

Concept for a new project-management application for eGroupWare by Ralf Becker



Due to multiple user contacts the following picture arises: In its current form the existing **projects** eGroupWare application is only **very limited adaptable to different operational requirements**. It also supports only one phase of the project management (the application / controlling!).

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Vision:

Rewriting the project management module, which can flexibly reproduce the operational workflows and requirements of a project in the context of the possibilities of eGroupWare, in particular by the **integration of the following applications**:

- infolog, calendar and TTS (TroubleTicketSystem).

The project management module supports all phases of the project management process

- from the project start (order acceptance, project structuring)
- over the project planning (subprojects, work packages, resource planning, process planning, quotation costing, etc..)
- over the project management and controlling (milestones, target/actual report, alarms)
- up to the project conclusion (account, Review).

Concretion:

In the project management module each project contains:

- **Project master data** like e.g..
 - project number, name and description of the project (as text fields)
 - budget (as optional entry *) and settlement/billing type e.g. no accounting, blanket rate, accounting by time unit/status or reference to price list (similar the "account over activities" in the old project management)
 - planning and actual starting date and final date (as optional entry *)
 - project manager and project members (as optional entry *)
 - project status (in planning, in work, settled, archives...)
 - customer and if necessary required resources

*) optional entry: the field e.g. budget or planned final date can be entered, if known/fixed in advance or it remains empty and results only from the associated project elements.

- **User-defined fields**
(i.e. arbitrary fields, which do not contain a logic, but are relevant in specific companies, e.g. customer number, quality criteria...)
- **Project elements** as arbitrary list of the following **data sources**:
 - Projects or Subprojects
 - Infolog entries (as ToDo/work package)
 - TroubleTicketSystem (as Todo/work package)
 - Calendar (as appointment)
 - resources bookkeeping

Classically a project is divided in subprojects, work packages and special orders, which get assigned requirements by the project and return result data to it. From result view these are the data sources of the project.

The large difference to the old project management lies in the flexible input and option of project master data, user-defined fields and project elements.

The new application of project managements does not prescribe a specific mode of operation:

- Thus a budget can be entered directly (as before) and one receives a warning if the budget is exceeded. If the budget should result only from the subprojects and/or project elements, it does not have to be entered in master data!
- The interface for the project master data contains exactly those fields that are relevant for the company (because of user-defined fields)
- When creating a new project one can start with an "empty project" (empty master data, no project elements) or select from a list a so-called Template. This Template then contains all associated master data and project elements. So similarly project don't have to be created several times with all subprojects and job orders, but only changing data (e.g. customer, starting date...) have to be adapted.

The so-called project-elements from the different data sources are specified for each project in the list of project-elements. The project-elements have on the one hand basic data, which are stored in respective application, like e.g.

- Name, description...
- Planned and actually duration
- Planned and actual starting and final date
- Planned and actual costs (if should be accounted)
- Client (owner of the entry) with the assigned coworker (responsible person) and if necessary required resources.
- Status (e.g. in InfoLog 50% done...)

This functionality is already present in the respective applications and will not be changed there. Existing entries of the data sources can be defined as project-elements by linking them to projects.

On the other hand additionally relevant data for the application of project management are defined and/or seized over dialogues in the project-element list for each project-element:

- Settlement data (e.g. package price, billing after time unit/status or reference to price list) can be selected global and then be assigned to the respective project-element. Only if one settlement type is selected (e.g. account after time unit/status), this settlement type does not have to be specially entered in the project-elements.
- Dependence to other project-elements, e.g. the project X must be settled to 50%, before the project-element Y can start.
- Milestones and if necessary alarms

Several reports can be shown and/or dispatched by mail (e.g. weekly report):

- Gantt-Chart with display of used up budget (time and/or costs) and/or proportional completion of the project-elements
- Tabular overview of budgets after time and/or costs of each project with all project-elements. Here different budgets can be indicated: planned, uses, accountable, not accountable, openly...
- Report by status of the project elements
- Report by resources (coworkers and other resources)

Goal:

The new application of project managements supports the phase of the project planning and planning optimization interactively. So the final date for the project can be prognosed for example by input of coworker work load (e.g. coworker A works 38 hours weekly, 50% available for project) and planned time requirement for the individual project elements. Also dependence of the individual project elements are considered.

Over dialogues notifications, alarms and reports (and thus the project Controlling) are flexibly adaptable to operational or project-specific requirements.

- the management of the project uses the application of project managements - which flexibility of application and the various linkage possibilities fulfils exactly your company specific needs
- the coworker works, by the integration of existing eGroupWare applications (like InfoLog, TTS, Calendar...) as project data sources, only with used applications (e.g. dates in the calendar, orders accepted/done in % in the InfoLog, etc....).

Conversion steps:

- 1) development of the project management application structure. Dialogues for entering project master data and listing of the projects.
 - 2) implementing the structure and the dialogues for putting on and working on the individual project-elements, so that:
 - existing entries of the data sources (e.g. InfoLog, TTS, Calendar, Projects...) can be assigned to Projects → definition of project-elements
 - additional settlement data can be seized
 - Definition of dependences and alarms (attention takes place only in the step 6!)
 - 3) implementation of the first report possibilities for account after status and time: As tabular overview and Gantt Chart
 - 4) set up of the Template functionality for creating new projects
 - 5) implementation of further settlement types (blanket rate and reference to price list) with appropriate report.
 - 6) development of the dialogues for defining dependence and milestone functionality → inclusive alarms and e.g. week and/or monthly reports
- FF) implementation of resource-functionality with **resources bookkeeping system** and according reports
set up of module for offers and invoices for the application of project managements development/programming of further settlement types...

Why a new development?

- the code of the existing application of projects is very rigidly and firmly programmed (e.g. fields, given operational sequence...)
 - ➔ the concept of the new application provides additionally to necessary master data fields also user-defined ones.
- the data sources in the old application are not abstracted, but strictly set project-subproject-relations, which would also be removable only with difficulties
 - ➔ new application uses an open and flexible data source model
- also the settlement types in the old ' projects ' are strictly encoded
 - ➔ in the new project management application settlement types are going to be understood as Plugins, which calculate from different input data such as time, costs and kind of the account (of the various project elements with the associated data sources) the actual costs and deactivate several fields if necessary (e.g. if no settlement by money budget is desired).
- development under new name, in order to be able to make actual new start independent of eGroupWare release cycle. I.e. (if at all reasonable) not all past 'projects' functionality has to be copied immediately.
 - ➔ however import of the existing project data will be made possible in any case.