



Projectile

Version 5.9

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

Help, Part 6: Templates, Construction Kit

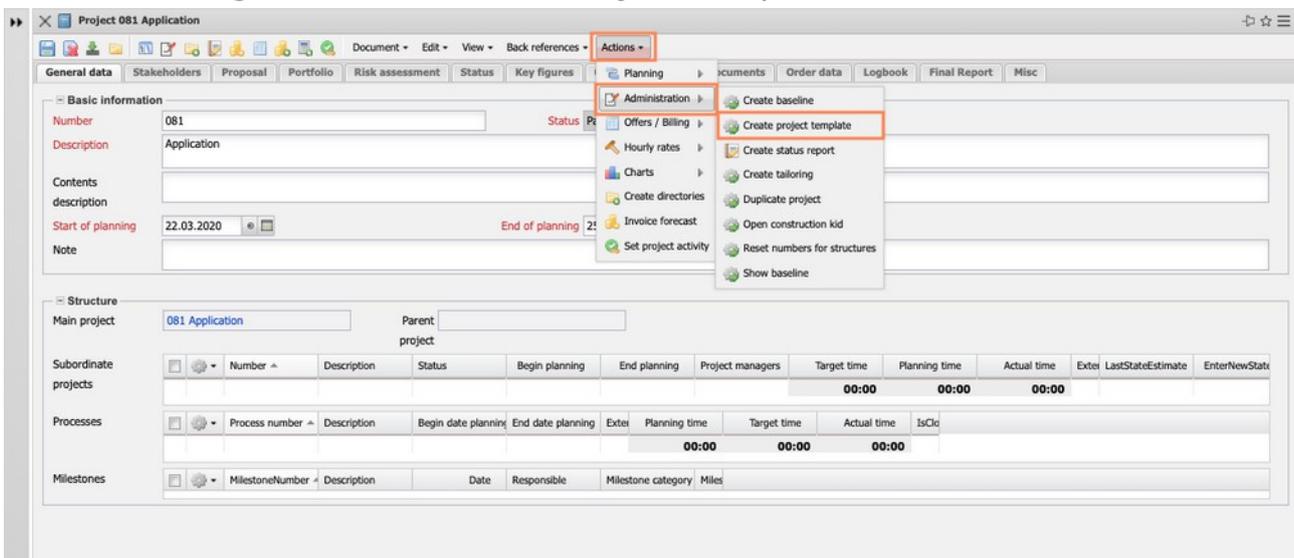
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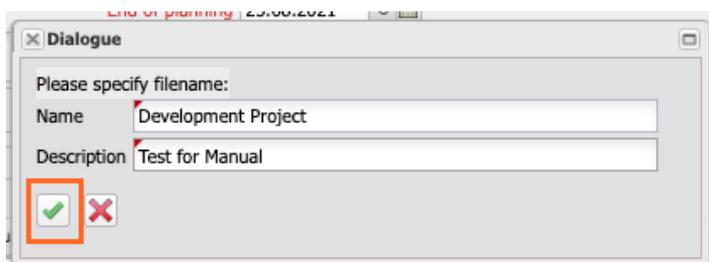
6.1 Project Templates

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.

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

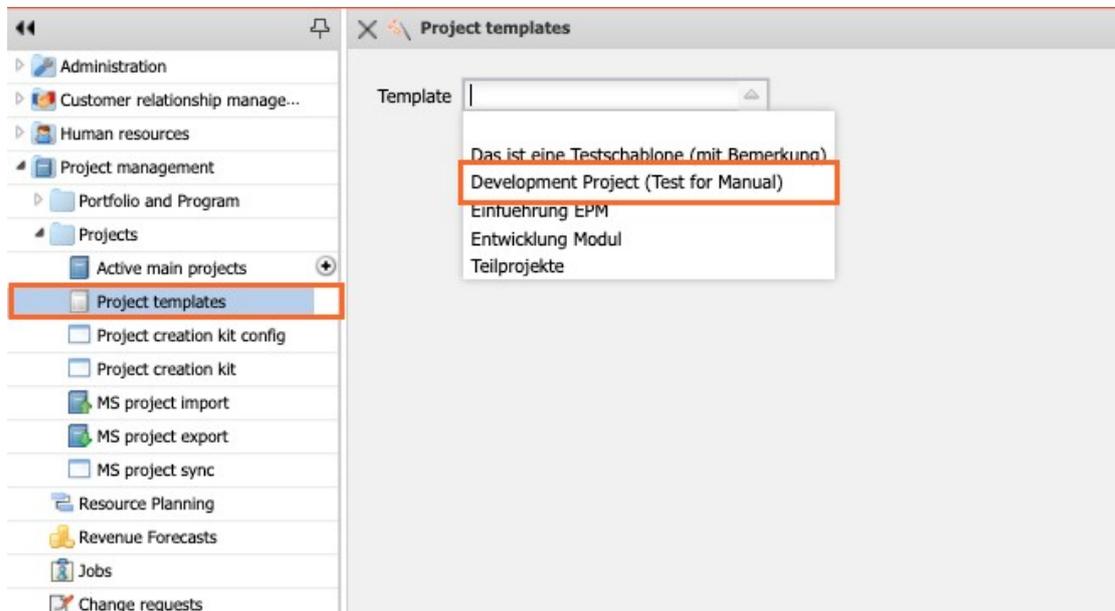


... a dialogue appears. The name of the template can be changed here.



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.

ProjectCreator HelpPage step 3/6

Back Next step Check

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Document Project 082 Application has 1 errors and 0 warnings End planning: Not Null

Parent project

InternalKey 83

Project number Number 082

Description Application

Project duration From 25.06.2021 To

External project Company MPE Maier Plant Engineering Gml

Commercial contact person

Unit Support

	First name	Name	Employee status
<input checked="" type="checkbox"/>	Peter	Schaub	Fixed

Billing type Expense

Priority 3 - normal priority

Currency EURO

Total costs

Cost center

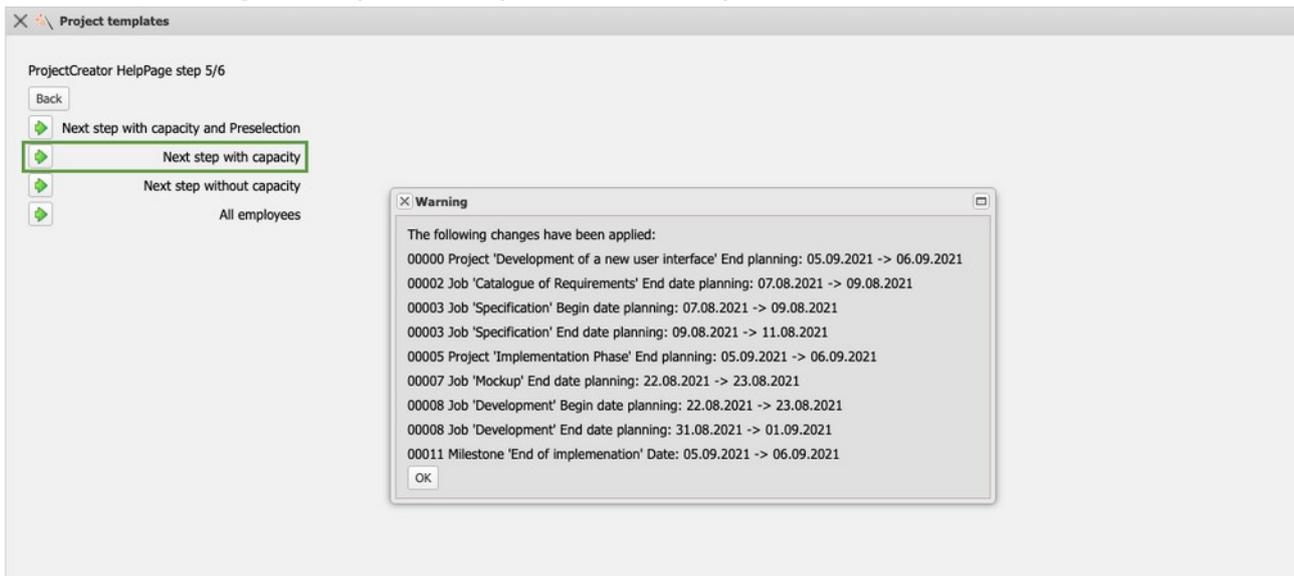
Category Introduction

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.

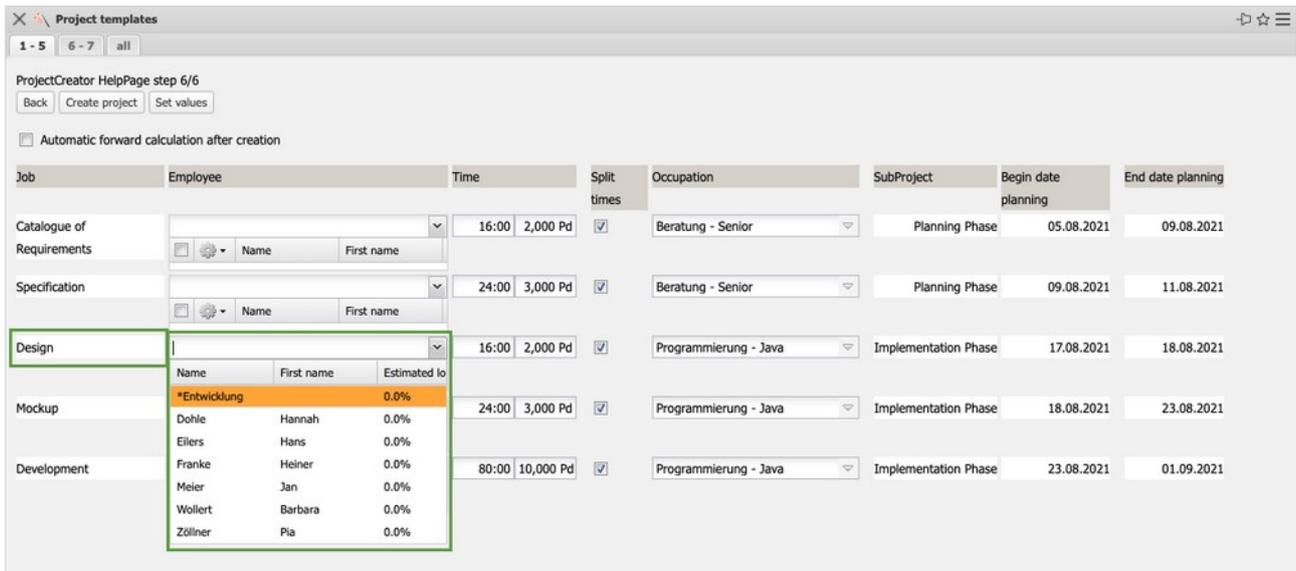
In the following example the option "with capacities" is used.



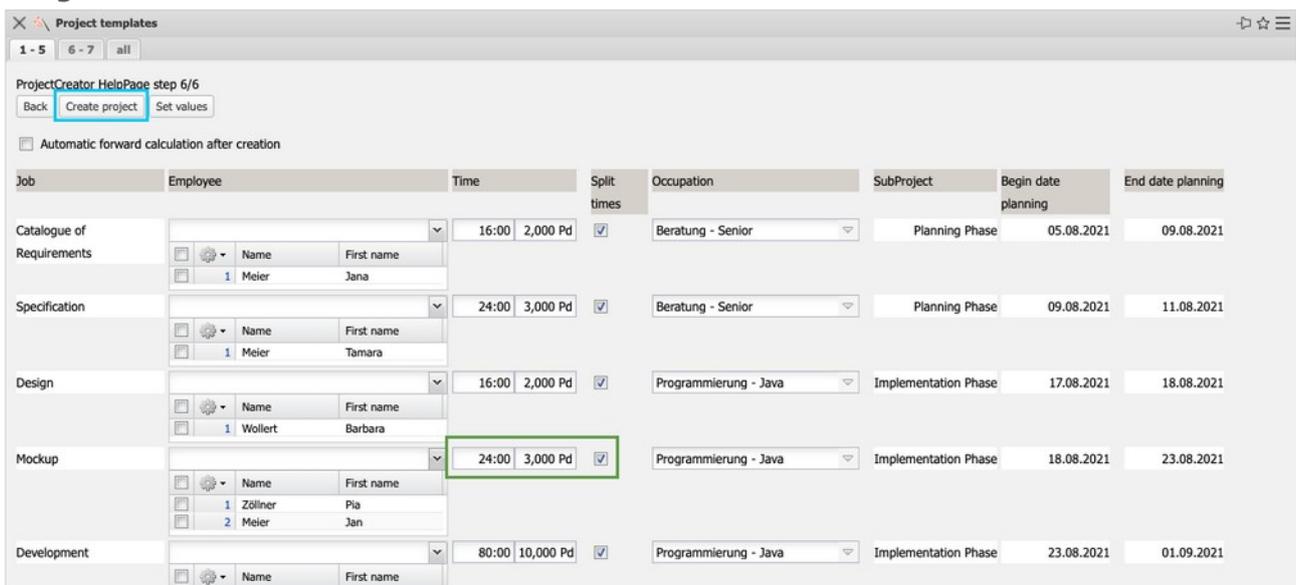
Now the last step is to complete the project planning. Here, all work packages of the project structure are displayed with plan effort, required skill (activity), the assigned sub-project and the processing period. For each work package, all employees who are suitable for this task (according to skill 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).



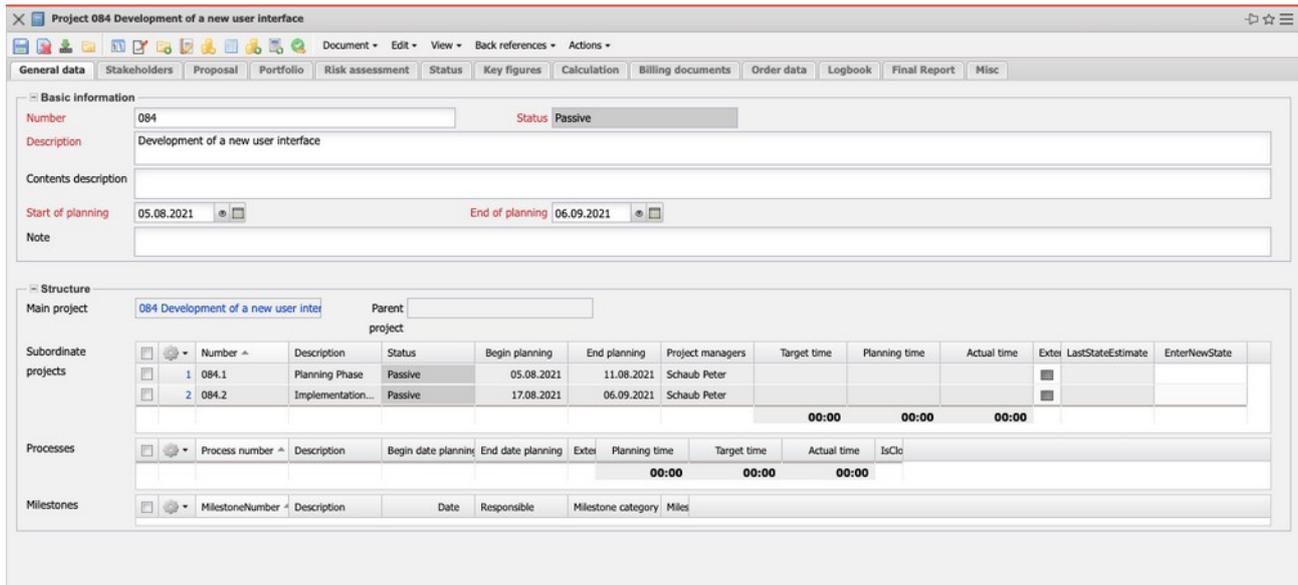
In this way, between 0 and n employees are scheduled for each work package. Work packages of the template cannot be occupied either; in this case, a corresponding note appears during generation and the work package may not be generated.



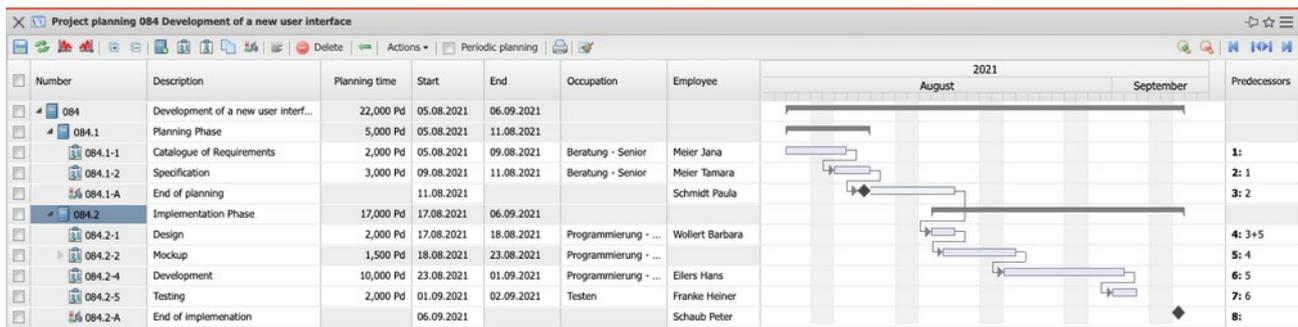
The option "Split Time" can be used for tasks with several agents. This checkbox can be used to determine whether the employees share the defined plan effort or whether each of them needs this number of hours for his work package. In addition, the assigned activity of the work package can also be changed. 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.



The project structure can be viewed and modified using the "Project Planning" action (see also Part 4).



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:



The structure can be viewed and edited with the elements main project, sub-projects, 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" ...

	Type	Name	Begin	End	Occupation	Employee	Unit	EstimatedTimeProj	Predecessors
<input checked="" type="checkbox"/>	1	Main project			Einführung EPM				
<input checked="" type="checkbox"/>	2	project			Planung				
<input checked="" type="checkbox"/>	3	process	0	7	Beratung	*Beratung		24	
<input checked="" type="checkbox"/>	4	process	8	15	Beratung	*Beratung		40	3
<input checked="" type="checkbox"/>	5	milestone	17		Abnahme der Planung	*Beratung			4
<input checked="" type="checkbox"/>	6	project			Customizing				
<input checked="" type="checkbox"/>	7	process	20	23	Konfiguration	*Support		8	5
<input checked="" type="checkbox"/>	8	process	24	60	Programmierung	*Entwicklung		72	7
<input checked="" type="checkbox"/>	9	process	61	75	Testen	*Support		16	8
<input checked="" type="checkbox"/>	10	process	61	75	Dokumentation	*Support		16	8
<input checked="" type="checkbox"/>	11	milestone	77		Abnahme Customizing	*Beratung			9 10
<input checked="" type="checkbox"/>	12	project			Pilotbetrieb				
<input checked="" type="checkbox"/>	13	process	80	87	Integrationstest	*Beratung		32	11
<input checked="" type="checkbox"/>	14	process	88	97	Schulung	*Beratung		24	13
<input checked="" type="checkbox"/>	15	milestone	100		Abnahme System	*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" ...

Project templates

ProjectCreator HelpPage step 3/6

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1

Parent project

InternalKey 86

Project number Number 085

Description Einführung EPM

Project duration From 05.08.2020 To 05.08.2021

External project Company

Commercial contact person

Unit Support

Project managers	First name	Name	Employee status
1	Peter	Schaub	Fixed

Billing type Expense

Priority 3 - normal priority

Currency EURO

Total costs

Cost center

Category

Product

strateg. Relevanz

Benefit

... 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

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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 Customizing' 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" ...

ProjectCreator HelpPage step 6/6

Automatic forward calculation after creation

Job	Employee	Time	Split times	Occupation	SubProject	Begin date planning	End date planning
Konzeption		24:00 3,000 Pd	<input checked="" type="checkbox"/>	Beratung	Planung	05.08.2020	31.08.2020
Spezifikation		40:00 5,000 Pd	<input checked="" type="checkbox"/>	Beratung	Planung	03.09.2020	28.09.2020
Konfiguration		08:00 1,000 Pd	<input checked="" type="checkbox"/>	Support	Customizing	19.10.2020	29.10.2020
Programmierung		72:00 9,000 Pd	<input checked="" type="checkbox"/>	Programmierung	Customizing	02.11.2020	15.03.2021
Testen		16:00 2,000 Pd	<input checked="" type="checkbox"/>	Support	Customizing	15.03.2021	05.05.2021

... generated the project structure. With the help of the "Project Planning" action, you can ...

Project 085 Einführung EPM

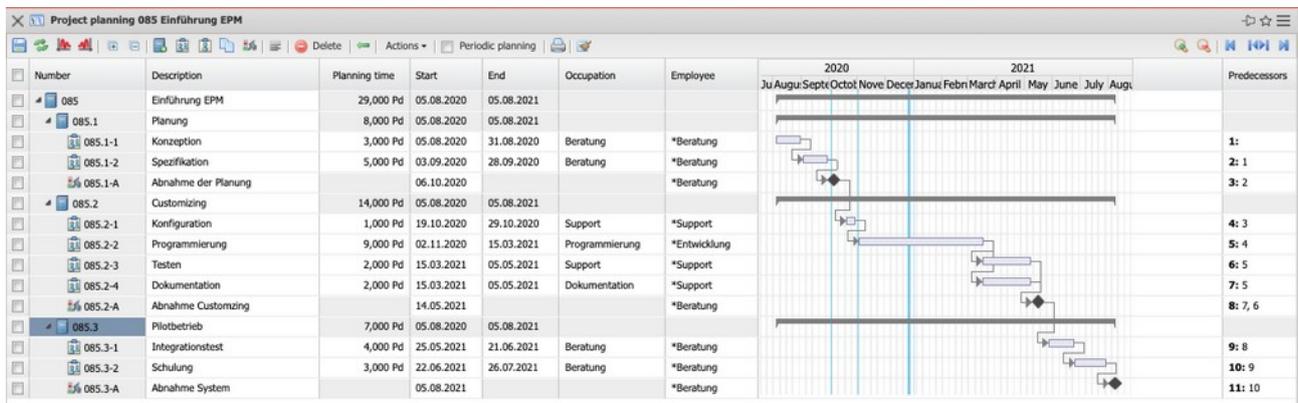
General data Stakeholders Proposal Portfolio Risk assessment Status Key figures Calculation Billing documents Order data Logbook Final Report Misc

Basic information

Number: 085 Status: Passive

Description: Einführung EPM

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



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

<input checked="" type="checkbox"/>	Type	Name	Begin	End	Occupation	Employee	Unit	EstimatedTimeProj	Predecessors
<input checked="" type="checkbox"/>	1	Main project							
<input checked="" type="checkbox"/>	2	project							
<input checked="" type="checkbox"/>	3	process	0	7	Beratung	*Beratung		32	
<input checked="" type="checkbox"/>	4	process	8	15	Beratung	*Beratung		40	
<input checked="" type="checkbox"/>	5	milestone	17			*Beratung			
<input checked="" type="checkbox"/>	6	project							
<input checked="" type="checkbox"/>	7	process	20	30	Programmierung	*Entwicklung		32	
<input checked="" type="checkbox"/>	8	process	31	60	Programmierung	*Entwicklung		68	
<input checked="" type="checkbox"/>	9	process	61	75	Support	*Support		16	
<input checked="" type="checkbox"/>	10	process	61	75	Dokumentation	*Support		16	
<input checked="" type="checkbox"/>	11	milestone	77			*Beratung			
<input checked="" type="checkbox"/>	12	project							
<input checked="" type="checkbox"/>	13	process	80	87	Beratung	*Beratung		32	
<input checked="" type="checkbox"/>	14	process	88	97	Support	*Support		8	
<input checked="" type="checkbox"/>	15	milestone	100			*Beratung			
<input checked="" type="checkbox"/>	16	Main project							
<input checked="" type="checkbox"/>	17	process	0	35	Beratung	*Beratung		40	
<input checked="" type="checkbox"/>	18	process	37	96	Beratung	*Beratung		80	
<input checked="" type="checkbox"/>	19	milestone	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).