



The integrated total solution for service providers: projects, processes, knowledge.

Help, Part 6: Templates, Construction Kit

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6.1 Project Templates

The project templates are a tool for repeatedly creating a complete project structure consisting of projects, sub-projects, milestones, work packages, arrangements and budgets. With the help of the action "Create project templates", a template can be created from any existing project. This template then contains the complete project structure in parameterized form. Relative dates are generated from the absolute dates (plan start and end) depending on the parameters from the project wizards.

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General data Sta	kehold	ers	Proposal Portfo	olio Risk ass	essment Status	Key figures	2 P	lanning	> >cu	ments	Order da	ta Logi	book F	inal Report	Misc			
- E Basic information	on						D' A	dministration	1 4	Create b	oaseline							
Number	081					Status Pa	0	offers / Billing	 4 	Create p	project tem	plate						
Description	Appl	ication					К. н	iourly rates	· 10	Create s	tatus repo	t						
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									1	Show ba	aseline							
- Structure																		
Main project	081	Applica	ation		Parent													
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Subordinate		@•	Number +	Description	Status	Begin planning	En	d planning	Project	managers	Tar	get time	Planning) time	Actual time	Exter	LastStateEstimate	EnterNewSt
projects												00:00		00:00	00:00			
Processes	11	- 65	Process number +	Description	Begin date planning	End date planning	Exter	Planning ti	me	Target	time	Actual tir	ne IsCi	0				
	-	olla					_	0	0.00		00-00	00	-00					
Milestones	10	- 60	MilestoneNumber 4	Description	Date	Responsible	Miles	tone category	Miles									

After executing the action "Create Project Templates" ...

... a dialogue appears. The name of the template can be changed here.

-	LIN		
1	× Dialogue		
	Please speci	ify filename:	
	Name	Development Project	
1	Description	Test for Manual	
	×		

After confirmation, the template is created under the entered name and stored on the web server. The template is then available for use (to create new projects with a similar structure). In the menu "Project Management" the entry "Project Template" is selected (step 1 of 6). The selection box "Project template" contains a list of all available templates. After selecting a template (here development project), the corresponding project template with the stored project structure is loaded (step 2 of 6):



In the project wizard (step 3 of 6), it is possible to enter all relevant project values. These basic values correspond for the most part to the values from the manual project definition.

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ProjectCreator Hel Back Next st	InPage step	alion has 1 errors and 0 war	nings End planning	a: Not Null		
Parent project						
InternalKey		83				
Project number	Number	082				
Description		Application				
Project duration	From	25.06.2021 🔹 🗔			То	
External project					Company MPE Maier Plant Engineering Gml 🗢	
Commercial contact person			Q			
Unit		Support	\bigtriangledown			
Project 😰		📄 🍈 • First name	Name 🛎	Employee status		
managers		Peter	Schaub	Fixed		
Billing type		Expense	\bigtriangledown			
Priority		3 - normal priority	\bigtriangledown			
Currency		EURO				
Total costs						
Cost center			\bigtriangledown			
Category		Introduction	4			

After changing the project corner values, you can select as an option for the next step whether and how a postponement of the start and end dates is desired (here "Postpone forward", i.e. to the next working day). After entering all necessary values, you can continue with "Next". In the next step (step 4 of 6), the changes to the project period are first listed.

Note: In the template the basic values for the (sub)projects, tasks and milestones are stored in parameterized form. When the system then determines the dates for the project to be generated, these can be on weekends or public holidays.

Before the last step, you must select an option for the proposal system. In the next dialog step, the option "with capacities and preassignment" displays all employees for the work packages who fulfill the required skill (activity) and preassigns the employee with the lowest workload in the planned period as a preselection. The option "with capacities" displays all employees with the appropriate skill and their workload in the processing period. The option "without capacities" considers only the skill management and ignores the workload. The option "all employees" also ignores the skill management.

In the following example the option "with capacities" is used.



Now the last step is to complete the project planning. Here, all work packages of the project structure are displayed with plan effort, required skill (activity), the assigned sub-project and the processing period. For each work package, all employees who are suitable for this task (according to skill management) appear in the dialog, along with the respective percentage of their workload. For the planned processing period of the "Design" work package between 07.01.2020 and 21.01.2020, the employee Peter Schaub is probably working at between 99.9% and 174.2% capacity. Maria Schneider is 0.0% busy in the planned processing period.

Explanation of the selection box:

Employees: Workload across all projects | Workload taking into account the project probability of planned projects (maximum capacity of the employee).

1 - 5 6 - 7 all ProjectCreator HelpPage step 6/6 Back_Create project_Set values SubProject_Set values End date plann planning Job Employee Time Split Occupation SubProject Begin date planning End date plann planning Catalogue of Requirements Image: Split with the strate and the	₽☆目
ProjectCreator HelpPage step 6/6 Back_Create project Set values Automatic forward calculation after creation Job Employee Time Split Occupation SubProject Begin date planning End date plann planning Catalogue of Requirements Image Image Ificiol 2,000 Pd Beratung - Senior Planning Phase 05.08.2021 09.08.2021 09.08.2021 Specification Image	
Back Create project Set values Back Create project Set values Employee Time Split Occupation SubProject Begin date planning End date planning Job Employee Time Split Occupation SubProject Begin date planning End date planning Catalogue of Requirements Image: Pirst name Info:0 2,000 Pd Beratung - Senior Planning Phase 09.08.2021 09.08.2021 09.08.2021 01.08.201 Specification Image: Pirst name Info:0 2,000 Pd Beratung - Senior Planning Phase 09.08.2021 11.08.201 Design Image: Pirst name Info:0 2,000 Pd Programmierung - Java Implementation Phase 17.08.2021 18.08.201 Mockup Name First name Estimated for the setimated for	
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Etlers Hans 0.0% Development Franke Heiner 0.0% 80:00 10,000 Pd Programmierung - Java Implementation Phase 23.08.2021 01.09.20 Meier Jan 0.0% 0.0% 0.0% 0.00% 0.0% <td></td>	
Development Franke Heiner 0.0% 80:00 10,000 Pd Implementation Implementation Phase 23.08.2021 01.09.20 Meier Jan 0.0% Implementation Programmierung - Java Implementation Phase 23.08.2021 01.09.20	
Meier Jan 0.0%	1
Wollert Barbara 0.0%	
Zöllner Pia 0.0%	

In this way, between 0 and n employees are scheduled for each work package. Work packages of the template cannot be occupied either; in this case, a corresponding note appears during generation and the work package may not be generated.

X 🔨 Project temp	ates									₽☆⊟
1 - 5 6 - 7 all										
ProjectCreator HelpPr Back Create project	t Set values									
Job	Employee		Time		Split	Occupation	SubProject	Begin date	End date planning	
					times			planning		
Catalogue of		*	16:00	2,000 Pd		Beratung - Senior 🗢	Planning Phase	05.08.2021	09.08.2021	
Requirements	🔲 🎲 - Name	First name								
	1 Meier	Jana								
Specification		~	24:00	3,000 Pd		Beratung - Senior 🗢	Planning Phase	09.08.2021	11.08.2021	
	🕅 🎲 • Name	First name								
	1 Meier	Tamara								
Design		~	16:00	2,000 Pd		Programmierung - Java 🗢	Implementation Phase	17.08.2021	18.08.2021	
	🗐 🎲 🕶 Name	First name								
	1 Wollert	Barbara			_					
Mockup		~	24:00	3,000 Pd		Programmierung - Java 🗢	Implementation Phase	18.08.2021	23.08.2021	
	🗐 🎲 - Name	First name								
	1 Zöllner	Pia								
	2 Meier	Jan								
Development		~	80:00	10,000 Pd		Programmierung - Java 🗢	Implementation Phase	23.08.2021	01.09.2021	
	🗐 🎲 🕶 Name	First name								

The option "Split Time" can be used for tasks with several agents. This checkbox can be used to determine whether the employees share the defined plan effort or whether each of them needs this number of hours for his work package. In addition, the assigned activity of the work package can also be changed. However, it is not possible to change the start and end dates here. However, these and other changes to the structure can be made directly after generation.

After clicking on the "Generate Project" button, the entire project structure is

created.

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Basic information	m															
Number	084					Status P	assive									
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Start of planning	05.08	2021	•			End of planning 0	6.09.2021		1							
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Structure Main project Subordinate projects	084 0	evelop	Number A 084.1 084.2	Per inter P Pr Description Planning Phase Implementation	roject Status Passive Passive	Begin planning 05.08.2021 17.08.2021	End p 1	planning 11.08.2021 06.09.2021	Project managers Schaub Peter Schaub Peter	Targ	et time PI	anning time	Actual time	Exter Las	stStateEstimate	EnterNewState
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The project structure can be viewed and modified using the "Project Planning" action (see also Part 4).

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	Number	Description	Planning time	Start	End	Occupation	Employee	2021 August	September	Predecessors
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	084.1-1	Catalogue of Requirements	2,000 Pd	05.08.2021	09.08.2021	Beratung - Senior	Meier Jana			1:
E	🛐 084.1-2	Specification	3,000 Pd	09.08.2021	11.08.2021	Beratung - Senior	Meier Tamara	4 		2:1
8	55 084.1-A	End of planning		11.08.2021			Schmidt Paula	↓ ◆		3: 2
0	/ 084.2	Implementation Phase	17,000 Pd	17.08.2021	06.09.2021					
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E	Þ 🚺 084.2-2	Mockup	1,500 Pd	18.08.2021	23.08.2021	Programmierung		4		5:4
E	084.2-4	Development	10,000 Pd	23.08.2021	01.09.2021	Programmierung	Eilers Hans	4	5	6: 5
E	084.2-5	Testing	2,000 Pd	01.09.2021	02.09.2021	Testen	Franke Heiner	Lice Line Line Line Line Line Line Line Lin	-	7:6
E	55 084.2-A	End of implemenation		06.09.2021			Schaub Peter		+	8:

6.2 Project Construction Kit

The project construction kit is a modular extension of the project templates. With the help of this functionality, the administrator can store any number of projects or sub-projects in a central file (and not just a structure as with the templates). In addition, sub-projects can also be combined to form a project structure and various preassignments can be stored.

In the "Project Management" menu, the "Project Construction Kit" entry is selected. In the dialogue, there is a list of all available project structures (or, in the HOAI version, the "service specifications"). After selecting one or more structures (here "System introduction") the stored project structure is loaded:

44	imes $ au$ Projektschabionen	-₽☆≡
Administration	use Selection	
Customer relationship manage	📄 🍈 - Hours ScopeOfService	
Image of the second secon	V 1 1 Einführung EPM	
Portfolio and Program	2 1 Entwicklung Modul	
4 Projects	3 1 Beratung	
Active main projects		
Project templates		
Project creation kit config		
Project creation kit		
MS project import		
MS project export		
Resource Planning		
Resource Fidming		

The structure can be viewed and edited with the elements main project, subprojects, activities and milestones. All selected elements will be taken over later (so not needed elements can be deselected here). For the activities the parameters "planned effort", period ("start" and "end"), "activity", "employee" and "predecessor" can be changed.

With the options "Append Project" the structure is generated as a sub-project in an existing project and with the option "Create Project" ...

=	Pr	ojektschablone	n								-D 🕁
Crea	ite d	ocuments Add	documents Add all documents to one								
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1		Туре	Name	Begin	End	Occupation	Employee	Unit	EstimatedTimeProj	Predecessors	
1	1	Main project	Einführung EPM								
1	2	project	Planung								
1	3	process	Konzeption	0	7	Beratung	*Beratung		24		
1	4	process	Spezifikation	8	15	Beratung	*Beratung		40	3	
]	5	milestone	Abnahme der Planung	17			*Beratung			4	
]	6	project	Customizing								
]	7	process	Konfiguration	20	23	Support	*Support		8	5	
	8	process	Programmierung	24	60	Programmierung	*Entwicklung		72	7	
]	9	process	Testen	61	75	Support	*Support		16	8	
	10	process	Dokumentation	61	75	Dokumentation	*Support		16	8	
]	11	milestone	Abnahme Customzing	77			*Beratung			9 10	
	12	project	Pilotbetrieb								
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	14	process	Schulung	88	97	Beratung	*Beratung		24	13	
]	15	milestone	Abnahme System	100			*Beratung			14	

... a new main project is created later.

In order to describe the basic values of the project, the project assistant opens (as with the project templates in section 6.1) and the user can enter all relevant project values. These basic parameters correspond to a large extent to the values from the manual project definition. After clicking on "Next" ...

X 🔨 Project templates	5								⊕☆☰
ProjectCreator HeloPage Back Next step	step 3/6 Check								
Parent project				▽					
InternalKey		86							
Project number	Number	085							
Description		Einführung EP	РМ						
Project duration	From	05.08.2020	•			To 05.08.2	2021 🛛 🗖		
External project						Company		<	
Commercial contact person				♥					
Unit		Support		~					
Project managers		🗐 🎯 • 🛛 F	First name	Name +	Employee status				
		🗐 1 P	Peter	Schaub	Fixed				
Billing type		Expense		\bigtriangledown					
Priority		3 - normal pri	iority	\bigtriangledown					
Currency		EURO		\bigtriangledown					
Total costs									
Cost center				▽					
Category				\bigtriangledown					
Product				\bigtriangledown					
strateg. Relevanz				\bigtriangledown					
Benefit				\bigtriangledown					

... one more option can be chosen for the suggestion system. In the following example, this option is not used because the employees have been preassigned in the assembly. The option "all employees" is then used here.

🗙 🔨 Project templates		
ProjectCreator HelpPage step 5/6 Back Next step with capacity and Preselection		
Next step with capacity		
Next step without capacity		
All employees		
	 Warning The following changes have been applied: J001 Job 'Konzeption' End date planning: 30.08.2020 -> 31.08.2020 J003 Job 'Konfiguration' Begin date planning: 17.10.2020 -> 19.10.2020 J003 Job 'Konfiguration' End date planning: 27.10.2020 -> 29.10.2020 J004 Job 'Programmierung' Begin date planning: 31.10.2020 -> 02.11.2020 J004 Job 'Programmierung' End date planning: 12.03.2021 -> 15.03.2021 J007 Job 'Integrationstest' Begin date planning: 24.05.2021 -> 25.05.2021 J007 Job 'Integrationstest' End date planning: 18.06.2021 -> 21.06.2021 J008 Job 'Schulung' End date planning: 25.07.2021 -> 26.07.2021 M002 Milestone 'Abnahme Customzing' Date: 13.05.2021 -> 14.05.2021 OK 	

Now the last step is to complete the project planning. Here (as with the templates) all work packages of the project structure are displayed with the basic parameters, modified if necessary and finally created with "Create

Project" ...

X 🔨 Project t	templa	ates											
1-5 6-8	all												
ProjectCreator H Back Create	telpPa project	ge step Set	6/6 values rd calculation af creat	fter									
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Spezifikation					~	40:00	5,000 Pd		Beratung	\bigtriangledown	Planung	03.09.2020	28.09.2020
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		1	*Support										
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Testen	-				~	16:00	2,000 Pd		Support		Customizing	15.03.2021	05.05.2021
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... generated the project structure. With the help of the "Project Planning" action, you can ...

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... the project structure can be viewed and modified (see also part 4).

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085	Einführung EPM	29,000 Pd	05.08.2020	05.08.2021					
A 085.1	Planung	8,000 Pd	05.08.2020	05.08.2021					
085.1-1	Konzeption	3,000 Pd	05.08.2020	31.08.2020	Beratung	*Beratung			1:
085.1-2	Spezifikation	5,000 Pd	03.09.2020	28.09.2020	Beratung	*Beratung	4		2: 1
🗐 🎒 085.1-A	Abnahme der Planung		06.10.2020			*Beratung	4 4 -1		3: 2
a 🔤 085.2	Customizing	14,000 Pd	05.08.2020	05.08.2021				1	
085.2-1	Konfiguration	1,000 Pd	19.10.2020	29.10.2020	Support	*Support	40 <u>0</u>		4: 3
085.2-2	Programmierung	9,000 Pd	02.11.2020	15.03.2021	Programmierung	*Entwicklung			5:4
085.2-3	Testen	2,000 Pd	15.03.2021	05.05.2021	Support	*Support			6: 5
085.2-4	Dokumentation	2,000 Pd	15.03.2021	05.05.2021	Dokumentation	*Support		4 <u></u>	7: 5
🖸 🎒 085.2-A	Abnahme Customzing		14.05.2021			*Beratung		₩ ₩	8: 7, 6
085.3	Pilotbetrieb	7,000 Pd	05.08.2020	05.08.2021			,		
085.3-1	Integrationstest	4,000 Pd	25.05.2021	21.06.2021	Beratung	*Beratung		<u>له المعامة الم</u>	9:8
085.3-2	Schulung	3,000 Pd	22.06.2021	26.07.2021	Beratung	*Beratung		4	10:9
085.3-A	Abnahme System		05.08.2021			*Beratung		40	11: 10

If several structures are selected in the Project Construction Kit dialog, Projectile creates a new main project with several (here two) sub-projects:

51	rojektschabionei	n								-P & =
Create	documents Add	documents Add all documents to one								
7	Type	Name	Begin	End	Occupation	Employee	Unit	EstimatedTimeProj	Predecessors	Structure
1 1	Main project	Entwicklung Modul								
1 2	project	Konzeption								
/ 3	process	Konzept	0	7	Beratung	*Beratung		32		
1 4	process	Pflichtenheft	8	15	Beratung	*Beratung		40		
/ 5	milestone	Abnahme Konzeption	17			*Beratung				
1 6	project	Entwicklung								
7	process	Datenbankdesign	20	30	Programmierung	*Entwicklung		32	Lannan an a	
1 8	process	Programmierung	31	60	Programmierung	*Entwicklung		68		
1 9	process	Testen	61	75	Support	*Support		16	la nun in	
10	process	Dokumentation	61	75	Dokumentation	*Support		16		
11	milestone	Abnahme Prototyp	77			*Beratung				
✓ 12	project	Implementierung								
13	process	Integrationstest	80	87	Beratung	*Beratung		32	Community of the	
14	process	Installation	88	97	Support	*Support		8	community and	
✓ 15	milestone	Abnahme System	100			*Beratung				
/ 16	Main project	Beratung								
/ 17	process	Bestandsaufnahme	0	35	Beratung	*Beratung		40	communities.	
/ 18	process	Umsetzung	37	96	Beratung	*Beratung		80		
/ 19	milestone	Abnahme	100			*Beratung				

6.3 Import of Project Data

Optionally, import from MS Project is also possible, if the corresponding interface is included in the scope of services (see separate documentation of the MS Project interface).