Projectile
Version 6

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" ...
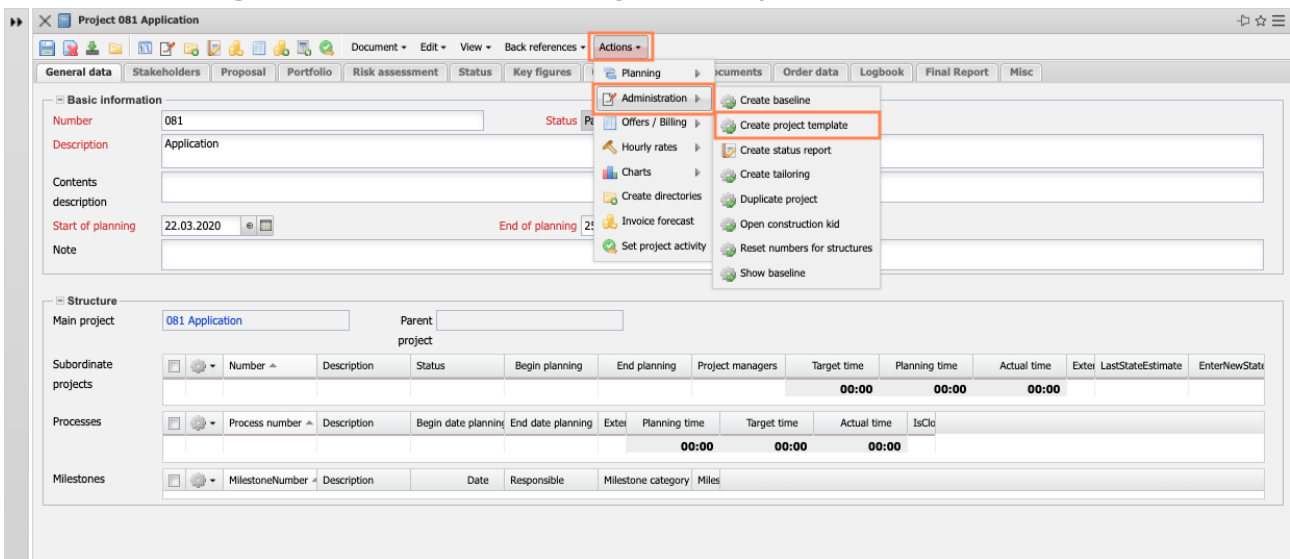
... a dialogue appears. The name of the template can be changed here.
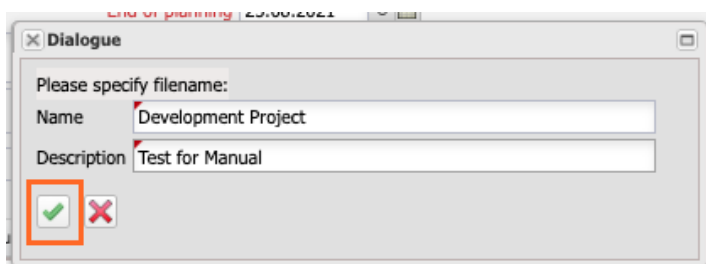
After confirmation, the template is created under the entered name and stored on the web server. The template is then available for use (to create new projects with a similar structure).

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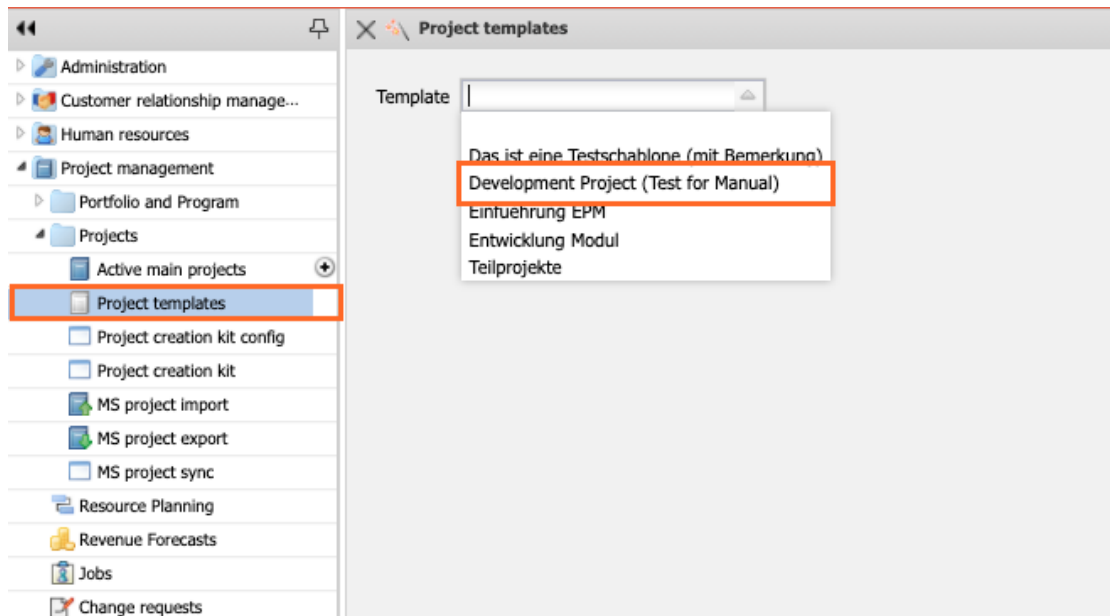
In the project wizard (step 3 of 6), it is possible to enter all relevant project values. These basic values correspond for the most part to the values from the manual project definition.

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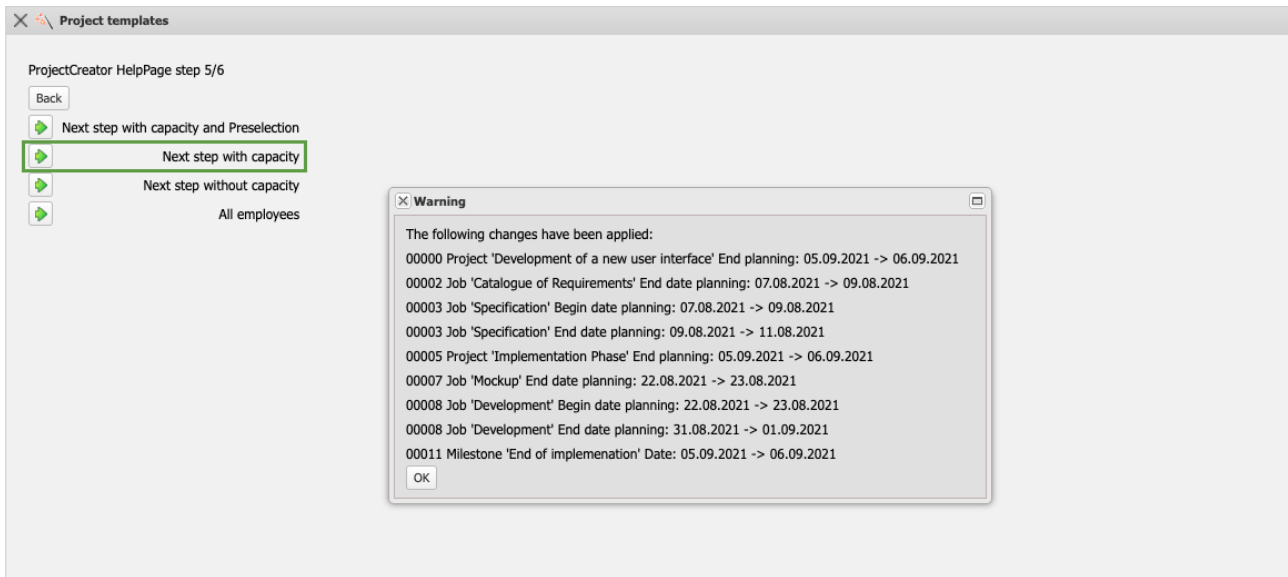
Now the last step is to complete the project planning. Here, all work packages of the project structure are displayed with plan effort, required skill (activity), the assigned sub-project and the processing period. For each work package, all employees who are suitable for this task (according to skill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

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[ ] Automatic forward calculation after creation

Job	Employee	Time	Split times	Occupation	SubProject	Begin date planning	End date planning
Catalogue of Requirements	(dropdown)	16:00 2,000 Pd	✓	Beratung - Senior	Planning Phase	05.08.2021	09.08.2021
	[ ] ⚙▾ Name First name						
Specification	(dropdown)	24:00 3,000 Pd	✓	Beratung - Senior	Planning Phase	09.08.2021	11.08.2021
	[ ] ⚙▾ Name First name						
Design	(dropdown)	16:00 2,000 Pd	✓	Programmierung - Java	Implementation Phase	17.08.2021	18.08.2021
	Name First name Estimated lo						
	*Entwicklung 0.0%						
	Dohle Hannah 0.0%						
	Eilers Hans 0.0%						
	Franke Heiner 0.0%						
	Meier Jan 0.0%						
	Wollert Barbara 0.0%						
	Zöllner Pia 0.0%						
Mockup	(dropdown)	24:00 3,000 Pd	✓	Programmierung - Java	Implementation Phase	18.08.2021	23.08.2021
Development	(dropdown)	80:00 10,000 Pd	✓	Programmierung - Java	Implementation Phase	23.08.2021	01.09.2021

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.

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| Job	Employee	Time	Split times	Occupation	SubProject	Begin date planning	End date planning
Catalogue of Requirements	(dropdown)	16:00 2,000 Pd	✓	Beratung - Senior	Planning Phase	05.08.2021	09.08.2021
	[ ] ⚙▾ Name First name						
	[ ] 1 Meier Jana						
Specification	(dropdown)	24:00 3,000 Pd	✓	Beratung - Senior	Planning Phase	09.08.2021	11.08.2021
	[ ] ⚙▾ Name First name						
	[ ] 1 Meier Tamara						
Design	(dropdown)	16:00 2,000 Pd	✓	Programmierung - Java	Implementation Phase	17.08.2021	18.08.2021
	[ ] ⚙▾ Name First name						
	[ ] 1 Wollert Barbara						
Mockup	(dropdown)	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	(dropdown)	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.
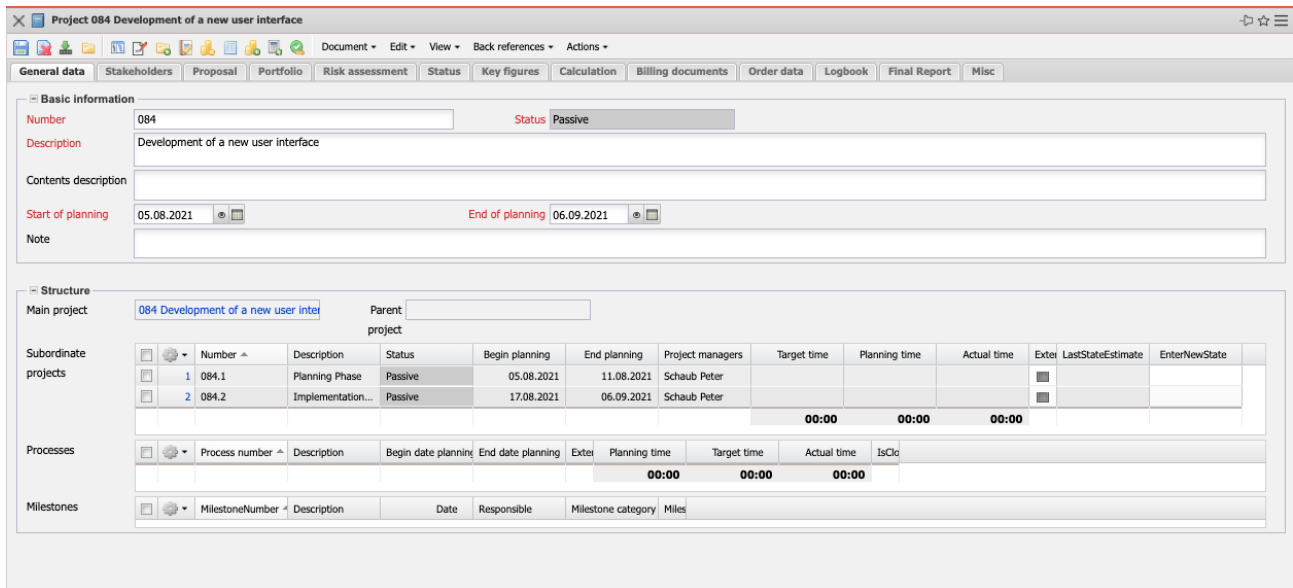
The project structure can be viewed and modified using the "Project Planning" action (see also Part 4).
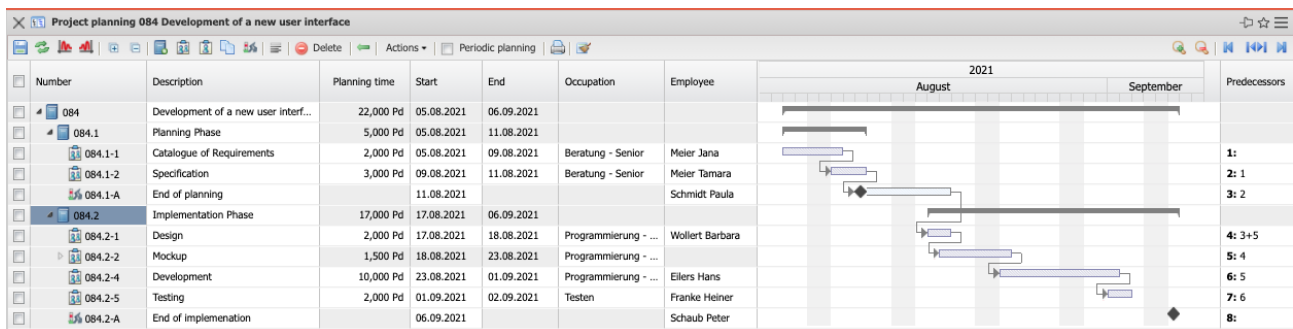
6.2 Project Construction Kit

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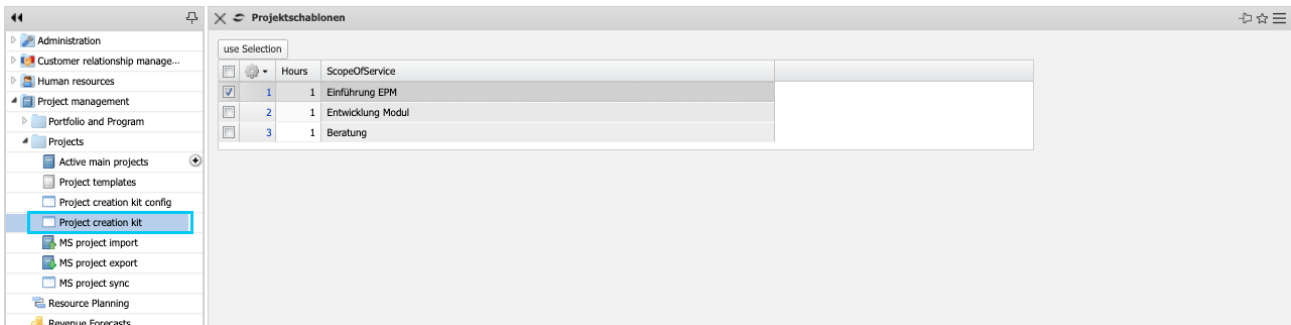
The structure can be viewed and edited with the elements main project, sub-projects, activities and milestones. All selected elements will be taken over later (so not needed elements can be deselected here). For the activities the parameters "planned effort", period ("start" and "end"), "activity", "employee"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

... 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" ...

... 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.

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" ...

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

... the project structure can be viewed and modified (see also part 4).
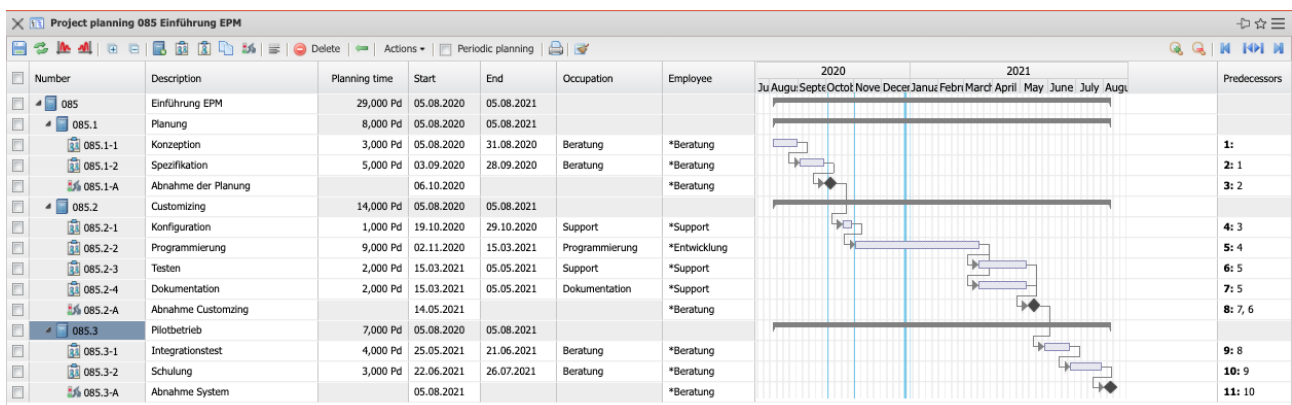
If several structures are selected in the Project Construction Kit dialog, Projectile creates a new main project with several (here two) sub-projects:

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).