

# ZENO.PM COMES PRE-CONFIGURED AND READY TO BE USED

## Common Questions & Answers

- **What configuration changes do I need to make so Zeno.PM will work?** The default configuration can be used to start using Zeno.PM, nothing additional is required.
- **What about config 'lock-in' will this limit the ability to change direction in the future?** Configurations can be easily adjusted when needed and they will flow seamlessly across the system at the time you change them.
- **We don't want to have customised development but we have some special requirements; how configurable is Zeno.PM?** There are over 500 individual configurable items in Zeno.PM, the only time we do custom development is when a customer wants a specific report tuned to their specific needs.
- **Do we need to determine a PM framework and get everything worked through before we start?** We recommend simply getting started regardless of where your framework is at. Good project management practice is consistent across frameworks. Zeno.PM immediately delivers structured data entry and good reporting practices which will help baseline your level of project management maturity and identify where to uplift and optimise.

This guide will get you started quickly and is meant to point to the critical configuration items required to achieve this.

After these configuration items are completed, your Zeno.PM environment will be ready to be populated with projects and project data such as issues, risks, dependencies, milestones & deliverables (Gantt chart items) and budgets.

Zeno.PM enables structured and consistent project data entry for any project by any skill level of project manager. It produces high quality outputs such as reports, spreadsheets and documents that can be used by PMMOs or for use in the management and delivery of projects, programs and portfolios.

Be up and running in minutes...



The next pages will run you through the critical configuration items



# SITE BRANDING

Add branding so that reports and other outputs are tailored to your company

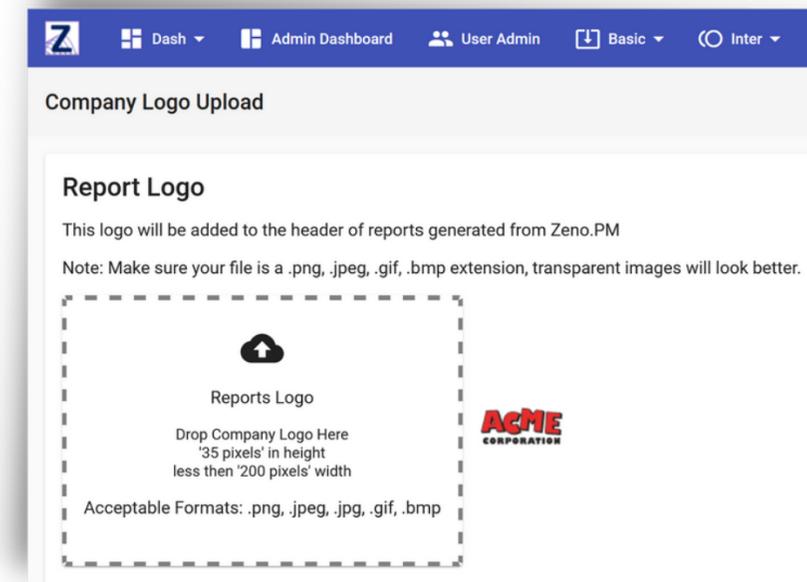
## Go to: Admin Dashboard -> Company Branding

There are various drag and drop regions on this page that will let you upload images to be used across Zeno.PM

**Report Logo** - is a small image that will be added to document headers such as PDF, XLSX and PPTX. Use an image editor program to size the image as above and upload. (The upload will not accept an image larger than 35px height by 200px width)

**Login Page Company Logo** - shows on the login page when your user base accesses Zeno.PM. This is another image where sizing is critical. *(The upload will not accept an image larger than 360px height by 350px width)*

**A4 Landscape Header Page** - Many of the reports (PDF and PPTX) use header pages to make them more readable as there can often be a large amount of content. The best way to make an image for this is to find a pptx with company branding, then remove anything other than the basics of the page and take a screen capture using 'Snipping Tool' or similar. Ensure that it is in the dimensions of 1125px height by 1500px width, save it local than upload into Zeno.PM



Branding configuration is complete, continue to (2) Security Controls

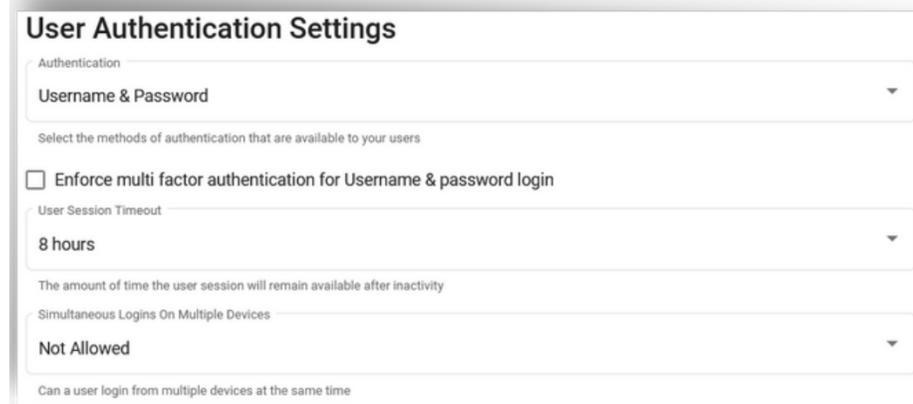
# 2

## SECURITY CONTROLS

Adjust security configuration to meet company standards and controls

**Go to:** Admin Dashboard -> System Configuration -> Global Settings

Application security is an important part of Zeno.PM and forefront when keeping your information safe from external threats.



**User Authentication Settings**

Authentication  
Username & Password

Select the methods of authentication that are available to your users

Enforce multi factor authentication for Username & password login

User Session Timeout  
8 hours

The amount of time the user session will remain available after inactivity

Simultaneous Logins On Multiple Devices  
Not Allowed

Can a user login from multiple devices at the same time

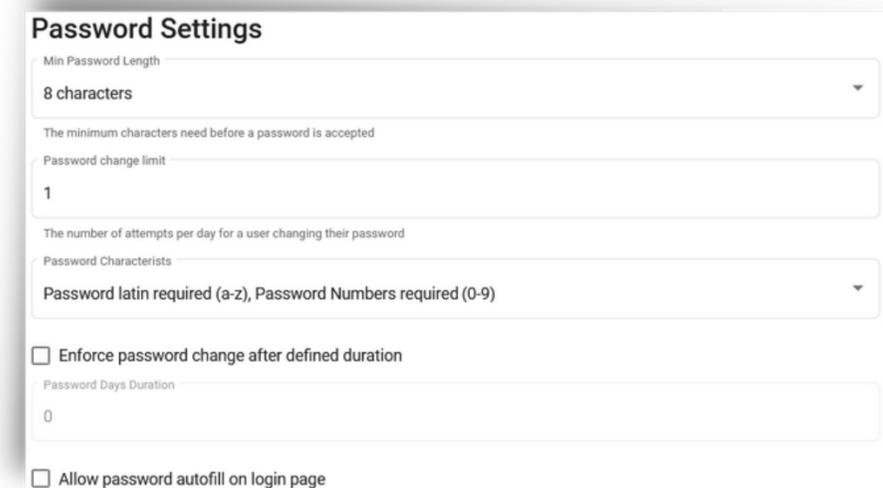
Configure how you want users to authenticate with Zeno.PM. Standard username and password is setup by default and will allow you quickly get started.

However it is recommended that you also configure two factor authentication (2FA) as soon as practicable to increase the login security posture.

**Best recommendation** is to set authentication to use your corporate AzureAD (Single Sign On, SSO) and remove the ability for users to login with other credentials

Adjust password complexity policies for users in Zeno.PM, these policies will be automatically applied in areas where password change functionality exists.

**Note:** All passwords in Zeno.PM are encrypted when stored, so once created it is no longer possible to retrieve passwords



**Password Settings**

Min Password Length  
8 characters

The minimum characters need before a password is accepted

Password change limit  
1

The number of attempts per day for a user changing their password

Password Characterists  
Password latin required (a-z), Password Numbers required (0-9)

Enforce password change after defined duration

Password Days Duration  
0

Allow password autofill on login page

Security Controls is complete, continue to (3) Stage Gates

# 3

## STAGE GATES

Adjust the default stage gates to match your project management framework

### Go to: Admin Dashboard -> Stage Gates

Project Stage Gates are key points in a project where a formal review of the project's current state is performed. Most often they appear at the phase transitions of projects and represent a point in the project where the sponsor and stakeholders will incur increased risk, expense, and reward.

Zeno.PM comes pre-configured with various stage gates for Projects, Programs and Portfolios. To start, select a **Workflow** that best represents your project management framework.

Update the individual Status Items in the high level stage Categories to align with naming conventions you want to use.

**Note:** The Categories [Pipeline, Delivery, Closed] are not able to be changed. They help Zeno.PM categorise project data in various algorithms, display views and reporting outputs.

Category	Status Item	Workflow Description	Order	Quality Controls
Pipeline	Unqualified - Not yet accepted in IT Capital Plan	Project is still in ideation phase. Sponsoring business unit has not yet articulated the required project outcome, benefits or identified funding.	1	<a href="#">Solution Architecture Document</a>
Pipeline	Qualified - Included in IT Capital Plan	Sufficient detail is known about the project and a funding source has been identified. Project remains a draft idea to be reviewed and approved before active submission into the IT project framework via the New Project Start-up form.	2	<a href="#">Business Requirements Document</a>
Pipeline	Waiting Start	Appropriate documentation developed and approvals have been given in order for the project to proceed.	3	<a href="#">Solution Architecture Document</a>
Delivery	Start up	Concept Brief or Project Mandate development undertaken for project approval purposes. This stage ends with an approved Gate A unless the project can proceed directly to Gate B (must be agreed with the PMO).	4	
Delivery	Initiation	A detailed business case developed and approvals for project to proceed. This stage ends with an approved Gate B	5	
Delivery	CMD - Detailed design	The detailed design phase of the project initiates the delivery activities agreed at Gate B, including the majority of procurement activities and resource onboarding.	7	
Delivery	CMD - Execute and Deploy	The execution phase of the project is when the project will build, test and deploy the solution in line with agreed plans and requirements.	8	
Delivery	Closure	Activity is being closed, usually pending final billing and handover of documentation, and any issues and risks to be transferred on. Phase includes Hypercare and warranty periods	9	
Closed	Project Closed		10	

ID	Type	Comment	Program	Workflow	Resource Profile
184	Portfolio			Default - 4 Step Process	VPN 2019 Resourcing Model
185	Program			Default - 4 Step Process	VPN 2019 Resourcing Model
186	Project	PMO Admin		Default - VPN UE Process - 9 Stages	IT Projects Resource Profile
187	Activity	Compliance Program		Activity	IT Projects Resource Profile
1428	Idea			Idea Default - 5 Step Process	VPN 2019 Resourcing Model

Go to: Admin Dashboard -> Application Configuration -> Project Defaults

Edit the project record in this area and ensure your chosen Gate Flow is selected as the default to be applied to all projects.

StageGates is complete, continue to (4) Resource Profiles

# 4

## RESOURCE PROFILES

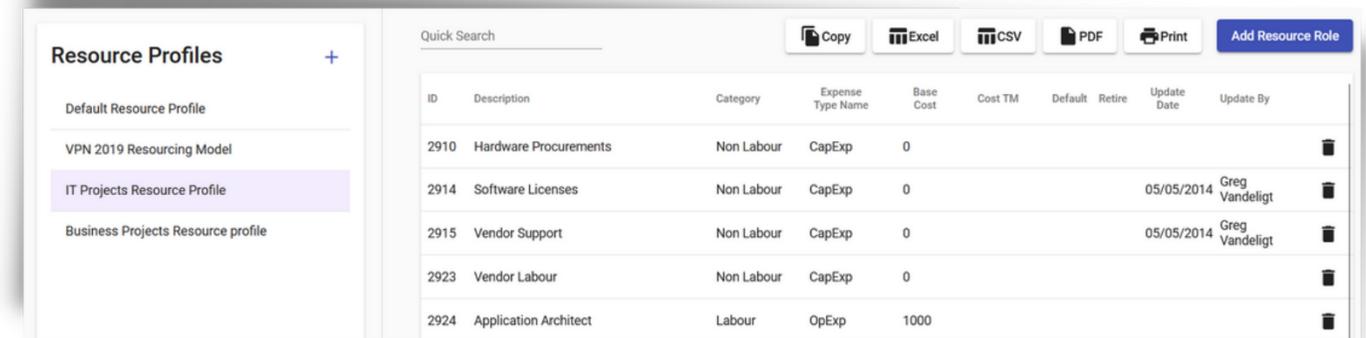
Adjust the default resource profiles to match resource needs and naming conventions

**Go to:** Admin Dashboard -> Resource Profiles

Resource Profiles are a list of standard resources (labour and non-labour items) that are required for the delivery of a project. Resource roles can be assigned to users, and it is these roles that are selected when creating budgets for projects.

Multiple resource profiles can be set up to accommodate scenarios where projects require completely different resources types.

For example a business may run projects related to IT but also projects developing property, both of which have very different resource requirements.



The screenshot shows the 'Resource Profiles' management interface. On the left, there is a sidebar with a list of profiles: 'Default Resource Profile', 'VPN 2019 Resourcing Model', 'IT Projects Resource Profile' (highlighted), and 'Business Projects Resource profile'. On the right, there is a table of resource items with columns for ID, Description, Category, Expense Type Name, Base Cost, Cost TM, Default, Retire, Update Date, and Update By. The table contains five rows of data.

ID	Description	Category	Expense Type Name	Base Cost	Cost TM	Default	Retire	Update Date	Update By
2910	Hardware Procurements	Non Labour	CapExp	0					
2914	Software Licenses	Non Labour	CapExp	0				05/05/2014	Greg Vandeligt
2915	Vendor Support	Non Labour	CapExp	0				05/05/2014	Greg Vandeligt
2923	Vendor Labour	Non Labour	CapExp	0					
2924	Application Architect	Labour	OpExp	1000					

**Note:** In most cases it is best to start using Zeno.PM with a single resource profile.

Edit item naming conventions to match the roles that will be commonly used on projects.

Resource Profiles is complete, continue to (5) Risk Matrix

# 5

## RISK MATRIX

Adjust the default risk matrix to match your risk management framework assessment

**Go to:** Admin Dashboard -> Business Configuration -> Risk Matrix

A risk matrix is a calculation tool that is used during risk assessment to define the level of risk by considering two inputs: 1) the probability or likelihood of the risk occurring, and 2) the consequence or severity if it does. This is a simple mechanism to quantify risk and increase visibility, assisting management with decision making.

Most risk matrices used in project management have a 5 x 5 configuration.

**Probability** represents the likelihood that the risk will occur

**Severity** represent the overall impact if the risk is realised

		Risk Severity				
		Minimal	Minor	Moderate	Major	Catastrophic
Risk Probability	Almost Certain	5	10	15	20	25
	Likely	4	8	12	16	20
	Possible	3	6	9	12	15
	Unlikely	2	4	6	8	10
	Rare	1	2	3	4	5

The numbers against each of the selected values are then multiplied to arrive at an overall **Impact**  
eg. Probability => 3 x Severity => 4 means Impact => 12

The model can be tweaked to arrive at a 4 x 4 model, and have different ranges within the model. The model can also be adjusted at a later stage and changes will automatically flow across existing risks.

Risk Matrix configuration is complete and basic Zeno.PM Config is complete