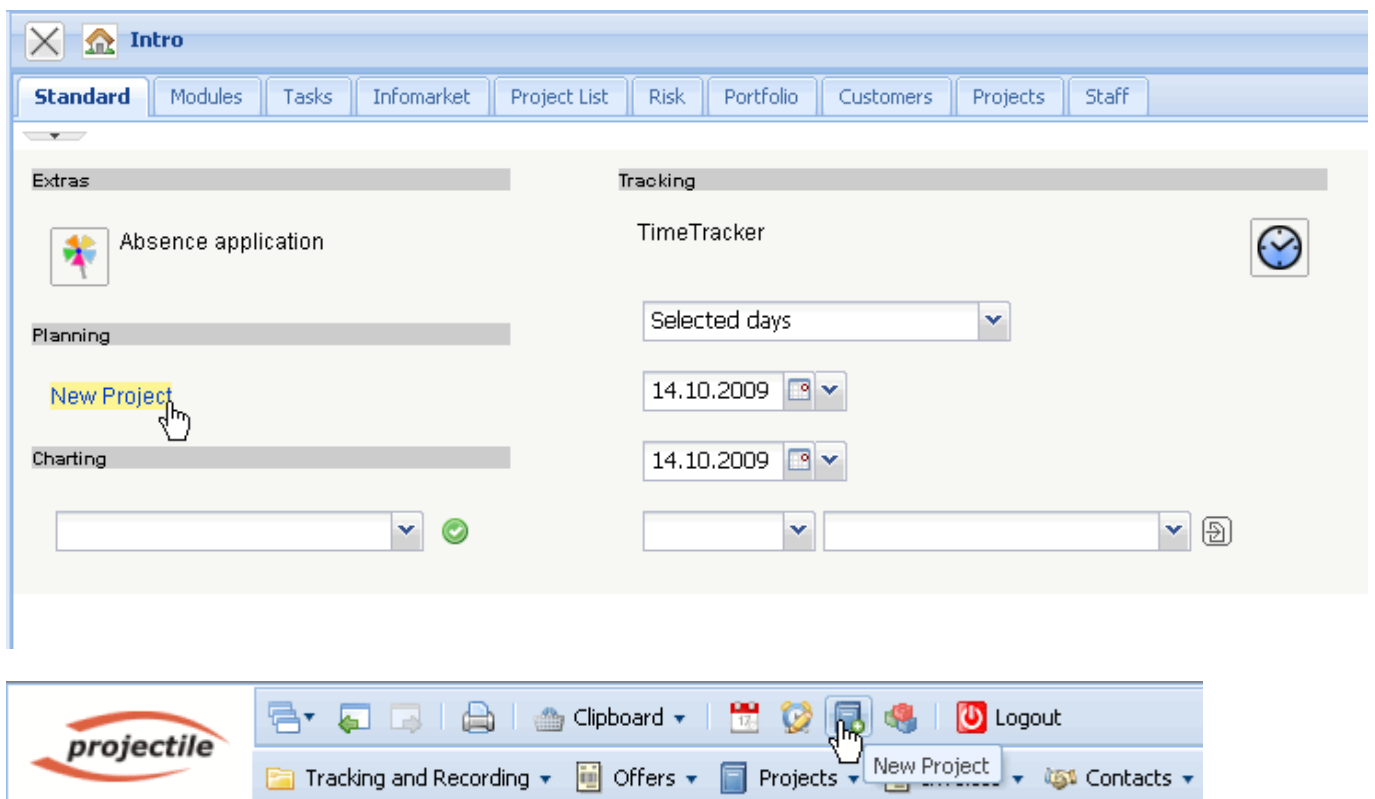


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4.04.01 Creating a Project Manually using Project Planning

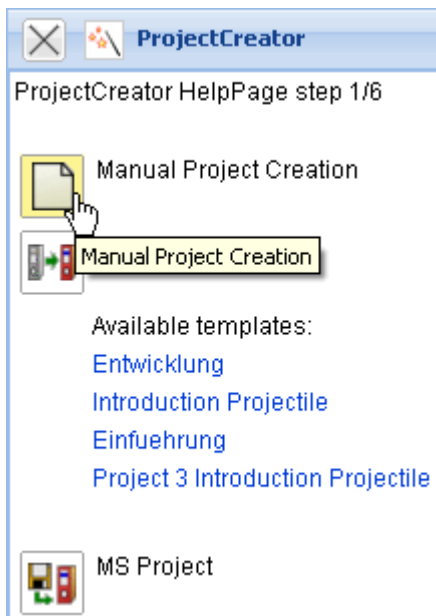
Project Master Data

When defining a new project, either the functionality “create” with the document type “project” in the work area or the functionality “New Project” ...



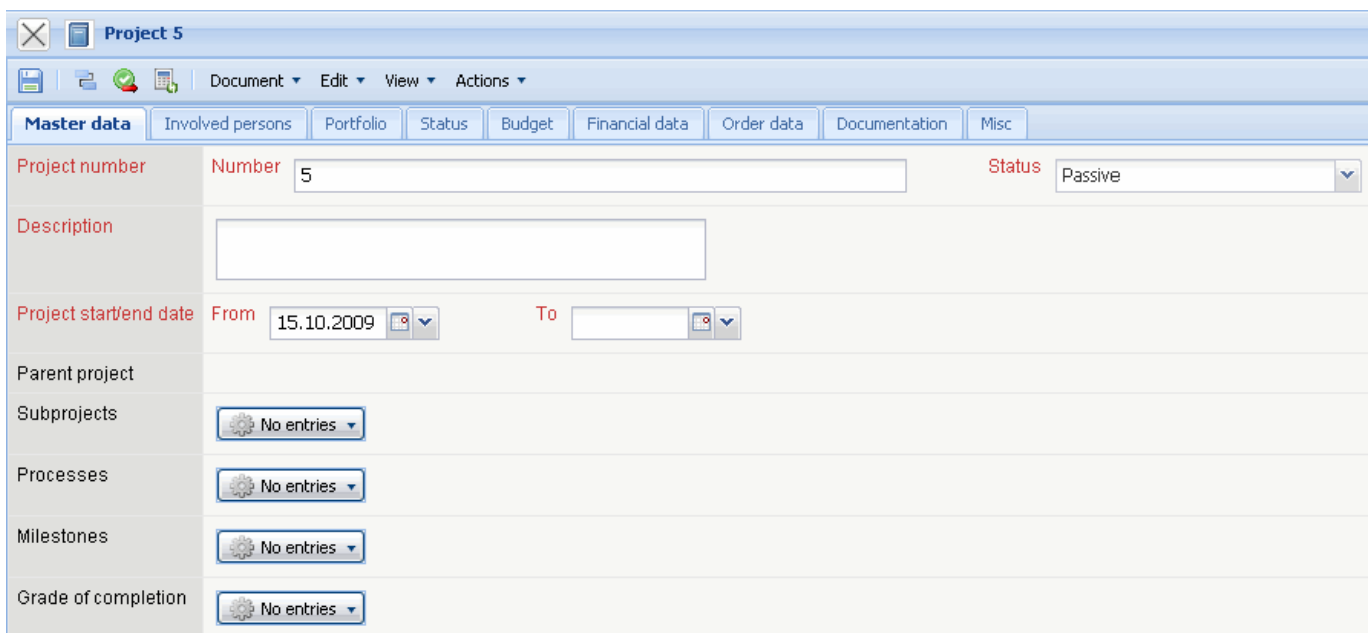
... can be used.

In the following example, the project can be manually created with the function “Manual Project Creation”.

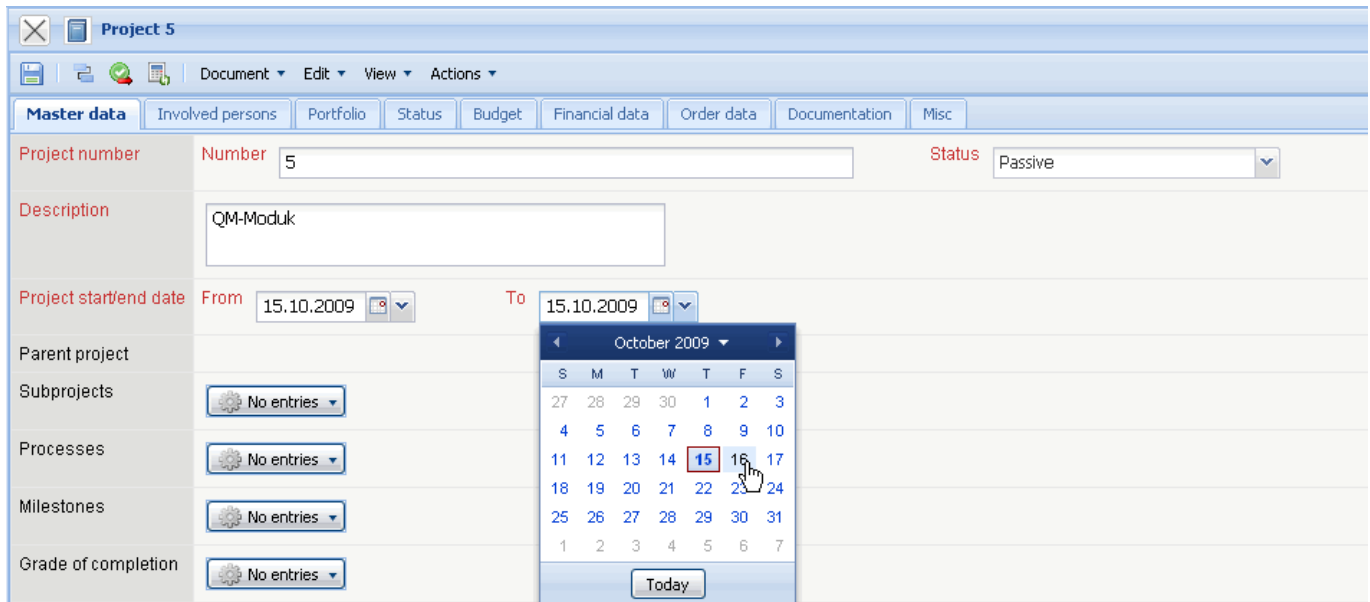


This project consists of the main project and two sub-projects with miscellaneous processes and various milestones and jump sequences.

Firstly, a new document is opened with various preset fields from the type "Project". Next, the project description ...

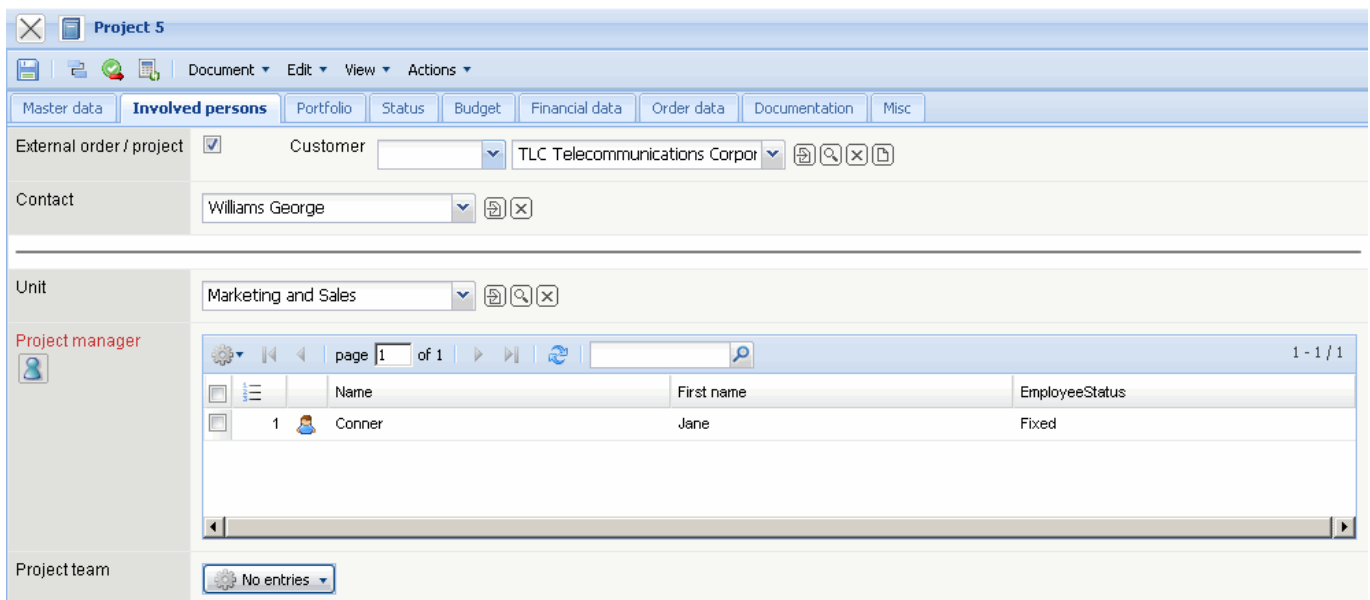


... and the time span is filled. The estimated time span is obligatory for each project because of resource planning. The project end must therefore always be filled!



The project time span (from and to) can be entered directly or using the date picker.

After defining the fields of the "Master Data" tab, the "Involved Persons" tab ...



... is displayed. All persons participating in the project are defined here. If the project is external, the appropriate check box is marked and the customer (see also contact form) is selected. The customer's contact person can be selected if a contact should be entered. This function loads all contact persons regarding the customer from the database.

Finally, the unit (organisation unit) of the project and the project manager are determined. The selection of the project manager also influences the permissions of the document. Generally, the project leader of the project cannot access all projects, but only the projects for which he/she is defined as project manager.

After defining the fields in the "Involved Persons" tab, the "Portfolio" tab is displayed. The priority, project type, project probability and further attributes are defined here. Probability is used for the suggestion scheme and the attributes are used as classification characteristics and can be used as selection criteria for the evaluation charts.

Project 5

Document Edit View Actions

Master data Involved persons **Portfolio** Status Budget Financial data Order data Documentation Misc

Order probability 075 %

Priority 3 - normal priority

Portfolio

Programs

Category Customizing

Produkt

Strategy 2 - mittel

Class 2 - Soll

On the "Financial Data" tab, the project currency, the order type and the cost center (if necessary, the benefactor) of the project is defined here.

Project 5

Document Edit View Actions

Save the document

Master data Involved persons Portfolio Status Budget **Financial data** Order data Documentation Misc

Net offer value EUR Net sum of billed invoices EUR

Leistungszukauf EUR

Currency GBP Rate 0,91575

Hourly rate EUR JobPriceExternal

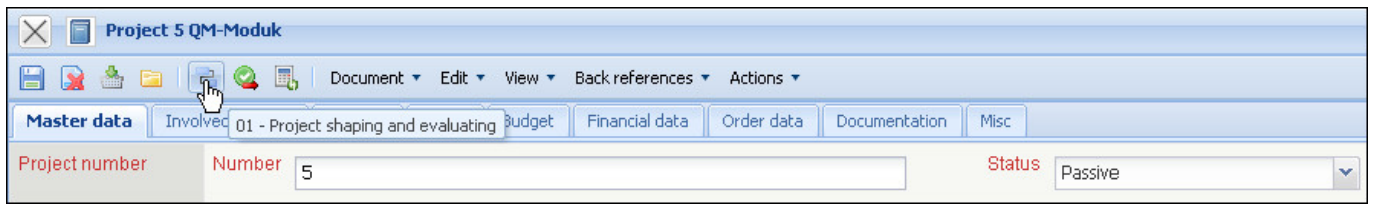
Order type Expense

Cost center Engineering

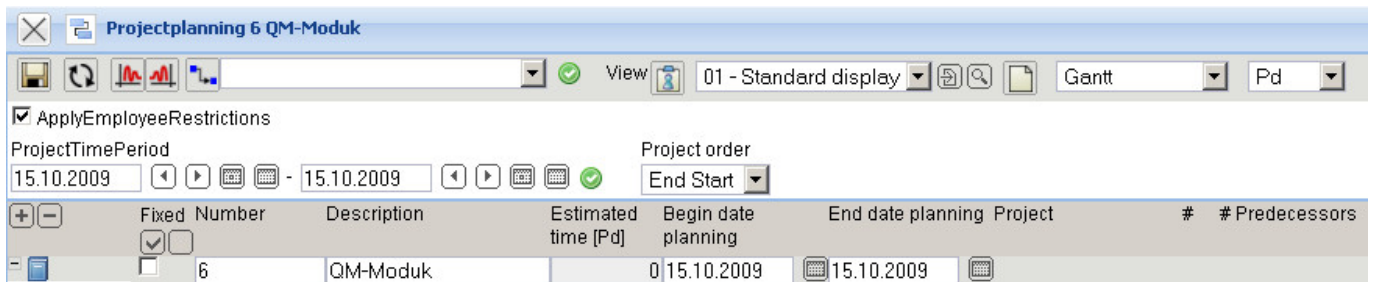
After saving the data, all further elements of the project's structure plan, as well as the milestones and the order relationships in the project planning can be defined here.

Create Project Structure

Project planning is opened with the action "Project shaping and evaluating":



The functionality "project planning" is based on the network planning technique and supports the user with the integrated project planning within the Projectile software. Network planning technique is an instrument for planning, regulating and controlling the project. Principally, structure planning and time planning are essential herewith.



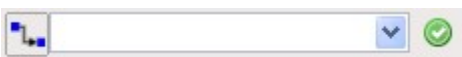
The dialog contains a functionality for saving the project data and a reload button in the function toolbar, ...



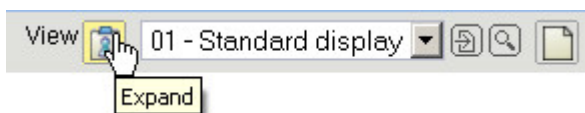
... buttons for forwards and backwards calculation, ...



... as well as buttons for integrated charts in the system (Gantt, project structure plan, a simplified network plan, ...).



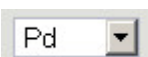
Next, there is a button for the advanced mode (display process or jobs), the functionality for viewing the project planning and ...



... the planning mode as well as ...



... the selection box for the time units for the time/effort.



Under the function toolbar is the option "Apply Employee Restrictions" for the forwards and backwards calculation. If this option is marked, the system considers the estimated project time and

working time of the employee.

ApplyEmployeeRestrictions

This dialog contains the two date components “Project Time Period”, which specify the start date and end date of the project. This key data are taken from existing project data.

ProjectTimePeriod
 15.10.2009 [calendar icon] [calendar icon] - 15.10.2009 [calendar icon] [calendar icon] [check icon]

In the next selection box, the jump sequence (sequence relationship, which defines the order of the jobs and/or milestones) can be selected.

Project order
 End Start [dropdown arrow]

In the lower block the (when projects exist) projects, sub-projects, jobs and milestones are displayed or can be newly defined.

+ -	Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
-	<input checked="" type="checkbox"/>	5	QM-Module New Entities	0	15.08.2009	16.10.2009	[calendar icon]		
Job	<input type="checkbox"/>				15.08.2009	16.10.2009	5 QM-Module	[dropdown arrow]	[search icon]

In the following example a job “Project management” with the estimated time/effort of 5 Pd (Person days) is planned for the project “Create QM-Module”.

[Save icon] EmployeeRestrictions

ProjectTimePeriod
 15.08.2009 [calendar icon] [calendar icon] - 16.10.2009 [calendar icon] [calendar icon] [check icon]

Project order
 End Start [dropdown arrow]

+ -	Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
-	<input checked="" type="checkbox"/>	5	QM-Module New Entities	0	15.08.2009	16.10.2009	[calendar icon]		
Job	<input type="checkbox"/>		Projectmanagement	1	15.08.2009	16.10.2009	5 QM-Module	[dropdown arrow]	[search icon]

After the definition the project plan is saved and on the right side of the dialogue, functionalities for defining the order relationship is supplied from the system. These columns are used for defining the order relationships between individual jobs and/or milestones.

+ -	Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
-	<input checked="" type="checkbox"/>	6	QM-Module	1	15.08.2009	16.10.2009	[calendar icon]		
[add icon]	<input checked="" type="checkbox"/>	6-1	Projectmanagement	1	15.08.2009	16.10.2009	6 QM-Module	[dropdown arrow]	#1 [input field]
			New Entities						

In the next step two sub-projects (Planning, Implementation) are defined. The type of the project elements should be set to “Project” and the sub-project should be labeled (description column).

Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
<input type="checkbox"/>	6	QM-Module	1	15.08.2009	16.10.2009			
<input type="checkbox"/>	6-1	Projectmanagement	1	15.08.2009	16.10.2009	6 QM-Module	#1	
New Entities								
<input type="checkbox"/>		Planning		15.08.2009	16.10.2009	6 QM-Module		
<input type="checkbox"/>		Implementation		15.08.2009	16.10.2009	6 QM-Module		

After saving the data, both sub-projects are created and assigned to the top project. The project elements are assigned in the "Project" column.

Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
<input type="checkbox"/>	6	QM-Module	1	15.08.2009	16.10.2009			
<input type="checkbox"/>	6-1	Projectmanagement	1	15.08.2009	16.10.2009	6 QM-Module	#1	
<input type="checkbox"/>	6.1	Planning	0	15.08.2009	16.10.2009	6 QM-Module		
<input type="checkbox"/>	6.2	Implementation	0	15.08.2009	16.10.2009	6 QM-Module		
New Entities								

In the next step three jobs (Concept, Specification, Requirement Specification) as well as a milestone (checkbox project element) are defined and the sub-project "planning" is assigned in the "Project" column. With jobs, the planned time/effort is also estimated.

Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
<input type="checkbox"/>	6	QM-Module	1	15.08.2009	16.10.2009			
<input type="checkbox"/>	6-1	Projectmanagement	1	15.08.2009	16.10.2009	6 QM-Module	#1	
<input type="checkbox"/>	6.1	Planning	0	15.08.2009	16.10.2009	6 QM-Module		
<input type="checkbox"/>	6.2	Implementation	0	15.08.2009	16.10.2009	6 QM-Module		
New Entities								
<input type="checkbox"/>		Conception		15.08.2009	16.10.2009	6.1 Planning		
<input type="checkbox"/>		Specification		15.08.2009	16.10.2009	6.1 Planning		
<input type="checkbox"/>		Requirement specification		15.08.2009	16.10.2009	6.1 Planning		
<input type="checkbox"/>		Approval planning		15.08.2009	16.10.2009	6.1 Planning		

After saving the data, the jobs and milestones are arranged in the structure.

Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
<input type="checkbox"/>	6	QM-Module	1	15.08.2009	16.10.2009			
<input type="checkbox"/>	6-1	Projectmanagement	1	15.08.2009	16.10.2009	6 QM-Module	#1	
<input type="checkbox"/>	6.1	Planning	0	15.08.2009	16.10.2009	6 QM-Module		
<input type="checkbox"/>	6.1-1	Conception	0	15.08.2009	16.10.2009	6.1 Planning	#3	
<input type="checkbox"/>	6.1-2	Specification	0	15.08.2009	16.10.2009	6.1 Planning	#4	
<input type="checkbox"/>	6.1-3	Requirement specification	0	15.08.2009	16.10.2009	6.1 Planning	#5	
<input type="checkbox"/>	6.1-A	Approval planning		15.08.2009	16.10.2009	6.1 Planning	#6	
<input type="checkbox"/>	6.2	Implementation	0	15.08.2009	16.10.2009	6 QM-Module		
New Entities								

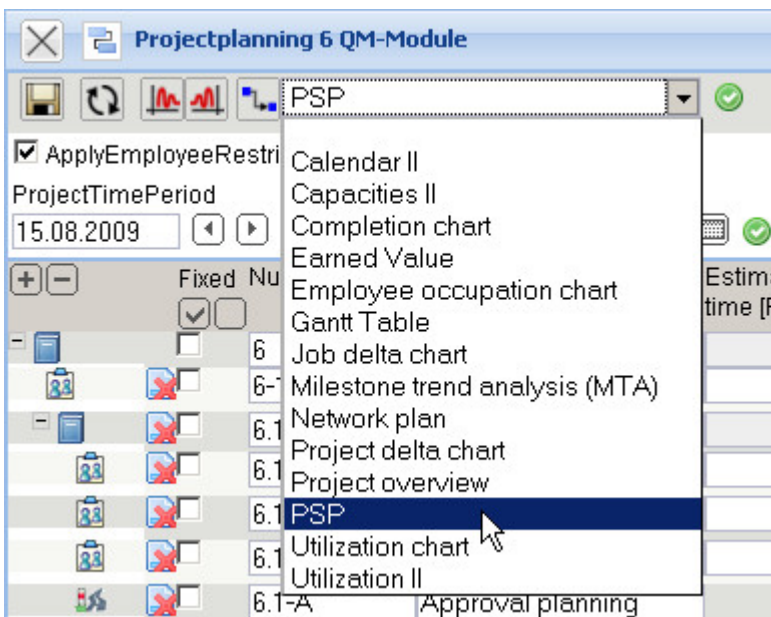
Finally the jobs and milestones for the second sub-project "Implementation" are:

Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
-	6	QM-Module	1	15.08.2009	16.10.2009			
-	6-1	Projectmanagement	1	15.08.2009	16.10.2009	6 QM-Module	#1	
-	6.1	Planning	0	15.08.2009	16.10.2009	6 QM-Module		
-	6.1-1	Conception	0	15.08.2009	16.10.2009	6.1 Planning	#3	
-	6.1-2	Specification	0	15.08.2009	16.10.2009	6.1 Planning	#4	
-	6.1-3	Requirement specificatio	0	15.08.2009	16.10.2009	6.1 Planning	#5	
-	6.1-A	Approval planning		15.08.2009		6.1 Planning	#6	
-	6.2	Implementation	0	15.08.2009	16.10.2009	6 QM-Module		
New Entities								
Job		Templates		15.08.2009	16.10.2009	6.2 Implementation		
Job		Reports		15.08.2009	16.10.2009	6.2 Implementation		
Job		Documentation		15.08.2009	16.10.2009	6.2 Implementation		
Milestone		Approval Prototype		15.08.2009	16.10.2009	6.2 Implementation		

... created.

Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planning	Project	#	# Predecessors
-	6	QM-Module	1	15.08.2009	16.10.2009			
-	6-1	Projectmanagement	1	15.08.2009	16.10.2009	6 QM-Module	#1	
-	6.1	Planning	0	15.08.2009	16.10.2009	6 QM-Module		
-	6.1-1	Conception	0	15.08.2009	16.10.2009	6.1 Planning	#3	
-	6.1-2	Specification	0	15.08.2009	16.10.2009	6.1 Planning	#4	
-	6.1-3	Requirement specificatio	0	15.08.2009	16.10.2009	6.1 Planning	#5	
-	6.1-A	Approval planning		15.08.2009		6.1 Planning	#6	
-	6.2	Implementation	0	15.08.2009	16.10.2009	6 QM-Module		
-	6.2-1	Templates	0	15.08.2009	16.10.2009	6.2 Implementation	#8	
-	6.2-2	Reports	0	15.08.2009	16.10.2009	6.2 Implementation	#9	
-	6.2-3	Documentation	0	15.08.2009	16.10.2009	6.2 Implementation	#10	
-	6.2-A	Approval Prototype		15.08.2009		6.2 Implementation	#11	
New Entities								

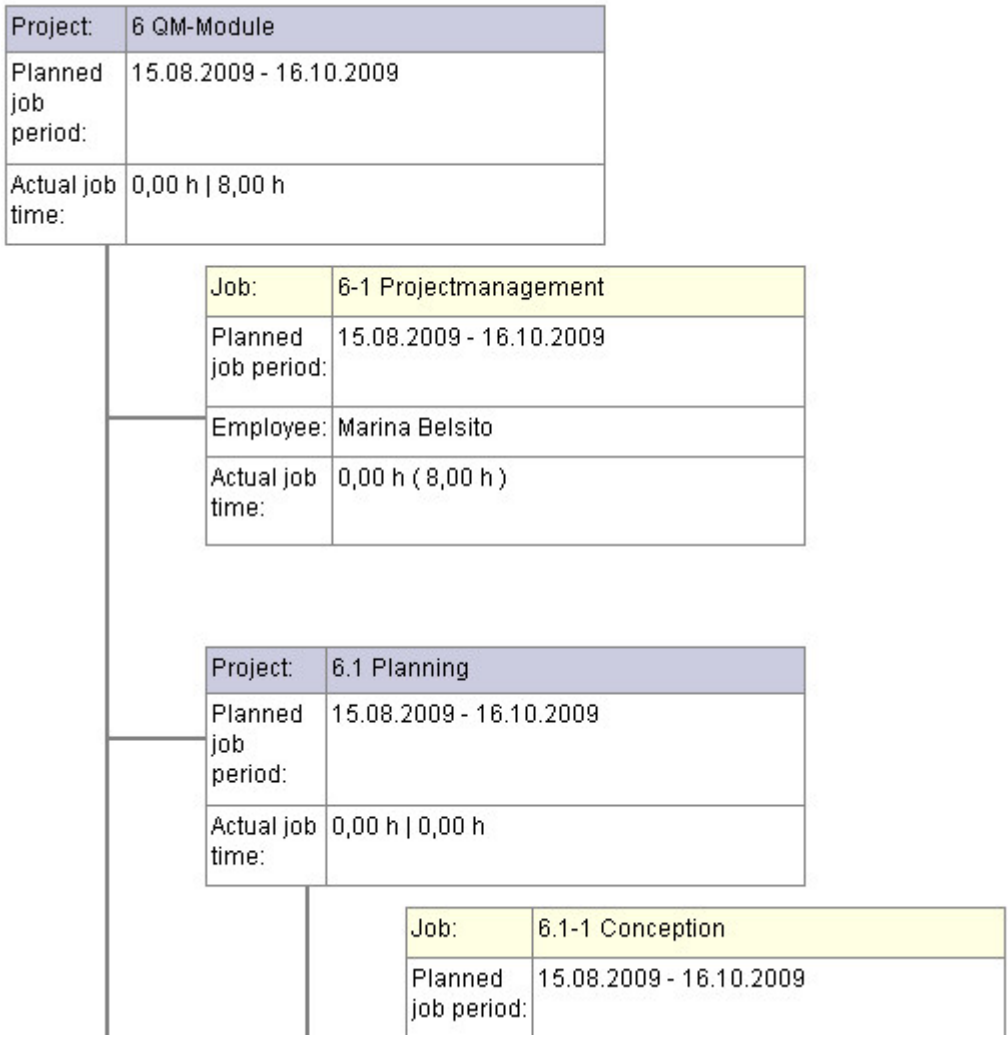
The work breakdown structure can be visualized ...



... with the "PSP" chart. The work breakdown structure in Projectile presents the relationship of the

project and the sub-project with the corresponding jobs. The most important planned values and actual values in the project structure are displayed here:

ProjectStructureChart



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