Araxis® Ketura

Quick Start Guide

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Every effort has been made to ensure that the information in this manual is accurate. Araxis frequently releases new versions of its software, so the images shown in this book might vary slightly from what you see on your screen.

Contents

A First Look at Ketura

1

This guide introduces you to Ketura, helping you get up and running quickly.

We're going to show you some key concepts and basic features. In the 2–3 hours it takes to walk through this guide, you'll gain a firm understanding of how to start putting Ketura to productive use. Along the way, you'll see that there are lots of more advanced features, but you don't need to worry too much about those for now.

WHAT IS KETURA?

Ketura is a powerful and easy-to-use project management system that can help you organize and manage your projects and teams. It helps you complete your projects on time by letting you know exactly what is going on, enabling you to prevent schedule slips. It helps you keep your projects within

TAKE CONTROL. GET THINGS DONE.

budget by providing you with the cost estimates, as well as predicted schedules.

Ketura uses *issues* to keep track of your projects and schedules. Issues are not necessarily *problems*; they are simply *the things that need to be done* to complete a project. In short, they're really more like *small-scale goals*.

Ketura can do many things for you

Staying on top of all the things you have to do can be a real challenge. Ketura can:

- *keep track of your clients' and team members' requests*, so that everyone stays on the same page;
- help you *organize your work* into clearly defined goals;
- automatically *create personal 'to-do' lists for each team member*, so that everyone knows what to do and when;
- *show you where time has been spent* on certain activities, so that you can avoid unprofitable lines of work in the future;
- even *predict project schedules*, automatically keeping them up-to-date with the latest progress and expectations of team members.

WHO CAN BENEFIT FROM USING KETURA?

Ketura is for the seasoned project manager, and for those *without any project management experience at all.*

It's for individuals, small businesses, consultants, legal professionals, publishers – really, anyone who works on projects. So no matter if you're a team of one, or one part of a team, Ketura can help you stay on top of things.

Ketura adapts to your changing needs

Ketura is good for all user levels – whether or not you are a project management professional.

BEGINNER

EXPERT

YOU

As a *new user* of Ketura, you can immediately apply the principles in this guide to your business. Ketura helps you keep things organized, so you can more easily balance your time between your customers and your projects. Ketura will adapt with you as you develop your skills and learn more about what it can do.

As an *expert user,* you can build on basic skills and take advantage of advanced capabilities, such as balancing tasks among team members, rescheduling projects, redefining goals, and using Ketura's powerful tracking and trending tools to see how your project is *really* progressing.

WHAT DOES A PROJECT MANAGER DO?

Simply put, a project manager organizes and manages projects. But we all know there's more to the job than just that, and Ketura is *just the tool* to help you manage your projects, including all the big and little things that come along during the course of a project. Ketura can help you:

- *plan your projects*, and define in a structured way the things that need to be done to complete them;
- *assign tasks to team members*, so that everyone knows what to do and when to do it;
- *organize existing issues*;
- *deal efficiently with new issues* that come up during your project;
- *record the time spent* by users on various activities;
- *gather expectations* from team members.

That last point perhaps need some elaboration. Often, team members will have a better idea than the project manager of how long their tasks will take. Ketura collates your team members' estimates of how much work there is left to do. It then provides project managers with a schedule prediction based upon these expectations. If this schedule starts to deviate from the official project plan, managers can immediately take action to bring things back on course.

ORGANIZE PROJECTS THE WAY YOU WANT

There are many ways of approaching project management. You can plan a project from the *top-down*, accounting at the outset for all the things you need to do and noting how much work there is to do. Ketura works well with top-down project planning.

TOP-DOWN

+

BOTTOM-UP

Alternatively, you can plan a project from the *bottom-up*, based on

incoming issues as they arise. The things to do to complete a project are added to the plan as the project progresses. So, the list of things to do, and when to do them, is formed along the way. Ketura works well with bottom-up project planning, too.

Ketura makes it natural to combine these two methods. You can enter your basic project information (things to do) using the top-down approach, based on what you already know about the project. Then, as other items arise, you add suitable new issues from the bottom up.

A key feature of Ketura in relation to the bottom-up approach is that it enables you to separate the process of reporting new issues from deciding what to do with them. This can be tremendously helpful. For example, you might have customer-facing team members who need to report issues, but who are not responsible for managing the project itself. A project manager can, at a convenient time, review new issues that have been reported by other team members, deciding how (if at all) those issues should be incorporated into the project plan.

In other words, *Ketura is designed to be flexible,* so you can use it any way you like, with any mix of methods that fit your situation.

WHAT GOES INTO A KETURA PROJECT?
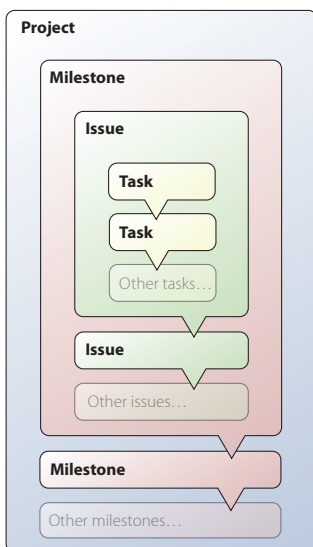
Ketura organizes each project, and the information related to a project, using a four-tiered hierarchy. Let's identify the elements of each tier.

- A *project* is a planned undertaking directed towards achieving a particular goal.
- A *milestone* is a significant stage in a project's life.
- An *issue* is a small-scale goal.
- A *task* is an item of work that must be done to resolve an issue.

By saying that these elements make up a *hierarchy*, we simply mean that:

- a *project* is made up of milestones;
- *milestones* are made up of issues;
- *issues* are made up of tasks;
- and *tasks* form the mini 'to-do' lists that your team members work on to resolve an issue.

Think of a Russian doll, where each tier contains those below it. A project contains milestones, milestones contain issues, and issues contain tasks. The diagram opposite shows how everything fits together.

Ketura is flexible about your 'to-do' lists

Most of us, at one time or another, have created lists of things that we *need to do*. These lists help us organize our day, ensuring that everything gets done.
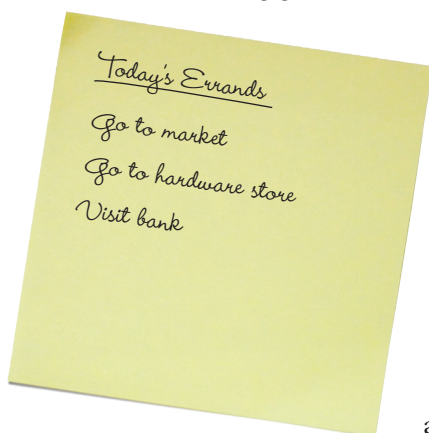
You might create a to-do list with a few items on it, looking something like the one shown on the left. You can consider these items as your *tasks*. If you think of these tasks as belonging to an *issue* called 'Today's Errands', you should start to see the relationship between *issues* and *tasks*.

But what if you preferred to make a detailed list, like that on the next page (turn over and take a quick look)? Now, the *tasks* in the first list become headings (*issues!*) in the detailed list. These goals each have their own list of things that must be done (tasks). And what about the 'Today's Errands' heading? You can now think of that as a *milestone*.

In the end, it really depends on how *you* prefer to organize and

think about the things you need to do. Your decision will be influenced by factors such as the estimated time to complete a task, or the level of complexity that you want for individual issues. Ketura is flexible – it helps you manage your projects no matter how you decide to organize them.

Today's Errands

Go to market
  Buy vegetables
  Buy milk & cheese

Go to hardware store
  Buy screwdriver
  Buy screws

Visit bank
  Deposit cheque
  Transfer money to savings

A QUICK REVIEW

We talked briefly about how Ketura helps you manage your projects and the issues that make them up. We saw that Ketura integrates the top-down and bottom-up approaches to project management to give you the benefits of both. And we looked at the elements that Ketura uses to help you organize and control your projects.

To get a better understanding of Ketura, watch the video on the Araxis website at:

  http://www.araxis.com/url/ketura/intro.uri

When you've finished, continue to the next chapter, where we'll get your system up and running quickly. Then we'll help you set up your first project.

First Steps

Now we're going to run through the process for getting your Ketura system up and running at the most basic level. We'll just cover the steps you need to get started, and to get your hands on something real.

At several points in this process, you'll see tabs or buttons or other interface items that might tempt you to do a little exploring. Feel free, but don't get too distracted – you'll have plenty of time to go investigate these later. And we'll direct you to other resources so you can learn all about Ketura if you wish.

The parts of a Ketura page
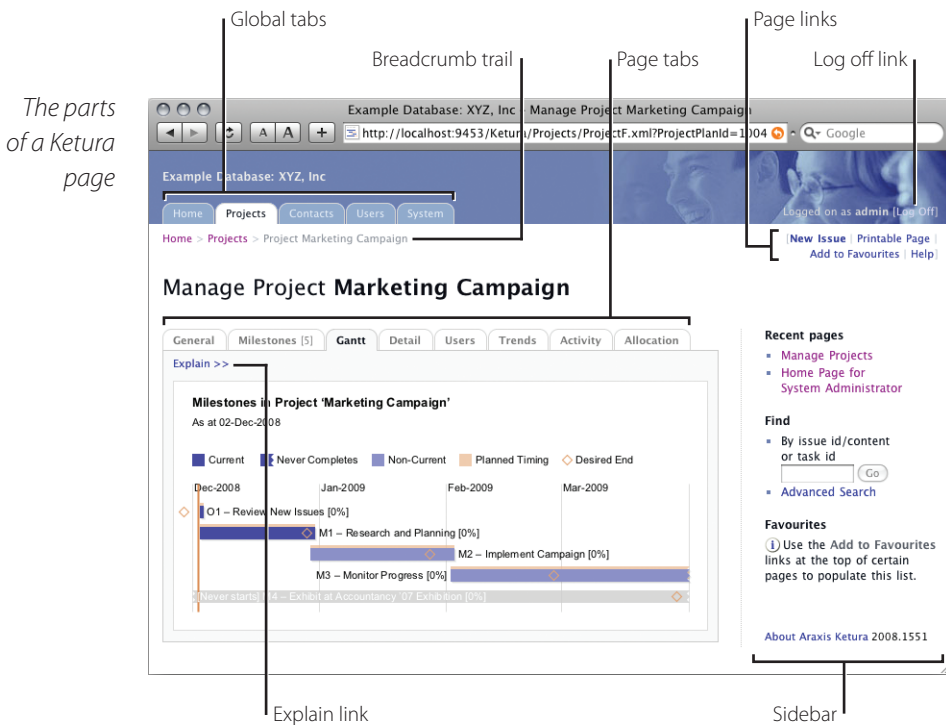
If you'd like to learn a little more about an item while we move through this process, click the **Explain** link at the top of the tab or section.

One other thing: if you do somehow get lost, use the **breadcrumb trail** just below the global tabs to find your way back.

GET THE SYSTEM UP AND RUNNING

Ketura is typically installed once on a single computer within an organization or department. Once installed, Ketura runs unobtrusively in the background. If your computers are networked, anyone on the local network can access Ketura simply by using a web browser. Even if you don't have a network, you can still access Ketura directly from the machine on which Ketura has been installed, again using a web browser.

Download and install the free 45-day evaluation

You need access to a Ketura installation to continue working through this guide. If you don't already have a suitable installation, you can install the free fully functional evaluation of Ketura on your own machine – perfect for trying Ketura out!

WARNING: This guide is intended to get you up and running with a fresh Ketura installation. If you want to use this booklet with a Ketura system that is already in use, first check with your Ketura administrator that this is OK, then backup the existing database to ensure that no data is inadvertently lost.

To download and install Ketura:

1. Go to the Araxis website, *www.araxis.com*, locate the Ketura product section, and download the free Ketura evaluation.
2. Install Ketura as you would any other application. The download and installation procedures are really straightforward, and you should be able to complete the process quite easily. If you do experience a problem, please contact Araxis via the Araxis website so that we can help you get on your way.

3. If you are installing Ketura on a Mac, go to the **Applications** folder and start the **Araxis Ketura Manager** application. Provide the details requested to complete the installation.

Ketura should now be running invisibly on your computer. You don't need to worry about starting or stopping Ketura – by default, it will start automatically whenever your computer starts.

Advanced feature: What if you'd like more control over when Ketura runs? On a Mac, you can use the **Araxis Ketura Manager** application to control whether Ketura starts with your machine, or to start and stop Ketura manually. On a Windows PC, you can do the same thing with the **Services** application, available from the Windows **Control Panel**, within the **Administrative Tools** area.

Log on to Ketura for the first time
As already mentioned, you use a web browser to access Ketura.

To log on to Ketura from the machine on which it has been installed:

1. If (and only if) you have installed Ketura on a Mac, start the **Araxis Ketura Manager** application and visit its **Status** tab. (If this is the first time you have started the Ketura Manager following installation, Ketura might prompt you for some information and take a few seconds to set up your database.)

Click the **Browse To Ketura Using Safari** button to go to Ketura.

2. Or, if you have installed Ketura on a Windows PC, go to the Windows **Start** menu, choose **All Programs**, then select the **Araxis Ketura 2008. xxxx Home Page** item.

3. You should now see the **Welcome to Araxis Ketura** log on page in your web browser.

(If you see the Ketura **Home Page** instead, you have been logged on automatically. You can get back to the log on page by clicking the **Log Off** link, towards the top-right of the page in your web browser.)

4. For the **User id**, enter `admin`. For the **Password** field, type in the password that you provided for the admin account during installation.

5. Click the **Log On** button.

ⓘ **Advanced feature:** Other users can simultaneously access Ketura across the local network. For information about how to do this, see the *Logging on to Ketura Using a Web Browser* topic, available from the full documentation table of contents in the Ketura area of the Araxis website.

Bookmark Ketura, or make it your home page

If you'd like to make it easier to access Ketura to manage your projects, consider bookmarking Ketura in your browser, or even making it

your home page. Just log on to Ketura as you normally would, then bookmark the page!

Refer to your browser's help for more information on creating bookmarks or setting the home page.
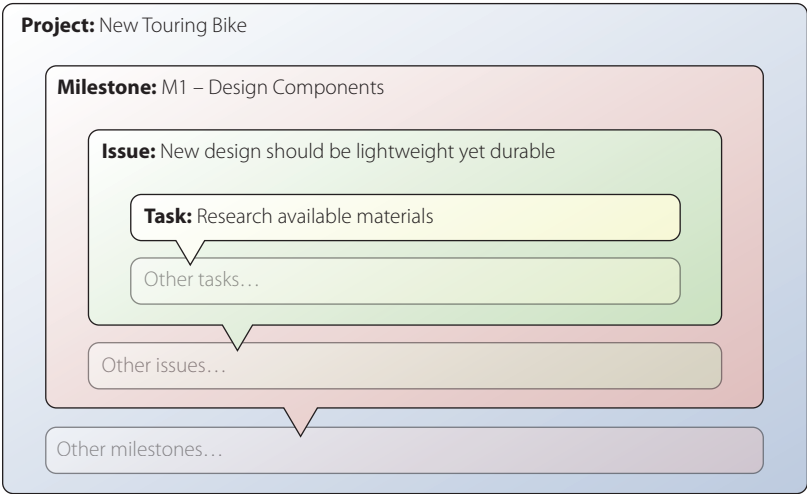
FOLLOW OUR EXAMPLE OR USE YOUR OWN

Throughout this guide, we will be using a fictitious company called *Bob's Bike Shop* to illustrate how to use Ketura, and to give you a story to follow as we enter information into the system.

You can follow along in this example by entering *exactly* what we do for Bob's Bike Shop, but you might want to consider using this as a model only, and enter your own information so you can more accurately see how Ketura would work with your specific business.

So for example, when we name our system 'Bob's Bike Shop', you would name yours after your business, or department, or other entity – whatever fits you best. And when we create a project to build a new bicycle, you would create a project to service a client, or to build a new product – again, whatever suits you best.

Look at the figure below to see how the example for Bob's Bike Shop is laid out. We will use a bicycle design scenario to illustrate each level of the process within Ketura.

Our Bob's Bike Shop example project

Of course, for a real project, you'd probably have multiple milestones, each with many issues. And each issue would have its own tasks. However, to keep things as simple as possible for our example, we'll only be adding a single milestone, issue and task.

If you want to create an example for your business, write your elements in the layout below, then use it to help you as we move along.

Your own example project

Naturally, if you feel more comfortable following along directly for the first pass, you are certainly welcome to do so. You can always re-initialize the database after we are through, and run through this guide again for your own purposes.

SWITCH AND NAME YOUR DATABASE

There are some bits and pieces that we need to tweak before we can create our project. Don't worry though, we'll get to that soon!

Switch to the normal database

Ketura includes an *example* database, which it uses by default following installation. The example database is designed as place where you can safely experiment, without worrying about disrupting your *normal*, working database. The various Ketura tutorials, available on

the Araxis website, are also based on the example database. You can switch Ketura between the two databases whenever you want.

Since this guide is designed to get you started using Ketura for real on your own projects, we need to switch to the normal database.

To switch to the normal database:

1. If you're not already logged on as the `admin` user, log on now with the password you assigned during installation. Notice the text in the top left corner of the page. It should currently read `Example Database: XYZ, Inc.`

Important: If the text starts with `Example Database:`, continue with these instructions. Otherwise, if it reads `Unnamed Ketura System`, skip to 'Give your Ketura system a meaningful name' on page 15.

2. Click on global **System** tab > **Administration areas** page tab > **Backup, Restore, Switch or Reinitialize the Database** link.

'Administration areas' tab

Global 'System' tab

Link

3. Click the **Switch between normal/example databases** tab, then click the drop-down list and select `Normal`.

4. Click the **Apply** button.
5. When the **Confirm Database Switch** page appears, enter your password, then click the **Switch Database** button to submit your confirmation.

Ketura will take a few seconds to switch the databases, and then log you off. You will be taken to the **Welcome to Araxis Ketura** log on page.

Notice that the text in the upper left corner has changed to `Unnamed Ketura System`. We'll take care of that next.

6. Log back on as `admin` and enter your password. The system confirms that the database switch was successful and you are ready to move on.

Give your Ketura system a meaningful name

You would typically assign a meaningful name to your system database; something that reflects the company, department, or larger entity that will be using the system. For our example, we'll use a company name: Bob's Bike Shop. You can use your own organization's name if you prefer.

To rename your database:

1. Click again on the global **System** tab and ensure that the **Administration areas** tab is selected.

2. Click the **Manage System Settings** link.
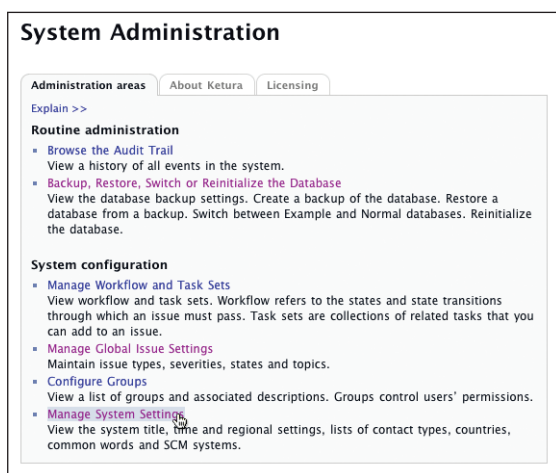
3. From the **System Settings** page > **General** tab, enter the name that you want to assign to your system database in the **Title** field.

ⓘ **Tip:** You must enter a value in all fields that have a red star following their labels.

System Settings

| General | Time | Regional | Contact types [4] | Countries [246] | Common words [23] | SCMs |

Explain >>

Title: Bob's Bike Shop

(Apply) (Reset)

Red star indicates a field that must be completed

4. Click the **Apply** button. Ketura will confirm the name change. You should now see the new name displayed in the upper left corner of every page.
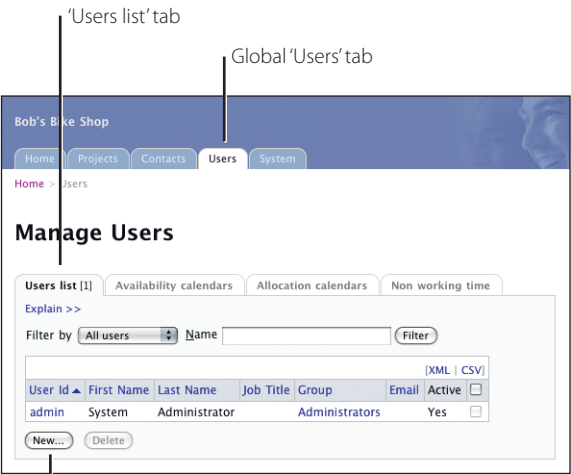
ADD USERS TO THE SYSTEM

You need to add information to identify your team members who will be using the system and working on your projects. You will add yourself and two other people, if you are following our example directly.

You will also define general working hours and modify availability if some of these users work on a different schedule.
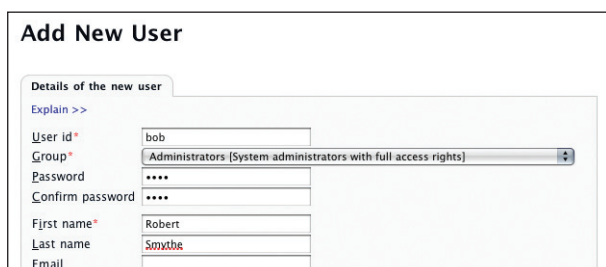
To add new users:

1. Click the global **Users** tab > **Users list** tab > **New…** button.

'Users list' tab

Global 'Users' tab

Bob's Bike Shop

| Home | Projects | Contacts | Users | System |

Home > Users

Manage Users

| Users list [1] | Availability calendars | Allocation calendars | Non working time |

Explain >>

Filter by [All users] Name [   ] (Filter)

[XML | CSV]

| User Id ▲ | First Name | Last Name | Job Title | Group | Email | Active ☐ |
| admin | System | Administrator | | Administrators | | Yes ☐ |

(New…) (Delete)

'New…' button

2. On the **Add New User** page, enter the information that describes the user. We'll add Bob Smythe first.

Use the following values for Bob Smythe:

- **User id**: bob
- **Group**: Administrators
- **Password**: bbs1
- **Confirm password**: bbs1
- **First name**: Robert
- **Last name**: Smythe

Most of the information on this page is self-explanatory. The **Group** field determines what the users can do after they log on to Ketura. You can provide additional contact details, too, but we don't need to worry about that for this example.

3. Click the **Apply** button. You're taken back to the **Manage Users** page.

4. Now let's add another user, Anita Chung. Repeat steps 2 and 3 with the following information:

- **User id**: anita
- **Group**: Users
- **Password**: bbs2
- **Confirm password**: bbs2
- **First name**: Anita
- **Last name**: Chung

5. Finally, repeat the same steps to add yourself as a user. You can choose your own user id and password, but make sure you assign yourself to the `Administrators` group. If you were setting up your own system for real, rather than working through an example, you'd add other members of your team, too. You'd probably want to add them to the `Users` group.

Tell Ketura when users are available for work

Now that we have added our users, let's tell Ketura what their working hours will be. This is done using the availability calendar.
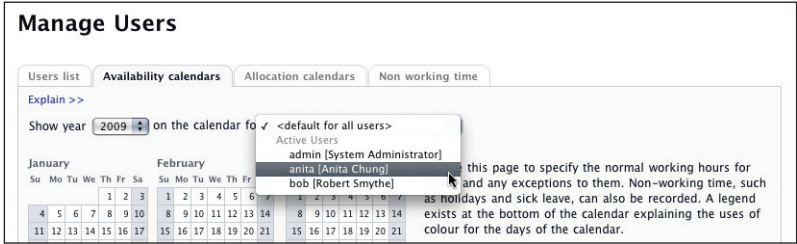
To go to the availability calendar:

1. Click the global **Users** tab > **Availability calendars** tab.

2. Click on December 31 in the calendar, then notice the shading used to identify working days, non-working days, and the selected day you just clicked on. You should see something similar to the screenshot below. A colour key just below the calendar identifies how Ketura marks each type of day on the calendars.

Just to the right of the calendars, you'll see the **Normal daily working hours**, where you define the normal daily working hours for the team member selected in the **on the calendar for** drop-down list. If `<default for all users>` is selected from that list, the information you define will be the default settings that apply to all users, unless you explicitly override them for a specific person. If most people in your organization work the same hours, you can set the defaults for all users appropriately, just making individual changes for those people who work nonstandard hours.

Underneath the Normal daily working hours section is the **Exceptions to normal daily working hours specified above** section. Here, you can define exceptions such as vacations, non-normal hours, maternity leave, and more. The information shown here relates to the date or dates selected in the calendar to the left, again for the user (or all users) selected in the **on the calendar for** drop-down list. Ketura accounts for all these exceptions when it predicts schedules for your projects.

Drop downs to select
year and user(s)

Normal working hours
apply to all dates

Manage Users

| Users list | **Availability calendars** | Allocation calendars | Non working time |

Explain >>

Show year 2009 ▲ on the calendar for <default for all users> ▲

| January | February | March |

Su Mo Tu We Th Fr Sa (January, February, March calendars)

ⓘ Use this page to specify the normal working hours for users, and any exceptions to them. Non-working time, such as holidays and sick leave, can also be recorded. A legend exists at the bottom of the calendar explaining the uses of colour for the days of the calendar.

Normal daily working hours

Unless otherwise specified, users work these hours:

| Sa* | 0 h | Su* | 0 h | Mo* | 8 h |
| Tu* | 8 h | We* | 8 h | Th* | 8 h | | Fr* | 8 h |

(Apply) (Reset)

Exceptions to normal daily working hours specified above

On the selected date(s), the user:

◉ ☐ Works the normal daily working hours specified above
○ ☐ Takes the day as Public holiday ▲
○ ☐ Works exceptional (non-normal) hours: 1 h
○ ☐ Works 4 h and takes 0.5 d Public holiday ▲

(Apply) (Reset)

| April | May | June |

| July | August | September |

| October | November | December |

☐ Normal working hours ■ Exceptional (non-normal) working hours
☐ Non-working day ☐ Day split between work and non-work
☐ Selected

Colour key

Exceptions apply only
to selected dates

ⓘ **Tip:** As well as selecting a single day on the calendar, you can select multiple dates and date ranges. This means that you can, for example, select an entire week and mark a particular user as being on vacation. Click a month name to select a whole month, a day name to select all those days in a month. To select a range of dates, click the first date, then **Shift**-click the end date. To select multiple dates, hold down **Ctrl** (**Option** on the Mac) while clicking.

For this example, we'll leave the `<default for all users>` settings as they are, and make just a couple changes for Anita.

To make changes to a user's normal working hours:

1. Make sure you are on the global **Users** tab > **Availability calendars** tab.

2. Select the user whose work schedule you want to define by using the **on the calendar for** drop-down list. We'll use Anita Chung for our example, so select her from the list.

3. In the **Normal daily working hours** section, click the radio button labelled **These specific working hours**.

4. Change the hours for each day as needed. For this example, Anita works Saturdays in place of Wednesdays, so we'll add eight hours to Saturday and remove Wednesday from Anita's schedule. Do this by entering 8h in the **Sa** field, and 0h in the **We** field, as shown below.

   Remember, fields marked with red stars indicate that values must be provided.

5. Click the **Apply** button.

   Look at the calendar after the changes. Notice how, in our example, Sunday and Wednesday are indicated as nonworking days for Anita Chung. No other days are indicated as exceptions in the calendars shown. Anita is now available on Saturdays in place of Wednesdays.
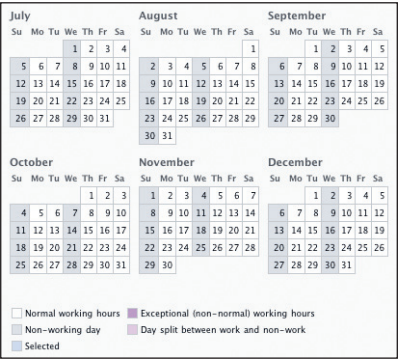
During an actual system setup process, you would define the availability for the rest of your users. You would then add non-working day exceptions for particular dates or date ranges as needed.

OVERVIEW OF GLOBAL ISSUE SETTINGS

As we saw back in chapter 1, *issues* are a key element of your projects. In Ketura, you can store a number of pieces of information for each issue, some of which are choices you make from predefined lists. These lists are collectively called the *global issue settings*.

Each time you create a new issue for your projects, you will select a value for each of three elements that help to describe your issue: *type*, *severity* and *topic*. As work progresses on an issue, you will also be changing its *state*.

Ketura starts off with sensible default lists that you can choose from for all of these fields, and you can certainly start-off using just those. Alternatively, you might choose to customize some or all of these defaults so they better reflect the needs of your business.

For this introductory exercise, we'll quickly review issue types, severities, states and topics so that you'll understand them when we create your new project. If you're in a hurry, you could skip this section for now and continue with the next chapter. You can always come back here later.

To go to the Global Issue Settings page:

1.   Click the global **System** tab > **Administration areas** tab > **Manage Global Issue Settings** link.
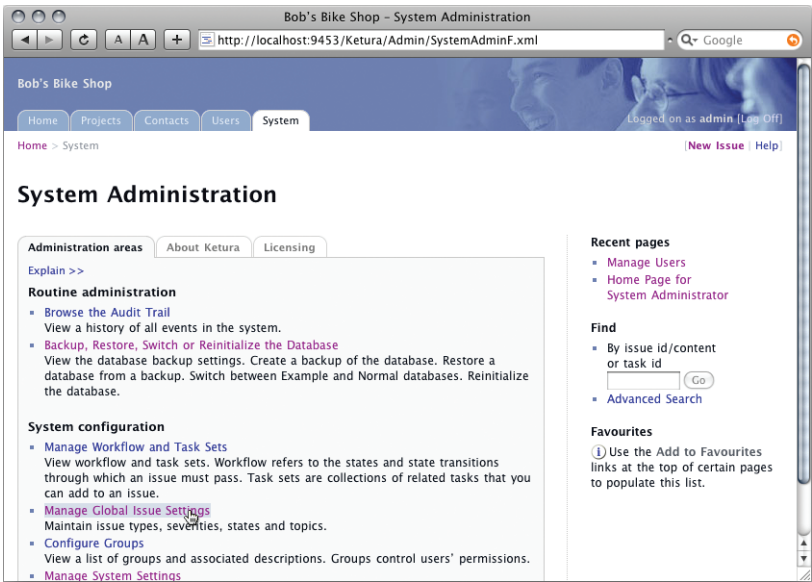
The **Global Issue Settings** page appears as shown below. You can see from the tab labels that you would use this page to define the issue **Types, Severities**, **States,** and **Topics**.
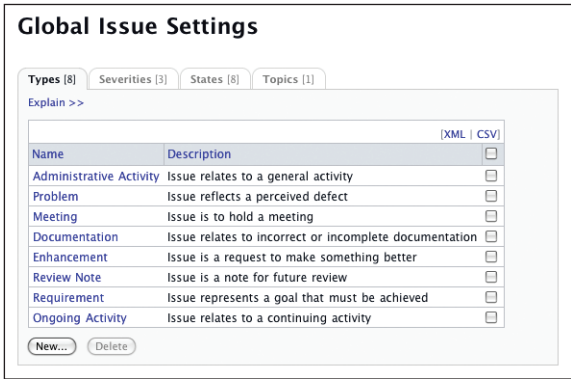
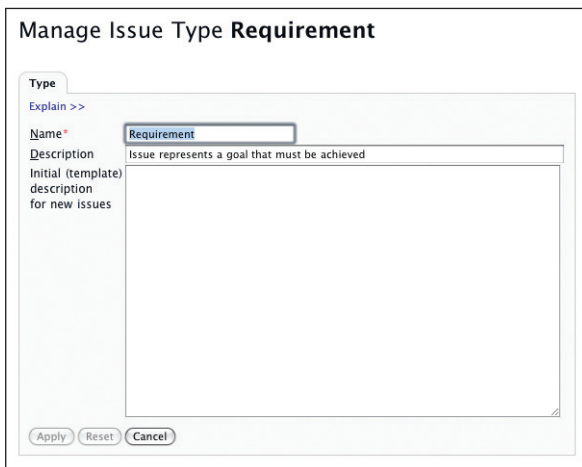Let's take a quick look at how each element contributes to defining the issues managed within Ketura.

Types

Types are used to identify what sort of issue is being recorded. Examine the type names and descriptions shown in the screenshot above to get an idea about how the standard set was organized. Let's consider the issue type called Enhancement. This type could be used by Bob's Bike Shop for issues that represent things that can be done to make the bicycle better. Things such as making the seats more comfortable, improving the gear shift, or using special tyres that don't go flat are all separate *issues* that are *Enhancements.*

It's easy to create new types if you need them for your issues. Just click the **New…** button on the **Types** tab and supply the requested information. We don't need a new type for our bike shop example, but let's customize the Requirement type so that you have an idea of what information you'd need to provide if you were to create a new type.

To modify an existing type:

1. Ensure that the **Types** tab is selected.
2. Click the name of the type that you want to modify. In this case, click the **Requirement** link. The **Manage Issue Type Requirement** page appears.

3. Notice the description of this type Requirement. It says that the Issue represents a goal that must be achieved. That sounds appropriate for our example issue, which is that our new bike design

should be lightweight yet durable. Type descriptions appear after the name of the type in the drop-down lists where you select them. The descriptions remind you when it is appropriate to choose that particular type.

4. Notice that the **Initial (template) description for new issues** field is blank. If you type some text here, it will be used as a default, template description for any new issues of this particular type. This initial description is therefore a great place for you to provide a reminder to the person reporting an issue of the sorts of information that they should include in the description.

5. Let's change the **Initial (template) description for new issues** to that shown in the screenshot below: `Provide a detailed description of the goal that is to be achieved. Try to make the goal specific and measurable.`

Manage Issue Type Requirement

> **Type**
>
> Explain >>
>
> Name*   Requirement
>
> Description   Issue represents a goal that must be achieved
>
> Initial (template) Provide a detailed description of the goal that is to be achieved. Try to make the
> description   goal specific and measurable.
> for new issues
>
> (Apply) (Reset) (Cancel)

---

6. Click the **Apply** button to save your changes.

7. Use the **Global Issue Settings** link in the sidebar **Recent pages** section to return to the **Global Issue Settings** page.

Recent pages
- Global Issue Settings
- System Administration
- Manage Users
- Home Page for
  System Administrator

Find
- By issue id/content
  or task id
  [   ] Go
- Advanced Search

Favourites
(i) Use the Add to Favourites
links at the top of certain pages
to populate this list.

Severities

Severities enable you to record how important an issue is to the person reporting it. Note that this element is recorded for information only. It does not necessarily affect the scheduling priority that a manager might give to an issue.

The standard severities provided are shown and described in the figure below. We'll just use these for our example.

Global Issue Settings

Types [8]	Severities [3]	States [8]	Topics [1]

Explain >>

[XML | CSV]

Name	Description	Weight ▼	
Critical	Issue is severe	100	☐
Important	Issue is serious	70	☐
Minor	Issue is not that important	30	☐

(Apply) (New...) (Reset)   (Delete)

States

Each issue has a *state*, indicating the issue's progress through the process of dealing with it from the time it is submitted to the time it is resolved.

(i) **Advanced feature:** You can use states and *workflow* together to ensure that particular kinds of issue move through all of the stages of a predefined process.

The standard states provided with Ketura are shown and described in the figure below. We won't be doing anything with states in our example, so there's no need to get into this too deeply just yet.

Notice, however, that some states are checked in the **Active** column. Issues that are in one of these states are deemed to be active. *Active* issues are ones for which you still expect that work might be performed. *Inactive* issues, by contrast, are ones that have been fully dealt with. Thus, an issue in the New state is active, and a Resolved issue is inactive.

Topics

Topics are used to categorize issues and define what they are all *about*. Ketura provides a lot of information on the activity associated with each topic on the topic's management page, so topics provide a great way to slice-and-dice issues independently of your projects. Of course, you don't *have* to make use of this capability. In fact, you don't even have to worry about topics much at all – Ketura will happily create default topics for you as necessary for your new projects.

Advanced feature: Along with states, topics play a crucial part in defining workflow. For this exercise, we won't bother ourselves with issue topics at all. You can learn more on topics and workflow later if you like.

The screenshot below shows the **Topics** tab. Right now, there's just a single topic, but if you check back here later after we have created a project, you'll see that Ketura has automatically created a new corresponding topic.
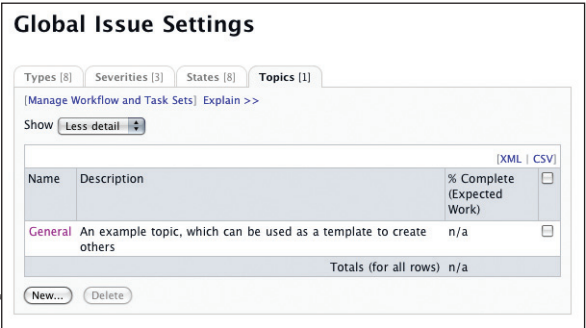
One way you might use issue topics is to break down a project into a number of different components. For example, instead of recording issues about something as big as the entire new bike project, it might be helpful to have topics to cover parts of the bike, such as the frame, drive train, etc. Bob could create separate topics for each of those things.

What if your business provides services to a number of clients? You could have a project or milestone for each client, but another way of organizing things would be to have a topic for each client, and then manage the different *kinds* of services you provide each in their own separate project. You could then use the project to report on how much work has been done on a particular kind of activity (and by whom) in a particular period of time, while using the topics to report on how much work has been done for each particular client. This is a great way to give you the data you need for invoicing clients!

REVIEW

You've installed Ketura, switched to the normal database and given your system a meaningful name. You've also added users to the system, and set their available working hours. Finally, you've seen some of the global issue settings.

Adding Your First Project

3

With the preparation out of the way, it's finally time to create a real project. This is where we apply your new-found knowledge. You'll see how the various pieces fit together to form the project hierarchy.

A REVIEW OF PROJECT ELEMENTS

Let's review the basic elements that Ketura uses to create a new project. Project managers create new *projects,* and in the process, their related elements, which are called *milestones*, *issues*, and *tasks*. Recall that:

- a *project* is made up of milestones;
- *milestones* are made up of issues;
- *issues* are made up of tasks;
- and *tasks* form the mini 'to-do' lists that your team members work on to resolve an issue.

If you'd like to refresh your memory, feel free to refer back to 'What goes into a Ketura project?' on page 4.

To follow this guide, you'll want to create a project that has a definite beginning and an end, so we can examine some of Ketura's important capabilities. For our *Bob's Bike Shop* example, we'll create a project to design a new type of bicycle.

Of course, Ketura is also great for projects that are perpetual in nature, such as those used to manage incoming help-desk tickets or ongoing administrative work.

CREATE A NEW PROJECT

A *project* is a planned work programme intended to achieve a par-
ticular goal. When you plan your project, you don't *have* to provide
estimates of how much work there is to do and who will be doing it
– however, if you do, Ketura will be able to predict a schedule.

To create a new project:

1. Click the global **Projects** tab > **Projects list** tab.

'Projects list' tab

Global 'Projects' tab
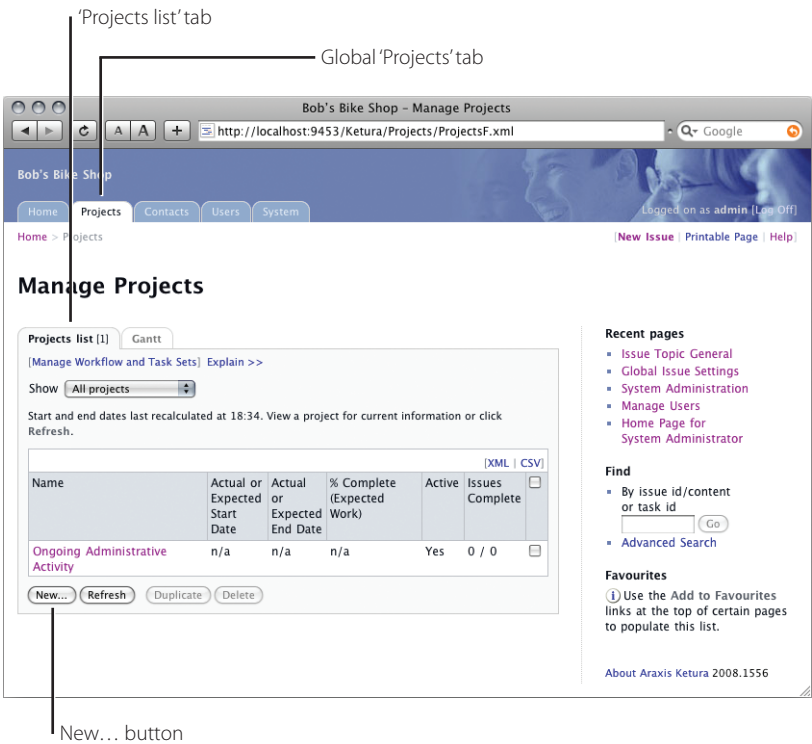
New… button

2. Click the **New…** button. The **Add New Project** page opens.

Add New Project

New project details

Explain >>

Project name*   New Touring Bike
Planned start date*   18-Dec-2008 (...)
☑ Make this project active

☑ Automatically create an issue topic and workflow for this project
Leave this checkbox checked if you simply wish to file new issues about this project and have
those issues added automatically to the project's 'O1 – Review New Issues' milestone. This is
recommended if you are new to Ketura. See the Explain >> link above for further details.

(Apply) (Cancel)

3. In the **Project name** field, enter a short project name. (We use `New Touring Bike` in our example.)

4. In the **Planned start date** field, enter the current date (today) because we want to start our project right away. If you prefer to use a calendar to select the start date, click the ellipsis (**...**) button to the right of the date field.

5. Ensure that the **Make this project active** box is checked.

6. Ensure that the **Automatically create a topic and workflow for this project** box is checked.

   When this box is checked, a new topic will be automatically created using the same name given to the project. We suggest that you use this approach until you learn more about topics and workflow, which we will leave for later.

7. Click the **Apply** button. You are returned to the **Manage Projects** page and the new project is shown in the table on the **Projects list** tab.

SET UP YOUR FIRST MILESTONE

Remember that a project is made up of a sequence of milestones. In life, milestones are generally considered significant or important events. It's exactly the same in Ketura; a *milestone* represents a significant stage in a *project's* life. Milestones are useful because they enable you to subdivide one massive goal (in our example, designing a new bike) into smaller steps. It's usually a lot easier to manage the completion of a single smaller step than it is to try and manage everything all at the same time.

Milestones are the elements that make up a project. So when you complete all your milestones, your project will be complete.

To setup your first milestone on a project:

1. From the **Manage Projects** page > **Projects list** tab, click the link for the project you just created.
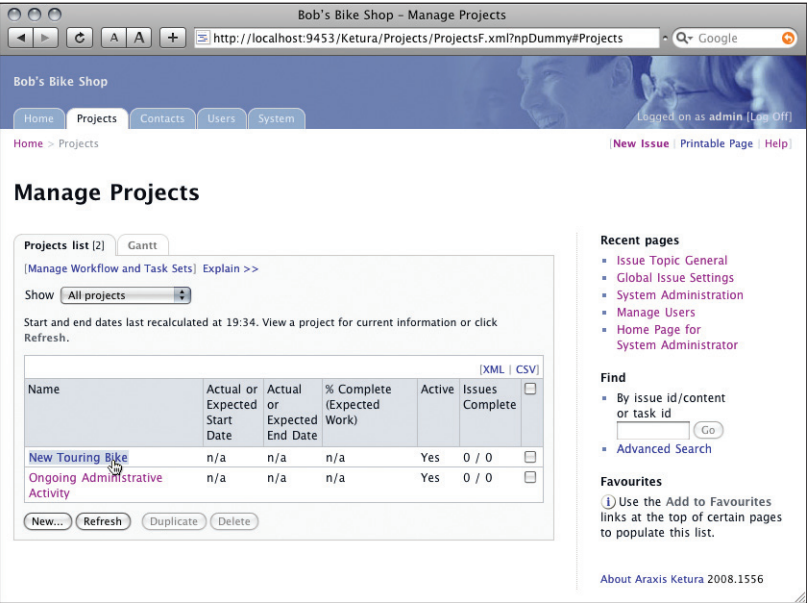
The **Manage Project…** page appears.

2. Select the **Milestones** tab.
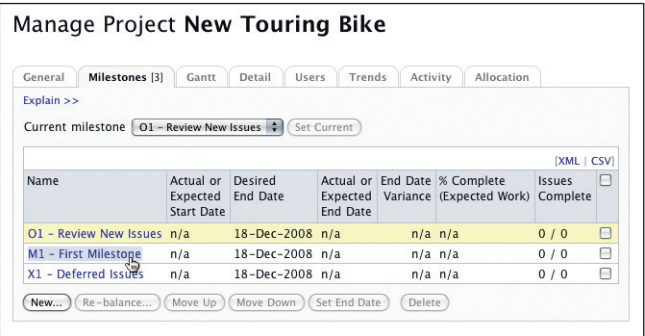
Notice that Ketura has automatically created three milestones to help you get started.

> **ⓘ** **Tip:** You can add extra milestones with the **New…** button.

The 'O' prefixed milestone ('O' = *ongoing*) indicates a best practice used to define ongoing milestones that generally do not have an end. For example, the `Review New Issues` milestone is used to collect automatically new issues coming into the project based on their topic's workflow. These issues are then reviewed and assigned (or rejected) by the project manager at a convenient time. This separates the role of creating issues from reviewing them and deciding whether to schedule them to be resolved. This separation is a crucial part of using Ketura in a bottom-up way to manage any new issues that arise as a project progresses.

The 'M' prefixed milestones ('M' = milestone) indicate a best practice used to define the *normal* milestones assigned to the significant stages of your project. You will add your issues to these milestones.

The 'X' milestone is a placeholder for issues that you might want to keep around, but will deal with at a later time. We don't need to be concerned with that this milestone right now.

3. Click on **M1 – First Milestone** link to drill-down to this milestone.

4. When the **Manage Milestone** page appears, click the **General** tab.


```
Manage Milestone M1 – First Milestone

 General   Issues   Gantt   Detail   Users   Trends   Activity   Alerts
[Manage User Allocation | Project New Touring Bike] Explain >>
Name*                          M1 – Design Components
Desired end date*              19–Jan–2009  ( ... ) (dd–MMM–yyyy)
Users start work on this milestone:
 ○ Together, when all users have completed their work on previous milestones
 ⊙ Separately, as soon as each user has completed his or her work on previous milestones
( Apply ) ( Reset )
```

5. In the **Name** field, edit the 'M1' milestone's name. Keep the 'M1' prefix and change the rest of the name as needed. (When you create successive milestones, use suitable 'M#' prefixes to give you a handy way of identifying them in discussions with team members.)

A milestone's name should describe the significant stage that it rep-

resents in the process for creating your product or delivering your service. It's best to keep it short and snappy. In our example, we'll call the first milestone M1 – Design Components.

6. In the **Desired end date** field, enter the date when you wish the milestone to be reached. Click the ellipsis (**…**) button if you prefer to use a calendar to select the end date.

   If you have a deadline for the milestone that you need to meet, enter that date here. This date is used as a target against which you can measure the schedule that Ketura predicts. For the bike shop example, we'll set an end date about one month from the project's start date.

7. Choose the appropriate radio button to specify whether users should complete their work together or separately before they move on to the next milestone. For our example, you can leave this set to Separately.

   Your choice here largely depends on whether you want everyone working on a single milestone at a time (users start together), or whether you're happy for some team members to move to this milestone as soon as they have finished their work on the previous one, even if other users aren't quite there yet (users start separately).

8. Click the **Apply** button.

ADD AN ISSUE DIRECTLY TO THE MILESTONE

An *issue* represents someone's perception (such as a customer, client or employee) that something needs to change. In Ketura, an issue records a small-scale goal – *something that needs to be done* (or even something that *might* need to be done).

   Issues are the elements that make up a milestone. So essentially, *issues* are the *things that need to be done* to reach a specific *milestone*.

Tip: If you need a little more guidance, refer to our discussion 'Ketura is flexible about your 'to-do' lists' on page 5.

To add an issue directly to a milestone:

1. From the **Manage Milestone M1…** page, click the **Issues** tab > **Add Issue…** button.
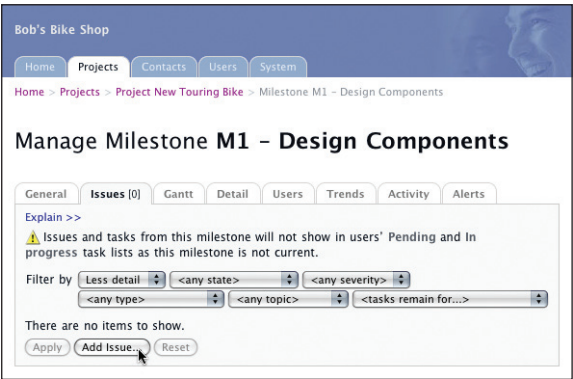
The **Add Issues(s) to Milestone M1…** page appears as shown below.

2. Ensure that the **New issue details** tab is selected.

3. Enter a brief description of the issue in the **Issue summary** field. Try to keep this reasonably short as this will appear in various lists elsewhere in Ketura – if you need more detail, you can use the **Detailed description (optional)** field. For our example, we'll enter `New design should be lightweight yet durable`.
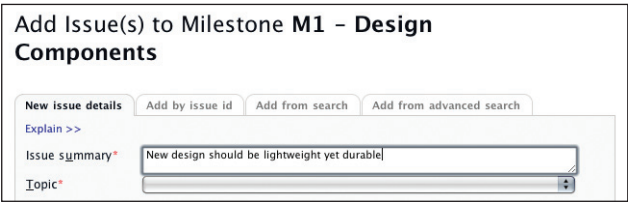
4. What is this issue about? Select the appropriate topic from the **Topic** drop-down list. Our example issue is 'about' our new touring bike, so we can choose the `New Touring Bike` topic, which was automatically created for us when we created the project of the same name.
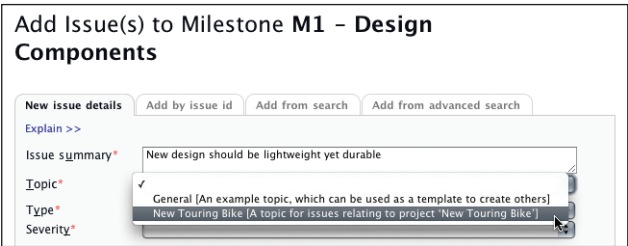
5. What sort of issue is this? Is it an enhancement request, a problem report, or something else? Select the appropriate type for the issue from the **Type** drop-down list. Our example issue is a requirement (a constraint that must be met), so we'll choose `Requirement` for the **Type** field.

Add Issue(s) to Milestone **M1 – Design Components**

| New issue details | Add by issue id | Add from search | Add from advanced search |

Explain >>

Issue summary*   New design should be lightweight yet durable

Topic*   New Touring Bike [A topic for issues relating to project 'New Touring Bike']

ⓘ This issue will be added to milestone **M1 – Design Components** on project **New Touring Bike**, irrespective of the workflow configured for this issue's topic.

Type*   ✓
Severity*
     Administrative Activity [Issue relates to a general activity]
     Documentation [Issue relates to incorrect or incomplete documentation]
Detailed descriptio   Enhancement [Issue is a request to make something better]
(optional)   Meeting [Issue is to hold a meeting]
     Ongoing Activity [Issue relates to a continuing activity]
     Problem [Issue reflects a perceived defect]
     Requirement [Issue represents a goal that must be achieved]
     Review Note [Issue is a note for future review]

After you select the type, the **Description** field will automatically populate with the template description we defined earlier for the `Requirement` issue type. You can modify the description here as needed to precisely describe the current issue, or you can leave it as is.

6. Define the issue's severity by selecting from the **Severity** drop-down list. Bob really wants this requirement to be met, so we'll use `Critical` for our example.

Add Issue(s) to Milestone **M1 – Design Components**

| New issue details | Add by issue id | Add from search | Add from advanced search |

Explain >>

Issue summary*   New design should be lightweight yet durable

Topic*   New Touring Bike [A topic for issues relating to project 'New Touring Bike']

ⓘ This issue will be added to milestone **M1 – Design Components** on project **New Touring Bike**, irrespective of the workflow configured for this issue's topic.

Type*   Requirement [Issue represents a goal that must be achieved]
Severity*   ✓
     Critical [Issue is severe]
Detailed descriptio   Important [Issue is serious]
(optional)   Minor [Issue is not that important]

7. Review the information you entered to ensure that it accurately describes the new issue you want to create. You can make changes now, or you can return later if needed.

Advanced feature: The other tabs on this page enable you to add pre-existing issues to your milestone. We don't need to worry about them here.

8. Click the **Apply** button to create your new issue. Your new issue is added to the table in the **Mange Milestone M1…** page > **Issues** tab, to which you have been returned.

Ketura automatically assigns a number prefixed by the letter 'I', called the *issue id*, to each new issue. Have a look at the **Issue** column to see the issue id for your new issue. You can always click the issue id to view or modify the related issue.
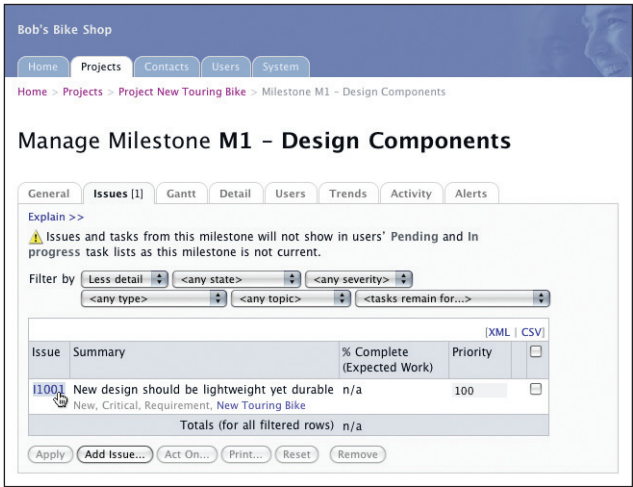
You could repeat this process to add more issues for this milestone if needed. We're only going to use this one for now, so we can move on to the next step to add tasks to our issue.

Tip: The issues in the milestone are shown in order of their relative *priority*, highest at the top, as indicated by the **Priority** column. The priority of an issue within the milestone is simply a number between 1 (highest priority) and 999 (lowest priority). Issues in the milestone that have the same priority are ordered by their id, from lowest to highest. Ketura schedules the issues in the order shown (that is, highest priority first). This ordering is reflected in users' personal to-do lists. Consequently, the project manager's priorities are immediately apparent to users when they choose which tasks to work upon.

Notice the warning triangle and message at the top of the Issues tab, telling us that issues and tasks from this milestone will not show up in users' task lists because the milestone is not current. We'll deal with that soon.

ADD YOUR TASKS TO THE ISSUE

A *task* is an item of work that must be completed to help resolve an issue. Tasks are usually assigned to a particular user, but you can also leave them unassigned if you are not yet sure who will be doing the work.

To add a task to an issue:

1. From the **Manage Milestone M1...** page, in the **Issue** column, click the issue id link (shown in the screenshot above) for the first issue you created.

2. The **Issue I####...** page appears. Notice that the issue has several tabs where you can record and view various kinds of additional information. You can even attach documents, images or other files to an issue.
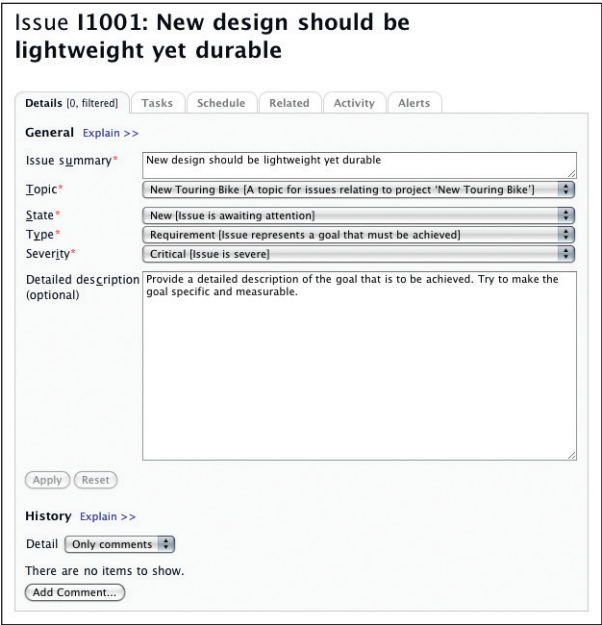
3. Click the **Tasks** tab.

4. Click the **New…** button to add a new task to the issue. The **Add New Task for Issue #** page appears.

5. Enter a brief description of the task in the **Task summary** field. Try to keep this reasonably short as this will appear in various lists elsewhere in Ketura – if you need more detail, you can use the **Detailed description (optional)** field. For our example, we'll enter `Research available materials`.

6. Select the person who should work on the task from the **Assigned to** drop-down list. For our example, let's just select `admin`, so we can see some other features more easily later on.

> ⓘ **Tip:** You won't be able to see some of the other features that we are going to introduce later if we assign this task to another user right now. If you are creating your own example, be sure to assign this task to `admin`.

7. Use the **Planned work** field to enter the amount of time that you expect should be needed to complete the task. For our example, enter 40h, for 40 hours.

> ⓘ **Tip:** You might think that 40 hours seems like a lot of time for a single task. If you do find that you are creating tasks like this that require significant amounts of time to complete, you might consider breaking them down into several, smaller tasks. You could even put some of those tasks on separate issues. Remember, Ketura is flexible, and you can define your issue/task structure as you see fit. Don't worry about the 40 hours for now, though – it plays a role as our example continues.

8. If you like, enter more information about the task in the **Detailed description** field. Don't feel you have to do this though – the task summary is usually sufficient.

> (i) **Tip:** For our example, Bob has ended up writing a mini-essay in the **Detailed description** field, shown in the above screenshot. In fact, he would probably have been *much* better off creating four separate tasks of 10 hours each, leaving the **Detailed description** field blank. However, it's quicker for us to leave things as they are.

9. Click the **Apply** button when you are satisfied with your new task. Ketura returns you to the **Issue I####…** page. The new task is added to the table showing the person assigned to the task. The planned work and work remaining are also shown.

You would repeat the process to add more tasks to this issue as needed, but we only need to add one task for now.

(i) **Advanced feature:** Maybe you're a little curious about the **Add Task Set…** button. As its name suggests, you can create canned task sets, which you can add to your issues in one go. But, there's a lot more to that story, so we'll leave it for now.

REVIEW

At this point, you have completed the basic steps for setting up a new project. Let's go over the ground we've covered and see what it all means to your project right now.

You have completed all your system setup tasks including:

- switching to the normal database;
- giving your system/database a meaningful name;
- adding users;
- defining user working hours;
- defining global issue settings (type, severity, state, and topic).

And you created a new project, milestone, issue and task.

Our Bob's Bike Shop example project

Project: New Touring Bike

> **Milestone:** M1 – Design Components
>
> > **Issue:** New design should be lightweight yet durable
> >
> > > **Task:** Research available materials
> > >
> > > Other tasks…
> >
> > Other issues…
>
> Other milestones…

If we look at the figure above, we see how our example followed a bicycle design scenario to illustrate how to describe each level of the process within Ketura. If you mapped out an example for your business, it should be similar.

Now we can take a look at how Ketura will use this information to schedule your project and its related elements, and what you can do to start using the power of Ketura to manage your own projects.

Predicting Schedules

<div style="text-align:right">

4

</div>

We've created our first mini-project – wouldn't it be great to get Ketura to predict when it will be completed? Let's make that happen.

VIEW SCHEDULES

Before we go any further, let's see what predictions Ketura is currently making about our project's schedule.

To view project and milestone schedules:

1. Click the global **Projects** tab > **Projects list** tab.
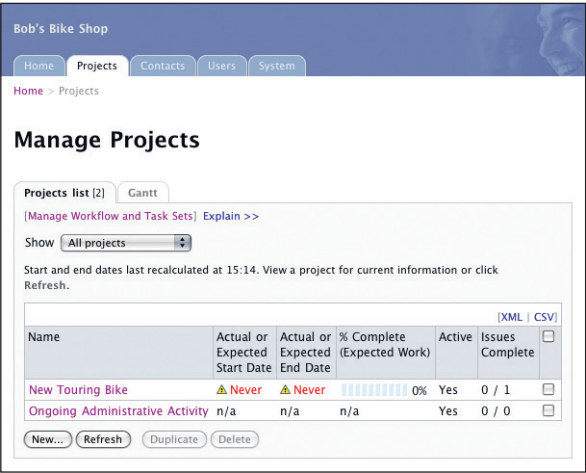
2. Nearly everywhere else in Ketura, any predicted schedule information shown will be live – based on the latest information that Ketura has. This tab is an exception, and the information here might not reflect all of the changes that have been made to Ketura within the last hour or so. To bring this information bang up-to-date, click the **Refresh** button.

3. Look at the **Actual or Expected End Date** column, which indicates
when Ketura expects each project to finish. Ketura is saying that the
`New Touring Bike` project will never end. In fact, it's also telling us
that it will never start!

UNDERSTAND OVERRUNNING SCHEDULES

Why is Ketura predicting that our project will never end? That's a
good question. Let's find out.

To find out why the project is not expected to complete:

1. From the **Manage Projects** page, click on your project's name to drill
down to it, then make sure that the **Milestones** tab is selected.
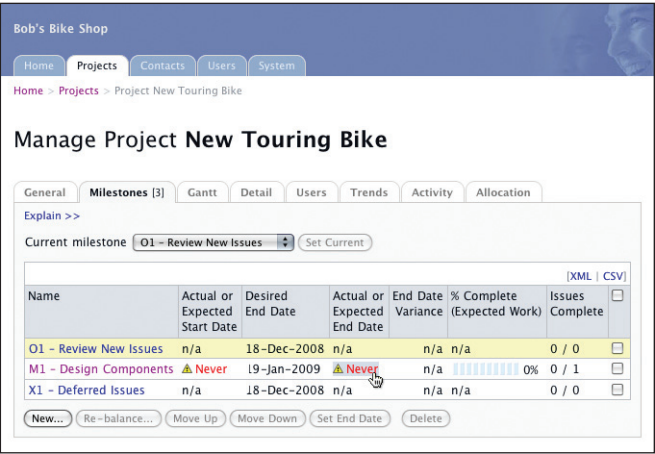
2. In the **Actual or Expected Start Date** and **Actual or Expected End
Date** columns on this page, we see `Never` against our `M1 – Design
Components` milestone. This milestone is therefore the culprit. To find
out why, click the word `Never` in the `Actual or Expected End Date`
column.
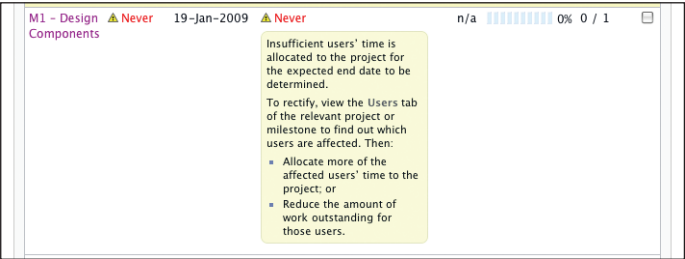
We have our answer for why the project will never end, and a helpful suggestion for what to do about it. It's because we have not yet *allocated* anyone's time to the project. We've told Ketura when we expect the project to start (the planned start date), and when people are available for work in general (the availability calendars), but we have not allocated any users' time to specific projects. Ketura doesn't yet know when each user is available to work on each project. Since Ketura can manage multiple projects simultaneously, that's a problem.

Finding out which users are holding up a project

We need to allocate some of our team members' time to the project to fix this problem. But which user or users? Ketura can tell us this, too.

To find out which users are holding up a milestone:

1. Make sure you are still on the **Milestones** tab of your project. If you moved away from this page, click the global **Projects** tab > **Projects list** tab, then click on your project name to drill down again to it. Finally, ensure that the **Milestones** tab is selected.
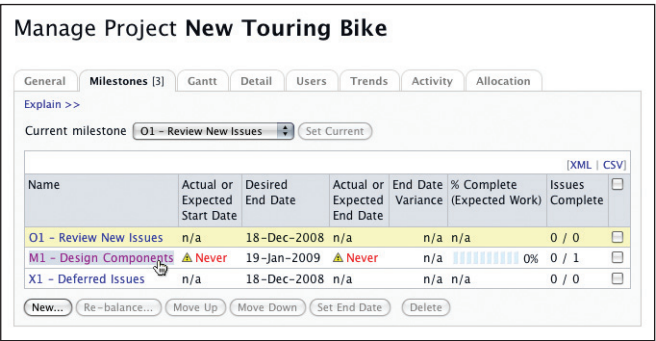
2. Click the link of the milestone that is being held up. In our example, it is the **M1 – Design Components** link. The **Manage Milestone** page is shown.

3. We want to find out which users are holding up the project, so make sure the **Users** tab is selected.

Ah, it's the `admin` user. That makes sense, because the task that we created with the 40 hours of work was assigned to this user. In fact, we can see that there is 40 hours work still remaining. That's reassuring.

Tip: In a real project, you'd see an row on this tab for every user with work on the milestone. You would thus be able to see the predicted end date for each user (not just whether a user will *never* finish). This can be incredibly useful – if a milestone looks like it is going to be late finishing, you can instantly see here who has too much work to do in the allotted time and is therefore overrunning your target date. You can then take steps to remedy the situation.

4. Click the `Never` warning to confirm why the admin user is not going to finish. You'll see that an insufficient amount of this user's time (none, in fact) is allocated to the project. Again, there is a helpful suggestion of what we can do to fix this.

ALLOCATE USERS' TIME TO A PROJECT

We have already told Ketura when our team members are *available* to work (when we defined the team member's hours using the availability

calendar). Let's now tell Ketura how much time we want our `admin` user to spend on this *particular* project, by allocating some of that user's time to it.

To allocate a user's time to a project:

1. Click the global **Users** tab > **Allocation calendars** tab.
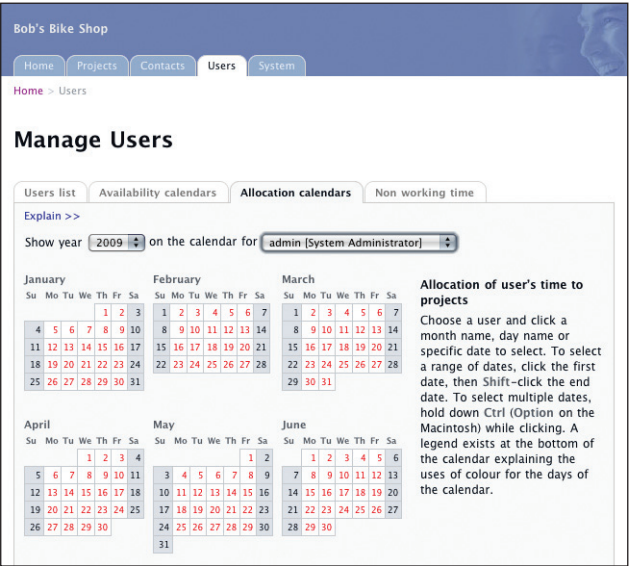
2. Ensure that an appropriate year is selected. This should generally be the current year, but we need to allocate time *in the future*. So, if you're heading towards December, or even in it, you'll need to choose next year instead.

Why do we only want to allocate time in the future? It's because the past has already gone, and Ketura knows that there's no point expecting work that is still outstanding to be done then!

(i) **Tip:** A related point is that we only want to allocate time that is on or after the **Planned Start Date** that you set for the project. Ketura won't schedule users' time for a project before this date, even if you try to allocate it.

3. Select the user whose time needs to be allocated to the project. In our
   example, this is the `admin` user.

       Notice that the dates for working days on the calendar are all in red.
   This shows that the user has time on those days that hasn't yet been
   allocated to a specific project.

4. Select a date range *in the future* that includes at least at least 40 hours
   of working time for the `admin` user (that's 10 working days, if you used
   our example of 8 hour days). More instructions can be found to the
   right of the calendars (see the previous screenshot). You might just
   want to click a month name that is in the future, to select the entire
   month. In the figure below, we've selected the entire month of March.
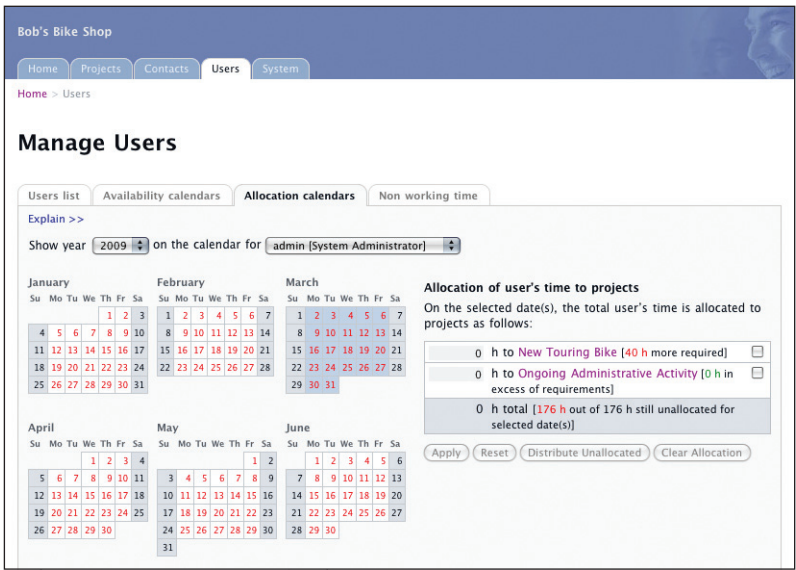
5. Notice the **Allocation of user's time to projects** section, just to the
   right of the calendar. This relates to the selected date or dates on the
   calendar (the month of March in the above screenshot). The amount
   of working time allocated to each currently active project is shown. In
   addition, the table shows the amount of extra time that needs to be
   allocated for the user to finish all his or her outstanding work on each
   project. Finally, the total amount of unallocated time (out of the total
   amount of working time) is displayed in the shaded summary row at
   the bottom of the table.

6. In our example, we can see that the `New Touring Bike` project needs another 40 hours of the user's time to be allocated to it.

ⓘ **Tip:** For a project to complete, you need to allocate at *least* as much time as is required. However, it's generally a good idea to allocate rather *more* than required, so that you don't have to come back later and allocate additional time to a project that is taking longer than expected. In any case, it's worth adding an hour or so to the bare minimum required, just to cover any rounding errors in the figures displayed.

In our example, we'll allocate 50 hours of the admin user's time to our project. Enter 50 in the text field at the left side of the `New Touring Bike` row (or your project, if you're using your own example).

7. Click the **Apply** button to save your allocation.

ⓘ **Tip:** Ketura tries to allocate the amount of time you enter evenly over all the dates that you have selected on the calendar.

The display updates to show us that we've actually allocated about 10 hours in excess of requirements. That's as we expected. Don't worry if it's not showing exactly 10 hours in excess – rounding issues might mean that the figure is fractionally different from what you were expecting.

Viewing the new schedule

Ketura has automatically updated our project's schedule based the allocation that we have just made. Let's see what the new schedule looks like.

To view the new project and milestone schedule:

1. Go back to the global **Projects** tab > **Projects list** tab. You should see there that Ketura is now able to predict expected start end dates for the project.
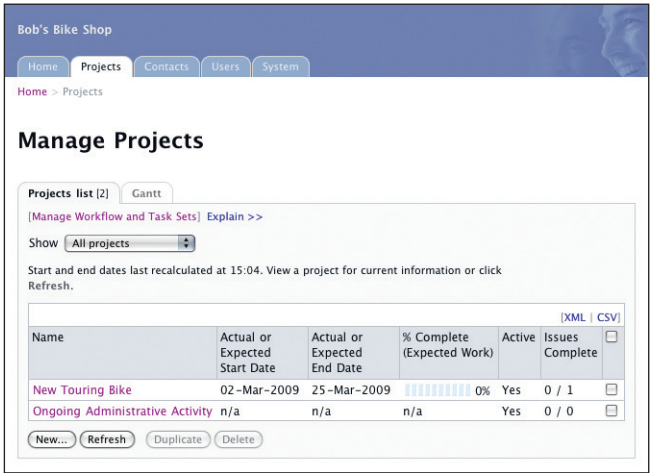
2. Click on your project name.
3. Ensure that the **Milestones** tab is selected.
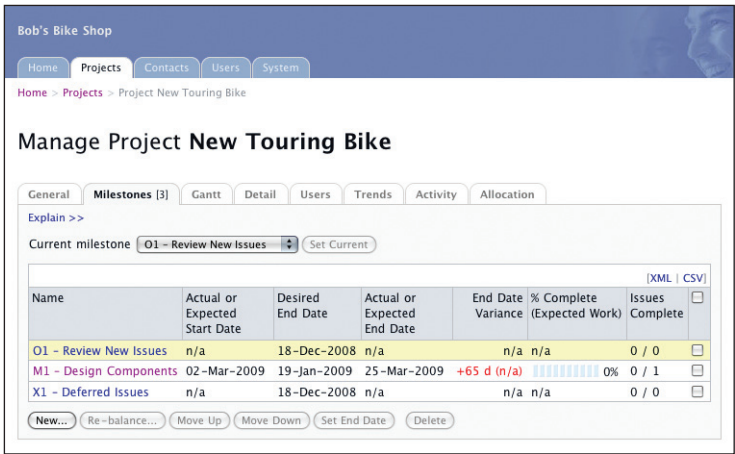
You see the same scheduling information here as in the previous page, this time for your M1 milestone. Notice the **End Date Variance** column, which identifies the difference (in days) between the actual or expected end date and the desired end date. If the variance is red,

the predicted end date is later than the project manager wanted; green means the scheduled date is earlier or the same as desired.

So that's it! You have now successfully set up a basic project, made sure that its tasks were properly assigned, and allocated the proper amount of time to the tasks.

MANAGING MULTIPLE PROJECTS

Of course, you can manage multiple projects with Ketura. In all likelihood, you team members will be working on more than one project. With that in mind, you would use the preceding process to allocate their available time to a variety of projects.

The ability to work with multiple projects is why Ketura has two calendars – one for *time available* and another for *time allocated*.

Advanced feature: What if you change a user's availability calendar (perhaps to record a vacation), or even someone's working hours, *after* you've allocated time to a project? Ketura will do the right thing and adjust the allocated time automatically to reflect the change.

MAKE A MILESTONE CURRENT

One great feature of Ketura is that it automatically creates personalized to-do lists for each user, based on your project plans. But, let's say you had planned a large multi-milestone project, where each milestone had dozens of issues. You wouldn't want to overload or demoralize your users by presenting them with hundreds of tasks all at once. Wouldn't it be much nicer if you could restrict the tasks that appear in their to-do lists to just those from the milestone (or possibly, milestones) that you are currently focusing upon?

That's exactly what setting a milestone as being current does in Ketura – only issues and tasks from the current milestone, and those preceding it in the project, are shown in users' to-do lists.

We haven't yet made our M1 milestone current, so issues and tasks in it won't show up in users' to-do lists. This is the reason for the warning notice that we saw on the **Manage Milestone M1…** page's issue tab back on page 38.

To make a milestone as current:

1. Click the global **Projects** tab > **Projects list** tab, click the name of the project you just created.
2. Click the **Milestones** tab.
3. Click the **Current Milestone** drop-down list and select the M1 – Design Components milestone.
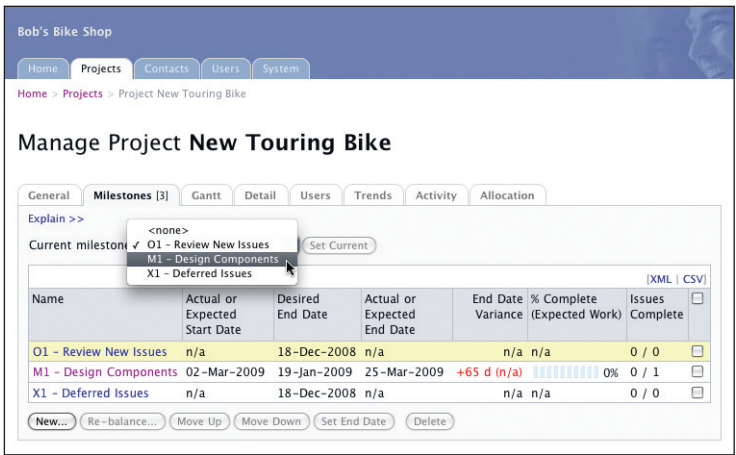
4. Click the **Set Current** button. The M1 milestone in the table will now be highlighted in yellow, together with the preceding milestone.

Now you and your team members will be able to see any issues and tasks from the highlighted milestones in your own personal to-do lists – and you didn't have to do anything else to set them up.

REVIEW

You've successfully created a new project, allocated time to it so that Ketura can predict its schedule, and made your main milestone current so that users can begin work on it. You're all set!

In the next chapter, we're going to look at how you and your team members can use Ketura to work on your projects and record your progress.

Working on Your Project

We're ready to see how Ketura will go to work for you and your team members.

As in our run through of the project creation process, we're going to take a quick trip through some of the Ketura pages and tools that you and your team members will use to complete your assigned tasks.

USE THE IN PROGRESS AND PENDING TABS

The personalized to-do lists that we have been talking about in this guide are found on two tabs located on the **Home Page**, which you can reach by clicking the global **Home** tab. Users see their own personal **Home Page**, and therefore their own **Pending** and **In progress** lists. These lists tell each team member what he or she is expected to be working on (and when, based on Ketura's schedule predictions).

The **In Progress** tab contains the tasks that your team members are working on now. The **Pending** tab contains those that are waiting for your team members' attention. Ketura populates both lists from the current milestones of active projects, based on the task assignments made by project managers.

Why two *separate* to-do lists? It's all about giving team members control, so that they can stay focused. Even though users only see tasks from *current* milestones in their to-do lists, that could still be a great many tasks. Rather than having to wade through all of these every time they want log some time on a task, or update their estimates of how much longer something might take, users can select just a few tasks and focus on those.

All tasks start off in the **Pending** list. Users can pick and choose which ones they move to their **In progress** lists, as we'll see in just a moment.

ⓘ **Tip:** For our example, we assigned a task to the `admin` user. This means that you (as the `admin` user) are effectively working as a one-person team.

The pending list

Remember when we marked the `M1 - Design Components` milestone as *current* (see page 53 onwards)? Completing that step enabled users to see in their **Pending** lists any issues and tasks from that milestone that are assigned to them. They would also see the issues and tasks for any earlier milestones in the same project. Let's take a look at the admin user's **In progress** list now.

To move a task manually to the from the Pending to In progress lists:

1. Still logged on as the `admin` user, click the global **Home** tab > **Pending** tab. Your screen should look similar to that shown below.
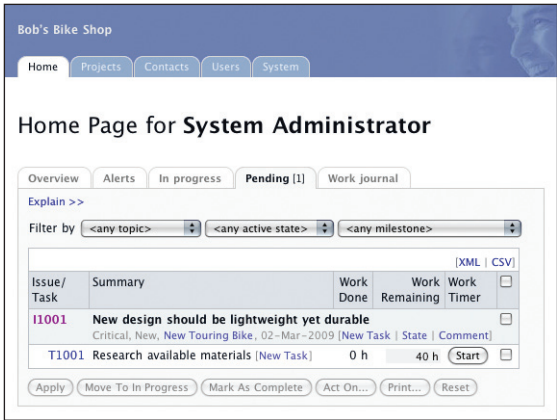
Have a look at the entries in the table for this team member (the `admin` user, in our example). You should see the issue(s) and related task(s) that you assigned. Until you move them, the **Pending** tab lists *all* of the incomplete tasks assigned to the team member that are in current milestones of active projects. Notice that the task(s) are grouped by issue.

How are the tasks ordered in the list? Project managers establish the order in which they want their team members to work on specific tasks when they plan a project. Ketura respects this order. It therefore

sorts each team member's **Pending** and **In progress** task lists based on the following factors (in decreasing order of importance):

- The desired start or end date of the related issue (which can be set on an issue's **Schedule** tab).
- The expected start date of the issue predicted by Ketura.
- The relative ordering of milestones within each project.
- The relative priority of issues within each milestone.
- The order of tasks within each issue.

Tip: If you ever need a reminder of this kind of information, you can always use a tab's **Explain** link. On this particular tab, the **Explain** help goes into more detail than our brief summary here.

All other things being equal, your project manager therefore probably intends you to work on the topmost task in the list, and for you to continue working through the tasks in order until you complete the one at the bottom. However, nothing in Ketura *forces* you to do this – Ketura is not a straightjacket. There might well be good reasons why you want to work on tasks in a slightly different order!

2. When you are ready to work on a task, you can move it to your **In progress** list. From the **Pending** tab, click the checkbox to right of the issue, then click the **Move To In Progress** button.
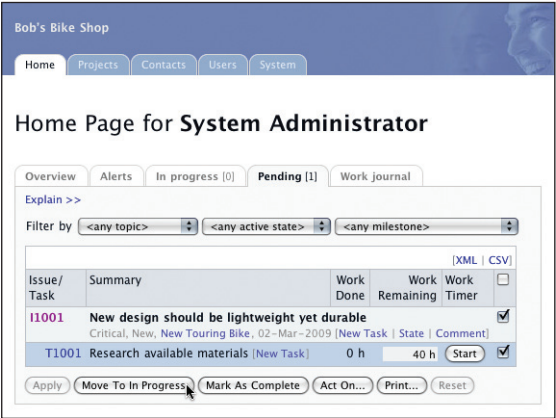
This will move all the tasks for the selected issue to the **In progress** list. You can also choose specific tasks by checking their checkboxes only, and moving them to the **In progress** list. You can select and move tasks from more than one issue in a single operation.

(i) **Tip:** You can also click the **Start** button for a task (just to the left of the task's selection checkbox). An entry will automatically be created on the **Work journal** tab and a work timer will be started. Ketura will also move the task to the **In progress** tab.

The In progress list

Let us look at the **In progress** tab, and find out how to log time to a task using the **Start** and **Stop** buttons.

Logging time to a task using the Start and Stop buttons:

1. Click the **In progress** tab. The issue that we just moved, and its task(s), should appear in the list.
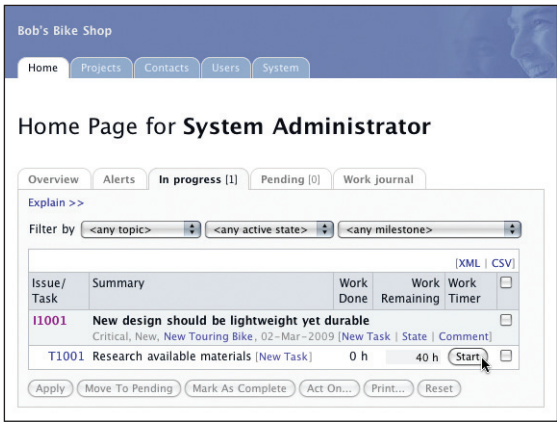
This tab lists the tasks that you have chosen to focus upon. Again, the tasks are grouped by issue.

(i) **Tip:** Of course, after issues and tasks are moved to the **In progress** list, they do not have to *stay* there. You can work on tasks or issues, then move them back to the **Pending** list by selecting them and clicking the **Move To Pending** button.

2. Click the **Start** button for a task in the list. The page changes to look similar to the one shown below.
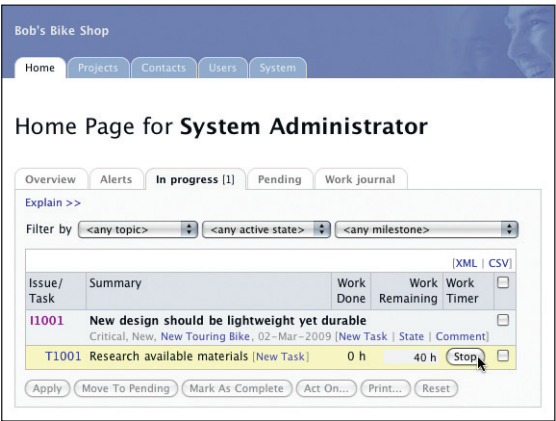
The task you are working on is highlighted in yellow, the **Start** button changes to a **Stop** button, and a work timer is started to track the time used to complete the task. Ketura also creates an entry on the **Work journal** tab, as we'll soon see.

When you want to stop working on a task (such as when the workday ends), click the **Stop** button to stop the timer. Ketura records the time worked on the task in the **Work journal** and automatically updates project schedules accordingly.

3. Click the **Stop** button to stop the timer for the current task.

(i) **Tip:** If you click the **Start** button for another task without stopping the work timer for a previous task, Ketura will automatically stop the previous task's timer for you. This means that you can switch between logging work on different tasks with just a single click.

Giving feedback on the project plan

One of the valuable things about Ketura is that it makes it really easy for every team member to tell the project manager how things are going. This isn't just about recording the work that has been done, but about each team member providing their current expectations of how much longer the tasks they are working on will take – after all, the

people who are doing the work probably have the best idea of how much work on each task is still outstanding.

This information can be crucial to a project manager. If something is going to take longer than expected, wouldn't you like to know *as soon as a team member has an inkling of this*, rather than *after* a task or issue has already overrun? Ketura gives project managers the benefit of their team members' insights, enabling decisive corrective action to be take at the earliest opportunity, instead of leaving things until it is too late to meet an important deadline.

To give your expectations about how much longer a task will take:

1. Staying on the **In progress** tab (although you can do the same thing on the Pending tab), notice the **Work Remaining** column in the table. This is where each team member can update their expectations of how much longer he or she thinks a particular task will take.

2. Let's say that the admin user now thinks that the task will take another 50 hours. Enter 50h in the **Work Remaining** field for the task.
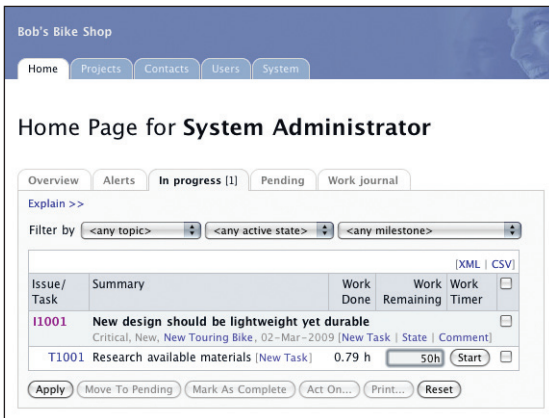
3. Click the **Apply** button.

ⓘ **Tip:** If desired, a project manager can, at the outset of a project, ask team members to provide work remaining estimates for all of the their tasks in their **Pending** lists. The project manager can then compare the official project plan against the initial expectations of team members.

How Ketura uses the work remaining information

Ketura actually keeps track of two separate estimates of the amount of work for every task. The first is the *planned work* estimate, for use by the manager of a project. The second is the *expected work remaining* estimate, set and updated by the person to whom a task is assigned, in the way that we have just seen. Together, these give project managers the benefit of insight into the expectations of team members, while enabling the manager to retain complete control of the official project plan.

Ketura uses these two values, together with the work done thus far on each task, to make two *separate* schedule predictions for all projects, milestones and issues. The first schedule is the *planned* prediction, based on the work done thus far and the planned work estimates for each outstanding task. The second is an *actual or expected* prediction, based on what has already happened and on the expected work remaining.

Ketura is able to highlight discrepancies between the actual or expected and planned schedules. Such discrepancies indicate differences between the official project plan and the expectations of the people undertaking the work. Consequently, project managers are able to spot potential schedule slips very early – often as soon as a team member changes his or her expectation of the amount of work remaining for a single task. Corrective action can then be taken to bring the project back on schedule.

Marking a task as complete

At some point, you will finish working on a task. When this happens, you need to mark the task as complete.

To mark a task (or tasks) as complete:

1. Select the task or tasks in your **In progress** or **Pending** lists. For our example, choose your task from the **In progress** list.
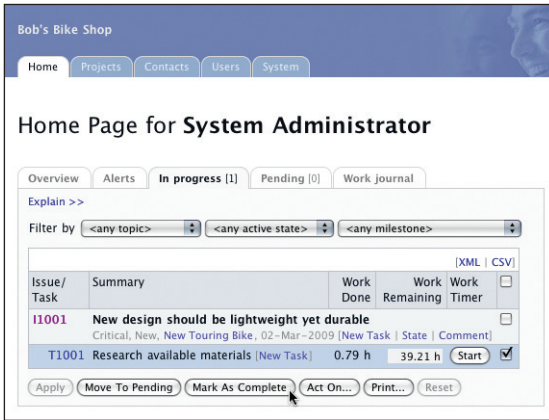
2. Click the **Mark As Complete** button.

3. If you've been following our example exactly (don't worry if you haven't), this was the *only* task on the issue. Whenever someone marks the last remaining task of an issue as complete, Ketura asks whether you'd like to change the issue's state.
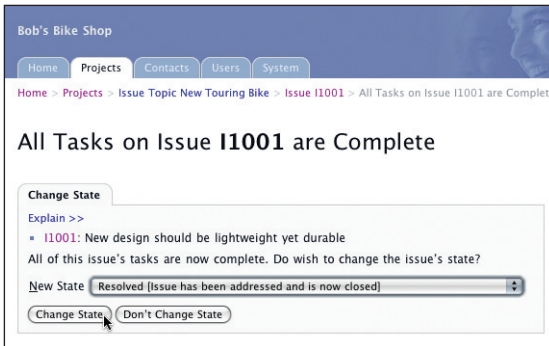
4. We're done with this issue, so choose `Resolved` from the **New state** drop-down list.

5. Click the **Change State** button. You are returned to the **Home Page** tab from which you came.

6. Notice that the task has disappeared from your **In progress** list. Since it is now complete, Ketura doesn't bother you with it any more.

Advanced feature: If you're using issue states to represent various stages in the process of handling an issue, you can change the state of an issue from the **In progress** and **Pending** lists at any time, using the

State link next to each issue. Depending on how the workflow relating to the issue's topic is defined, this might automatically mark all the existing tasks on the issue as complete, and possibly add further tasks.

USE THE WORK JOURNAL

The work journal records all the information about the work logged for particular tasks and issues. Each journal entry records the task that was worked on, when it was worked on it, and how much work was done.

As you just saw, you and your team can log work to tasks by clicking the **Start** and **Stop** buttons next to the tasks in the **In Progress** and **Pending** tabs. That's great if you're working on a task *now*. But what if you forget to click a task's **Start** timer when you start work, and only do so later? Or what if you're out of the office when you are working on a task?

You have the flexibility you need, because you can update existing work journal entries, and create new ones to log time manually, using the work journal.

To add a new entry to the work journal manually:

1. Click the **Work journal** tab.

Let's assume that for our example, our `admin` team member did some work at home on this project, so she was away from her desk and could not have Ketura automatically record her time. We'll add her entry manually to show how this can work.

2. Click the **New Entry** button. Ketura adds a line to the journal, as shown below.
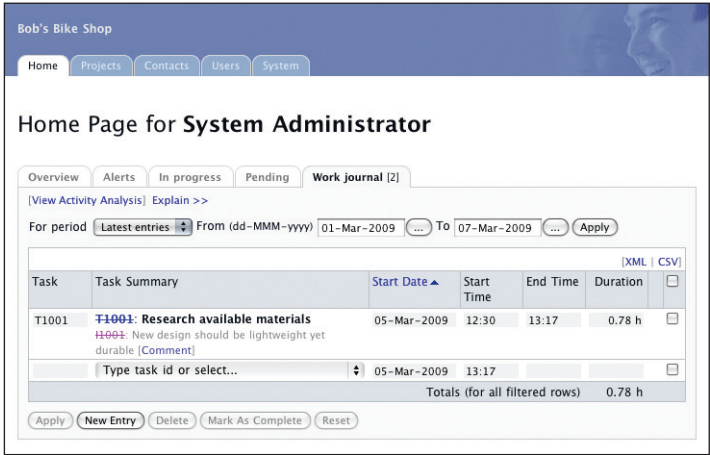
3. The drop-down in the **Task Summary** column lists all of the tasks from your **In progress** and **Pending** lists. Normally, you'd be able to choose one of them. However, since (if you've been following our example) we've just marked our lone task as complete, the drop-down list will be empty. Instead, copy the task id (from the **Task** column) from the row above and paste it into the task id field on the row for your new entry.

ⓘ Tip: In this way, you can even log time for tasks that have been marked as complete, even for tasks whose issues are now in an inactive state.

4. Enter today's date in the **Start Date** column.

5. Enter a time in the **Start Time** column (use one hour ago).

6. Enter a time in the **End Time** column (use the current time). Your screen should look something like that below. (As an alternative to entering an **End Time**, you could instead enter a **Duration**.)

> **Tip:** You don't want overlapping work journal entries – Ketura will warn you if you accidentally create some. If you need to, you feel free to adjust the start and end times of your new entry so that it doesn't overlap with the one already there.

7. Click the **Apply** button. Ketura will automatically calculate the duration and complete the new entry. It will also update the task status and your overall schedule.

REVIEW

We've seen some of the tools that team members use to work on the tasks that have been assigned to them, give feedback about their latest expectations, and log the time that they have spent. All of these tools are available conveniently from the personal **Home Page** of each user.

Bottom-Up Planning and Workflow

6

What we've seen thus far has, broadly, been a top-down approach to project planning – we've known from the outset what issues and tasks there will be. That's fine for many projects, but it is not at all unusual for further issues to arise as the project progresses. What do we do with them? And what about a project that is being used to manage an ongoing activity, such as looking after a help desk? There, you'd typically know *very* few of the issues in advance.

As we've tried to make clear, Ketura is designed to work well with *both* a top-down and a bottom-up approach, and anything in between.

One of the key ways that Ketura makes a bottom-up approach possible is to enable you to separate the *creation* of issues and tasks from *scheduling* them on a project. This means that *any* member of your team (for example, someone who is dealing with your customers) can file an issue, even if they are not a project manager.

A project manager can come along later and review the issues that have been filed by other team members, deciding whether to schedule the issue for resolution, defer it until later, or perhaps reject the issue entirely.

This separate review process means that it becomes feasible to file an issue just to capture an idea or suggestion, even if you're not sure that it will ever be resolved. The project manager can review these issues at an appropriate point and decide what to do with them.

REPORT AN ISSUE WITHOUT WORRYING ABOUT ANYTHING ELSE

Let's see how a team member who is not a project manager can report an issue without worrying about the project scheduling side of things. For our example, Anita Chung (user id `anita`) has noticed that Bob Bike Shop's usual bicycle gear supplier has put up its prices signifi-

cantly, and that a new supplier will therefore need to be found to keep the new bike design within budget. We'll have her report this as an issue, so that it isn't forgotten.

To report an issue:

1. If you are logged on to Ketura, use the **Log Off** link at the top-right of the page to log off.
2. Log on as Anita Chung (user id `anita`, password `bbs2`).
3. Click the global **Home** tab, to go to Anita's **Home Page**.
4. Click the **New Issue** link, at the top-right of the white area of the page.
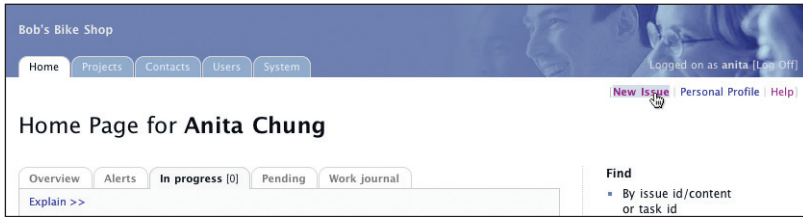
5. The **Report a New Issue** page appears. Fill it out as shown below.

   Notice that as soon as you have selected the `New Touring Bike` as your topic, a message appears telling you that workflow will automatically add issues of that topic to the `01 - Review New Issues` milestone on the project `New Touring Bike`. Now we understand why this milestone is so useful – it acts as a place where new issues can be collected, ready for later processing by a project manager.

(i) **Advanced feature:** You can set up the workflow to add new issues of a topic to any milestone you like, but the default workflow that was created for us when we created our project works fine for our purposes.

6. Click the **Apply** button. You are taken to the newly created issue's page, where you can add additional information to the issue.

7. Anita is done, however, so she can return to her **Home Page** by clicking the global **Home** tab.

PROCESS NEWLY ADDED ISSUES

We've seen how team members can report new issues without worrying when (or, indeed, whether) they're going to be scheduled. The other side of this process is the project manager reviewing such newly added issues and deciding what to do with them. A project manager can do this whenever he or she finds it convenient.

For our example, we'll have Robert Smythe log on and act as the project manager to do this.

To review and process issues newly added to a project:

1. If you are logged on to Ketura, use the **Log Off** link at the top-right of the page to log off.

2. Log on as Robert Smythe (user id `bob`, password `bbs1`).

3. Click the global **Projects** tab > **Projects list** tab > **New Touring Bike** link
> **Milestones** tab. You should see something like that below.
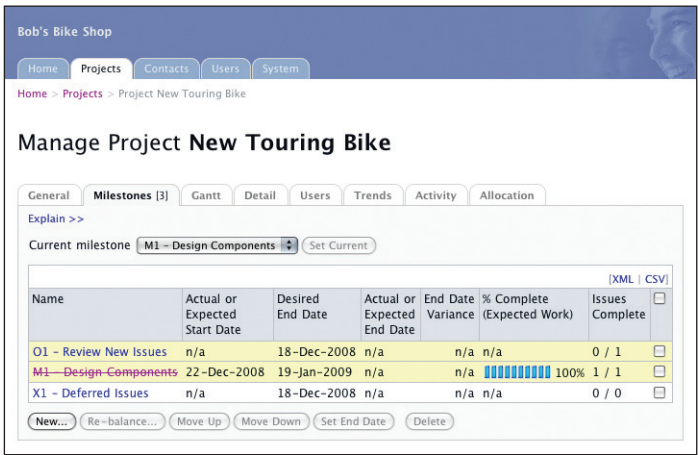
4. Follow the **O1 – Review New Issues** link. Click the **Issues** tab. This lists
the issues on the 01 milestone. As expected, we just see a single issue
here.
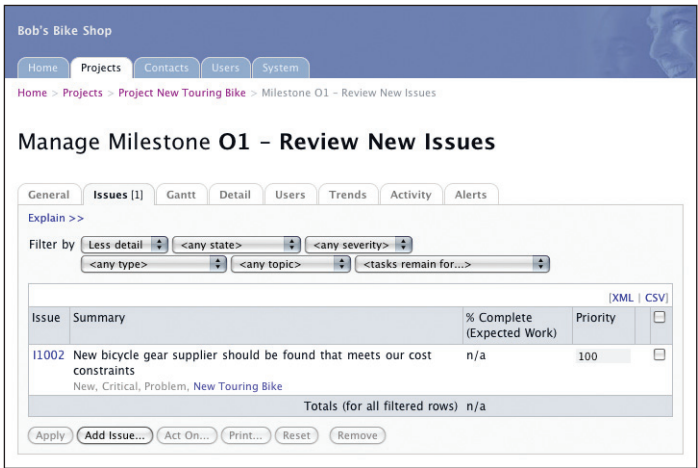
5. Click the issue's id link, to take you to the issue's page. You can review
the information recorded about the issue.

How are we going to deal with this issue? We have three basic
options:

- *Schedule* the issue on a milestone of our choice, because we'd like it to be resolved.
- *Reject* the issue outright, because we don't want to deal with it. To do this, we could just change the issue's state to `Rejected`, although we might choose to move it to a different milestone (perhaps the one we're mainly working on at the moment) as well.
- *Defer* the issue until later, as it might be something we want to handle in the future. To do this, we'd move the issue to the `X1 – Deferred` Issues milestone and change its state to `Deferred`.

For our example, we'll choose to schedule the issue to our `M1 – Design Components` milestone.

6. Choose the **Schedule** tab. We're going to use the **Reschedule issue** section on this tab, which provides us with all the tools we need in a single place.
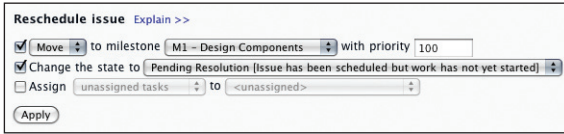
7. Check the first checkbox in the **Reschedule issue** section. In the adjacent drop-down list to the right of the checkbox, make sure that `Move` is selected. For the **to milestone** drop-down, choose `M1 – Design Components`.

8. We're going to change our issue's state to `Pending Resolution`, to indicate that it is ready for work to start upon it. To do this, check the

checkbox on the second row of this form, and change the `Change the state to` drop-down field to `Pending Resolution`.

(i) **Advanced feature:** If we had configured workflow appropriately, changing the issue's state to `Pending Resolution` could automatically add one or more tasks (for example, a task to 'Fix the issue') to the issue. Some or all of those tasks might initially be unassigned. We could then use the third row of this **Reschedule issue** form to assign all such 'unassigned tasks' to the user that we want to work on the issue. All this in a single step!

9. Make sure that the checkbox in the third row of the form is unchecked.
10. Click the **Apply** button.
11. Since we haven't configured workflow to add tasks to the issue automatically when the state changes, we could now go to the **Tasks** tab of the issue and manually add any tasks we envisage for particular users. Feel free to do that, although it is not integral to our example.

(i) **Advanced feature:** We've seen how to process a single new issue. What happens if there are many issues that you'd like to process in a similar way? You could open each issue in a *separate* browser tab from the `01 – Review New Issues` milestone's **Issues** tab, and just work through each one, closing each tab as you finish with it. That would be quicker than doing one issue at a time, and then returning after each to the `01` milestone's **Issues** tab to open the next issue. Another alternative is to select multiple issues in the **Issues** tab, and click the **Act On…** button on that tab. You can then apply the **Reschedule issues** form actions to *all* of your selected issues in a single step. In this way, you can process dozens of issues very, very quickly.

FIRST STEPS IN WORKFLOW

We've mentioned workflow several times in this guide, including its ability to add tasks to an issue automatically when the issue changes state. This actually applies even to an issue entering the New state, when it is first created.

   To give you just a taste of what you can do with workflow, we'll now set things up so that a task 'Review new issue' is added automatically to each new issue that is about the topic New Touring Bike. We'll have that task assigned to Robert Smythe. Thus, Bob will automatically have a task appear in his **Pending** task list for each new issue that is created and waiting for him to review.

   You'll be able to use the same principles to, for example, add tasks automatically to an issue when its state is changed to Pending Resolution, which could help automate a project manager's scheduling of newly added issues.

To have a task added automatically to new 'New Touring Bike' issues:

1. While logged on as Robert Smythe, click the global **System** tab > **Administration areas** tab > **Manage Workflow and Task Sets** link > **Workflow** tab.
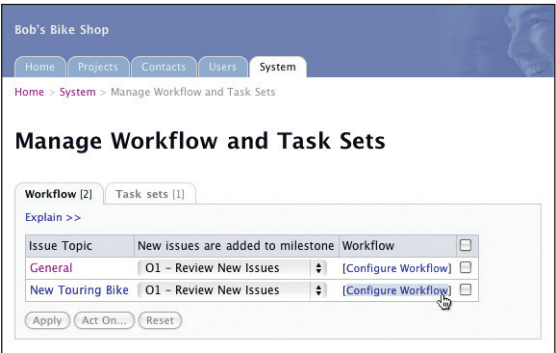
You can see that each issue topic is listed on this tab. For each topic, you can choose the milestone to which new issues of that topic are added. There's also a **Configure workflow** link for each topic.

2. Click the **Configure workflow** link for the New Touring Bike topic.

3. Choose the **State behaviour** tab, which deals with what happens when an issue of this topic enters each of its possible states.

On this tab, we can choose a task set whose tasks will be added to the issue when it enters each active state. The drop-down is disabled for inactive states, because an issue in an inactive state is not allowed to have any outstanding tasks on it, so it doesn't make sense to add tasks automatically to an issue entering such a state.

4. For the top row in the table, relating to the New state, choose the task set `Tasks added automatically to new issues` from the drop-down in the **Add Tasks From Task Set** column. This is a task set that is created for you by default, but you can tailor it to your own needs or create your own additional task sets.

5. Click the **Apply** button.

6. We're not quite done because the task in the task set that we have
    chosen is assigned to the `admin` user. We want it assigned to Robert
    Smythe instead. To fix this, click the **Manage Task Sets** link at the top
    of the **State behaviour** tab. We're taken to the **Task sets** tab on the
    Manage Workflow and Task Sets page.

You could create new task sets on this tab, but we're just going to
modify the existing one, `Tasks added automatically to new
issues`, whose id we see here is TS1000.

7. Click the **TS1000** link and select the **Tasks** tab.

8. In the **Assigned to** column, use the drop-down list to select bob as the user to whom this Review new issue task will be assigned.

9. Click the **Apply** button.

We're done with our workflow changes, but let's try out our changes by creating a new test issue and making sure that a task is automatically added to it.

To test the new workflow:

1. Still logged on as Robert Smythe, click the **New Issue** link towards the top right of the page. The **Report a New Issue** page appears.

2. We'll file an enhancement request with the following details:

3. Click the **Apply** button. You are taken to the new issue's page.

4. Select the **Tasks** tab. Notice that a task for Robert Smythe has been added automatically.

5. Click the global **Home** tab > **Pending** tab. Notice that Robert's **Pending** tab automatically shows the new task, ready for him to work upon. This is because the task's issue is in a current milestone of an active project.

REVIEW

We have seen how Ketura enables you to separate reporting an issue from deciding what to do about it. This separation is key to bottom-up project management, enabling team members who are not project managers to be involved in creating new issues.

We have learnt how to file an issue without worrying about scheduling it, and how a project manager can process such issues at a convenient time. Finally, we scratched the surface of workflow, seeing how it can automate the process of added tasks to an issue as the issue enters different states in its life.

Where Next? 7

We have learnt about projects, milestones, issues, and tasks. We've seen what they are, how to set them up, and how to work with them in Ketura. We have looked at the Ketura pages and tools that you and your team will use to work on a project. You are well on your way to using Ketura to manage and control your own projects, taking advantage of accurate and up-to-date schedule predictions whenever you need them.

But there is still much to discover. Learning more will show you the variety of additional tools that Ketura puts at your disposal. Tools that help you monitor, adjust, and control your projects to keep them on schedule and under budget.

EXPLORE

DISCOVER

Now would therefore be a good time to explore. You might want to go back to your project and add more milestones, issues, and tasks. You could also go back to some of those tabs and features that caught your eye and do a little more investigating. Or, if you've been following our bike shop example, perhaps you'd like to launch out and use Ketura for real on your own work?

FIND OUT MORE

The first place you could start is the **Overview** tab on your **Home Page**. As its name implies, this tab gives you a starting point to get a high-level view of Ketura. The diagram on that tab shows you how the various parts of Ketura fit together, as well as providing you with direct links to other parts of the Ketura system. A table at the bottom of the tab also shows you a summary of your activity on each project.
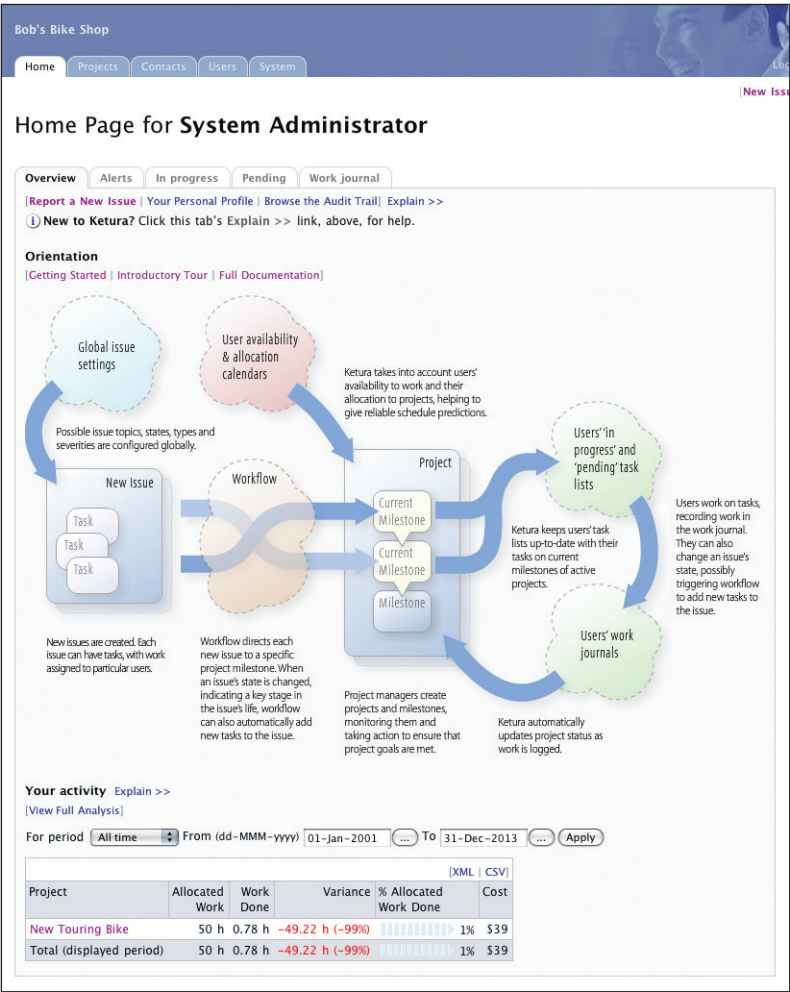
Of course, there's always the more formal approach to furthering your Ketura education. At several points throughout this guide, we told you a little about advanced features, and how you could learn more later. Now would be a good time to look into the full set of Ketura documentation, available from within Ketura and also on the Araxis website. The *Introductory Tour of Ketura* will be of particular benefit.

As you explore Ketura at your leisure, please feel free to contact us if you need assistance. Use the contact form on the Araxis website, *www.araxis.com*.

ADDENDUM: START WITH A CLEAN SLATE

If for any reason you want to clean out Ketura's database, and start afresh, you can reinitialize the database.

⚠ **WARNING:** This procedure will completely erase all content in the currently selected (normal or example) database. Take a backup first. Do not reinitialize the database unless you are sure that you do not want *any* of the information in it.

To reinitialize the current database:

1. Log on as an administrator (e.g. the `admin` user).
2. Click on global **System** tab > **Administration areas** tab > **Backup, Restore, Switch or Reinitialize the Database** link.
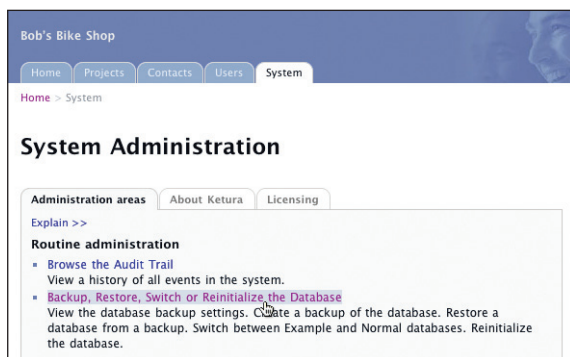
3. Select the **Reinitialize** database tab.
4. Click the **Reinitialize Normal Database…** button.
5. When the **Confirm Database Reinitialize** page appears, enter your password in the **Your log on password** field.
6. Click the **Reinitialize Database** button. A message will appear telling you that Ketura is re-initializing the database. In a few seconds, the process will complete, and Ketura will automatically take you to the log on page. You can then log back on to the system and start over with a clean database.