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" ...

	0									
Standard	Modules	Tasks	Infomarket	Project List	Risk	Portfolio	Customers	Projects	Staff	
Extras				Т	racking					
Absence application				TimeT	racker				\bigotimes	
Planning					Selec	ted days		*		
New Project				14.10.2009						
Charting					14.10.2009 🔤 🕶					
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		'∃• 🧯) 🗌 🌰 Clipbo	ard 🔻	1	R 🔍 🗌	🚺 Logout		
project	lie	📄 Track	ing and Recor	ding 👻 🧾 O	ffers 🔻	📄 Projec	ts V New Pro	iject 🗸 🍇	🇯 Contac	cts 🔻

... 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 ...

Project 5									
🔚 🔁 💁 🎚 Document 🕶 Edit 👻 View 👻 Actions 👻									
Master data Invo	ved persons Portfolio Status Budget Financial data Order data Documentation Misc								
Project number	Number 5 Status Passive								
Description									
Project start/end date	From 15.10.2009								
Parent project									
Subprojects	No entries 🔻								
Processes	No entries 🔻								
Milestones	No entries 🔻								
Grade of completion	No entries 🔻								

... 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!

Project 5														
📄 🔁 😋 🕕 Document - Edit - View - Actions -														
Master data Invol	ved persons Portfolio	Status	Budget	Financ	cial data	Or	ler data	D	ocumentation	Misc				
Project number	Number 5									Statu	^B Passive)		¥
Description	QM-Moduk													
Project start/end date	From 15.10.2009	• •	То	15.10	.2009	•								
Parent project				•	Octob	oer 200	€.							
Subprojects	No entries 🔹			S 1 27 2	м т 18 29	30	TF 12	S 3						
Processes	No entries 🔻			4	2 13	14 1	8 9 5 16	10 17						
Milestones	No entries 🔹			18 1 25 2	9 20 26 27	28 2	2 23- 9 30	- 24 31						
Grade of completion	No entries 🔻			1	2 3	4 oday)							

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

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

Project 5									
🔚 🔁 💁 🗒 Document 🔻 Edit 👻 View 👻 Actions 👻									
Master data Involve	Master data Involved persons Portfolio Status Budget Financial data Order data Documentation Misc								
External order / project	External order / project 🔽 Customer 🔽 TLC Telecommunications Corpor 🔽 🗃 🔍 🗶 🖿								
Contact	Williams George								
Unit	Marketing and Sales 🗸 🔊 🕲 🔍 🗙								
Project manager	🌼 📲 🔄 page 🚺 of 1 🕨 🕅 🧶 🗌	Q	1-1/1						
	Name Name	First name	EmployeeStatus						
	🔲 1 🧟 Conner	Jane	Fixed						
	4								
Project team	No entries 🔻								

... 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 evalaution charts.

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Project 5										
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Master data In	volved persons Portfolio Status Budget Financial data Order data Documentation Misc	٦								
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 -										
Master Save the docu	persons Portfolio	Status Budget Financial data Order data	Documentation Misc							
Net offer value	EUR	Net sum of billed invoices	EUR							
Leistungszukauf	EUR									
Currency	GBP	► DQ× Rate 0,91575								
Hourly rate	EUR	JobPriceExternal	 DC@XD 							
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":

Project 5 Q	M-Moduk							
😑 🚂 🎂 📼 🙀 🕰 🖳 🛛 Document + Edit + View + Back references + Actions +								
Master data Invo	ved 01 - Proje	ct shaping and evaluating Budge	t 📔 Financial data	Order data	Documentation	Misc		
Project number	Number	5				Statu	JS Passive	~

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.

🗙 🔁 Pro	jectplanning 6 Q№	1-Moduk				
	<u>M</u>		🗾 📀 View	V 👔 01 - Stan	dard display 🗾 🗐 🤇 📔 🛛 G	antt 🗾 Pd 🗾
🗹 ApplyEmplo	oyeeRestrictions					
ProjectTimePe	eriod			Project order		
15.10.2009		• 15.10.2009 🔄 🕨 🖲	• • •	End Start 💌		
•-	Fixed Number	Description	Estimated time (Pd)	Begin date planning	End date planning Project	# #Predecessors
	6	QM-Moduk		0 15.10.2009	15.10.2009	

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 ...

View 🔝	01 - Standard display	-	99	
E×	pand			

... 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.

ProjectTimePer	riod		
15.10.2009		🖲 - 15.10.2009	•

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 💌

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
-	5	QM-Module		0 15.08.2009	16.10.2009		
		New Entities					
Job				15.08.2009	📃 🎟 16.10.2009 👘 💷 5 QM-Module	e 🗾 🔍	

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".

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Save /Emplo	oyeeRestrictions							
ProjectTimePe	eriod			Project order				
15.08.2009		- 16.10.2009 🔹 🕨 🕅	•	End Start 💌				
+ -	Fixed Number	Description	Estimated time [Pd]	Begin date planning	End date plann	ing Project	#	# Predecessors
	5	QM-Module		0 15.08.2009	16.10.2009			
		New Entities						
Job 🔻		Projectmanagement		1 15.08.2009	16.10.2009	🔲 5 QM-Module	- 0	

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 planr	ning Project	#	# Predecessors	
		6	QM-Module		1 15.08.2009	16.10.2009				
88		6-1	Projectmanagement		1 15.08.2009	16.10.2009	🔲 6 QM-Module 💌 (् #1		
			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).

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0		1.	-	🛛 📀 Viev	w 👔 01 - Stand	lard display 🗾 🕀) 🖸 📔 Gantt	•	Pd 💌		
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ProjectTim	ePeriod			1000	Project order						
15.08.200	3	🕨 🗐 🗐 - 🛽	6.10.2009 🔄 🕨 🔳	•	End Start 💌						
÷	Fixed	Number	Description	Estimated time [Pd]	d Begin date planning	End date plann	ing Project	#	# Predecessors		
-		6	QM-Module		1 15.08.2009	16.10.2009					
88		6-1	Projectmanagement	1	1 15.08.2009	16.10.2009	🔲 6 QM-Module 💌 🤅	् #1			
			New Entities								
Project	-		Planning		15.08.2009	16.10.2009	🔲 6 QM-Module 💌 🤅	2			
Proiect	- I		Implementation		15.08.2009	16.10.2009	6 QM-Module 🔽	2			

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

	Projectpl	anning 6 QM-M	odule							? 🗙
D	<u> ₩ √ </u>	"l	•	🛛 📀 🛛 Viev	/ 👔 01 - Stan	dard display 💌 🗜	Gantt	Pc	▼	
ApplyEn	nployeeRe	estrictions								
ProjectTim 15.08.2009	ePeriod	• • • •	6.10.2009	•	Project order End Start 💌					
+ -	Fixed	Number)	Description	Estimated time [Pd]	Begin date planning	End date planr	ning Project	#	# Predecessors	
-		6	QM-Module		1 15.08.2009	16.10.2009				
33		6-1	Projectmanagement		1 15.08.2009	16.10.2009	🔲 6 QM-Module	▼ (1 #1		
		6.1	Planning		0 15.08.2009	16.10.2009	6 QM-Module	- 0		
-		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.

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Save in	nployeeR	estrictions								
ProjectTim	ePeriod			_	Project order					
15.08.2009	3	🕩 🗐 🗐 - 1	6.10.2009		End Start 💌					
÷Ð	Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date plan	ning Project	#	# Predecessors	
-		6	QM-Module		1 15.08.2009	16.10.2009				
88		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	<u>-</u> Q		
		6.2	Implementation		0 15.08.2009	16.10.2009	🔲 6 QM-Module 💌	9		
			New Entities	_						
Job	–		Conception		15.08.2009	16.10.2009	🔲 6.1 Planning	<u> </u>		
Job	-		Specification		15.08.2009	16.10.2009	🔲 6.1 Planning	- 9		
Job	- 		Regirement specification	D	15.08.2009	16.10.2009	6.1 Planning	- 9		
Milestone	-		Approval planning		15.08.2009	16.10.2009	6.1 Planning	– Q		

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

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÷	Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date plann	ning Project	#	#Predecessors	<u> </u>
-		6	QM-Module		1 15.08.2009	16.10.2009				
88		6-1	Projectmanagement		1 15.08.2009	16.10.2009	🔲 🖲 QM-Module	▼ Q #1		
		6.1	Planning		0 15.08.2009	16.10.2009	🔲 6 QM-Module	- 9		
88		6.1-1	Conception		0 15.08.2009	16.10.2009	6.1 Planning	▼ Q #3		
23		6.1-2	Specification		0 15.08.2009	16.10.2009	6.1 Planning	▼ (3,#4		
28		6.1-3	Regirement specification		0 15.08.2009	16.10.2009	6.1 Planning	▼ (1 , #5		
85		6.1-A	Approval planning		15.08.2009		6.1 Planning	▼ (3,#6		•
		6.2	Implementation		0 15.08.2009	16.10.2009	🔲 6 QM-Module 🔻	10		
			New Entities							

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

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÷	Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planr	ning	Project	#	# Predecessors		-
		6	QM-Module		1 15.08.2009	16.10.2009						
83		6-1	Projectmanagement		1 15.08.2009	16.10.2009		6 QM-Module	▼ (3 , #1			
		6.1	Planning		0 15.08.2009	16.10.2009		6 QM-Module	- 0			
83		6.1-1	Conception		0 15.08.2009	16.10.2009		6.1 Planning	▼ (3 #3		=	
83		6.1-2	Specification		0 15.08.2009	16.10.2009		6.1 Planning	▼ (3, #4			
83		6.1-3	Regirement specification		0 15.08.2009	16.10.2009		6.1 Planning	▼ (3,#5		=	
85		6.1-A	Approval planning	1	15.08.2009			6.1 Planning	▼ ি #6		•	
		6.2	Implementation		0 15.08.2009	16.10.2009		6 QM-Module 🔽	Q			
20000			New Entities					_	_			
Job	–		Templates		15.08.2009	16.10.2009		6.2 Implementatio	n 💌 🔍			
Job	- I		Reports		15.08.2009	16.10.2009		6.2 Implementatio	n 🔻 🔍			
Job	-		Documentation		15.08.2009	16.10.2009		6.2 Implementatio	n 🗖 🔍			
Milestone			Approval Prototype		15.08.2009	16.10.2009		6.2 Implementatio	n 🔽 🔍			

... created.

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ApplyEr	mployeeR	estrictions								
ProjectTim	nePeriod			25 	Project order					
15.08.200	9 4	Image: A state of the state	6.10.2009	iii 📀	End Start 💌		\mathbf{k}			
+ -	Fixed	Number	Description	Estimated time [Pd]	Begin date planning	End date planr	ning Project	#	#Predecessors	-
-		6	QM-Module		1 15.08.2009	16.10.2009				
88		6-1	Projectmanagement		1 15.08.2009	16.10.2009	🔲 6 QM-Module	▼] # 1		
- E 📑		6.1	Planning		0 15.08.2009	16.10.2009	🔲 6 QM-Module	- 0		
83		6.1-1	Conception		0 15.08.2009	16.10.2009	6.1 Planning	▼ Q #3		
83		6.1-2	Specification		0 15.08.2009	16.10.2009	6.1 Planning	▼ ()#4		
88		6.1-3	Regirement specification	D	0 15.08.2009	16.10.2009	6.1 Planning	▼ () #5		
<u>55</u>		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 🚽	a		
83		6.2-1	Templates		0 15.08.2009	16.10.2009	6.2 Implementatio	n 🔻 🔍 #8		
23		6.2-2	Reports		0 15.08.2009	16.10.2009	6.2 Implementatio	n 🔽 🔍 #9		
83		6.2-3	Documentation		0 15.08.2009	16.10.2009	🔲 6.2 Implementatio	n 🔻 🔍 #10		
84		6.2-A	Approval Prototype		15.08.2009		6.2 Implementatio	n 🔽 🔍 #11		•
			New Entities							

The work breakdown structure can be visualized ...

	Projectplan	ning 6 QM-Module	
D	<u> </u>	PSP -	
ApplyEn ProjectTim 15.08.2009	nployeeRestr ePeriod 3 • • • Fixed Nu	ⁱ Calendar II Capacities II Completion chart Earned Value Employee occupation chart Gantt Table	🗐 🥏 Estima time (F
	6- 6- 6- 6- 6- 6- 6- 6- 6- 6-	Job delta chart Milestone trend analysis (MTA) Network plan Project delta chart Project overview	
83 83	6.	Utilization chart 🕅 Utilization II 1-A Approval planning	

... 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

Project:	6 QM-Module	
Planned job period:	15.08.2009 - 16.10.2009	
Actual job time:	0,00 h 8,00 h	

Job:	6-1 Projectmanagement
Planned job period:	15.08.2009 - 16.10.2009
Employee:	Marina Belsito
Actual job time:	0,00 h (8,00 h)

Project:	6.1 Planning					
Planned job period:	od:					
Actual job time:	0,00 h 0,00 h					
	Job:	6.1-1 Conception				
	Planned job period:	15.08.2009 - 16.10.2009				

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