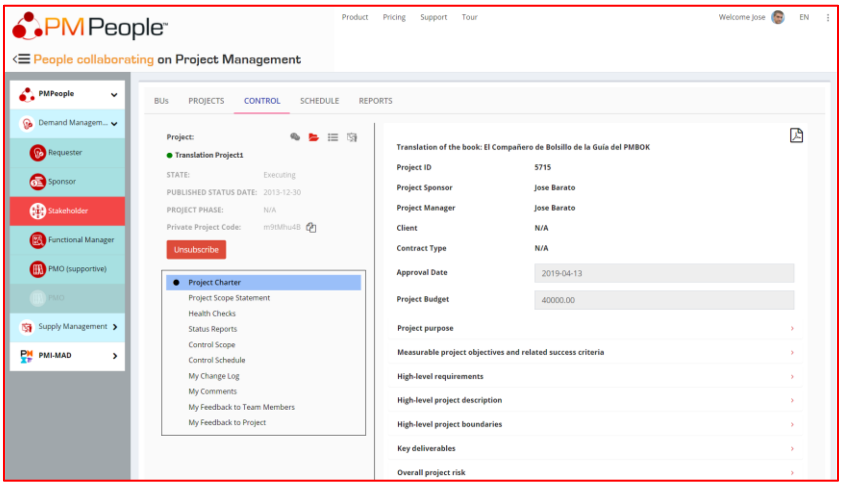
2.1.4.26. AS A SH, FM, PM, SP, RQ, I CAN REVIEW THE PROJECT CHARTER

The **project charter** is the document issued by the project sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities. At a high level, the project charter ensures a common understanding by the stakeholders of the key deliverables, milestones, and the roles and responsibilities of everyone involved in the project.

Project Manager (PM), also PMO, PMOS, PfM and PgM, Sponsor (SP) and Requester (RQ) can edit the project charter at **INITIATION > Project Charter**:

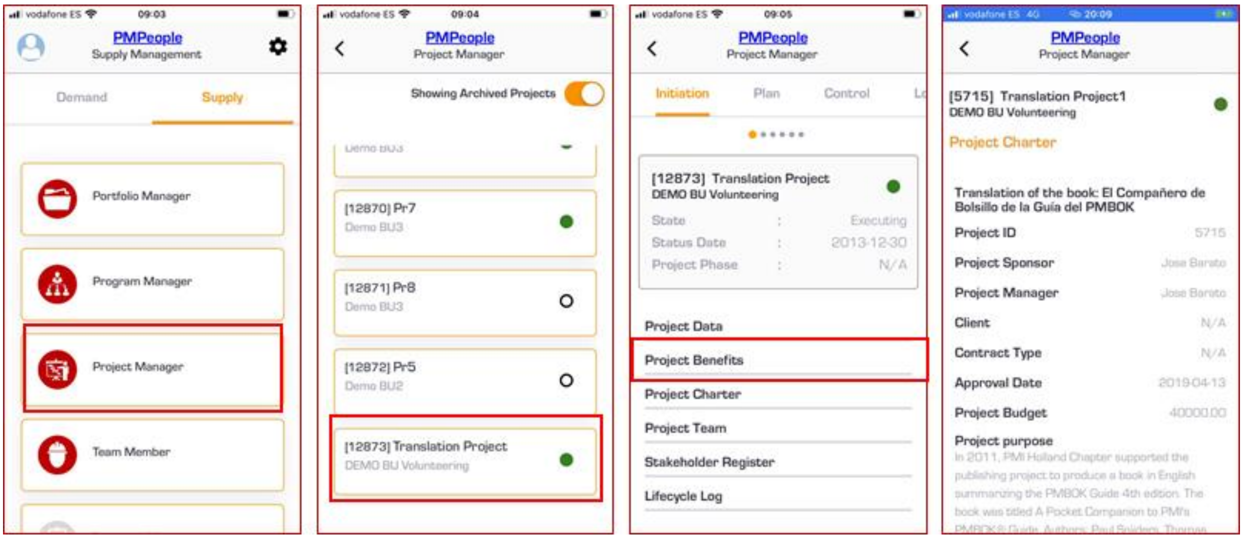


Roles Stakeholder (SH) and Functional Manager (FM) read project charter data at **CONTROL > Project Charter**:

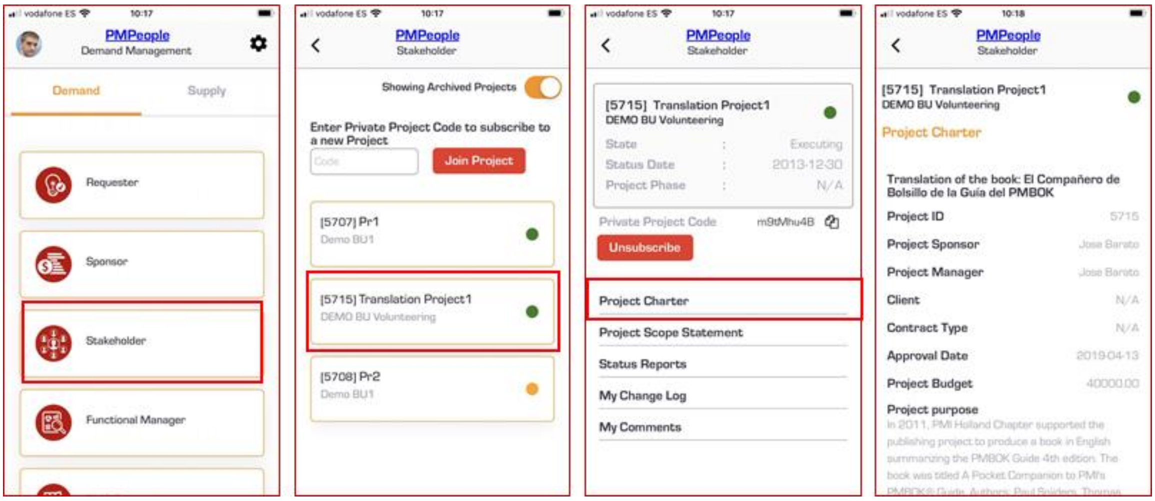


Project charter document can be downloaded as a PDF file clicking the PDF icon [ ].

Project Manager (PM) and project Sponsor (SP) can update the Project Charter with the **mobile application**:

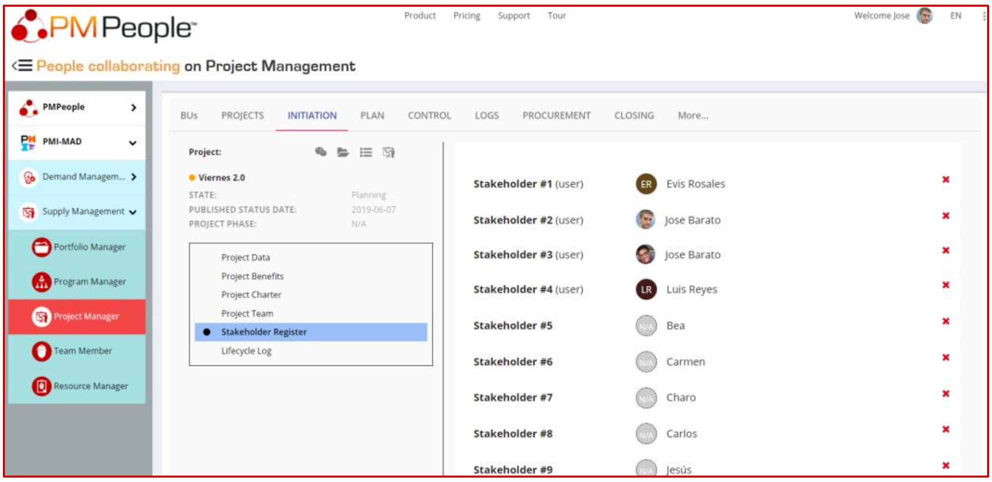


Stakeholders (SH) can read the Project Charter with the **mobile application:**

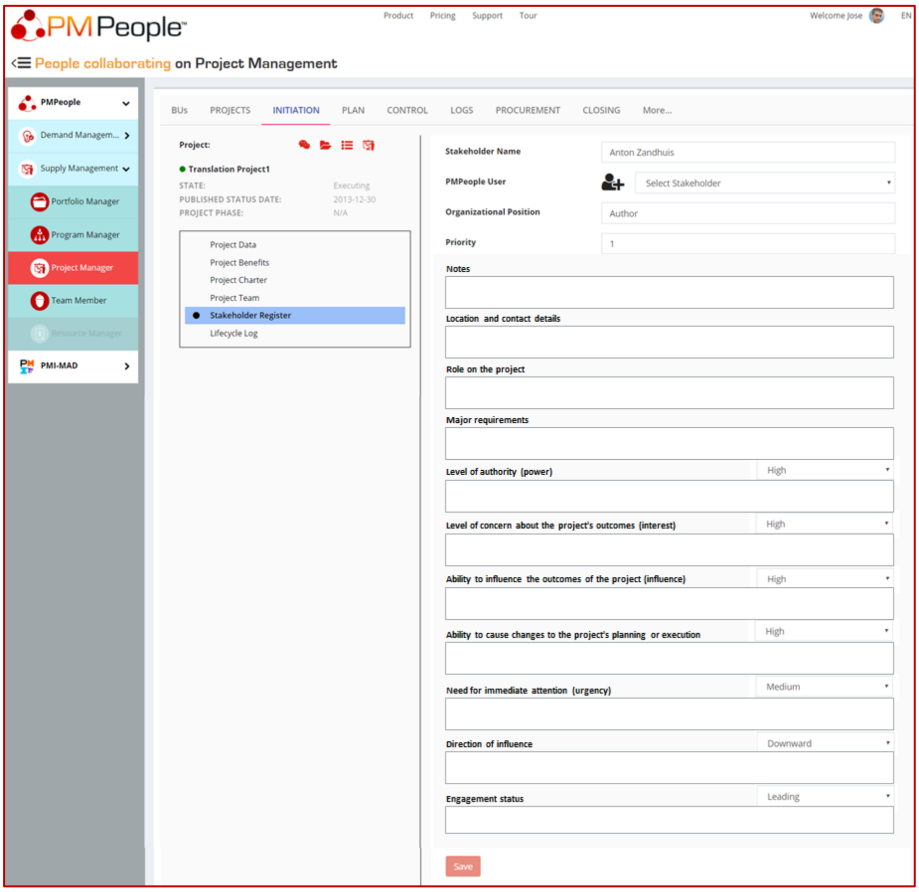


2.1.4.27. AS A PM, RQ, I CAN REVIEW THE STAKEHOLDER REGISTER

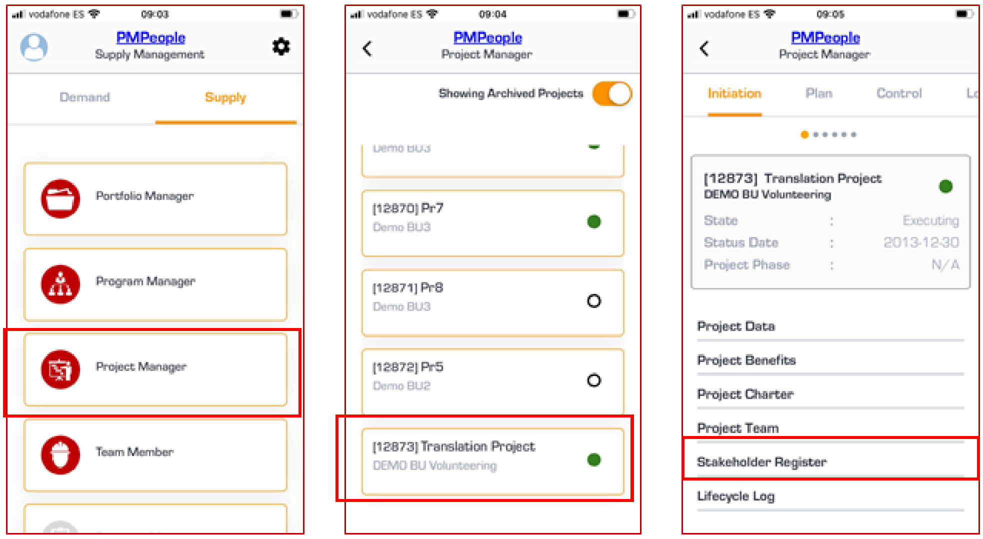
Stakeholder register includes the identification, assessment, and classification of project Stakeholders. Project Manager (PM), also PMO, PMOS, PfM and PgM, and Requester (RQ) can review stakeholder list at **INITIATION > Stakeholder Register**:



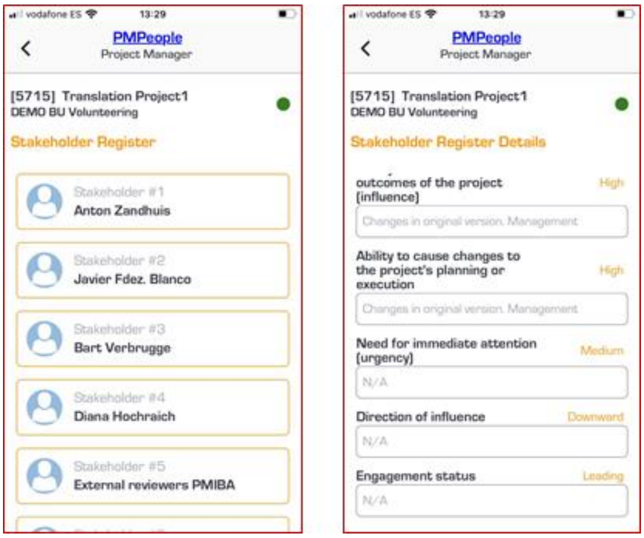
PM can update Stakeholder register. Requester (RQ) can access to read only:



Stakeholder register data can be accessed with the **mobile application**:



Stakeholder Register data is displayed in this screen:

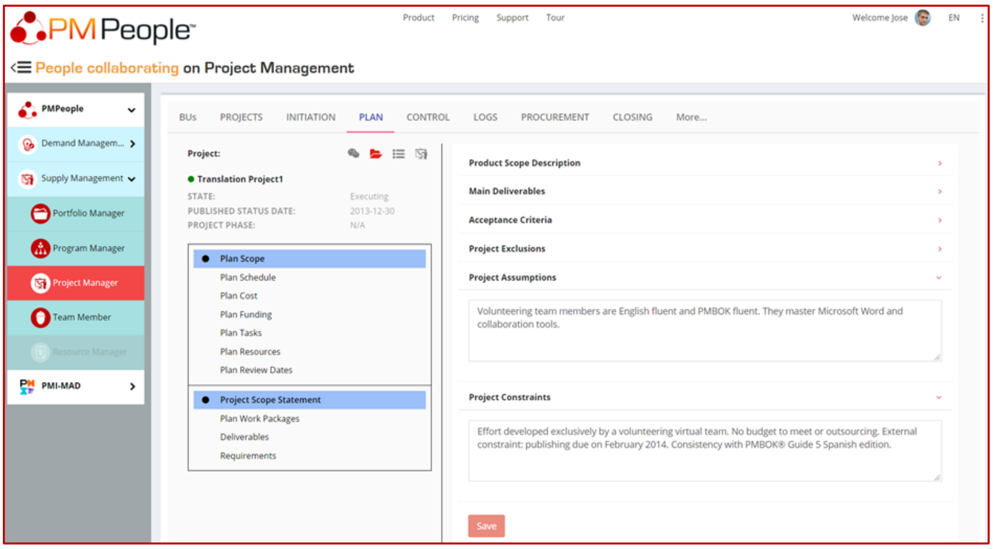


Scroll down to see all fields. PM can update Stakeholder register. Requester (RQ) can access to read only.

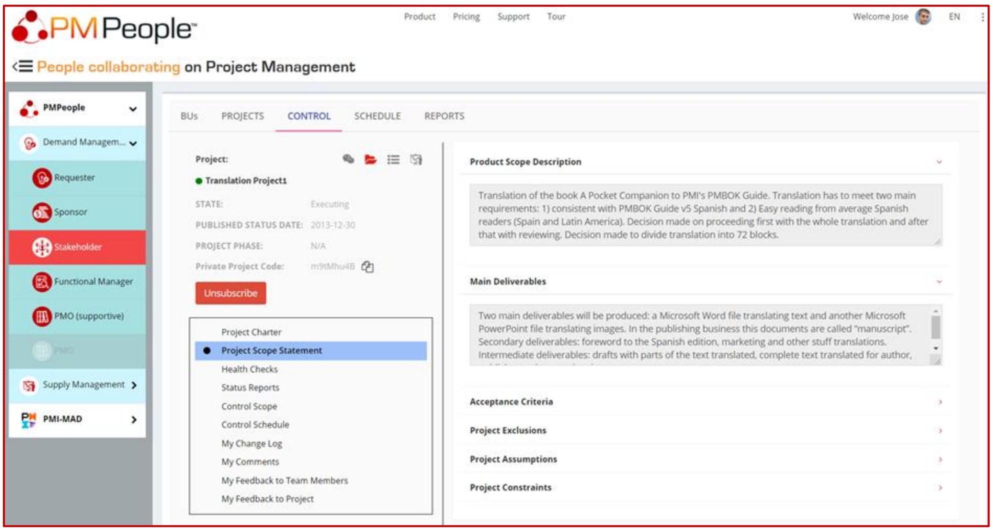
2.1.4.28. AS A PM, RQ, SP, SH, FM, I CAN REVIEW THE SCOPE STATEMENT

The **project scope statement** is the description of the project scope, major deliverables, assumptions, and constraints. It provides a common understanding of the project scope among project stakeholders. It may contain explicit scope exclusions that can assist in managing stakeholder expectations. It guides the project team's work during execution and provides the baseline for evaluating whether requests for changes or additional work are contained within or outside the project boundaries.

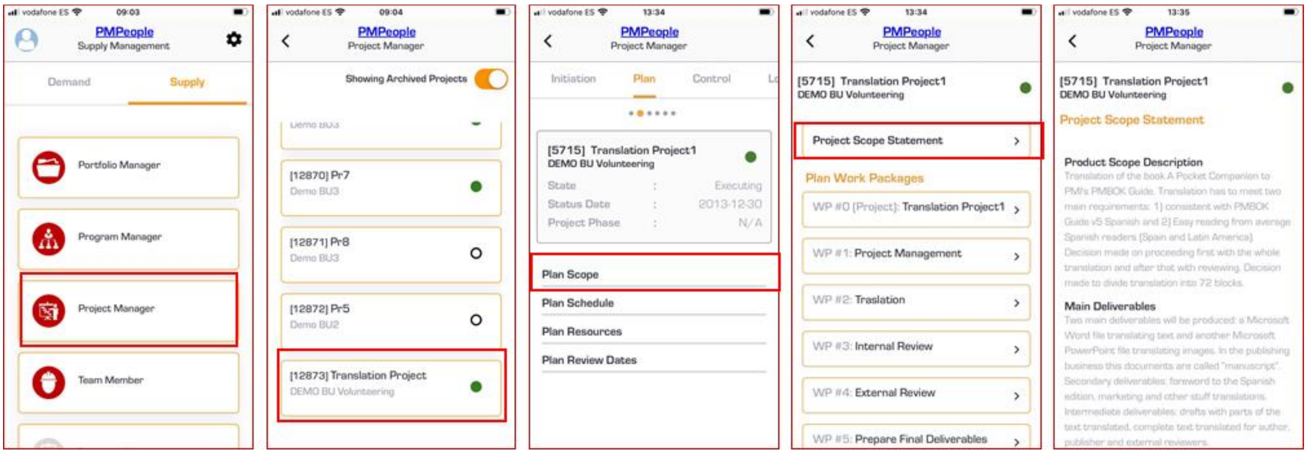
Project Manager (PM), also PMO, PMOS, PfM and PgM, Requester (RQ), Sponsor (SP) can update the project scope statement at **PLAN > Plan Scope > Project Scope Statement**:



Stakeholders (SH) and Functional Manager (FM) can read project scope statement at **CONTROL > Project Scope Statement**:



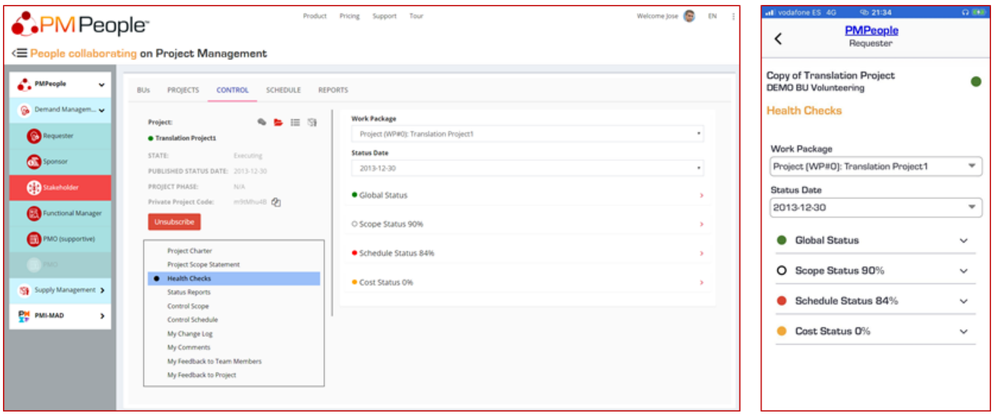
Project Managers (PM) can update project scopement statement with the **mobile application**:



Requester (RQ), Sponsor (SP) and Stakeholders (SH) can read project scopement statement with the **mobile application**.

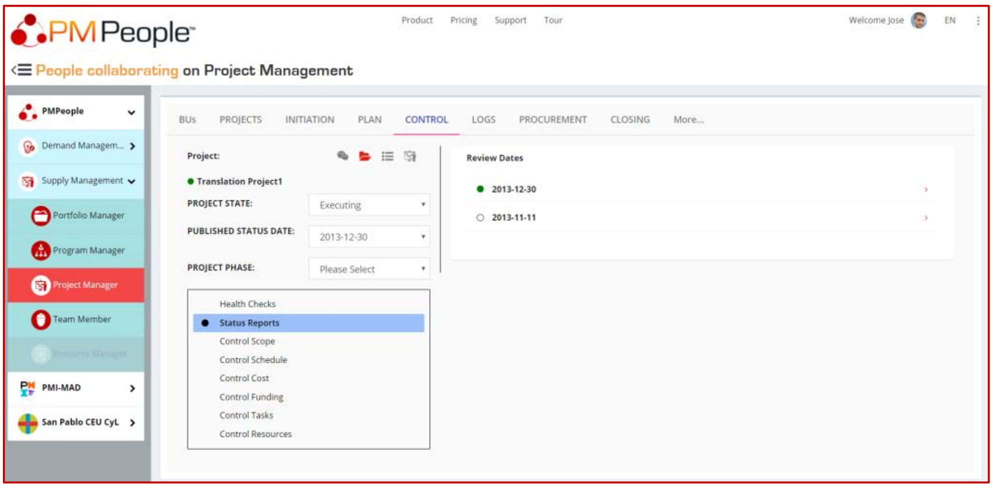
2.1.4.29. AS A SH, RQ, SP, FM, I CAN CONTROL THE PROJECT HEALTH CHECK

Stakeholders (SH), Requester (RQ), Sponsor (SP) and Functional Manager (FM), can monitor project global status at **Health Checks**. They can do that also with the mobile application:



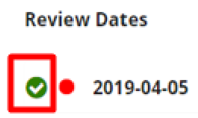
2.1.4.30. AS A SH, RQ, SP, FM, PM, I CAN REVIEW THE PROJECT REPORTS

The Project Manager (PM), also PMO, PMOS, PfM and PgM, and Stakeholders (SH), Requester (RQ), Sponsor (SP) and the Functional Manager (FM), can review the project reports at **CONTROL > Status Reports**:



In the summary view, they can see the traffic light color and data date for the project itself (Work Package #0).

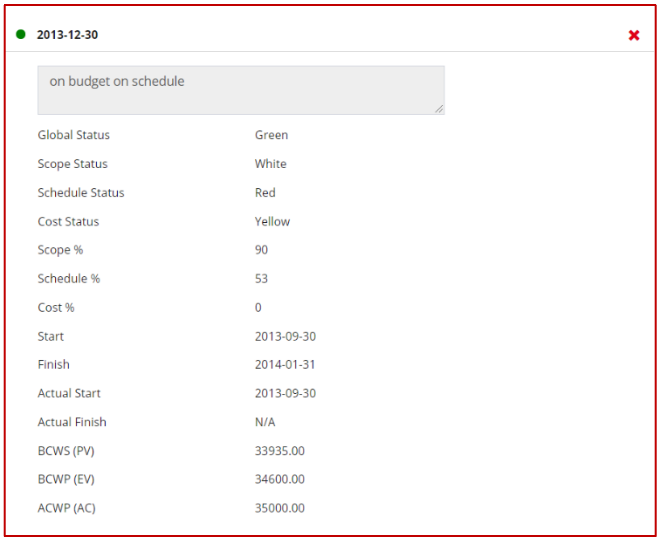
The project status report, as of a given review date, can be produced at **CONTROL > Health Checks**.



Reliable organization can certify these status reports, so that they cannot be altered. Then an icon is shown before the traffic light. This icon indicates if status report has been published, verified, or invalidated.

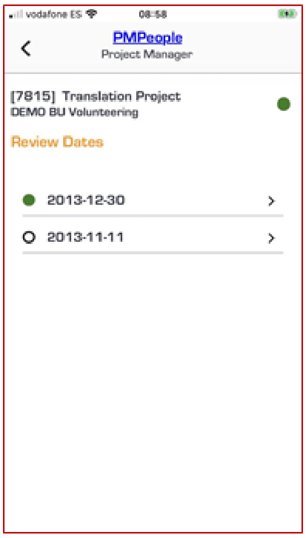
Opening a project status report summary item, it can be deleted by clicking the “cross” icon [**X**]. Header is formed by traffic light and data date. Details are shown for WP#0’s status data:

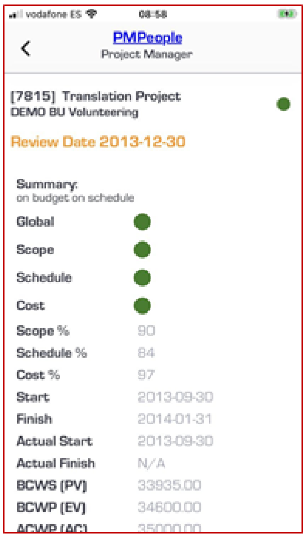
- Project global status summary.
- **Global Status**: Traffic light color for global status.
- **Scope Status**: Traffic light color for scope management status.
- **Schedule Status**: Traffic light color for schedule management status.
- **Cost Status**: Traffic light color for cost management status.
- **Scope%**: Percent of work completed.
- **Schedule%**: Percent of duration spent.
- **Cost%**: Percent of budget spent.
- **Start**: Project manager’s best estimate of project start date. See 2.2.3.6.
- **Finish**: Project manager’s best estimate of project finish date. See 2.2.3.6.
- **Actual Start**: Project actual start date if the project has started. See 2.2.3.6.



- **Actual Finish**: Project actual finish date if the project has finished. See 2.2.3.6.
- **BCWS (PV)**: Budgeted Cost of Work Scheduled, a.k.a. Planned Value. See 2.2.2.11.
- **BCWP (EV)**: Budgeted Cost of Work Performed, a.k.a. Earned Value. See 2.2.3.8.
- **ACWP (AC)**: Actual Cost of Work Performed, a.k.a. Actual Cost. See 2.2.3.8.

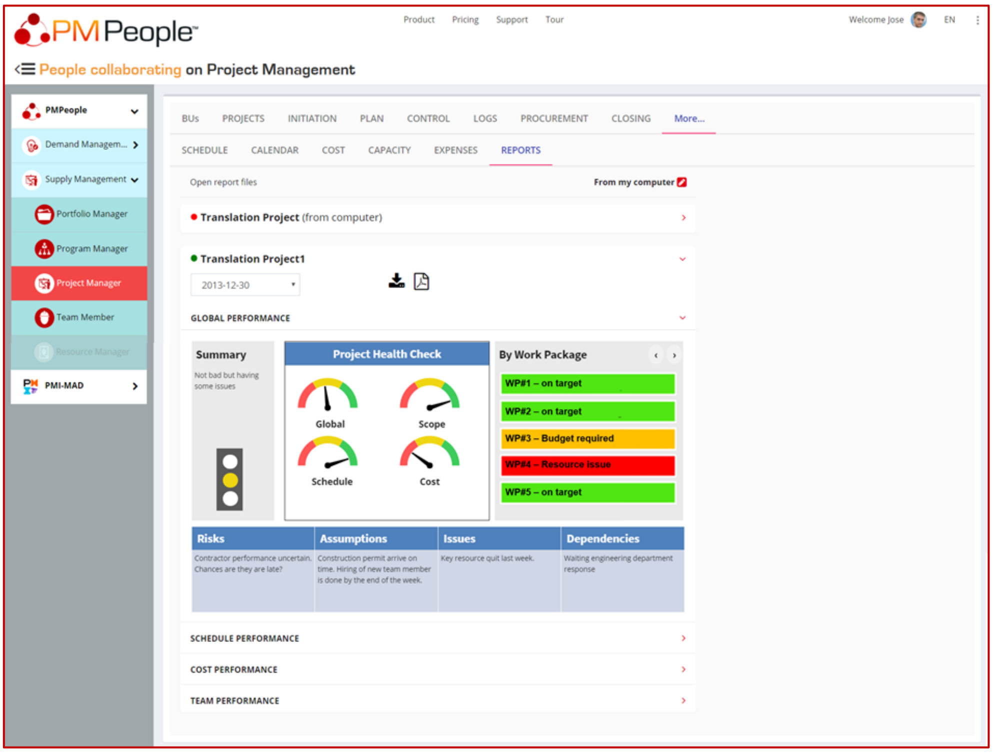
The same data can be read in the **mobile application**:



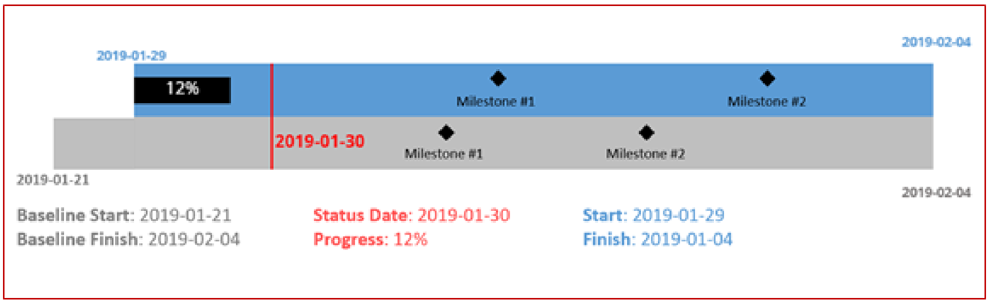


In regard to dashboard representation, Project Manager (PM), also PMO, PMOS, PfM and PgM, and Stakeholders (SH), Requester (RQ), Sponsor (SP) and the Functional Manager (FM), can review a dashboard on each project status report at **More... > REPORTS**.

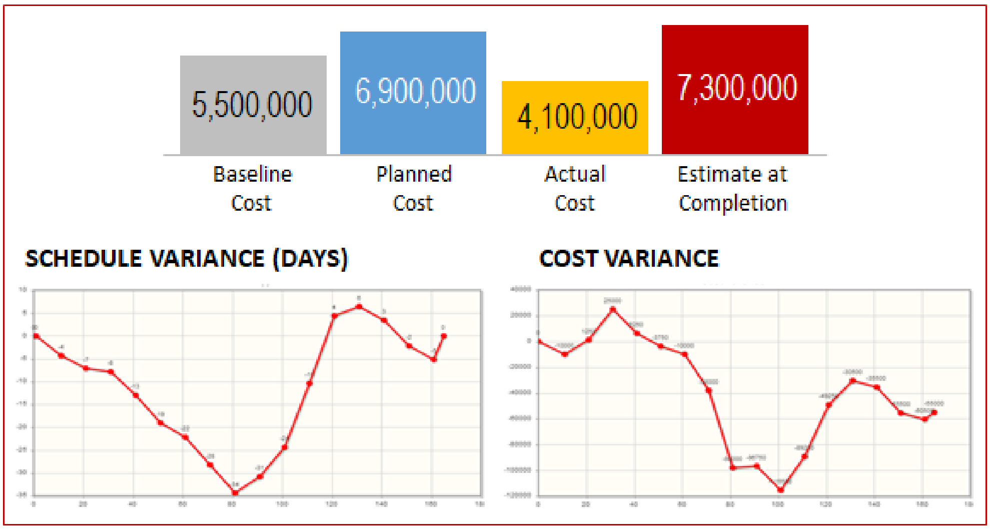
Open section **GLOBAL PERFORMANCE** to see global status summary for work package #0, and also traffic lights for scope, schedule, and cost. Below we can read status summaries for risks, assumptions, issues, and dependencies. Global status summaries for decomposing work packages can be read on the right. See 2.2.3.1.



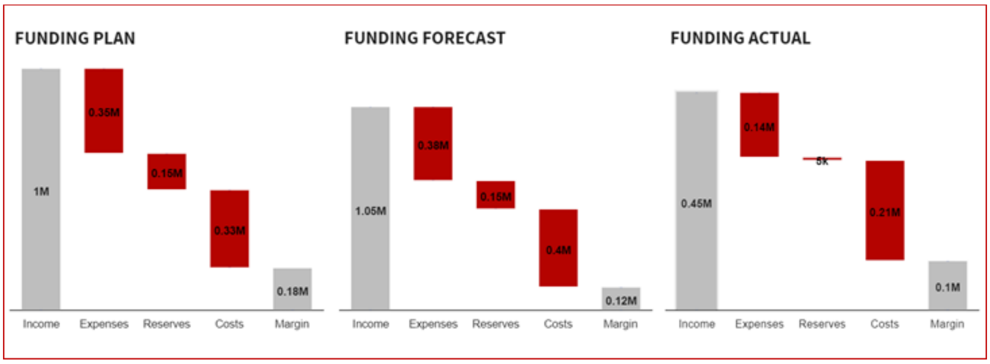
Open section **SCHEDULE PERFORMANCE** to see a schedule status summary for work package #0. See 2.2.3.6.



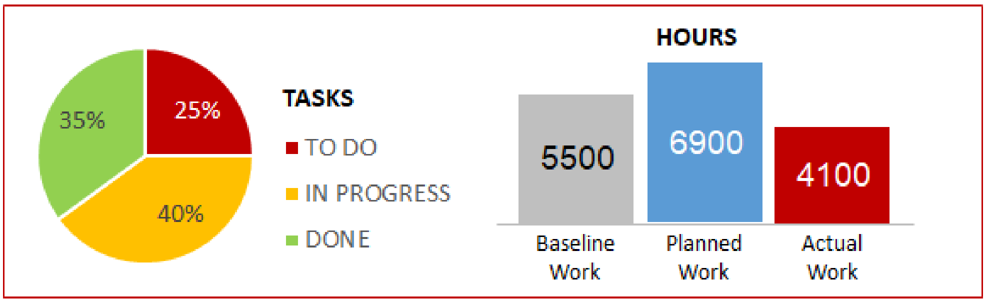
Open **COST PERFORMANCE** to see a cost status summary for work package #0. See 2.2.3.9.



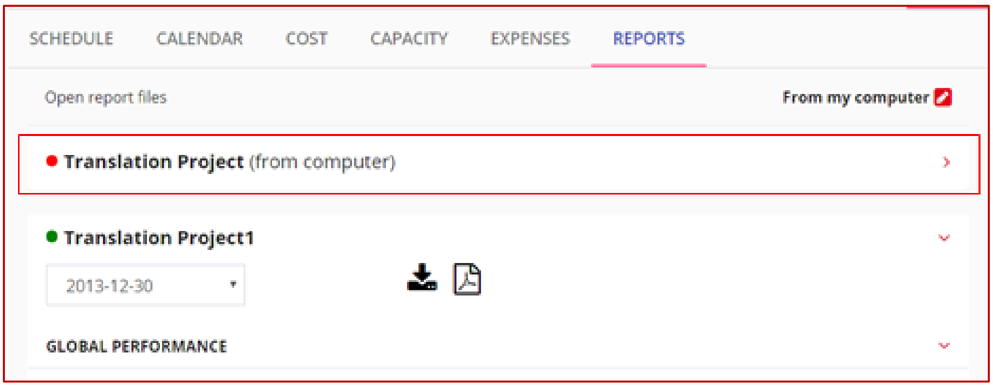
Open section **FUNDING** to see a summary of funding performance as baselined, planned, and actual for work package #0. See 2.2.3.12.



Open section **TEAM PERFORMANCE** to see a summary of team hours as baselined, planned, and actual, also a chart with tasks to-do, in progress and done so far.



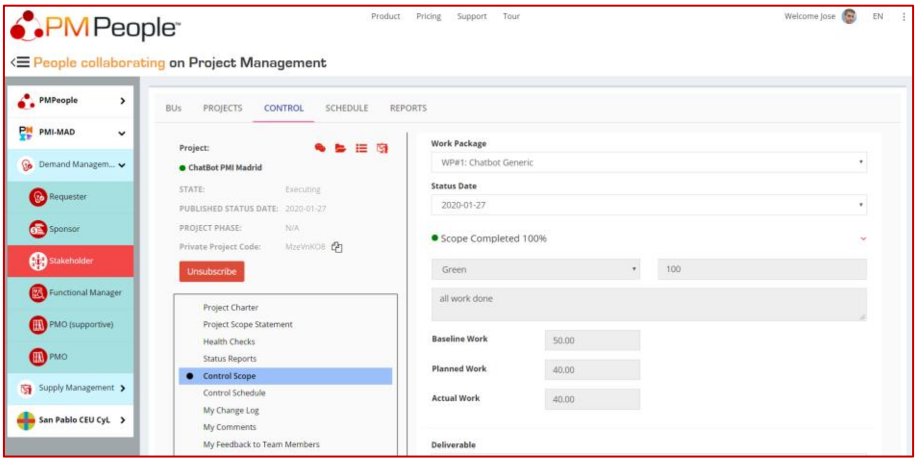
Users can download these reports as a PDF file ( ) or XML file ( ). XML files can be uploaded later (From my computer) in **REPORTS** section of this project (or another) to keep evidence of project status as of a certain review date. Users can add or remove their own reports collecton above:



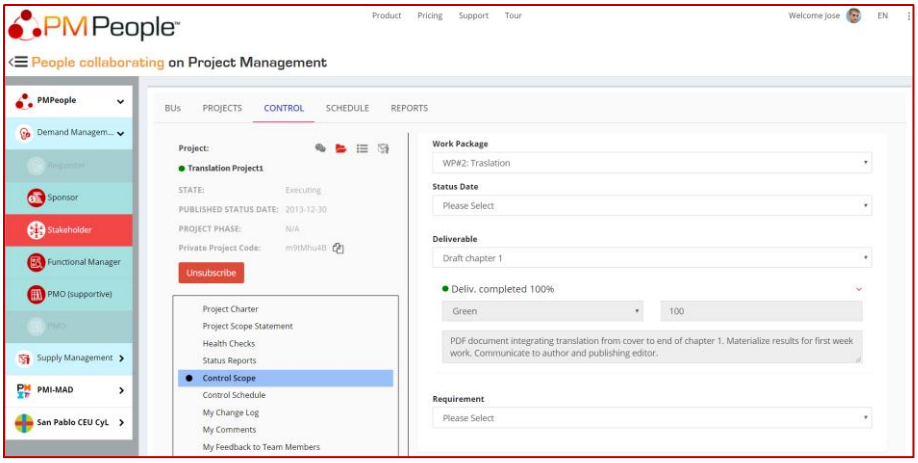
In reliable organizations, users can also add status reports which have been published in Blockchain. See 2.1.4.33.

2.1.4.31. AS A SH, RQ, SP, FM, I CAN CONTROL SCOPE

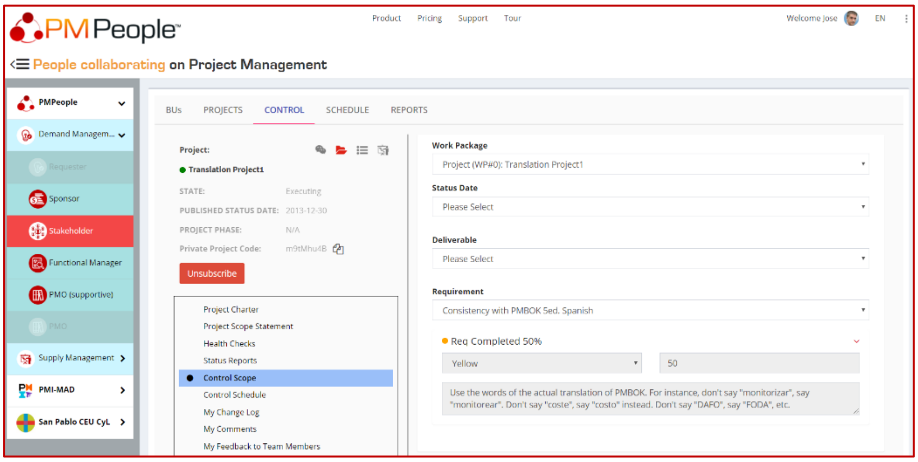
Stakeholders (SH), Requester (RQ), Sponsor (SP) and the Functional Manager (FM), can monitor scope at **CONTROL > Control Scope**:



They can also monitor **deliverables** associated to each work package:

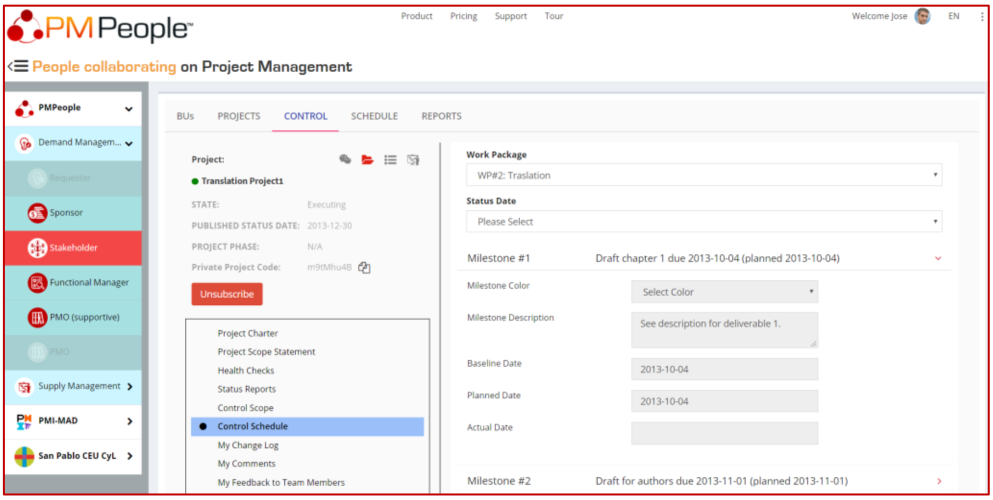


And they can also monitor **requirements** associated to each work package:

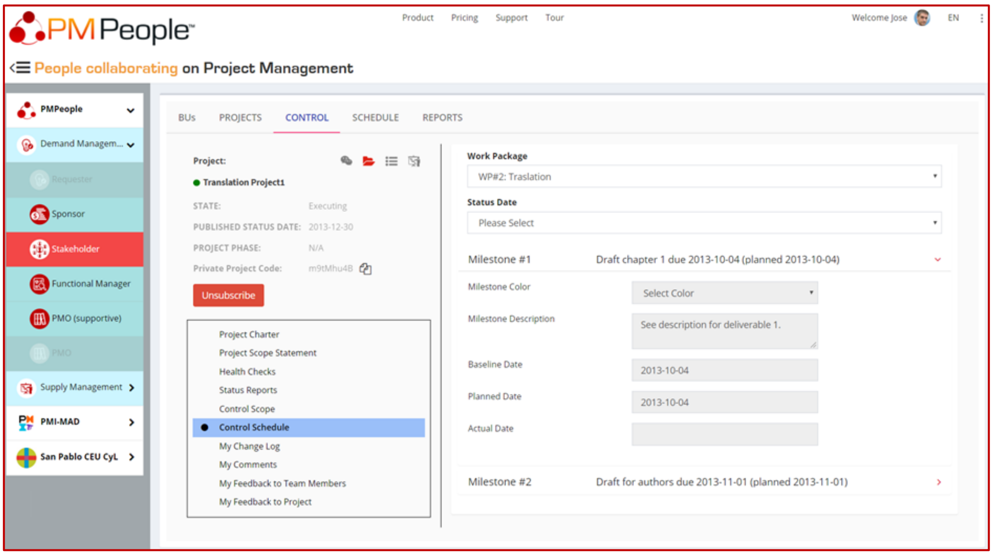


2.1.4.32. AS A SH, RQ, SP, FM, I CAN CONTROL SCHEDULE

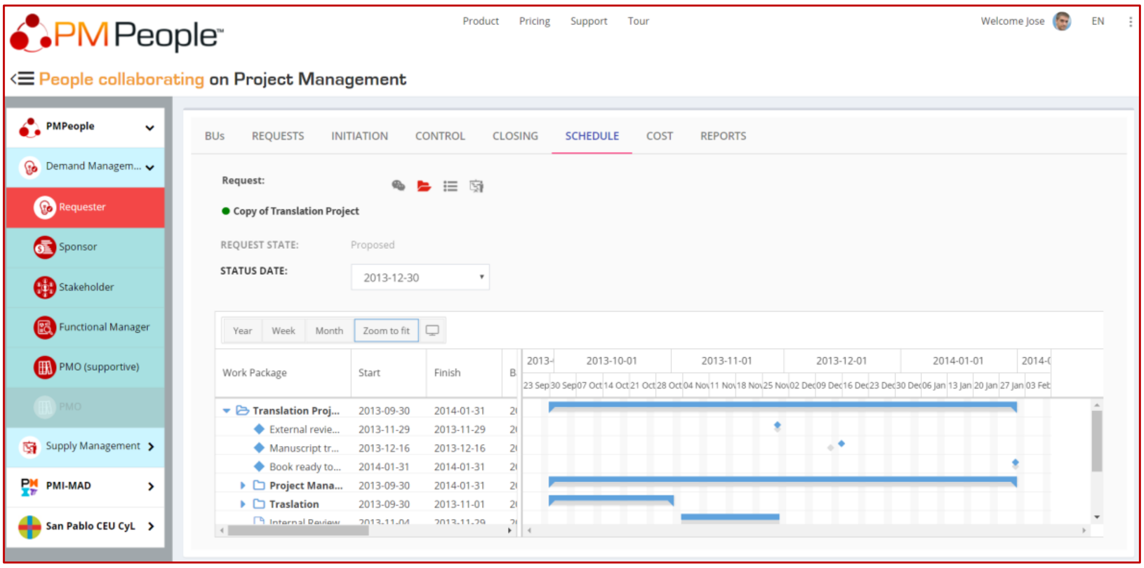
Stakeholders (SH), Requester (RQ), Sponsor (SP), Functional Manager (FM), the Project Manager (PM), or other manager (PMOS, PMO, PfM, PgM), can monitor schedule at **CONTROL > Control Schedule**:



They can also monitor **milestones** associated to each work package:



Regarding the graphical view, Stakeholders (SH), Requester (RQ), Sponsor (SP), Functional Manager (FM), the Project Manager (PM), or other manager (PMOS, PMO, PfM, PgM), can review project schedule performance, as of each review date, at **More... > SCHEDULE**.



2.1.4.33. AS A SH, I CAN TRUST PROJECT MANAGEMENT

To make periodic project status reports trustable, that is, impossible to face, the unique feasible technological solution is to publish project status reports files in Blockchain. In PMPeople, the organization owner can set the **"reliable organization seal"**, allowing status reports have a certified copy in Blockchain.

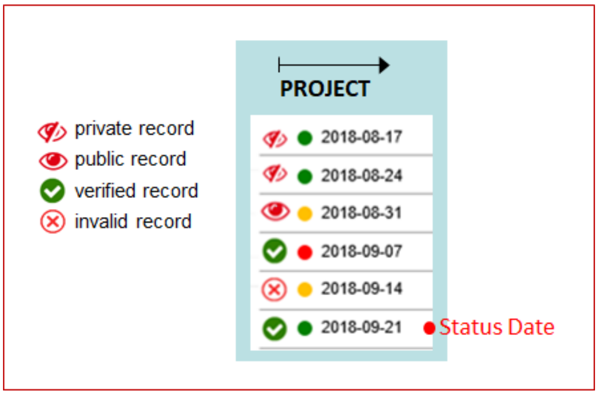
In reliable organizations, any project manager can publish project status reports in Ethereum, at a cost of 0.10€ each.

Four states are possible for any project status report:

- **Private**: Project status has not been stored on Blockchain.
- **Public**: Project manager has stored project status on Blockchain.
- **Verified**: At least one stakeholder has checked that the stored project status matches the information in the PMPeople tool.
- **Invalidated**: At least one stakeholder has checked that the stored project status does not match the information in PMPeople tool.

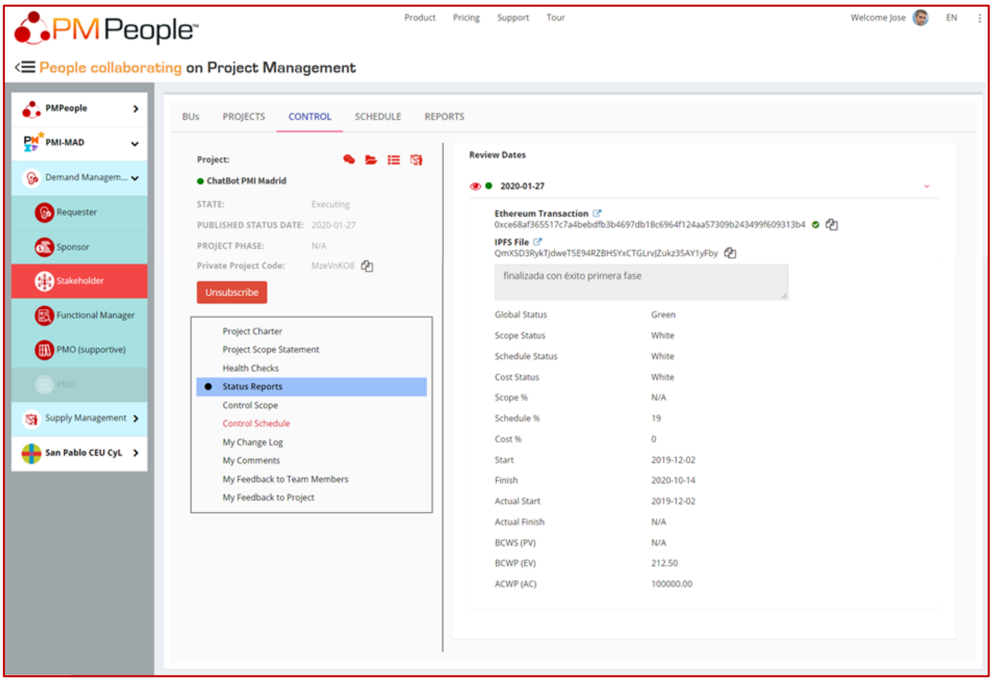
Imagine a project as of September 21st. Project status report has been published in Blockchain. At that time, the project is on track:

- Users granted to access project status reports in PMPeople can see that dates August 17th and 24th are not been published.
- August 31st report is published but nobody has verified it yet
- September 7th and 21st reports are verified indeed.
- September 14th report has been changed in PMPeople and does not match Blockchain record.
- Project manager can always publish August 17th and 24th.
- Project manager can also "unpublish" September 14th and set it to public again—PMPeople will call a new Blockchain transaction that will be secured in a new block.



In reliable organizations, stakeholders and project managers know that project status reports are kept in Blockchain. PMPeople hides technical details, though.

In reliable organizations, stakeholders (SH) can verify or invalidate a project status report at **CONTROL > Status Reports**:

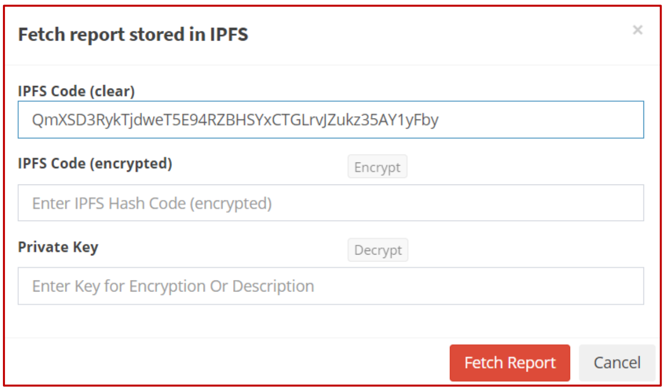


Unlike ordinary organizations, **reliable organizations** show this data:

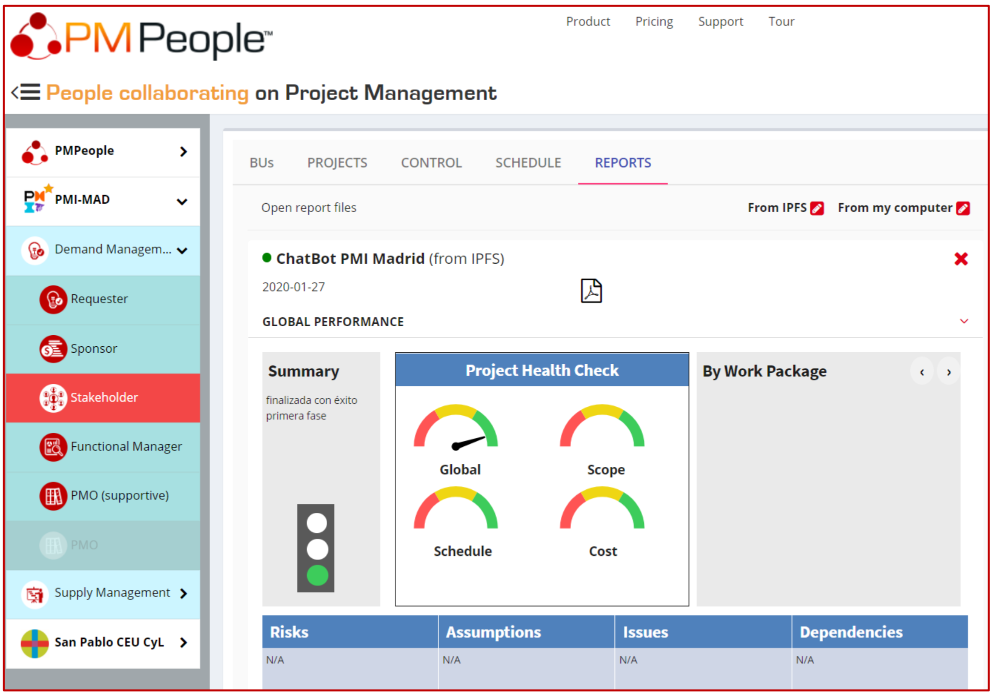
- **Reliable state icon**: Indicates if report is private [ ], public [ ], verified [ ], or invalidated [ ]. Stakeholders can click this icon to change project status report state to **"verified"** or **"invalidated"**.
- **Ethereum Transaction**: Public code of the Ethereum transaction containing status report file. This is not the real file, but the IPFS hash. Anyone can go to Eherscan, enter this code, and see the real Ethereum transaction. An Ethereum transaction can never be changed. Transaction data field contains the encrypted IPFS hash. This hash would allow anyone to get the actual file stored in IPFS.
- **IPFS File**: Anyone can go to ipfs.io, enter this hash, and see the actual project status report file stored in IPFS.

Watch this video explaining blockchain implementation in PMPeople.

In reliable organizations, in section **REPORTS**, project stakeholders can use IPFS code to see the graphical report from IPFS file. They can click button [**from IPFS**] and fill the text box in the pop-up window:



This way, stakeholders can keep their own copies of published status reports at several dates:



Stakeholders can see **the XML file stored in IPFS**. They can go to page ipfs.io and enter the IPFS code, like this one:
https://ipfs.io/ipfs/QmXSD3RykTjdweT5E94RZBHSYxCTGLrvJZukz35AY1yFby

ipfs.io/ipfs/QmXSD3RykTjdweT5E94RZBHSYxCTGLrvJZukz35AY1yFby

This XML file does not appear to have any style information associated with it. The document tree is shown below.


```xml
<Project>
  <ProjectID>8321</ProjectID>
  <ProjectName>ChatBot PMI Madrid</ProjectName>
  <ProjectShortName>ChatBot PMI Madrid</ProjectShortName>
  <BUID>1043</BUID>
  <BUName>Equipo TIC</BUName>
  <ProjectStatusDate>2020-01-27</ProjectStatusDate>
  <ProjectState>Executing</ProjectState>
  <ProjectPhase/>
  <Followup>
    <Followup_ID>42915</Followup_ID>
    <Followup_Date>2020-01-27</Followup_Date>
    <Reported>1</Reported>
    <ControlAccounts>
      <CA_Baseline>
        <CA_Name>ChatBot PMI Madrid</CA_Name>
        <CA_Desc/>
        <CA_BLStart>2019-12-02</CA_BLStart>
        <CA_BLFinish>2020-11-04</CA_BLFinish>
        <CA_Duration/>
        <CA_BLCost>1250.00</CA_BLCost>
        <CA_BCWP>212.50</CA_BCWP>
        <CA_IsCA0>1</CA_IsCA0>
      </CA_Baseline>
      <CA_Global>
        <CA_GlobalStatus_Dial>90</CA_GlobalStatus_Dial>
        <CA_GlobalStatus_Color>1</CA_GlobalStatus_Color>
        <CA_GlobalStatus_Sum>finalizada con éxito primera fase</CA_GlobalStatus_Sum>
        <CA_GlobalStatus_Risk/>
        <CA_GlobalStatus_Issues/>
        <CA_GlobalStatus_Depen/>
      </CA_Global>
      <CA_Scope>
        <CA_ScopeStatus_Percent>100</CA_ScopeStatus_Percent>
        <CA_ScopeStatus_Dial/>
        <CA_ScopeStatus_Color>0</CA_ScopeStatus_Color>
        <CA_ScopeStatus_Desc/>
      </CA_Scope>
      <CA_Cost>
        <CA_BCWS/>
        <CA_ACWP>100000.00</CA_ACWP>
        <CA_Cost>1250.00</CA_Cost>
        <CA_BCWP>212.50</CA_BCWP>
        <CA_CostStatus_Percent>0</CA_CostStatus_Percent>
        <CA_CostStatus_Dial/>
```

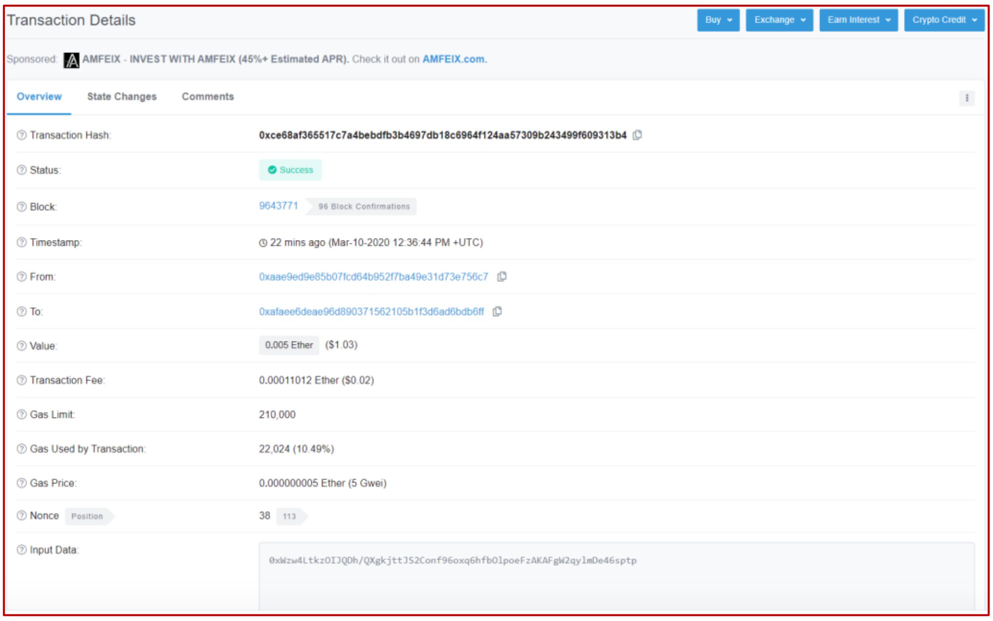

Any user with the Ethereum code, and the PMPeople project private key, is able to see the XML file, following 4 steps:

1) Go to Eherscan and enter **Ethereum** transaction code (try this example):

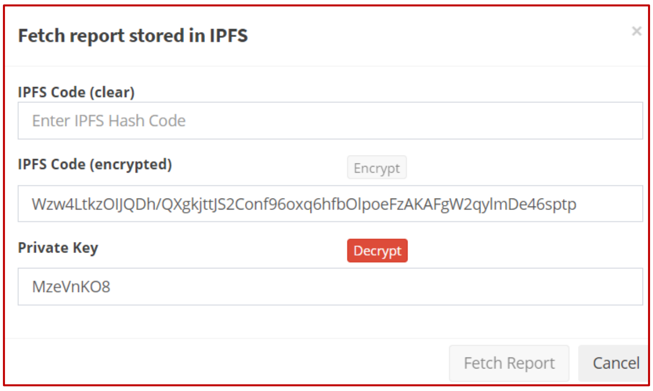
https://etherscan.io/tx/0xce68af365517c7a4bebdfb3b4697db18c6964f124aa57309b243499f609313b4

2) Go to field “Input Data” to get **the encrypted IPFS code**:

Wzw4LtkzOlJQDh/QXgkjttJS2Conf96oxq6hfbOlpoeFzAKAFgW2qylmDe46sptp



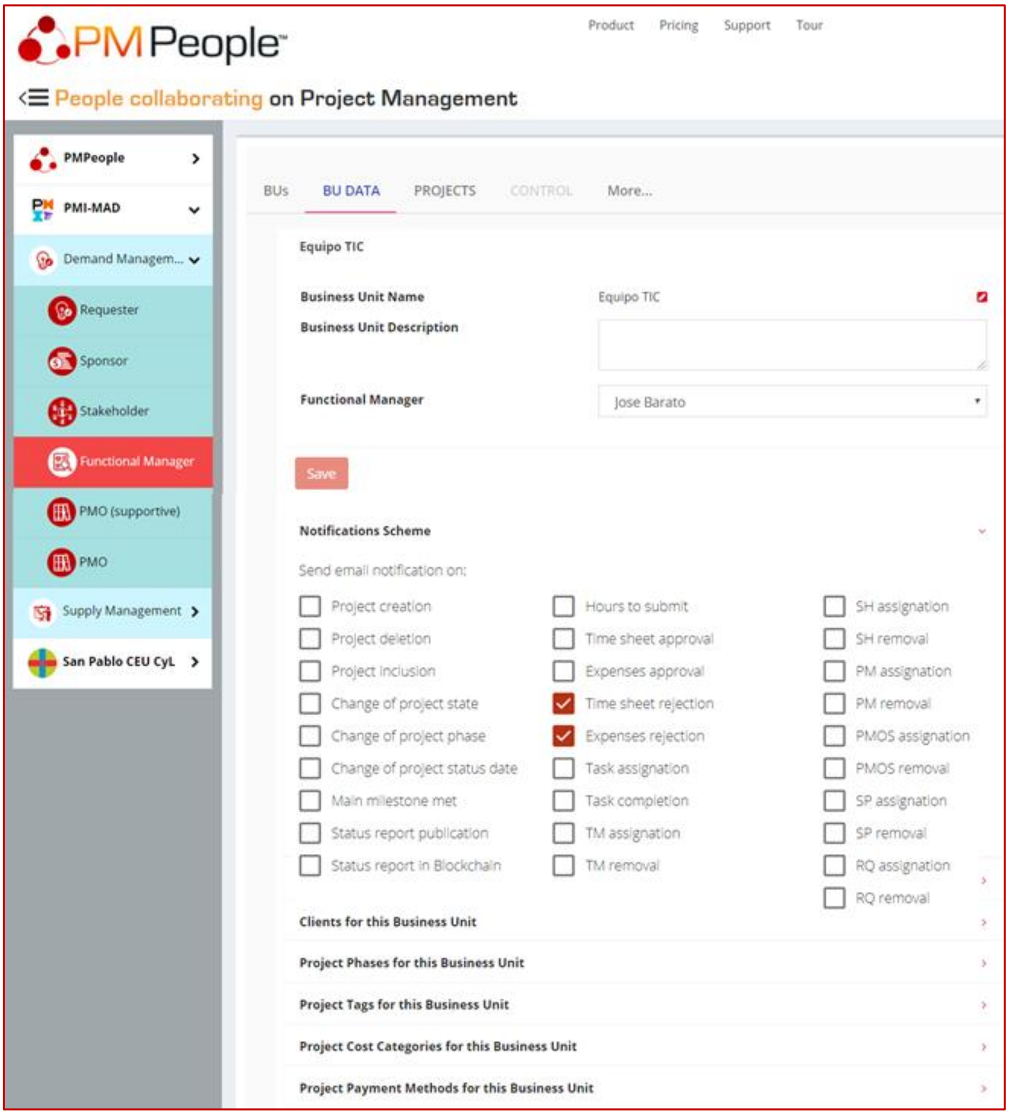
3) This text is encrypted with Data Encryption Standard DES, using the PMPeople project private key: MzeVnKO8. Any standard tool can be used to **decrypt the text**. In PMPeople, you can go to the pop-up window to fetch IPFS reports and click button [**Decrypt**]:



4) Finally, go to ipfs.io, enter **IPFS Code (clear)** to get the **original XML file**.

2.1.4.34. AS A FM, PMO, I CAN SETUP EMAIL NOTIFICATIONS

Functional Managers (FM) and Project Management Office (PMO) can set email notifications at **BU DATA > Notifications Scheme**.



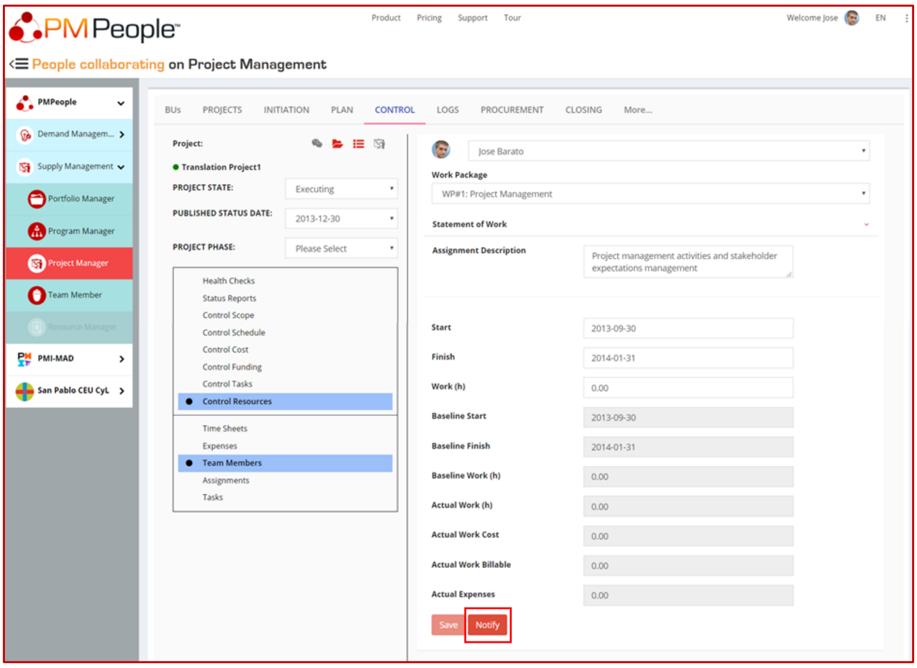
If the corresponding box is marked, some people, according to their role in the project inside the Business Unit, will receive an email if some event happens:

- **Project creation**: FM will be notified if a project is created inside the BU.
- **Project deletion**: FM and PMOs will be notified if a project is deleted.
- **Project inclusion**: FM, PgM and PfM will be notified if project changes Business Unit, Program or Portfolio, respectively.
- **Change of project state**: Roles SH, RQ, SP, FM, PgM and PfM will be notified if project change state—initiating, planning, execution, closing, archived.
- **Change of project phase**: Roles SH, RQ, SP, FM, PgM and PfM will be notified if project change project phase.

- **Change of project status date**: Roles SH, RQ and SP will be notified if project change published status date:
- **Main milestone met**: Roles SH, RQ and SP will be notified if project meet some main milestone—associated to work package#0—that is, milestone actual date is updated.
- **Status report publication**: Roles SH, RQ and SP will be notified when project status report is created.
- **Status report in Blockchain**: Roles SH, RQ, SP, FM, PMO, PMOS, PfM, PgM and PM will be notified when project status report is published in Blockchain.
- **Hours to submit**: TMs with week hours pending to submit are notified.
- **Time sheet approval**: Team Members will be notified if their submitted timesheets are approved for a day or for a week.
- **Expenses approval**: Team Members will be notified if their submitted expenses are approved for a day or for a week.
- **Time sheet rejection**: Team Members will be notified if their submitted timesheets are rejected for a day or for a week.
- **Expenses rejection**: Team Members will be notified if their submitted expenses are rejected for a day or for a week.
- **Task assignment**: Team Members will be notified if they are assigned to tasks.
- **Task completion**: Roles PMOS and PM will be notified when a project task is completed.
- **TM assignment**: When assigning a TM to a work package, he will be notified, along with his RM.
- **TM removal**: When removing a TM from a task, he will be notified, along with his RM.
- **SH assignment**: When assigning a SH to a project, he or she will be notified, along with roles PMOS and PM.
- **SH removal**: When removing a SH from a project, he or she will be notified, along with roles PMOS and PM.
- **PM assignment**: When assigning a PM to a project, he or she will be notified, along with roles RQ, SP, PMOS, PfM and PgM.
- **PM removal**: When removing a PM from a project, he or she will be notified.
- **PMOS assignment**: When assigning a PMOS to a project, he or she will be notified, along with the other roles PMOS and PM.
- **PMOS removal**: When removing a PMOS from a project, he or she will be notified, along with the other roles PMOS and PM.
- **SP assignment**: When assigning an SP to a project, he or she will be notified.
- **SP removal**: When removing an SP from a project, he or she will be notified.
- **RQ assignment**: When assigning a RQ to a project, he or she will be notified.
- **RQ removal**: When removing a RQ from a project, he or she will be notified.

2.1.4.35. AS A PM, I CAN EMAIL CHANGES ON ASSIGNMENTS

The Project Manager (PM), also PMO, PMOS, PfM and PgM, can email changes on assignments at **CONTROL > Control Resources > Team Members/Assignments**:



Click button [**Notify**] to send an email to the TM containing the information on screen.

2.1.4.36. AS A PM, I CAN SET EMAIL REMINDERS FOR TASKS

The Project Manager (PM), also PMO, PMOS, PfM and PgM, can set email reminders for tasks at **PLAN > Plan Tasks**.

Assignees can be emailed one day before due date, on due date, and/or one day after due date.