



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.

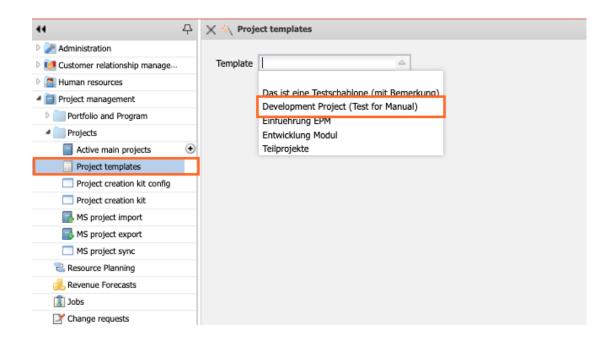
🗄 🙀 🏯 🗀 🛛 🕅	1 🛛 🕞 🛛	2 👶 🗉 👶 🖳	Ocument •	• Edit • View •	Back references -	Actions										
General data Sta	keholders	Proposal Portf	olio Risk asses	ssment Status	Key figures	🔁 Pi	anning	≱ )cum	nents 0	rder data	Logbook	Final Repo	rt Misc			
Basic information	on					🛛 A	Iministration	۱ (A)	Create base	line						
Number	081				Status Pa	0	fers / Billing	Þ 🐵	Create proj	ect template						
Description	Applicatio	n				🔨 He	ourly rates	• 👿	Create stat	us report						
Contents						💼 a	narts	× 💩	Create tailo	ring	-					
description						Cr 🚰	eate directori	es 👜	Duplicate p	roject						
Start of planning	22.03.202	e 🔲			End of planning 2!	🔔 In	voice forecast		Open const	ruction kid						
Note							t project activ	/ity 🚲	Reset num	ers for struct	tures					
								- 104	Show base	ine						
- Structure																
Main project	081 Appli	cation	F	Parent												
			р	roject												
Subordinate		Number 🔶	Description	Status	Begin planning	End	d planning	Project m	managers	Target tir	me Pla	anning time	Actual time	Exter	LastStateEstimate	EnterNewS
projects						_				00	0:00	00:00	00:00			
Processes																
Processes		<ul> <li>Process number  </li> </ul>	Description	Begin date planning	End date planning	Exter	Planning tir		Target tim		tual time	IsClo				
							00	:00	00:	00	00:00					
		MilestoneNumber	Description	Date	Responsible		one category									

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

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

× Dialogue		
	cify filename:	
Name	Development Project	
Descriptio	Test for Manual	
<u> </u>		

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.

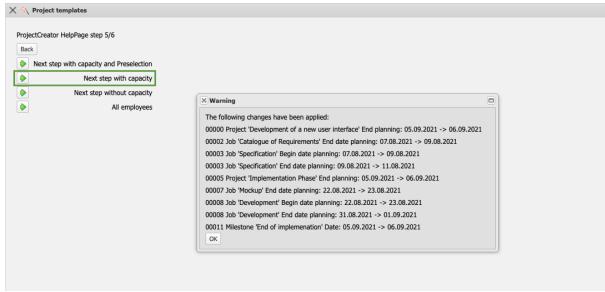
🗙 🐴 Project te	mplates				-0 ☆ Ξ
ProjectCreator He Back Next s 1	÷ i i i i i i i i i i i i i i i i i i i	3/6 heck			
	082 Applic	ation has 1 errors and 0 warnir	ngs End planning:	Not Null	
Parent project					
InternalKey		83			
Project number	Number	082			
Description		Application			
Project duration	From	25.06.2021 🛛			То 🛛 🔊 🛄
External project					Company MPE Maier Plant Engineering Gml 🗢
Commercial			$\bigtriangledown$		
contact person					
Unit		Support	$\bigtriangledown$		
Project		📄 🎲 • First name	Name 🛎	Employee status	
managers		Peter	Schaub	Fixed	
Billing type		Expense	$\bigtriangledown$		
Priority		3 - normal priority	$\bigtriangledown$		
Currency		EURO	$\bigtriangledown$		
Total costs					
Cost center			$\bigtriangledown$		
Category		Introduction	$\bigtriangledown$		

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).

🗙 🔨 Project templ	ates								
1-5 6-7 all									
ProjectCreator HelpPa	age step 6/6								
Back Create project	t Set values								
Automatic forwar	rd calculation after cre	ation							
Job	Employee			Time	Split	Occupation	SubProject	Begin date	End date planning
					times			planning	
Catalogue of			¥	16:00 2,000 Pd	V	Beratung - Senior 🗢	Planning Phase	05.08.2021	09.08.2021
Requirements	🔲 🌼 - N	ame f	First name						
Specification			¥	24:00 3,000 Pd	<b>V</b>	Beratung - Senior 🗢	Planning Phase	09.08.2021	11.08.2021
	🔲 🌼 - N	ame f	First name						
Design	1		v	16:00 2,000 Pd		Programmierung - Java 🗢	Implementation Phase	17.08.2021	18.08.2021
	Name	First name	Estimated lo						
Mockup	*Entwicklung		0.0%	24:00 3,000 Pd		Programmierung - Java	Implementation Phase	18.08.2021	23.08.2021
Поскар	Dohle	Hannah	0.0%	24.00 3,000 Pd	V	Programmerung - Java	Implementation mase	10.00.2021	23.00.2021
	Eilers	Hans	0.0%						
Development	Franke	Heiner	0.0%	80:00 10,000 Pd	<b>V</b>	Programmierung - Java 🗢	Implementation Phase	23.08.2021	01.09.2021
	Meier	Jan	0.0%						
	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.

5									
🗙 🔨 Project temp	plates								-
1-5 6-7 al	I								
ProjectCreator HelpP									
Back Create proje	ect Set values								
Automatic forum	ard calculation after creation								
Automatic forwa	ard calculation after creation								
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	20100 2,00014		berdearing bernor	- I daning mass	0510012022	C STOOLEDEL	
Requirements	1 Meier	Jana	-						
	1 Picici								
Specification			✓ 24:00 3,000 Pd	V	Beratung - Senior	<ul> <li>Planning Phase</li> </ul>	09.08.2021	11.08.2021	
	🔲 🎲 🕶 Name	First name							
	1 Meier	Tamara							
Design			✓ 16:00 2,000 Pd		Programmierung - Java	<ul> <li>Implementation Phase</li> </ul>	17.08.2021	18.08.2021	
	Name	First name							
	1 Wollert	Barbara							
Mockup			✓ 24:00 3,000 Pd		Programmierung - Java	<ul> <li>Implementation Phase</li> </ul>	18.08.2021	23.08.2021	
	🔲 🎲 🕶 Name	First name							
	I Zöllner	Pia							
	2 Meier	Jan							
Development			✓ 80:00 10,000 Pd		Programmierung - Java	<ul> <li>Implementation Phase</li> </ul>	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.

) 💽 🚣 🗀 🛛	17	a 🗖	🔔 🔳 🚜 🔍	Ocument -	Edit - View -	Back references +	Action:	s <del>*</del>									
	akehold		Proposal Portfo	olio Risk asses	sment Status	Key figures	Calcula	tion Bill	ng documents	Order	data Logbo	ok Final R	eport Misc				
- Basic informat	ion																
Number	084					Status P	assive										
Description	Dev	lopme	nt of a new user in	erface													
Contents description																	
Start of planning	05.0	8.2021	•		E	nd of planning 0	6.09.20	21 🔍 🗖									
Note																	
ubordinate		- 46k	Number 🔺	Description	oject Status	Begin planning	En	d planning	Project manager	s T	arget time	Planning time	Actual tin	e Ext	er LastStateEstimate	EnterNewState	
projects			084.1	Planning Phase	Passive	05.08.2021		11.08.2021	Schaub Peter								
		2	084.2	Implementation	Passive	17.08.2021			Schaub Peter								
											00:00	00:0	0 00	00			
		- @	Process number A	Description	Begin date planning	End date planning	Exter	Planning t	me Targe	t time	Actual time	IsClo					
Processes								0	0:00	00:00	00:	00					
Processes																	
Processes Milestones		۵.	MilestoneNumber 4	Description	Date	Responsible	Milest	one category	Miles								

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

-		084 Development of a new user int							-\□ ☆ ⊟
	🛸 🌆   🕒 🖻	🔜 🗟 👔 🐚 🏍   🚍 🤤 D	velete 🛛 🖛 🛛 Actio	ns 🕶 📄 Peri	odic planning	🚔   📝		Q, Q	N NAM N
-	Number	Description	Planning time	Start	End	Occupation	Employee	2021 August September	Predecessors
	4 🗐 084	Development of a new user interf	22,000 Pd	05.08.2021	06.09.2021				
-	4 🔲 084.1	Planning Phase	5,000 Pd	05.08.2021	11.08.2021				
-	084.1-1	Catalogue of Requirements	2,000 Pd	05.08.2021	09.08.2021	Beratung - Senior	Meier Jana		1:
	084.1-2	Specification	3,000 Pd	09.08.2021	11.08.2021	Beratung - Senior	Meier Tamara		2:1
-	55 084.1-A	End of planning		11.08.2021			Schmidt Paula	· · • •	<b>3:</b> 2
	a 📄 084.2	Implementation Phase	17,000 Pd	17.08.2021	06.09.2021				
-	084.2-1	Design	2,000 Pd	17.08.2021	18.08.2021	Programmierung	Wollert Barbara		4: 3+5
-	084.2-2	Mockup	1,500 Pd	18.08.2021	23.08.2021	Programmierung		4 <u></u>	5: 4
	084.2-4	Development	10,000 Pd	23.08.2021	01.09.2021	Programmierung	Eilers Hans		<b>6:</b> 5
	084.2-5	Testing	2,000 Pd	01.09.2021	02.09.2021	Testen	Franke Heiner		7:6
ñ	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 -	구	×÷	C Pro	ojek	ctschab	onen	-口 ☆
Administration		1164	e Selec	tion			
🛚 🛃 Customer relationship manage					Hours	ScopeOfService	
E Human resources						-	
Project management				1	1	Einführung EPM	
Portfolio and Program				2	1	Entwicklung Modul	
4 Projects				3	1	Beratung	
Active main projects	۲						
Project templates							
Project creation kit config							
Project creation kit							
MS project import	•						
MS project export							
MS project sync							
🔁 Resource Planning							
a Revenue Forecasts							

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" ...

Crea	ite di	Add	documents Add all documents to one								
										s	tructure
V		Туре	Name	Begin	End	Occupation	Employee	Unit	EstimatedTimeProj	Predecessors	
V	1	Main project	Einführung EPM								
7	2	project	Planung								
7	3	process	Konzeption	0	7	Beratung	*Beratung		24		
7	4	process	Spezifikation	8	15	Beratung	*Beratung		40	3	
<b>V</b>	5	milestone	Abnahme der Planung	17			*Beratung			4	
<b>V</b>	6	project	Customizing								
7	7	process	Konfiguration	20	23	Support	*Support		8	5	
7	8	process	Programmierung	24	60	Programmierung	*Entwicklung		72	7	
7	9	process	Testen	61	75	Support	*Support		16	8	
7	10	process	Dokumentation	61	75	Dokumentation	*Support		16	8	
7	11	milestone	Abnahme Customzing	77			*Beratung			9 10	
<b>V</b>	12	project	Pilotbetrieb								
7	13	process	Integrationstest	80	87	Beratung	*Beratung		32	11	
7	14	process	Schulung	88	97	Beratung	*Beratung		24	13	
7	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						-⇔⇔
ProjectCreator HelpPage s Back Next step	tep 3/6 Check					
Parent project				$\bigtriangledown$		
InternalKey		86				
Project number	Number	085				
Description		Einführung	EPM			
Project duration	From	05.08.2020	0			To 05.08.2021 🛛 🗉
External project						Company
Commercial contact person						
Unit		Support		$\bigtriangledown$		
Project managers		E .	First name	Name 🛎	Employee status	
		1	Peter	Schaub	Fixed	
Billing type		Expense		$\bigtriangledown$		
Priority		3 - normal	priority	$\bigtriangledown$		
Currency		EURO		$\bigtriangledown$		
Total costs						
Cost center				$\bigtriangledown$		
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.

Note: Strate Project templates		
S 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	

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" ...

🗙 🔦 Project te	mplates											
1-5 6-8	all											
ProjectCreator Hi Back Create p	roject Set	6/6 values d calculation afte creatio										
Job	Employee			Time		Split	Occupation		SubProject	-	End date planning	
							times				planning	
Konzeption				~	24:00	3,000 Pd		Beratung	$\bigtriangledown$	Planung	05.08.2020	31.08.2020
	E 🔅 •	Name	First name									
	1	*Beratung										
Spezifikation				~	40:00	5,000 Pd		Beratung	$\bigtriangledown$	Planung	03.09.2020	28.09.2020
	E 🔅 •	Name	First name									
	1	*Beratung										
Konfiguration				~	08:00	1,000 Pd		Support	$\bigtriangledown$	Customizing	19.10.2020	29.10.2020
	E 🔅 •	Name	First name									
	1	*Support										
Programmierung				~	72:00	9,000 Pd	1	Programmierung	$\bigtriangledown$	Customizing	02.11.2020	15.03.2021
	E 🔅 -	Name	First name									
	1	*Entwicklung										
Testen				~	16:00	2,000 Pd		Support	$\bigtriangledown$	Customizing	15.03.2021	05.05.2021
	E @-	Name	First name									
	-	*Support										

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

>	× 📄 Project 085 Einführung EPM -D ☆ 🚍													
E	🖹 💽 🚣 🖻	🍸 📴 🎉 🗐 🍰 🗒 🥝 Document + Edit + View + Back references + Actions +												
Γ	General data	olders 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												
	Contents													
	docorintian													

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

×	Project planning	g 085 Einführung EPM								-□ ☆ =
	🛸 🏊 🐴   🙃 🛛	8 🗟 🗟 🚺 🏍 🖃	🤤 Delete   🖛   Actio	ns 🕶 📄 Peri	odic planning	🚔   📝				Q Q   N I4H N
	Number	Description	Planning time	Start	End	Occupation	Employee	2020	2021	Predecessors
	-							Ju Augu: Septe Octot Nove DecerJ	anua Febri March April May June July Augu	
1	4 📄 085	Einführung EPM	29,000 Pd	05.08.2020	05.08.2021					
	4 📄 085.1	Planung	8,000 Pd	05.08.2020	05.08.2021			,		
3	085.1-1	Konzeption	3,000 Pd	05.08.2020	31.08.2020	Beratung	*Beratung			1:
3	085.1-2	Spezifikation	5,000 Pd	03.09.2020	28.09.2020	Beratung	*Beratung			2: 1
3	55.1-A 5 5 5	Abnahme der Planung		06.10.2020			*Beratung	4 <b>4</b> -1		<b>3:</b> 2
3	4 🗐 085.2	Customizing	14,000 Pd	05.08.2020	05.08.2021					
3	1085.2-1	Konfiguration	1,000 Pd	19.10.2020	29.10.2020	Support	*Support	4 <u>0</u>		4: 3
3	🚺 085.2-2	Programmierung	9,000 Pd	02.11.2020	15.03.2021	Programmierung	*Entwicklung	4		5: 4
1	085.2-3	Testen	2,000 Pd	15.03.2021	05.05.2021	Support	*Support			<b>6:</b> 5
1	085.2-4	Dokumentation	2,000 Pd	15.03.2021	05.05.2021	Dokumentation	*Support			<b>7:</b> 5
1	5.2-A	Abnahme Customzing		14.05.2021			*Beratung		<b>₩</b>	8: 7, 6
	4 📄 085.3	Pilotbetrieb	7,000 Pd	05.08.2020	05.08.2021			,		
3	🚺 085.3-1	Integrationstest	4,000 Pd	25.05.2021	21.06.2021	Beratung	*Beratung			<b>9:</b> 8
1	085.3-2	Schulung	3,000 Pd	22.06.2021	26.07.2021	Beratung	*Beratung		ц	10: 9
i i	35.3-A	Abnahme System		05.08.2021			*Beratung			<b>11:</b> 10

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

S	Projektscha	blonen							-口 ☆
ireat	e documents	Add documents Add all documents to one							
									Structure
1	Туре	Name	Begin	End	Occupation	Employee	Unit	EstimatedTimeProje Predecessors	
7	1 Main proj	ect Entwicklung Modul							
	2 project	Konzeption							
7	3 proce	ss Konzept	0	7	Beratung	*Beratung		32	
<b>v</b>	4 proce	ss Pflichtenheft	8	15	Beratung	*Beratung		40	
7	5 miles	one Abnahme Konzeption	17			*Beratung			
2	6 project	Entwicklung							
7	7 proce	ss Datenbankdesign	20	30	Programmierung	*Entwicklung		32	
7	8 proce	ss Programmierung	31	60	Programmierung	*Entwicklung		68	
<b>v</b>	9 proce	ss Testen	61	75	Support	*Support		16	
7	LO proce	ss Dokumentation	61	75	Dokumentation	*Support		16	
	11 miles	one Abnahme Prototyp	77			*Beratung			
7	12 project	Implementierung							
7	L3 proce	ss Integrationstest	80	87	Beratung	*Beratung		32	
	L4 proce	ss Installation	88	97	Support	*Support		8	
7	L5 miles	one Abnahme System	100			*Beratung			
	16 Main proj	ect Beratung							
7	L7 proce	ss Bestandsaufnahme	0	35	Beratung	*Beratung		40	
	L8 proce	ss Umsetzung	37	96	Beratung	*Beratung		80	
7	19 miles	one 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).